



Tacoma Public Schools

Increasing Visibility for Audits

Overview of Tacoma Public Schools

Tacoma Public Schools is the fourth largest public school in Washington. It is composed of 36 elementary schools, 11 middle schools, 11 high schools, and 4 early learning centers. The district has over 25,000 students and nearly 5,000 employees. Tacoma Public Schools has a five-point strategic plan, including a goal to focus on effective and efficient business practices to ensure student academic success.

Balancing Audits with Day-to-Day Operations

When audit season comes around, Cheri Estrada, the Purchasing and Warehouse Director at Tacoma Public Schools, cannot drop her responsibilities to facilitate audits. Purchase requests still need to be processed and approved. When the Washington State Auditors Office (SAO) comes to the district to perform audits, Cheri and her team must gather monthly reports from transactions for the year.

The most significant pain point for Cheri was matching the transaction records to PCard users. She and the auditor would also travel to each school site to review the paper documents, shifting through several binders to find the correct receipts and documentation.

“Receipts fade over time. The beauty about Informed K12 is once receipts are scanned, they are nice and pristine seven years later.”

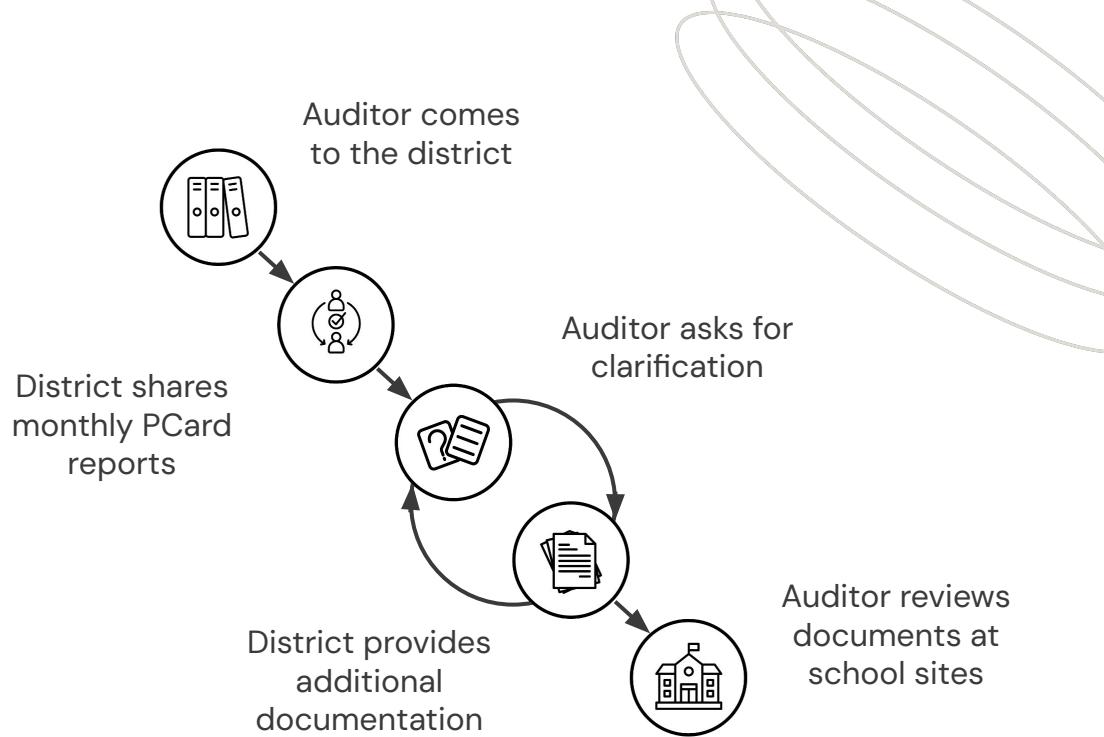


Cheri Estrada, Director of Purchasing

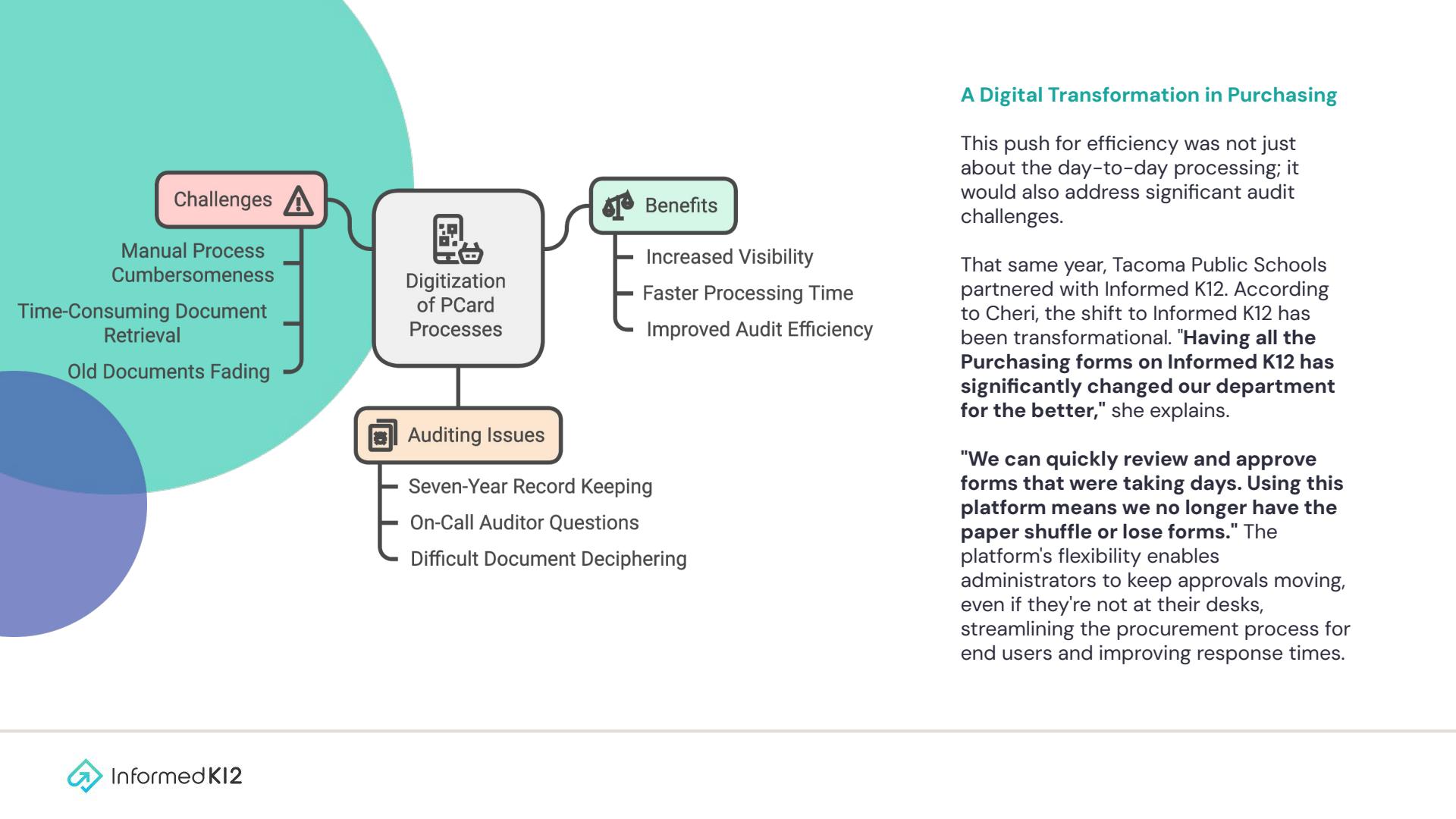
Paperwork Overload: The Case for Change

In 2015, Cheri Estrada was the district's Lead Buyer and PCard Administrator. All of the department's purchasing forms, from PCard applications to requests for credit increases, were on paper and needed to be manually approved. Since Tacoma is Washington's fourth-largest school district, the volume of requests that would come in was incredibly large. Cheri said the team **"needed more visibility and faster processing time for our 'spot buys' or quick, easy purchases."**

For PCard forms, auditors would come directly to the purchasing department to retrieve documents. **"I would have to provide details about each transaction,"** Cheri states, **"who the PCard holder was, who reconciled, and then the school location."** Auditors would then have to travel to each school site to review the paper copies of the receipts and approval forms. **"The auditing process would take several days, if not weeks, depending on the sample size under review."**



Manual Auditing Process at TPS



From Binders to Digital Transparency

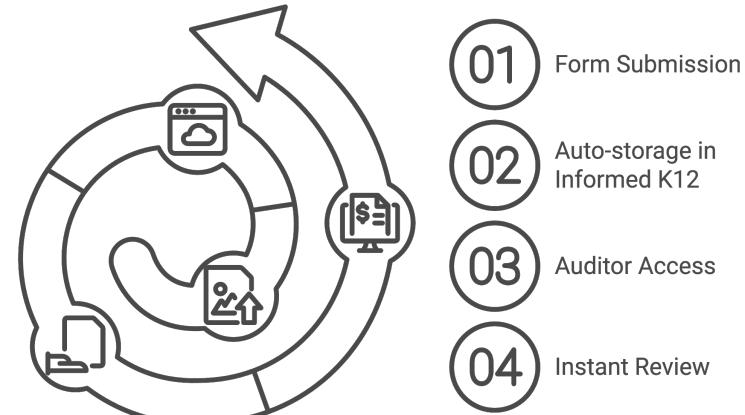
The partnership has also changed the way the district handles audits for the SAO. Every form submission, including attachments like receipts, is stored on the platform. Instead of waiting to be called on by the auditor with questions they might have, Cheri gives the auditor "read-only" access to the Informed K12 platform. **Today, audits are completed in one to two days.**

"The auditor could look at the form, and they could make sure the form was filled out correctly, and then look at all the attachments, making sure that they included their final receipt, and that all the approvals were obtained."

Now that Cheri spends a significantly smaller portion of her time with the SAO during audits, she can focus on emerging needs. If auditors have questions, she can hop on a call and point them in the right direction instead of digging through binders of receipts.

Audits are now completed in one to two days.

TPS's Digital Audit Process



A Transparent and Efficient Future for Tacoma Public Schools

By moving to Informed K12, Tacoma Public Schools has created an efficient, transparent, and audit-ready PCard process that enhances both daily operations and compliance. As Cheri shares, **"We now have complete visibility of each form and step."** This digital shift means Tacoma's team can focus on meeting emerging needs, while auditors can access the information they need independently.

Tacoma Public Schools quickly expanded their partnership with Informed K12 and now **has over 230 forms and processes on the platform.**

