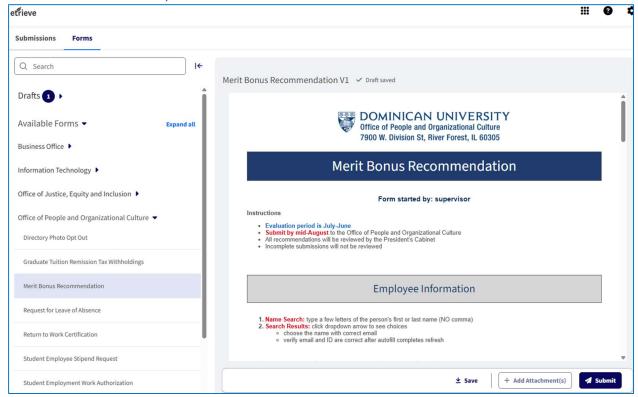
# **Softdocs etrieve - Form Instructions**

## **OPC Merit Bonus Recommendation**

Direct link to form: https://dom.etrieve.cloud/central/forms/162



### Alternate access:

- 1. Open Softdocs etrieve: <a href="https://dom.etrieve.cloud/central">https://dom.etrieve.cloud/central</a>
- 2. Click on "Forms"
- 3. Scroll down to "Office of People and Organizational Culture" section (or search form name in box at top)
- 4. Click on desired form

# Workflow process:

- 1. The supervisor starts/opens the form and their DU ID, full name, & email autofill.
- 2. The supervisor completes all sections and signs.
- 3. The supervisor receives an email confirming submission.
- 4. OPC confirms (not approves) or denies and completes "office only" area.
- 5. Data is aggregated for reporting to Cabinet.
- 6. The supervisor receives an email of confirmation or denial.
- 7. The form files in Softdocs etrieve Content (document repository).

**Softdocs etrieve issues:** Please submit a Support Ticket to Information Technology <a href="https://support.dom.edu/TDClient/2074/Portal/Requests/TicketRequests/NewForm?ID=C">https://support.dom.edu/TDClient/2074/Portal/Requests/TicketRequests/NewForm?ID=C</a> <a href="https://support.dom.edu/TDClient/2074/Portal/Requests/TicketRequests/NewForm?ID=C">neTR2sN8Jk</a> & RequestorType=Service

# **Example screenshots:**



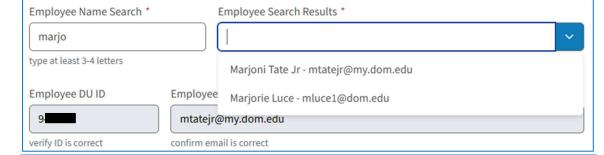
# **Merit Bonus Recommendation**

### Form started by: supervisor

### Instructions

- · Evaluation period is July-June
- Submit by mid-August to the Office of People and Organizational Culture
- All recommendations will be reviewed by the President's Cabinet
- Incomplete submissions will not be reviewed

# **Employee Information**



# **Employee Information**

- 1. Name Search: type a few letters of the person's first or last name (NO comma)
- 2. Search Results: click dropdown arrow to see choices

 choose the name with correct email
 verify email and ID are correct after autofill completes refresh Employee Name Search \* Employee Search Results \* Marjorie Luce - mluce1@dom.edu Marjorie Luce type at least 3-4 letters click arrow to see search results **Employee DU ID Employee DU Email** mluce1@dom.edu verify ID is correct confirm email is correct

Job Title \*

Assistant Director of Systems Integrations

Department \*

Information Technology

# **Supervisor Information**

Supervisor Full Name

Supervisor DU Email

Marjorie Luce

mluce1@dom.edu

# **Evaluation Rubric**

Please evaluate the employee's contribution using the following criteria:

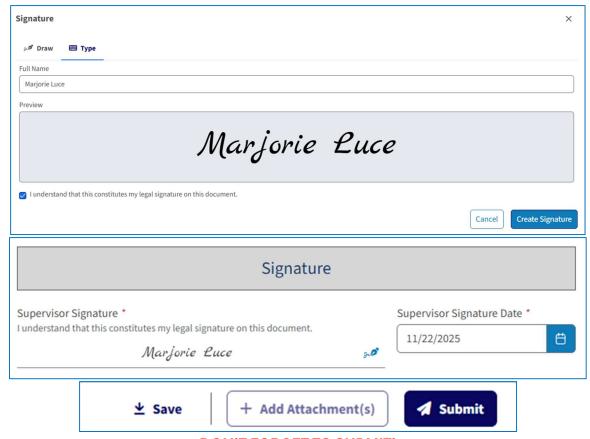
- Exceeds Expectations Consistently goes above and beyond in this area; demonstrates outstanding performance and impact.
- Meets Expectations Consistently performs effectively and fulfills all core responsibilities in this
  area
- Not Applicable (N/A) This performance area does not apply to the employee's role.

Category	Exceeds	Meets	Needs	Not Applicable
	Expectations	Expectations	Improvement	

				I
	Demonstrates			
	exceptional	Effectively meets		
Job	performance,	job	Occasionally	
Responsibilities	proactively adapts	responsibilities,	struggles with role	
& Role Alignment	to role changes,	aligns work with	responsibilities,	N/A if role does
	and exceeds	university goals,	needs additional	not include
	institutional	and adapts as	guidance and	evolving
	expectations.	needed.	improvement.	responsibilities.
Operational Excellence	Consistently			
	improves	Meets job		
	processes,	expectations with	Shows	
	demonstrates	effective problem-	inconsistencies in	
	efficiency, and	solving and	work quality,	
	maintains high-	reliable	efficiency, or	N/A if not
	quality work.	performance.	problem-solving.	applicable to role.
Team Contributions	Proactively			
	collaborates,	Works effectively		
	mentors peers,	within a team,	Shows minimal	
	and leads	contributing to	engagement in	
	initiatives to	collective goals	team activities,	N/A for roles with
	enhance	and supporting	limited	independent work
	teamwork.	colleagues.	collaboration.	responsibilities.

	Provides			
	outstanding	Maintains		
Customer	service,	professional and	Needs	
Service	anticipates needs,	responsive	improvement in	
	and proactively	interactions,	responsiveness or	N/A if not a
	enhances the	ensuring	customer	customer-facing
	user experience.	satisfaction.	interactions.	role.
	Leads			
Service Contributions	committees,	Participates in		
	mentors	committees and	Minimal	
	colleagues, and	service activities	participation in	N/A if service
	actively supports	that contribute to	service activities,	contributions are
	university	the institution and	needs more	not part of role
	initiatives.	community.	engagement.	expectations.
	Engages in			
	continuous			
	learning, regularly			
	attends and/or			
Professional	organizes			
Development	workshops, earns			N/A if no
	certifications, and		Rarely seeks	professional
	applies new skills	Attends training	development	development
	to improve	and applies new	opportunities or	requirements
	performance.	skills.	applies new skills.	exist for the role.

# Merit Review Provide 1–2 examples of how the employee has exceeded expectations in both quality and quantity of work. First Example \* Marjorie did such and such fantastic work Second Example Recommended Merit Bonus Amount \*



# **DON'T FORGET TO SUBMIT!**

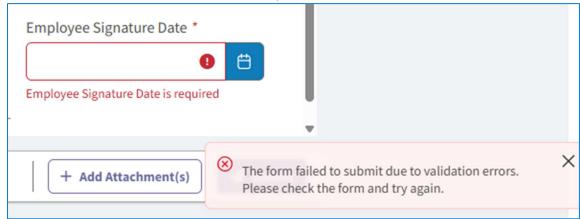


# Merit Bonus Recommendation V1 submitted

Your form has been submitted and will be processed soon.

### Form errors:

All boxes with red asterisk must be completed to "submit" the form.



# **Draft form:**

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

