

RFA Attachment A&B - LAUSD Employee User Guide

Table of Contents

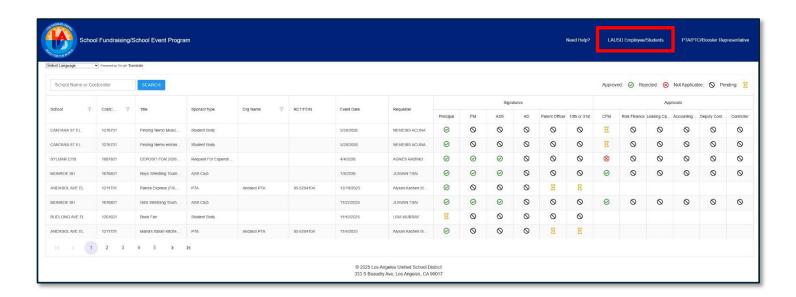
RFA Att	tachment A&B – LAUSD Employee User Guide	1
	_AUSD Employee (School Administrators, Principal, SAA, SFM, CFM, etc.)	
A.	Create a new RFA (Request for Authorization)	2
B.	E-Signing or Rejecting an RFA	10
C.	Approving or Rejecting an RFA	14
D.	Appendix	16



For LAUSD Employee (School Administrators, Principal, SAA, SFM, CFM, etc.)

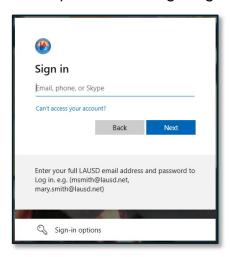
A. Create a new RFA (Request for Authorization)

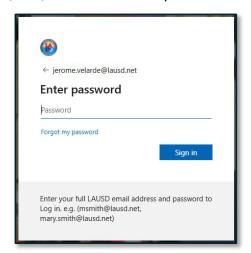
 To create a new RFA (Request for Authorization), access the School Fundraising and School Event Program website at <u>www.fundraising.lausd.net</u>. Click on the **LAUSD** Employee/Students menu.



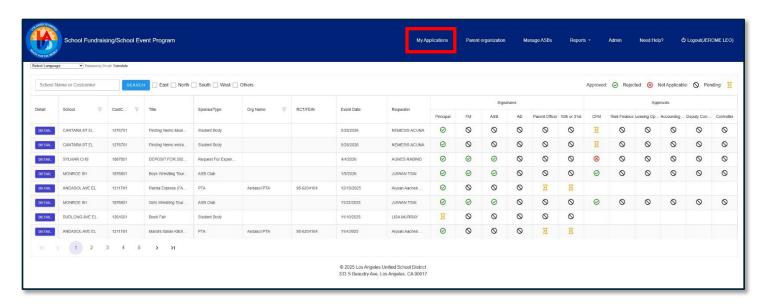


2. Sign in with your LAUSD Single Sign-On (SSO) username and password.



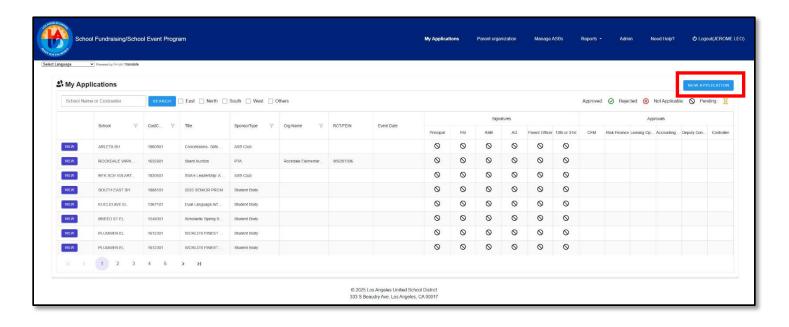


3. Click on the **My Applications** menu.

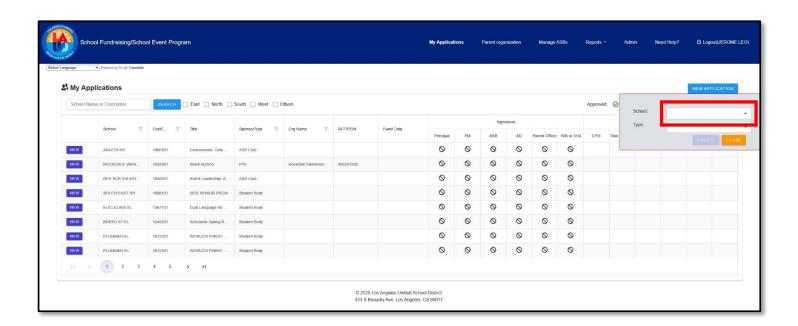




4. Click on the New Application button.



5. Select the school from the **School** dropdown list. Alternatively, you can search for a school using its name or the Cost Center Code (CCC).

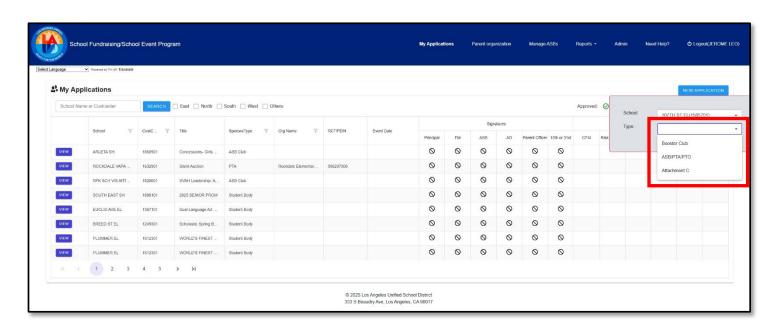




6. Select the event type from the **Type** dropdown list, then click the **Create**Alternatively, click the **Close** button to cancel.

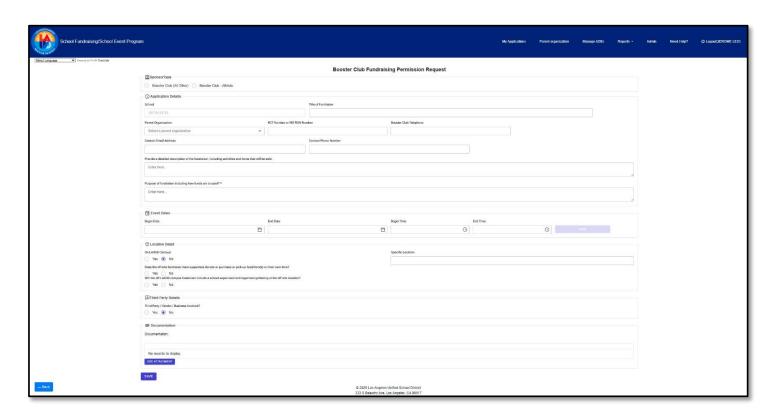
CREATE

button.



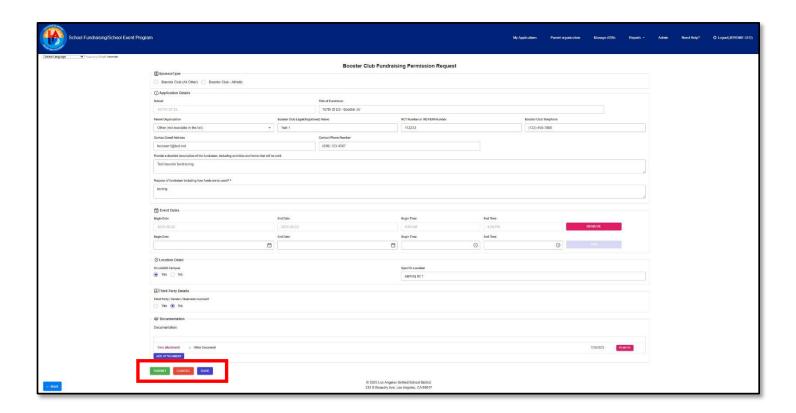


7. Enter the required information for the **Sponsor Type, Application Details, Event Dates, Location Detail, Third Party Details, and Documentation**. Click on the **Save** button to save the information entered or click on the **Back** button to go back to the application dashboard.





8. Click on the **Submit** button to proceed with the application. Click on the **Cancel** button to cancel the application. You can also edit your current application and click the **Save** button before submitting it. Please refer to the Appendix for additional information.

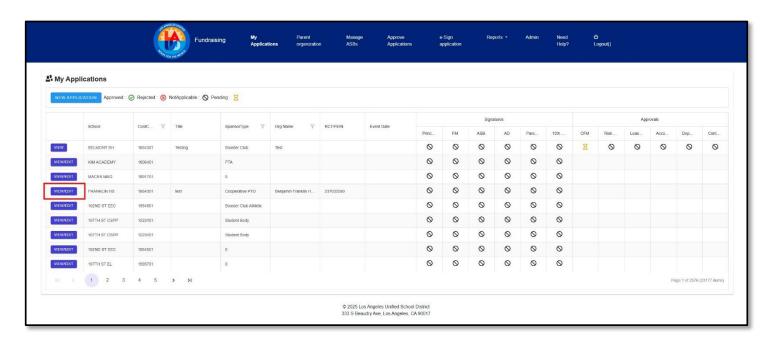


Click the YES, SUBMIT button to confirm submission or the NO, REVIEW button to review application.



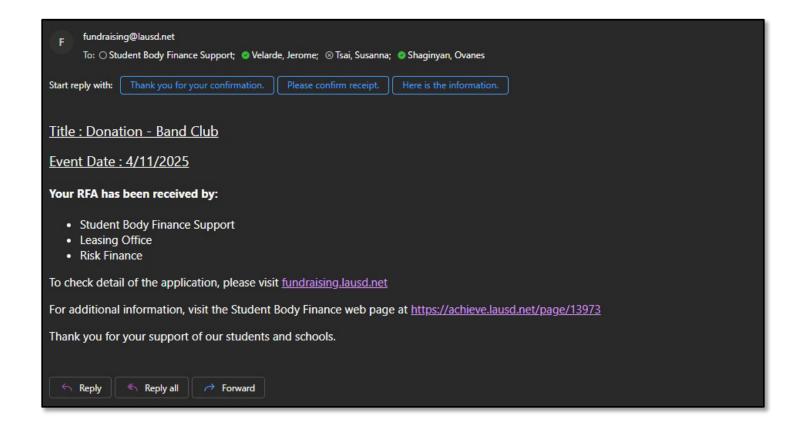


10. To edit previously saved applications, navigate to the My Applications menu and click the **View/Edit** view/edit button.





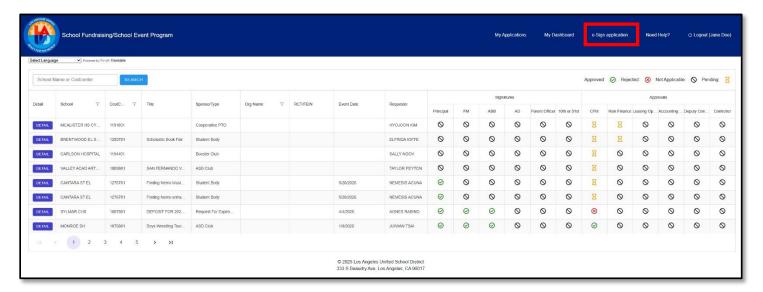
11. After submitting an RFA, email notifications will be sent to signers for their e-signatures.



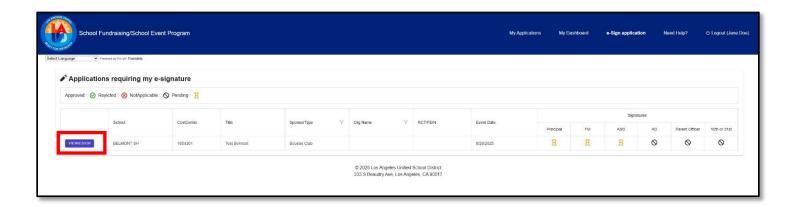


B. E-Signing or Rejecting an RFA

 A required e-signer logs in to the school fundraising application and selects the e-Sign application menu.



2. Click the **View/eSign** view/esign button to sign on the pending RFA.

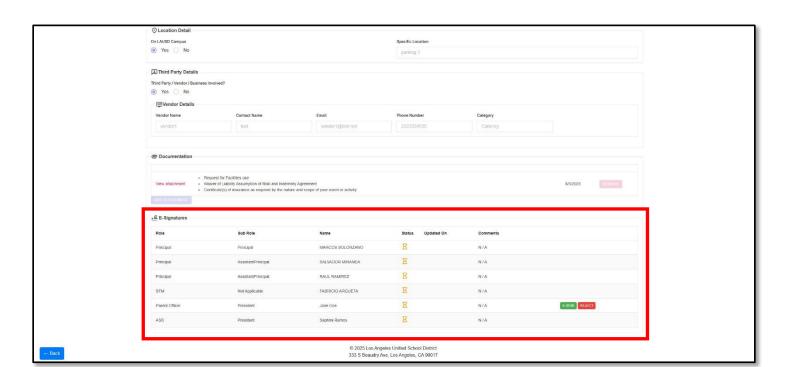




3. In the **E-Signatures** section, click the **e-Sign** to decline.

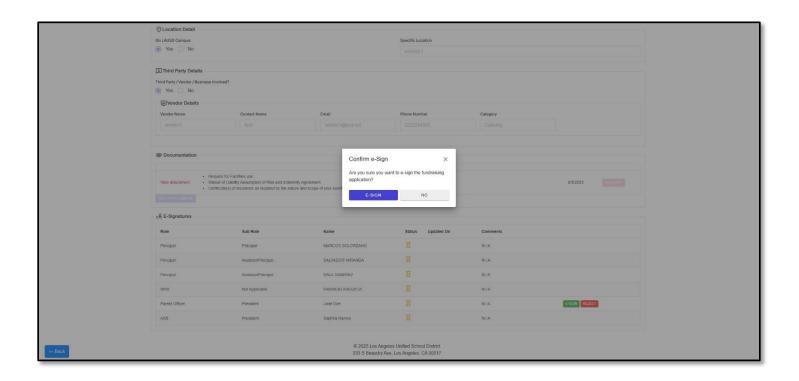


button to sign, or the **Reject** button



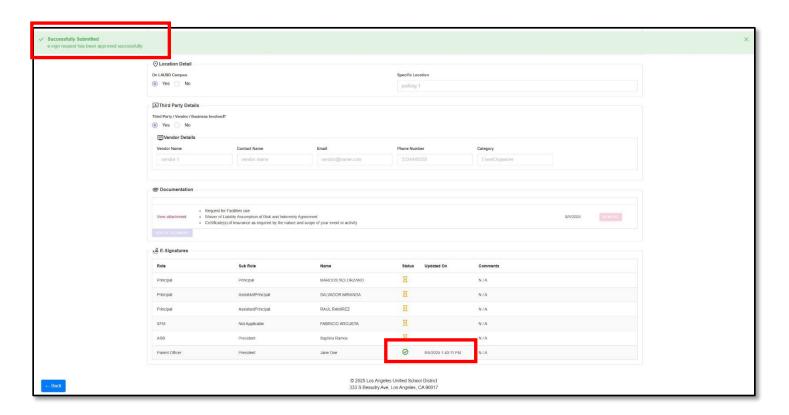


4. Click the **E-SIGN** button to proceed or the **NO** button to cancel in the confirmation window.





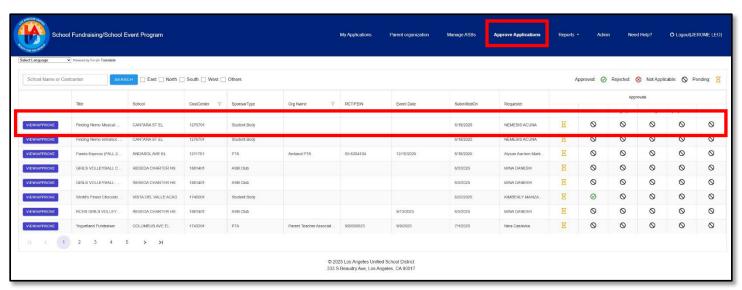
5. When e-Signed, a success message will display, and a omark with a timestamp will be added in the e-Signatures section.





C. Approving or Rejecting an RFA

Go to the Approve Applications menu, find the application, and click the View/Approve button.

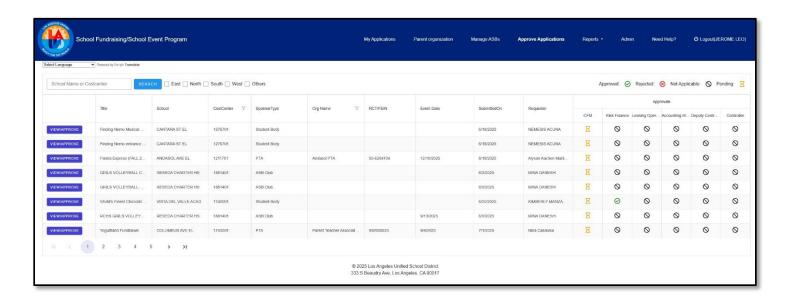


 In the Review section, select an option from the dropdown under On behalf of. Choose Approve application to approve, Reject application to reject, or No SBFS Approval Required. If needed, enter comments in the Comment textbox, then click the Submit button.





3. Users can check the status of their request approvals on the My Applications screen.



The status can be categorized as follows:





D. Appendix

* - required field

Green font – condition statement; e.g., if the condition is met then the following questions will appear

+Add more items - action button to create more record/row for data entry

I. ASB (Student Body)

1. Sponsor Type section

Sponsor = ASB (Student Body)

2. Application Details section

School*

Title of Fundraiser*

Contact Email Address

Contact Phone Number

Distribution of Proceeds*

ASB Share (%) (default to 100% and is not editable)

Brief Description of Fundraiser*

Purpose of fundraiser including description of activities and/or items will be sold?*

3. Event Dates section

Begin Date*

End Date*

Begin Time*

End Time*

+Add more items (if event is held on multiple days)

4. Location Details section

On LAUSD Campus*

Specific Location*

If On LAUSD Campus = No, answer the following 2 questions

Does the off-site fundraise have patrons purchase or pick up food/items on their own time?*

Will the off-site fundraiser include a school organized and supervised gathering at the off-site location?*



5. Third Party Details section

Third Party / Vendor / Business involved?*

If Third Party / Vendor / Business involved = Yes, provide vendor details below

Vendor Details

Vendor Name*

Contact Name*

Email*

Phone Number*

Category*

+Add more items (if more rows are needed to provide information for multiple vendors)

6. Documentation section (Required documentations may vary if event is on or off campus and if third party/vendor/business involved. Click Add Attachment button and choose doc(s) to be uploaded and doc type(s) in the pop up window.)

If On LAUSD Campus = Yes and Third Party/Vendor/Business Involved = Yes

For (Student Body Finance Support):

Request for Authorization*

For (Risk Finance):

Third Party Insurance Guidelines*

OEHS Checklist*

If On LAUSD Campus = Yes and Third Party/Vendor/Business Involved = No

For (Student Body Finance Support):

Request for Authorization*

If On LAUSD Campus = No

For (Student Body Finance Support):

Request for Authorization*



II. Club

1. Sponsor Type section

Sponsor = Club

2. Application Details section

School*

Title of Fundraiser*

Contact Email Address

Contact Phone Number

Distribution of Proceeds

ASB Share (%)

Club Share (%)

Brief Description of Fundraiser*

Purpose of fundraiser including description of activities and/or items will be sold?*

3. Event Dates section

Begin Date*

End Date*

Begin Time*

End Time*

+Add more items (if event is held on multiple days)

4. Location Details section

On LAUSD Campus*

Specific Location*

If On LAUSD Campus = No, answer the following 2 questions

Does the off-site fundraise have patrons purchase or pick up food/items on their own time?*

Will the off-site fundraiser include a school organized and supervised gathering at the off-site location?*



5. Third Party Details section

Third Party / Vendor / Business involved?*

If Third Party / Vendor / Business involved = Yes, provide vendor details below

Vendor Details

Vendor Name*

Contact Name*

Email*

Phone Number*

Category*

+Add more items (if more rows are needed to provide information for multiple vendors)

6. Documentation section (Required documentations may vary if event is on or off campus and if third party/vendor/business involved. Click Add Attachment button and choose doc(s) to be uploaded and doc type(s) in the pop up window.)

If On LAUSD Campus = Yes and Third Party/Vendor/Business Involved = Yes

For (Student Body Finance Support):

Request for Authorization*

For (Risk Finance):

Third Party Insurance Guidelines*

OEHS Checklist*

If On LAUSD Campus = Yes and Third Party/Vendor/Business Involved = No

For (Student Body Finance Support):

Request for Authorization*

If On LAUSD Campus = No

For (Student Body Finance Support):

Request for Authorization*



III. PTA or PTO

1. Sponsor Type section

Sponsor = PTA or PTO

2. Application Details section

School*

Title of Fundraiser*

Parent Organization* (Select from existing parent organization drop down. If none or n/a, select Other and provide Organization (Registered) Name, RCT Number or IRS FEIN Number and PTA/PTO Telephone)

Organization (Registered) Name*

RCT Number or IRS FEIN Number*

PTA/PTO Telephone*

Contact Email Address

Contact Phone Number

Distribution of Proceeds

PTA/PTO Share (%) (default to 100% and is not editable)

Brief Description of Fundraiser*

Purpose of fundraiser including description of activities and/or items will be sold?*

3. Event Dates section

Begin Date*

End Date*

Begin Time*

End Time*

+Add more items (if event is held on multiple days)

4. Location Details section

On LAUSD Campus*

Specific Location*

If On LAUSD Campus = No, answer the following 2 questions

Does the off-site fundraise have patrons purchase or pick up food/items on their own time?*

Will the off-site fundraiser include a school organized and supervised gathering at the off-site location?*



5. Third Party Details section

Third Party / Vendor / Business involved?*

If Third Party / Vendor / Business involved = Yes, provide vendor details below

Vendor Details

Vendor Name*

Contact Name*

Email*

Phone Number*

Category*

+Add more items (if more rows are needed to provide information for multiple vendors)

6. Documentation section (Required documentations may vary if event is on or off campus and if third party/vendor/business involved. Click Add Attachment button and choose doc(s) to be uploaded and doc type(s) in the pop up window.)

If On LAUSD Campus = Yes

For (Student Body Finance Support):

Request for Authorization*

For (Risk Finance):

Request for Facilities Use*

Civic Center Permit Request for Facilities Use*

Waiver of Liability Assumption of Risk and Indemnity Agreement*

Third Party Insurance Guidelines*

If On LAUSD Campus = No

For (Student Body Finance Support):

Request for Authorization*



IV. Booster Club (All Other)

1. Sponsor Type section

Sponsor = Booster Club (All Other)

2. Application Details section

School*

Title of Fundraiser*

Parent Organization* (Select from existing parent organization drop down. If none or n/a, select Other and provide Organization (Registered) Name, RCT Number or IRS FEIN Number and PTA/PTO Telephone)

Booster Club Legal (Registered) Name*

RCT Number or IRS FEIN Number*

Booster Club Telephone*

Contact Email Address

Contact Phone Number

Brief Description of Fundraiser*

Purpose of fundraiser including description of activities and/or items will be sold?*

3. Event Dates section

Begin Date*

End Date*

Begin Time*

End Time*

+Add more items (if event is held on multiple days)

4. Location Details section

On LAUSD Campus*

Specific Location*

If On LAUSD Campus = No, answer the following 2 questions

Does the off-site fundraise have patrons purchase or pick up food/items on their own time?*

Will the off-site fundraiser include a school organized and supervised gathering at the off-site location?*



5. Third Party Details section

Third Party / Vendor / Business involved?*

If Third Party / Vendor / Business involved = Yes, provide vendor details below

Vendor Details

Vendor Name*

Contact Name*

Email*

Phone Number*

Category*

+Add more items (if more rows are needed to provide information for multiple vendors)

6. Documentation section (Required documentations may vary if event is on or off campus, and/or if third party/vendor/business involved, and/or if off-site fundraiser included a school organized and supervised gathering at the off-site location. Click Add Attachment button and choose doc(s) to be uploaded and doc type(s) in the pop up window.)

If On LAUSD Campus = Yes

For (Student Body Finance Support):

Request for Authorization*

For (Risk Finance):

Request for Facilities Use*

Civic Center Permit Request for Facilities Use*

Waiver of Liability Assumption of Risk and Indemnity Agreement*

Third Party Insurance Guidelines*

If On LAUSD Campus = No and Will the off-site fundraiser include a school organized and supervised gathering at the off-site location = Yes

For (Student Body Finance Support):

Request for Authorization*

For (Risk Finance):

Third Party Insurance Guidelines*

Request for Approval of Off Site Special Event*

OEHS Check List*

If On LAUSD Campus = No and Will the off-site fundraiser include a school organized and supervised gathering at the off-site location = No

For (Student Body Finance Support):

Request for Authorization*



V. Booster Club - Athletic

1. Sponsor Type section

Sponsor = Booster Club - Athletic

2. Application Details section

School*

Title of Fundraiser*

Parent Organization* (Select from existing parent organization drop down. If none or n/a, select Other and provide Organization (Registered) Name, RCT Number or IRS FEIN Number and PTA/PTO Telephone)

Booster Club Legal (Registered) Name*

RCT Number or IRS FEIN Number*

Booster Club Telephone*

Contact Email Address

Contact Phone Number

Brief Description of Fundraiser*

Purpose of fundraiser including description of activities and/or items will be sold?*

3. Event Dates section

Begin Date*

End Date*

Begin Time*

End Time*

+Add more items (if event is held on multiple days)

4. Location Details section

On LAUSD Campus*

Specific Location*

If On LAUSD Campus = No, answer the following 2 questions

Does the off-site fundraise have patrons purchase or pick up food/items on their own time?*

Will the off-site fundraiser include a school organized and supervised gathering at the off-site location?*



5. Third Party Details section

Third Party / Vendor / Business involved?*

If Third Party / Vendor / Business involved = Yes, provide vendor details below

Vendor Details

Vendor Name*

Contact Name*

Email*

Phone Number*

Category*

+Add more items (if more rows are needed to provide information for multiple vendors)

6. Documentation section (Required documentations may vary if event is on or off campus, and/or if third party/vendor/business involved, and/or if off-site fundraiser included a school organized and supervised gathering at the off-site location. Click Add Attachment button and choose doc(s) to be uploaded and doc type(s) in the pop up window.)

If On LAUSD Campus = Yes

For (Student Body Finance Support):

Request for Authorization*

For (Risk Finance):

Request for Facilities Use*

Civic Center Permit Request for Facilities Use*

Waiver of Liability Assumption of Risk and Indemnity Agreement*

Third Party Insurance Guidelines*

If On LAUSD Campus = No and Will the off-site fundraiser include a school organized and supervised gathering at the off-site location = Yes

For (Student Body Finance Support):

Request for Authorization*

For (Risk Finance):

Third Party Insurance Guidelines*

Request for Approval of Off Site Special Event*

OEHS Check List*



If On LAUSD Campus = No and Will the off-site fundraiser include a school organized and supervised gathering at the off-site location = No

For (Student Body Finance Support):

Request for Authorization*