Equipment Request Tracker, HSGP

Contents

General Information

The Equipment Request Tracker is used to simplify and streamline the process by which Task Force equipment requests are received and processed by PEMA.

https://etrack.pema.pa.gov

Creating an Account

For a Task Force individual to have an account, one of the people on their current DGM-02 must identify that individual as needing an account and what role the individual should have. An email can be sent to RA-GrantProgram@pa.gov requesting approval of access for these individuals.

Keystone Login

The Equipment Request Tracker utilizes a system known as Keystone Login (https://keystonelogin.pa.gov). This system is being put in place across the Commonwealth to provide a single login for Commonwealth Agency systems.

On the login page, click Register a new user. This takes you to the screen to create your Keystone Login. Make sure the User Name and Password fields are blank when you click the link to register as a new user.

Equipment Request Tracker

Once you have set up your Keystone Login, use that user name and password to log into the Equipment Request Tracker. When you click Log in the first time, you will see a screen asking you to register and explain why you need access. This will only appear the first time you log in. <u>Complete all fields, you only request one role.</u>

After you request access, you will see this notice:

> Information
>
> We can see that your email has been confirmed but to logon to the Equipment Request Tracker the registration request must be approved by the Site Admin. Please contact the Admin

Please send an email to the Grants mailbox (RA-GrantProgram@pa.gov) to notify an administrator that your newly created account needs to be activated. Once activated, an email will be sent back to you confirming your access to the system.

Roles

Task Force Level Roles

All roles are specific to the Task Force(s) to which the user is assigned. Each Task Force must have at least one Submitter. Please note that if there are multiple Requestors/Submitters for the Task Force, they will see all the requests for that Task Force, regardless of who is actually working on them.

Viewer

A Viewer can only view requests, their related attachments, and run reports.

Requestor

A Requestor can view requests, initiate new requests, make comments, add attachments, and run reports.

Submitter

A Submitter can do everything a Requestor can, but also has the ability to submit the request to PEMA.

Equipment Request Approval Process

The Task Force is responsible for determining the process for approval of equipment requests/DGM-24s. Requests that are entered in the system and submitted to PEMA by an authorized individual will be considered approved by the Task Force. The Equipment Request Tracker has one approval step built in. It is up to the Task Force if they utilize it or if all approvals take place outside of the system.

Logging into the Dashboard

Use your Keystone Login and password to log in. When you log in, the initial view is the Dashboard, which shows all requests for the Task Force(s) to which your account is assigned. There are sorting and filtering options to view specific requests, as well.

The requests can be sorted by clicking on the column header. The search box uses the PEMA Request ID. The Filter has options for Task Force, Grant Year, Status, and TF Tracking Number. If you activate a filter, the Dashboard will keep that filter active until you clear it.

Requests that are at your level will have the option to Edit or Delete. Requests that have been submitted to the next level will only have the option to View. Once a request has passed your level, the only changes you can do are to add attachments and make comments. Please note that you can only add attachments if the request status is "Procurement in Process" or "Procurement Completed."

Log in

UserName:
The UserName field is required.

Password:
The Password field is required.

Log in

Register a new user?
Forget your password?

Filter ×

--Task Force--

--Start Grant Year--

--End Grant Year--

--Status--

Task Force Tracking Number

Filter   Clear

Entering a New Request

Click on the button for New Request.

The Request Type, Task Force, and Project are the minimum required to allow the request to be saved and given a PEMA Request ID (4-digits). Once you have entered the Request Type (Standard vs Direct Procurement) and saved the request, the Request Type cannot be changed. It is recommended that the AEL be entered before you push save as the soft search does not operate in the Edit screen. If you prefer to copy and paste the AEL numbers, that must be done from the edit screen after the request has been initially saved.

Enter the information specific to the request:

Request Type: Standard or Direct Procurement. Once the request is submitted to PEMA, this type cannot be changed.

Expected by Date: Enter the date this request is expected to be received by.

Task Force: Will default unless the user is assigned to more than one Task Force

Task Force Tracking Number: Optional

Receiving Team/Entity: Enter what team or entity will be receiving this equipment.

Amount Not to Exceed: Enter the amount budgeted for this request. Procurement will not go over this amount unless approval is received from the TF and PEMA Finance.

LETPP Amount: Enter the amount benefiting Law Enforcement. This field populates the reports run to see if the LE minimum has been met.

Equipment Type: Drop down list that contains the same options as the BSIR and the application.

Project/Sub-Project: Dropdown with the relevant projects for the Task Force. The drop down also contains the grant year. Soft search is built into this field.

- For Southeast Subprojects, use the budget code as the soft search criteria.
- The Contract Number is the Grant Agreement number (from ESA). The ESA grants only began with FFY 2018, so the field will be blank for grant years 2014 through 2017.
- PEMA Finance will add the Internal Order when they approve the request. The internal order is the "T" number on the left-hand side of the monthly balance reports.
- Click Add. You must click Add for the project information to be saved.

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Receiving Counties: Choose the county from the dropdown, identify the percentage for that county up to 2 decimal points, and click Add. You must click add for the county information to be saved. This is the information that will be used to populate the SEFA reports.

* Receiving Counties:			
County	Cost Center	Percentage	
BUCKS	3136002309	100.00 %	Edit Remove
Total Percentage		100.00%	
⌄		0.00 %	Add

The cost center is the code that is used to determine the dollar amount of the request per county for SEFA purposes. This will automatically populate based on which county is selected.

Ael:

Type the AEL Numbers

01AR-01-SAR - Respirator, Supplied Air
01AR-01-SCBA - SCBA, CBRN
01AR-01-SCBC - Cylinders and Valve Assemblies, Spare, and Service/Repair Kits, CBRN SCBA
01AR-01-SCBR - Kit, Retrofit/Upgrade, CBRN SCBA
01AR-01-SCBT - SCBA, CBRN, Tactical
01AR-01-SCCC - Respirator, Full-Facepiece, Closed-Circuit, Self-Contained (Re-Breather)
01AR-02-APR - Respirator, Air-Purifying, Full-Face, Tight-Fitting, Negative Pressure, CBRN
01AR-02-APRC - Canister, CBRN, APR
02EX-03-ELCM - Equipment, Electronic Countermeasures
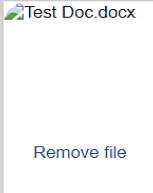01AR-03-PAPB - Battery Pack, PAPR

Equipment Description: Describe what you need. The first 100 characters will show on the dashboard.

AEL: Only valid AELs can be entered. The system uses a soft search method to bring up the numbers. More than one AEL can be entered.

Attachment Box: Upload your DGM-24/24A, quotes, or supporting documentation into the grey attachment box.

==*** As of June 2020, the Equipment Request Tracker now has the capability to completely replace the DGM-24 and DGM-24A. **These forms are still available for Task Force use but are not required when submitting a request to PEMA.** Please remember that all fields must still be completed in the equipment request tracker before submitting to PEMA. Questions regarding what needs to be completed should be sent to your Planner. Quotes and any supporting documentation for the request must also still be attached before submission. Remember you can only attach and save one document at a time.==

Drop attachments here or click here to add

Test Doc.docx

Remove file

When you have entered your information and uploaded your documents, click the Save button at the top of the page. Once you click Save you are returned to the Dashboard list. Your newly entered request will automatically be assigned a Request ID and you'll be able to access the request and finish entering the rest of your information.

Editing Equipment Requests

General Information

Comments

Purchase Orders

Activities

General Information

This section includes everything from when the new request was created, including the rest of the information required to submit a request to PEMA. See Entering a New Request for completing fields that are not listed below.

Request Status: This is the submission dropdown. Requestors can change the status to Submitter Review. Submitters can Return the request to the Requestor or submit to PEMA by changing the status to In Review. Once a request is submitted to PEMA, it cannot be edited. See Submitting a Request to the Next Level for more information.

Submission Date: Automatically defaults to current date.

Identify how this equipment will support the region:

Identify how and where this equipment will be used:

Surge Capacity?

Security Sensitive?

Specifications Included?

Maintained by HSGP Funds?

Identify how the recipient will provide maintenance/care for the equipment or coordinate this service over the next 5 years?

Comments

On the Dashboard, click View for the appropriate request. Scroll down to the blue bar that says Comments and click on Comments to expand the section. Task Force Comments is the bottom left field.

There are separate comment sections for the Planners, Grants, Finance, Procurement, and the Task Force. Once a request has been submitted to the next level, the only change you can make is to make comments. When a request status is "Approved Direct Procurement" or "Closed," no comments can be made.

If the request is at your level, you will not have the "Add Comment" box. Simply type in your comment and when you save the request, it will be there. If the request is not at your level, type in the appropriate comment and click the blue "Add Comment" box. The comment will appear above with the user name and date stamp.

Do not ask a question in the comment field. Adding comments does not trigger any notifications and there is no guarantee if the appropriate person would see the comment timely. If there is a specific question regarding the request, please contact the individual at the current step in the process. Refer to the last page for the table with who to contact at each status.

Comments

Planner Comments:

Comments	Entered By	Date
No Comments		

Grants Comments:

Comments	Entered By	Date
No Comments		

Finance Comments:

Comments	Entered By	Date
No Comments		

Procurement Comments:

Comments	Entered By	Date
No Comments		

Task Force Comments:

Comments	Entered By	Date
No Comments		

File ▾ Edit ▾ View ▾ Format ▾

↶ ↷ Formats ▾ **B** *I* ≡ ≡ ≡ ≡ ⇥ ⇤

Purchase Orders

This section gives the PO or shopping cart number, when it was sent to the vendor, the name of the vendor, and the initial order amount. The Purchasing Agent will show once the request is with Procurement and after the Purchasing Agent has been assigned.

Purchase Orders

Purchasing Agent:

PO ID	PO/SC Number	Completed Date	Send Date	Vendor	Order Amount	PO/SC Status
No Purchase Orders						
Add Purchase Order						

Activities

This section shows when the status was changed and by whom. The Application User is the Task Force user responsible for the request.   A Submitter can change this to another Task Force user if necessary.   When changing the Application User, keep in mind what role the user has, i.e. if the user to which it is changed only has viewer rights.

Activities

Requestor:

kpoe78

Old Status	New Status	Changed By	Date
Created	Submitter Review	kpoe78	8/9/2019 4:23:20 PM
Submitter Review	In Review	kpoe78	8/9/2019 4:23:43 PM
In Review	Financial Approval	kpoe78	8/9/2019 4:26:46 PM
Financial Approval	Approved for Procurement	kpoe	10/16/2019 1:16:44 PM

Submitting a Request to the Next Level

Submitting a request cannot be done from the New Request screen. It can only be done from the Edit screen. **Before you change the status, make sure you have all your information completed/attached.**

From the Dashboard, click the edit button for the request that is ready to submit to the next level. Under "Request Status," change the status of the request.

- A Requestor can change the status to "Submitter Review"
- A Submitter can change the status to "In Review", "Submitter Returned," or "Submitter Hold."

You will receive a notice that the request has been received. In a test, both the person who created the request and the person who submitted the request received the notice.

NoReply-EQRequestTracker@pa.gov
to me

The Equipment Request: 4084 has been submitted to PEMA.

To Review this and other requests in the Dashboard, Please click on the link below:

Edit New Equipment Request

Status

The status of a request determines where in the workflow process it is.

Task Force Statuses

If you do not have individuals with a requestor role, you will not see In Draft or Submitter Returned.

- In Draft – Request has been initiated by a Requestor
- Submitter Returned – A request has been returned to a Requestor by a Submitter.
- Submitter Review – Request has been passed on to a Submitter by a Requestor **or** has been initiated by a Submitter.
- Submitter Hold – A request has been put on hold by a Submitter.
- Planner Returned – A request has been returned to a Submitter by a PEMA Planner.

PEMA Statuses

- In Review – A request has been submitted to PEMA by someone with a Submitter role and is now with a PEMA Planner.
- Grants Approval - The request has been programmatically approved by the Planner and is now with Grants. This applies to Direct Procurement requests and to requests that need additional approvals outside of the system, such as an ARL or EHP.
- Financial Approval – The request has been programmatically approved by the Planner and any necessary additional approvals have been received and the request is now with Finance.
- Approved for Procurement – The request has been approved by Finance and is now with Procurement. A Supervisor will assign it to a Purchasing Agent.
- Procurement in Process – The request has been assigned to a Purchasing Agent and they are working on it.
- Procurement Completed – All Purchase Orders/Shopping Carts for the Request have been created and sent to the vendor. The request is now with the Fiscal Assistant.
- Closed – All DGM-08s/invoices have been received and the invoice(s) have paid.
- Finance Returned – A request has been returned to either Grants or the Planner by Finance.
- Procurement Returned – A request has been returned to Finance.
- Grants Returned – A request has been returned to the Planner.
- On Hold – Additional information is necessary, and the request is on hold pending receipt of that information. The status will show what level put it on hold, the activity section will show the user who put it on hold.
- Approved Direct Procurement – A direct procurement request has been approved. *This is only applicable to requests with the "Direct Procurement" Type.*
- Rejected – Requests can be rejected for a variety of reasons. The Rejection information is under the Equipment Request Status section. The user who rejected the request will be identified, when it was rejected, and why. There may also be additional comments. *If a request was submitted as "Standard" and was then changed to "Direct Procurement," the reason for rejection will be listed as "Approved Direct Procurement."*

Who do I Contact with Questions?

For any questions that cannot be answered by the information provided in the Equipment Request Tracker, please send an email to the Grants Mailbox (RA-GrantProgram@pa.gov). In the email, identify the PEMA Request Number and the current status of the request.

The activities section will show the last user who updated the status.