

## Softdocs etrieve - Form Instructions

### OPC Merit Bonus Recommendation

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

The screenshot displays the Softdocs etrieve web application interface. On the left, a sidebar menu lists various forms under the 'Forms' tab, with 'Merit Bonus Recommendation' highlighted. The main content area shows the 'Merit Bonus Recommendation V1' form, which is marked as 'Draft saved'. The form header includes the Dominican University logo and name. The form title is 'Merit Bonus Recommendation'. Below the title, it states 'Form started by: supervisor'. The 'Instructions' section lists: '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', and 'Incomplete submissions will not be reviewed'. The 'Employee Information' section is currently empty. 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 “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  
[https://support.dom.edu/TDClient/2074/Portal/Requests/TicketRequests/NewForm?ID=CneTR2sN8Jk\\_&RequestorType=Service](https://support.dom.edu/TDClient/2074/Portal/Requests/TicketRequests/NewForm?ID=CneTR2sN8Jk_&RequestorType=Service)

## Example screenshots:

**DOMINICAN UNIVERSITY**  
Office of People and Organizational Culture  
7900 W. Division St, River Forest, IL 60305

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

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 \*

marjo

type at least 3-4 letters

Employee Search Results \*

Marjoni Tate Jr - mtatejr@my.dom.edu

Marjorie Luce - mluce1@dom.edu

mtatejr@my.dom.edu

Employee DU ID

9

verify ID is correct

Employee DU Email

mtatejr@my.dom.edu

confirm email is correct

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 \*

Marjorie Luce

type at least 3-4 letters

Employee Search Results \*

Marjorie Luce - mluce1@dom.edu

click arrow to see search results

Employee DU ID

9

verify ID is correct

Employee DU Email

mluce1@dom.edu

confirm email is correct

Job Title \*

Assistant Director of Systems Integrations

Department \*

Information Technology

## Supervisor Information

Supervisor Full Name

Marjorie Luce

Supervisor DU Email

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

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

\$750



Signature

✎ Draw

Type

Full Name

Marjorie Luce

Preview

Marjorie Luce

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

Cancel

Create Signature

Signature

Supervisor Signature \*

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

Marjorie Luce

Supervisor Signature Date \*

11/22/2025

Save

+ Add Attachment(s)

Submit

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.

The screenshot shows a form titled "Employee Signature Date" with a red asterisk indicating a required field. The input field is empty and has a red border. Below the field, a red error message states "Employee Signature Date is required". To the right of the input field is a blue calendar icon. At the bottom of the form, there is a button labeled "+ Add Attachment(s)". A red error banner at the bottom of the form states: "The form failed to submit due to validation errors. Please check the form and try again."

### Draft form:

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

The screenshot shows the "etrieve" interface with the "Forms" tab selected. There is a search bar with the placeholder text "Search". Below the search bar, there is a section for "Drafts" with a count of "1" and a dropdown arrow. To the right of the "Drafts" section is a blue "Edit" button. Below the "Drafts" section, there is a table with one row: "Directory Photo Opt Out" with a date of "11/17/2025". At the bottom of the table, there is a link "Available Forms" and a button "Collapse all".

The screenshot shows the "Drafts" dropdown menu. It has a count of "1" and a dropdown arrow. To the right of the dropdown is a blue "X" button. Below the dropdown, there are two buttons: "Delete Selected" and "Unselect All". Below these buttons, there is a table with one row: "Directory Photo Opt Out" with a date of "11/17/2025" and a red trash icon.

The screenshot shows the form footer with three buttons: "Delete Draft" (with a red trash icon), "Save" (with a blue download icon), and "Submit" (with a blue arrow icon). There is also a button labeled "+ Add Attachment(s)" between the "Save" and "Submit" buttons.