

# **MCFRS TAR Jotform User Guide**



**MCFRS Tech Training  
Updated April 2025**

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## **MCFRS TAR Jotform Information**

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### *Introduction*

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

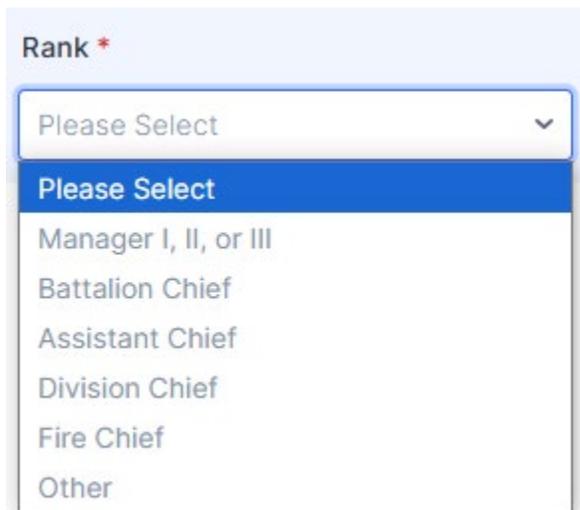
### *Submitting a TAR*

Fill out each section as needed for the travel 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.

- Date of Request: Note that this is the date you are submitting the form, not the travel date.

### *Your Information Section*

- Name: Capitalize the first letter of your first name and the first letter of your last name.
- E-Mail: Use your county e-mail address (**firstname.lastname@montgomerycountymd.gov**). Note: Your SSO@montgomerycountymd.gov is **not** your e-mail address, despite what you may hear people suggest in the field.
- Rank: Note that only certain ranks are reflected in the Rank drop-down field. If your rank is not listed, choose **Other**. The form will ask for your direct supervisor's e-mail address and rank. Please check the spelling of the e-mail address before submitting the form.



The image shows a screenshot of a web form's 'Rank' dropdown menu. The label 'Rank \*' is at the top left. The dropdown box is open, showing a list of options. The first option is 'Please Select' with a downward arrow. Below it is another 'Please Select' option highlighted in blue. The remaining options are 'Manager I, II, or III', 'Battalion Chief', 'Assistant Chief', 'Division Chief', 'Fire Chief', and 'Other'.

### *Travel Information Section*

- Traveling Employee: Choosing **Yes** will auto-fill the name and e-mail fields below, whereas choosing **No** enables you to input other information.
- Travel Description: Describe the travel, training, certification or membership expense. Justify how the travel is critical to your job. Provide enough detail so that no one in your chain of command or Fiscal Management will need to ask you follow-up questions.
- Event and Travel Dates: Provide the expected information.
- Location/Destination: Identify the City and State (separated by a comma).

- Travel Request Memo: Write your travel request memo in a Word version of the department memo form and save it on your computer. Upload the file in this form field. [Click here to see a sample memo](#) (link also available above the form on the TAR SharePoint page).
- Brochures and Other Supporting Documents: Add any supporting documents for the reason for your travel (e.g., brochures, agendas, etc.) in this field.

### ***Expense Information Section***

- Total: Calculate the estimated total dollar amount and input it here.
- Per Diem: Choose Yes or No for whether or not you will need a Per Diem in advance.
- Fund: Most TARs fall under the **100 – Fire** code. Select a different one as appropriate.

100 - Fire

160 - Grants

180 - Restricted Donations

- Cost Center: Use the Cost Center of the department section or unit which is related to the reason for your travel.
- Account: Input the appropriate account. Since many people (incorrectly) assume they may choose anything for this field, Fiscal Management has provided some guidance as follows: The most common two codes which should be used for travel are **64010** (Metropolitan Area Travel) and **64012** (Non-Metropolitan Area Travel).

64010 - Metropolitan Area Travel

64012 - Non-Metropolitan Area Travel

- Click the **Submit** button.

### ***TAR Approval Overview***

For each TAR 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.

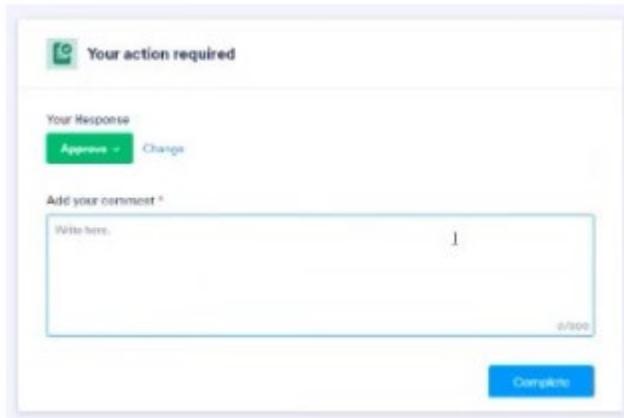
The person who submits the TAR will receive status notifications along the approval flow. Each e-mail message (including those sent to approvers) also includes a PDF attachment of both the submission data as well as an activity history that shows each person's involvement in the process and a running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

The TAR 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. Details from the various form fields are listed in the message below the approval option buttons.



Upon clicking the **Approve** or **Deny** button, the approver needs to type a comment that becomes part of the activity history.

A screenshot of a web form titled "Your action required". Under the heading "Your Response", there is a dropdown menu currently set to "Approve" with a "Change" link next to it. Below this is a text area labeled "Add your comment \*" with the placeholder text "Write here...". A character count "1 / 500" is visible in the bottom right corner of the text area. At the bottom right of the form is a blue "Complete" button.

**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 TAR 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).