MCFRS PAR Jotform User Guide

MCFRS Tech Training
Updated May 21, 2024

MCFRS Tech Training – PAR Jotform Process

Introduction

This document serves as an overview of the PAR Jotform. If you have technical questions or concerns, please contact Matt Bowen, IT Web Coordinator.
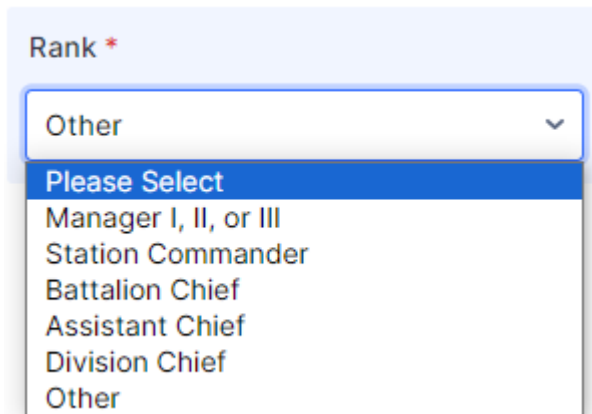
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Submitting a PAR

Fill out each section as needed for the purchase approval request. After entering in the appropriate information, click the **Submit** button at the bottom of the form. You will receive status updates as the form approval works its way through the chain of command. See notes below.
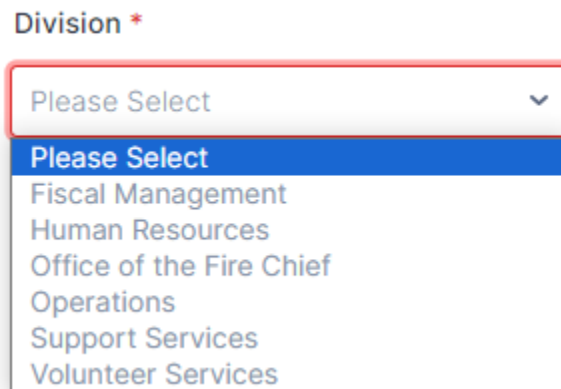
Your Information Section

- Name and Email should be self-explanatory.

- Rank: Select your rank. Most civilian requests will originate from either a Manager I/II/III or Other.

- Division: Please select your division. Unless you are the division chief, the approval request will route via chain of command to the proper division chief.

- Section: Identify your section. (Note: If you are an executive officer to a division chief, please select *Not in a Listed Section*.)

- Section Chief/Manager: If you are a section chief or section manager, select Yes. If you are not, choose No and note that another question will ask if you report to the Chief/Manager. Enter the corresponding information requested.

Purchase Information Section

- Purchase Justification: Explain what you are purchasing and why the purchase is being made. This is shown to the approvers as part of your request.

- Request Type: Select the type of purchase you are planning to make. If you choose a Purchase Card (P-Card), then a separate field will appear for you to identify the P-Card holder's name.

  ○ Purchase Card
  ○ Direct Purchase Order
  ○ Requisition for Issuance of Purchase Order Against Contract
  ○ Requisition for Issuance of a Contract Amendment
  ○ Requisition for Issuance of a Formal Solicitation (IFB, RFP)
  ○ Requisition for Issuance of Informal Solicitation

- Vendor Name/Number: The county's official vendor list is linked to this field, so that you will see some options as you type. If you do not see your vendor's name in the list, that is acceptable. If you see your vendor in the list, though, click to select it.

  Vendor Name/Number *

  | Computer |

  ADVANCED **COMPUTER** CONCEPTS (5711)
  DALY **COMPUTER**S INC (35019)

- Vendor Phone and Address: Input the vendor's phone number and address.

- LSBRP: Identify if the vendor is an approved Local Small Business Reserve Program member.

- Fund, Cost Center and Account: Input the appropriate information.

- Grant/Project Number, Grant/Project Name and Grant/Project Detail: Input the appropriate information. If a required field does not apply to your particular PAR, please enter N/A. (If you select **160-Grants** or **405 – Capital Projects**, additional fields will appear.)

Commodities/Services Requested Section

- Commodity Code: Input the Commodity Code. For your reference, the list of commodity codes may be found via a link on the form. Up to five boxes will also appear, asking for more information.

- Commodity Purchase Description: Identify the specific commodity items being purchased. For each, please identify the quantity and cost per item in US dollars.

- Upload: Drag and drop or click to select any supporting documentation you would like to add to the request, for your chain of command to review.

- Total Cost: Enter the total cost (still in US dollars) you are requesting to spend.

- Contract Number: Input the contract number if this is related to a contract. Otherwise, enter N/A.

- Bill to/Ship to FRS Location Name: Enter the related location name.

PAR Approval Overview

For each PAR submitted, select members of the chain of command will get e-mail messages. Those e-mail messages contain links to uploaded supporting documentation as well as **Approve** and **Deny** buttons. Separate scenarios follow this section of the document for purchases by station commanders and also purchases other than P-Cards.

General PAR Scenario

The person who submits the PAR will receive status notifications along the approval flow. Below is a screenshot of a notification e-mail from a submission. Each e-mail message (including those sent to approvers) also includes a PDF attachment of both the submission data as well as an activity history that shows each person's involvement in the process and a running log of the e-mail notifications.

The PAR Jotform uses logic to determine the next approval needed, moving from submitter to section chief (unless the section chief is the one submitting the form) and then on to the division chief. If there is a mid-level manager, that person will be included in the flow, as well.

Below is a screenshot of an e-mail message that an approver receives. (Not shown is the PDF attachment noted earlier in this document.) Note that there are **Approve**, **Deny** and **Request More Info** buttons for the approver.
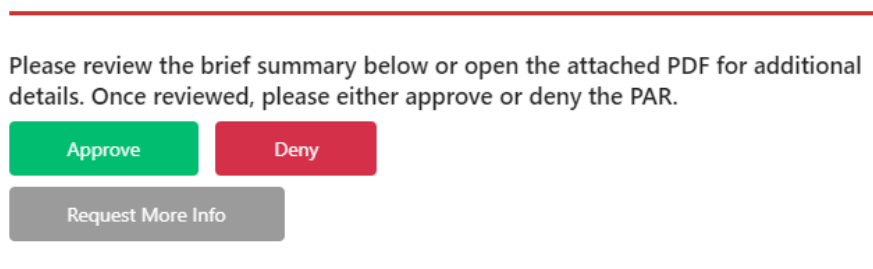
Following the buttons are the basics of the request – date, purchase justification, links to any attached documentation submitted with the request and the total cost.

Upon clicking the **Approve** or **Deny** button, the approver needs to type a comment that becomes part of the activity history.
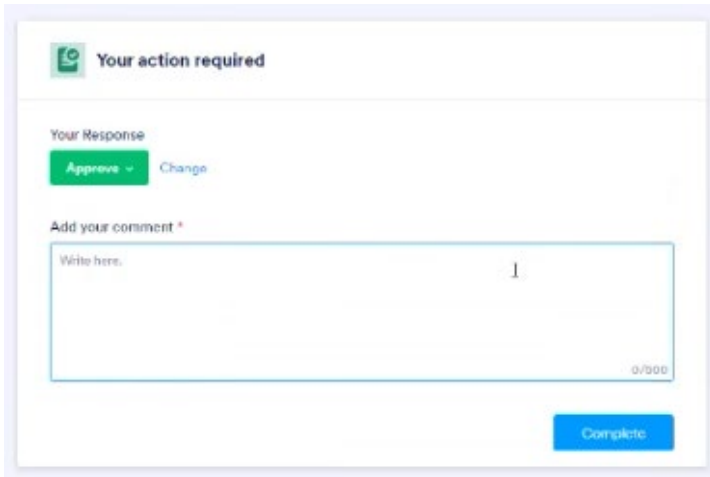
Note: If the approver clicks the wrong button, there is still an opportunity to change to the other button. If the approver chooses to deny the request and clicks the blue **Complete** button, though, there is no opportunity to approve the submission and the PAR would need to be resubmitted. Finally, the title of the person who denied the request shows in the e-mail notification to the submitter (e.g., **Denied by Division Chief** or **Denied by Head of Section** in the subject line).

As noted earlier in this document, the submitter is notified with each step of the process. Specifically, as shown below, the notification details where the PAR is in the approval process.

Please see the attached PDF for details. This PAR is now with the Division Chief for approval.

Comments from Head of Section:
All the food sounds great!

Station Commander Scenario

When a station commander submits a PAR, the approve/deny option sits only with the Support Services Division executive battalion chief. Upon approval, the e-mail notification is slightly different from the other PAR notifications.
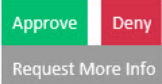
Please review the brief summary below or open the attached PDF for additional details. Once reviewed, please either approve or deny the PAR. If a limit increase is needed, please note that and provide details as part of the approval comments.

Approve Deny
Request More Info

If a station commander requests an increase above the $300 monthly limit, that will be included in the standard message to the program manager and administrative specialist in Fiscal Management who receive the requests.

The attached PAR has been approved. Please refer to the following comments below or the attached PDF for notes about any needed limit increase.

Comments from Support Services BC:
Approved, increase limit to $500 until end of April 2024.

Comments from Fiscal:
Processed.

Purchase Scenario Not Involving a P-Card

The approval flow here is similar to the P-Card scenario, except that the message delivered to the MCFRS Purchase Approval Requests mailbox in Fiscal Management includes options to assign who will receive the final message, in order to input the data into Oracle.

This PAR was approved by chain of command. Please review the brief summary below or open the attached PDF for additional details. Once reviewed, please either approve and assign or deny the PAR.

Approve - No OSC	Approve - Mary Lee
Approve - Yvette Giles	Approve - Evelin Serpas
Deny	Request More Info

The assigned OSC then gets an e-mail message typical of the rest of the approval process messages:

Montgomery County Fire & Rescue Service
Montgomery County, Maryland

The attached PAR has been approved for processing.

Comments from Fiscal:
Approved.

|	
PAR Number	PAR-0000000003
Date of Request	03-19-2024
Purchase Justification	Need supplies.
Uploaded quotes and other related documents.	Invoice.pdf
Total Cost	600

Setting up a Guest Account for Approvals and Tracking

To be able to review the PAR submissions you have previously, currently and (eventually) approve and deny, you will need a Jotform account. For most people, these are special accounts called Jotform Guest Accounts. Because of the nature of these accounts tied to your approving and denying requests, they must be set up a certain way. (Note: Please do not try to create a guest account on your own via the Jotform homepage. That is a different type of account which will not link to the PARs.)

- Wait for someone to submit a PAR and identify you as an approver. You will get the e-mail from Jotform, as noted earlier in this end-user guide.

- Click the **Approve** or **Deny** button and go through that process.
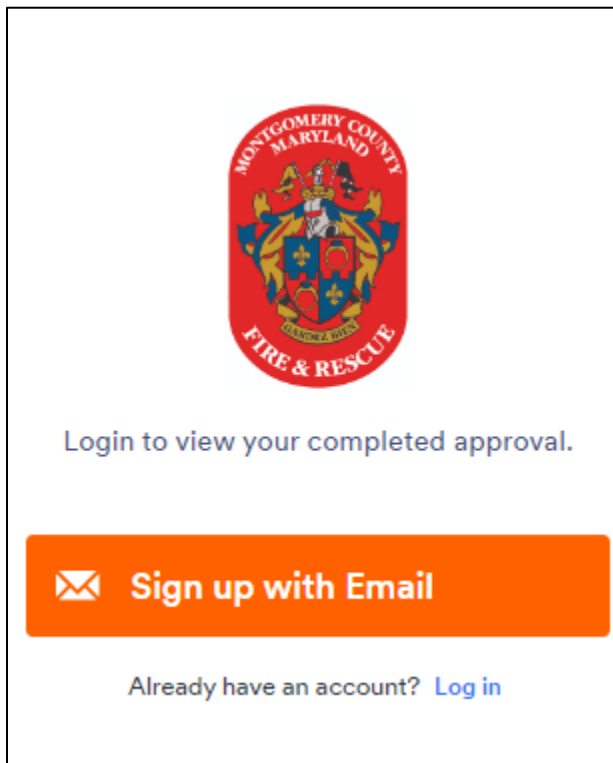

- Note the blue button at the bottom of the Thank You! screen, enabling you to see your completed approvals.
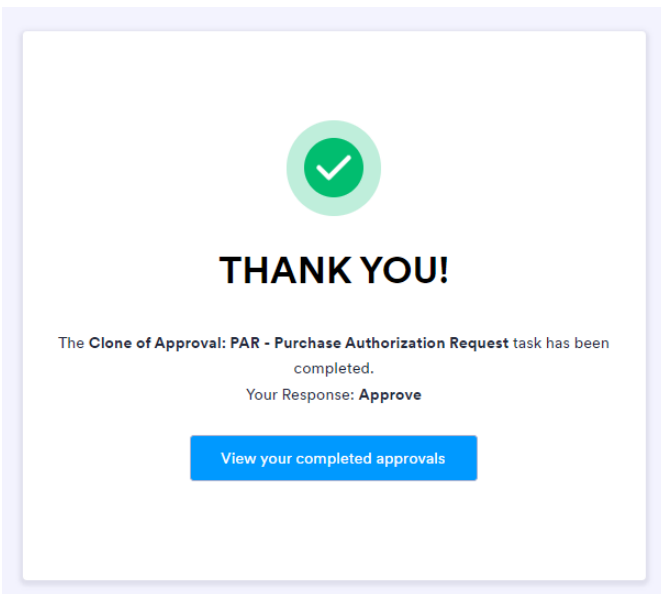
- Click the blue **View your completed approvals** button and this will bring you to the MCFRS Jotform login page.
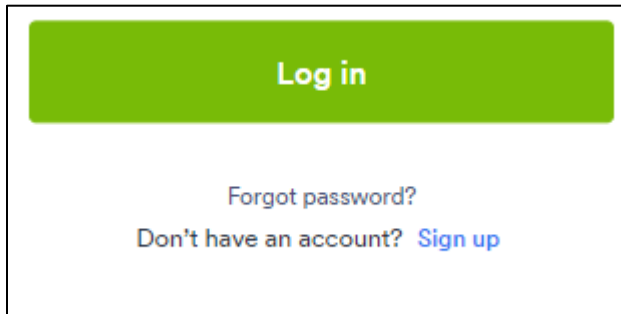
- Find and click the blue **Sign Up** link below the green **Log in** button. This will take you to an MCFRS-specific sign-up page.

- Click the orange **Sign up with Email** button.

- Fill in your name and select a password of your choice, as long as it has a minimum of eight characters. (Note: Leave the e-mail address as is; it will match the address to which PARs are being sent. If you change it, you will not be able to see the PARs.)

- Note the screen that comes up, the Jotform account inbox. Any PARs sent to the address (past and present) will appear in a list on the left side of the screen. Click any individual entry to see the details on the right side the screen (much like most any e-mail inbox).

Note: Once you have an account, the approval screens will appear in-line within the inbox. Jotform will take you there, instead of giving you the stand-alone approval screens used elsewhere in this document.