Jotform Approval Instructions

Each form can be accessed for approval through the email that is sent out or by accessing the webpage https://mckendree.jotform.com/ which will give you access to all of the forms you've had review steps for, or you've submitted.

Jotform Portal:

When accessing mckendree.jotform.com, pending whether you have only approved, submitted, or completed both tasks within the system, your initial view will have 'My Forms' selected on the top left corner:
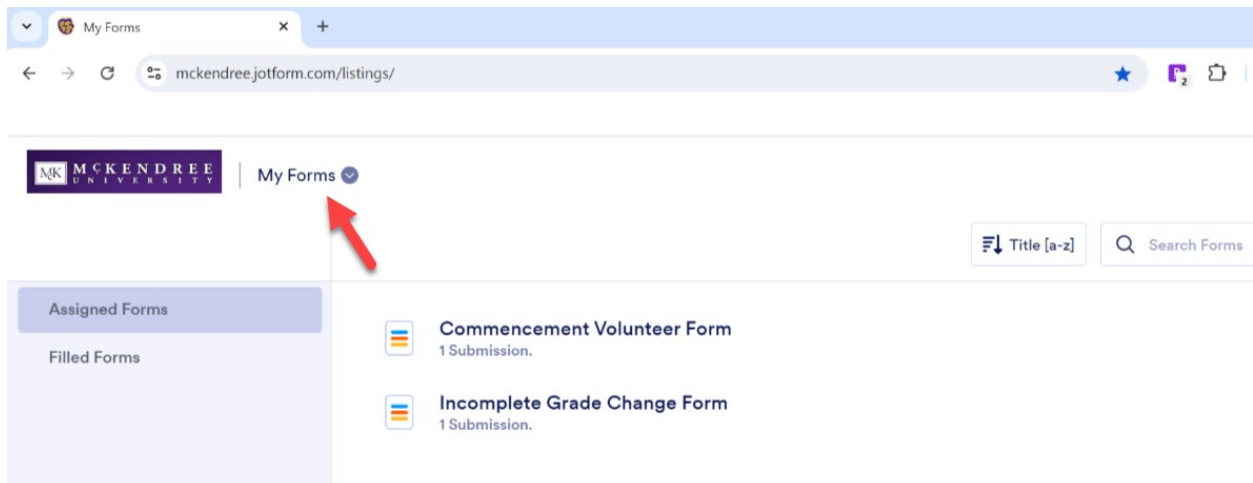
Clicking on the down arrow next to 'My Forms' will allow you to switch to 'My Approvals'.
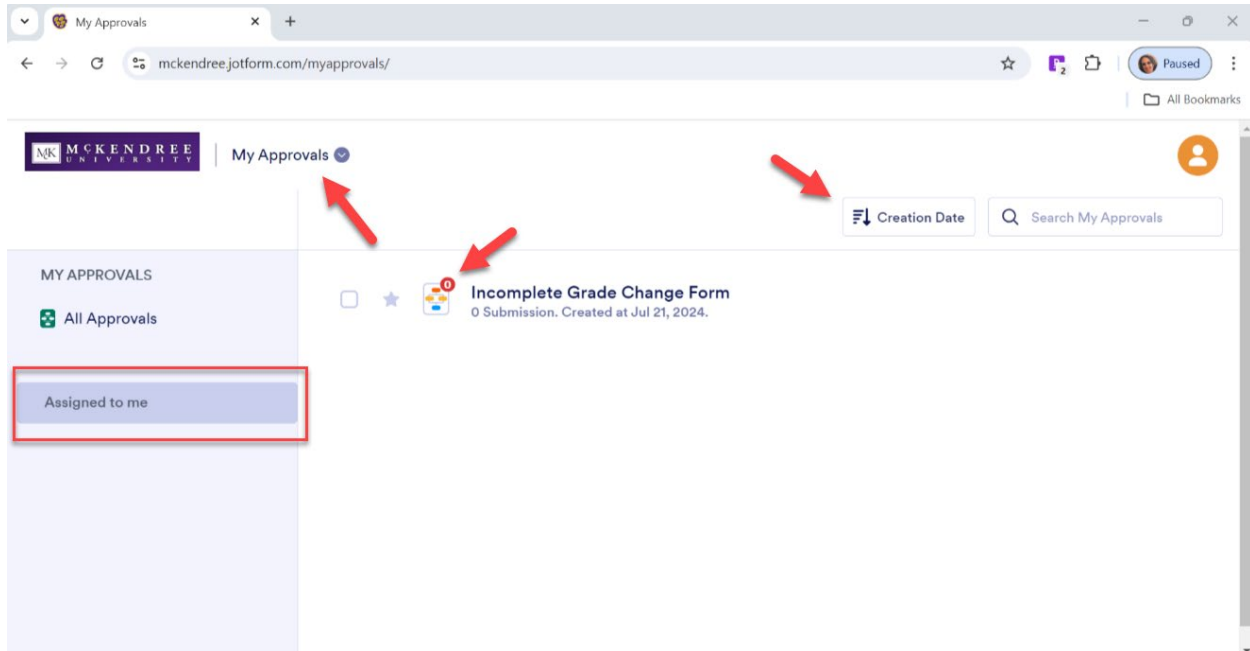
- Assigned to Me (On the left) will give you a count in a blue box of how many forms are pending your approval, with the number listed next to each form.
  - Depending on how many different forms are sent to you, you may have forms listed with the number 0, as there are no submissions pending your approval for that specific form.
- The screenshot shows the default of sorting by Creation Date, but this can be switched to sort by Title alphabetically if you choose. This is helpful if you are approving several different forms.

Timeline: As soon as a submission is sent to you, you will receive an email stating Your action is required for XXX form. You will receive a reminder for 3 subsequent days beyond the initial email, and then the reminder emails will stop. Pending the form, some forms are set to escalate to the next level supervisor after the 3 days, and others are coded to wait for your response. Your prompt attention to these forms is essential, as the next approval or processing step does not receive the form until your review decision is made.

Approval Decision: Depending on the form, each form has a different approval flow process. If a form is sent to you, you will either be given the opportunity to approve, deny, or review a request. Every form will require a comment to be left on the form. The comment can be as simple as 'Approved' or as complex as you'd like. Unlike the eForms system, you cannot reassign a form for additional review. Thus, if you must consult with someone else before making a review decision, you must do so outside of the Jotform system.