

Softdocs etrieve - Form Instructions BUS W-9 for New Vendor

Direct link to form: <https://dom.etrieve.cloud/central/forms/401>

The screenshot displays the 'etrieve | CENTRAL' web interface. On the left, a sidebar menu lists various forms under 'Available Forms', with 'W-9 for New Vendor' selected. The main content area shows the form title 'W-9 for New Vendor V1' with a 'Draft saved' status. Below this is the Dominican University Business Office logo and contact information. A dark blue banner reads 'W-9 for New Vendor' and 'W-9 = Request for Taxpayer Identification Number and Certification'. The form is categorized as 'Form started by: staff or faculty'. It includes a section for 'Employee Information' with input fields for 'Employee Full Name' (Marjorie Luce) and 'Employee DU Email' (mluce1@dom.edu). At the bottom, there are buttons for 'Save', 'Add Attachment(s)', and 'Submit'.

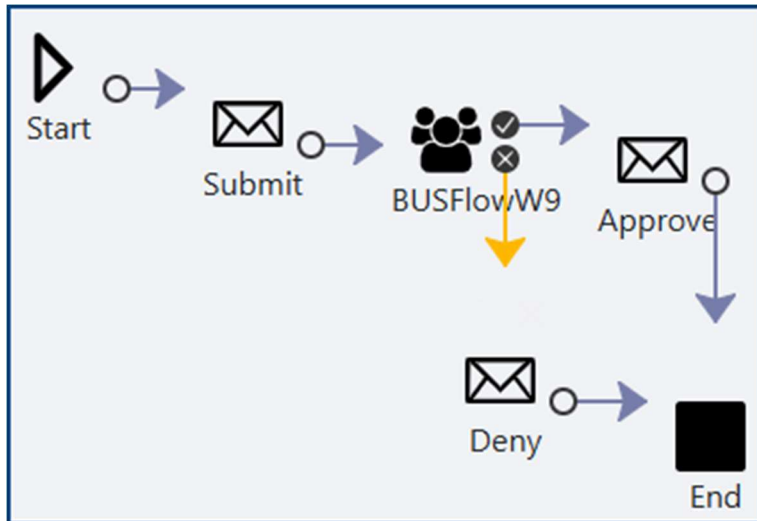
Alternate access:

1. Open Softdocs etrieve: <https://dom.etrieve.cloud/central>
2. Click on “Forms”
3. Scroll down to “Business Office” section (or search form name in box at top)
4. Click on desired form

Softdocs etrieve issues: Please submit a Support Ticket to Information Technology <https://support.dom.edu/TDClient/2074/Portal/Requests/Service/53278/Report-a-Softdocs-Etrieve-Issue/Request>

Workflow process:

1. Employee starts form and their information autofills.
2. Employee receives email confirming submission.
3. Business Office receives an email notification to approve/deny.
4. Employee receives an email confirming approval or denial.
5. Form files in Softdocs etrieve Content (document repository).



Submissions: Once someone touches a form (submitted, reviewed, approved, denied, or signed), then they can check the status at any time via their Submissions tab in etrieve Central. The form is viewable as it is filled out at that moment in time. It will show which step in the workflow it is at and the status. Each column can be sorted or filtered.

etrieve CENTRAL				
Submissions		Forms		
Search		Needs Review In Progress Completed Clear all		
Package Name ↑↓	Workflow ↑↓	Step ↑↓	Status ↑↓	
Return to Work Certification V1 - Marjorie Luce - [REDACTED]	Return to Work Certification	End	Completed	
Directory Change Request V1 - Marjorie Luce [REDACTED]	Directory Change Request	End	Completed	
Directory Change Request V1 - Marjorie Luce [REDACTED]	Directory Change Request	End	Completed	
Student Employment Work Authorization V2 - Marjorie Luce [REDACTED]	Student Employment Work Authorization	End	Completed	

Needs Review = YOU need to act

In Progress = SOMEONE ELSE needs to act

Completed = All done!

Needs Review	In Progress	Completed	Clear all
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Draft form:

A draft form will be saved automatically and can be resumed at any time (or deleted).

Submissions **Forms**

Search

Drafts **1** [Edit](#)

Directory Photo Opt Out 11/17/2025

Available Forms [Collapse all](#)

From the form list, click “edit,” checkmark draft to delete, click trash icon. Or simply hover over the draft form name, then click trash icon.

Drafts **1** [X](#)

[Delete Selected](#) [Unselect All](#)

☒ Directory Photo Opt Out 11/17/2025

When a draft is open, it can also be deleted using trash icon at bottom of form.

[Delete Draft](#) [Save](#) [+ Add Attachment\(s\)](#) [Submit](#)

Form errors:

All boxes with red asterisk must be completed to “submit” a form. If all required fields are completed & error message still appears, submit an IT Support Ticket using link on page 1.

Employee Signature Date *

Employee Signature Date is required

[+ Add Attachment\(s\)](#)

The form failed to submit due to validation errors. Please check the form and try again. [X](#)

Example screenshots:



DOMINICAN UNIVERSITY
Business Office
7900 W. Division St, River Forest, IL 60305

[DU-IT's Softdocs etrieve website](#): form instructions, troubleshooting, Support Center help

W-9 for New Vendor

W-9 = Request for Taxpayer Identification Number and Certification

Form started by: staff or faculty

Questions? Refer to the [Business Office SharePoint site](#)
or contact Accounts Payable (accountspayable@dom.edu)

Employee Information

Employee Full Name

Employee DU Email

Marjorie Luce

mluce1@dom.edu

New Vendor Name *

Calendar Year *

ABC Company, Inc.

2026

If you need a blank form to fill out, then go to the [IRS website](#) and search for W-9.

Please attach W-9 *
PDF and JPEG only

Drag and drop a file here to upload

— OR —

+ Browse Files

Please attach W-9 *
PDF and JPEG only

✓

[Test Attachment.pdf](#)





Signature

Employee Signature *

I understand that this constitutes my legal signature on this document.

Employee Signature Date *

Signature

Draw

Type

M. Luce

Clear

☒ I understand that this constitutes my legal signature on this document.

Cancel

Create Signature

Draw OR Type your signature

Draw

Type

Full Name

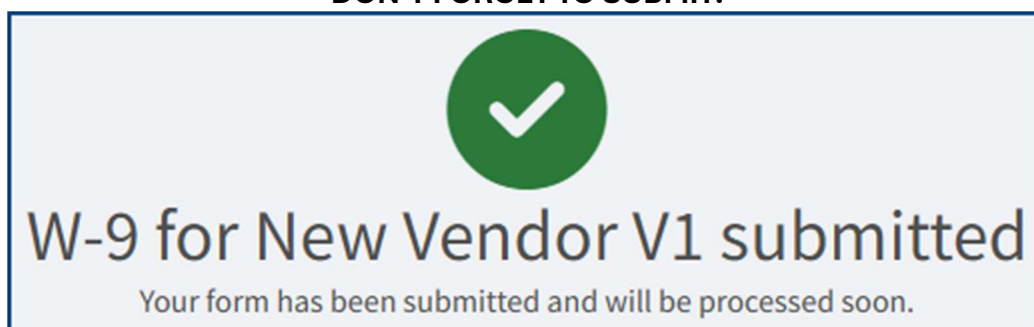
Marjorie Luce

Preview

Marjorie Luce

Signature	
Employee Signature * I understand that this constitutes my legal signature on this document. <i>Marjorie Luce</i>	Employee Signature Date * 08/17/2026
Save + Add Attachment(s) Submit	

DON'T FORGET TO SUBMIT!



To search by a vendor name... or portion of a vendor name

Vendor Information

1. Vendor ID or Name Search:

Type vendor ID

Or part of vendor name

Or a person's first or last name (no comma)

2. Search Results:

Choose the name with correct ID

Verify vendor information that appears below (email, phone, and address)

Vendor Name or ID Search *

electric

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results *

Addison Electric - 6

Belec Electrical Inc - 9

Connor Electric Services, Inc. - 9

D & J Electric Inc. - 7

Integrated Electrical Services, LLC - 9

Once a choice is made, then other boxes autofill

Vendor Name or ID Search *

electric

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results *

Integrated Electrical Services, LLC - 9

click arrow to see search results

Vendor DU ID

97

Vendor Name

Integrated Electrical Services, LLC

To search by a vendor ID (Jenzabar ID)... or portion of a vendor ID

Vendor Information

1. Vendor ID or Name Search:

- Type vendor ID
- Or part of vendor name
- Or a person's first or last name (no comma)

2. Search Results:

- Choose the name with correct ID
- Verify vendor information that appears below (email, phone, and address)

Vendor Name or ID Search *

789

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results *

Adlers Foreign Books Inc. - 789

Archdiocese Of Chicago - 789

Association Of Governing - 789

Association Of Governing - 789

Ballet Folklorico Sones Mexicanos, LLC 789

Once a choice is made, then other boxes autofill

Vendor Name or ID Search *

789

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results *

Association Of Governing - 789

click arrow to see search results

Vendor DU ID

Vendor Name

789

Association Of Governing

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Verify vendor information that autofills

Vendor Email	Vendor Phone #	
Vendor Physical Address		
Boards of Universities & Colleges [REDACTED]		
Vendor City	Vendor State	Vendor Zip
Boston	MA	[REDACTED]

Business Office Use Only

Approved? *



If **Yes** chosen, then click **Approve** at bottom of form. No comment required.

If **No** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Decline** at bottom of form.

BUS Notes

 Save  Unlock  Decline  Approve

Approve / Deny

Approved? *

If **Yes** chosen, then click **Approve** at bottom of form. No comment required.

If **No** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Decline** at bottom of form.

Yes

No

EXAMPLE 1: **Approved**

Approved? *

If **Yes** chosen, then click **Approve** at bottom of form. No comment required.

If **No** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Decline** at bottom of form.

Yes

Save Unlock Decline Approve

EXAMPLE 2: **Denied**

Approved? *

If **Yes** chosen, then click **Approve** at bottom of form. No comment required.

If **No** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Decline** at bottom of form.

No

Save Unlock Decline Approve

08/23/2026 at 1:31 PM

This is not a valid account #. Please resubmit with correct account #.

Send Comment

Business Office Use Only

Approved? *

If **Yes** chosen, then click **Approve** at bottom of form. No comment required.

If **No** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Decline** at bottom of form.

No

Save Unlock Decline Approve

Marjorie Luce

This is not a valid account #. Please resubmit with correct account #.

Ip Address: 69.219.216.130

08/23/2026 at 2:11 PM

Edit Delete

Send Comment