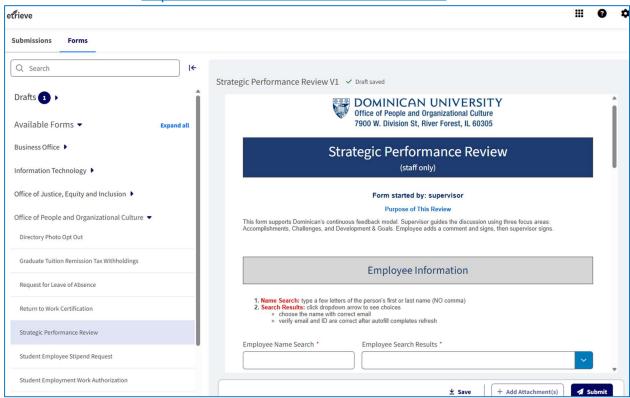**Softdocs etrieve - Form Instructions**
**OPC Strategic Performance Review**

**Direct link to form:** https://dom.etrieve.cloud/central/forms/164



**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)
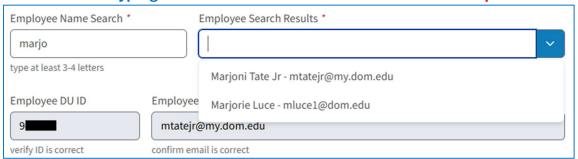4. Click on desired form

**Workflow process:**
1. The supervisor starts/opens the form and their full name & email autofill.
2. The supervisor completes sections 1-4.
3. The supervisor receives an email confirming submission.
4. The employee adds comment and signs.
5. The supervisor adds VP information and signs
6. The Vice President signs.
7. OPC completes "office only" area.
8. Data is aggregated for reporting.
9. The supervisor receives an email confirming completion.
10. The form files in Softdocs etrieve Content (document repository).

**Softdocs etrieve issues:** Please submit a Support Ticket to Information Technology
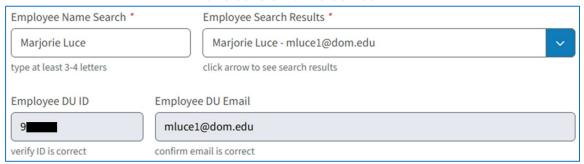https://support.dom.edu/TDClient/2074/Portal/Requests/TicketRequests/NewForm?ID=CneTR2sN8Jk_&RequestorType=Service

**Example screenshots (supervisor):**

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

## Strategic Performance Review
### (staff only)

**Form started by: supervisor**

**Purpose of This Review**

This form supports Dominican's continuous feedback model. Supervisor guides the discussion using three focus areas: Accomplishments, Challenges, and Development & Goals. Employee adds a comment and signs, then supervisor signs.

### 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

**Preview after typing some letters in search box with results in dropdown box**

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

Employee DU ID

9▮▮▮▮

verify ID is correct

Employee

mtatejr@my.dom.edu

confirm email is correct

**An email will autofill after you type in search term.**
**Once you choose the correct name from dropdown list, the email will refresh.**
**Make sure email is correct!!**

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

## Performance Review / Check-In

Check-In Type *

End-of-Year Summary

Discussion Date *

06/15/2026

Check-In Start Date *

07/01/2025

Check-In End Date *

05/31/2026

**1. Position Description Review**

Determine whether the position description accurately reflects current responsibilities.

1. Supervisor Notes *

blah

Identify updates, evolving responsibilities, or workload considerations.

## 2. Accomplishments

Recognize achievements, contributions, and strengths demonstrated during this period.

2. Supervisor Notes *

blah, blah

## 3. Challenges

Identify barriers impacting performance or progress, including resource, operational, or skill-related barriers.

3. Supervisor Notes *

more blah

## 4. Development & Goals

Outline next steps, expectations, and aligned goals for the next review period.

4. Supervisor Notes *

super blah

## SMART Goal Planning Table

| S | Specific: Define a clear, specific goal. |
|---|---|
| M | Measurable: Make sure you can track progress. |
| A | Attainable: Create a goal that is realistic. |
| R | Relevant: Ensure your goal aligns with the organization. |
| T | Time-bound: Assign a target date to keep accountable. |

Above image attribute: https://www.productplan.com/glossary/smart-goal-setting

| Goal | Specific | Measurable | Achievable | Relevant | Time-Bound |
|---|---|---|---|---|---|
| Lead a process improvement for student onboarding | Yes | Reduce processing time by 20% | Within employee's control | Tied to departmental operations | Complete by end of Q3 |

# Strategic Performance Review V1 submitted
Your form has been submitted and will be processed soon.

↓ Save | + Add Attachment(s) ✈ Submit

**DON'T FORGET TO SUBMIT!**

**Example screenshots (employee):**

Comments

### 5. Employee Comments

Employee may reflect on accomplishments, barriers, development, or additional context

Add Employee Comments *

Uber blah, blah, blah

---

**Signature**                                                                    ✕

✎ Draw        ⌨ Type

Full Name

Marjorie Luce

Preview

*Marjorie Luce*

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

Cancel        **Create Signature**

---

Employee Signature *

I understand that this constitutes my legal signature on this document. I acknowledge this performance conversation has been conducted and reviewed.

Employee Signature Date *

11/30/2025    📅

*Marjorie Luce* ✎

⬇ Save     🔓 Unlock     ✓ Approve

---

⬇ **Save**     🔒 **Lock**     ✓ **Approve**
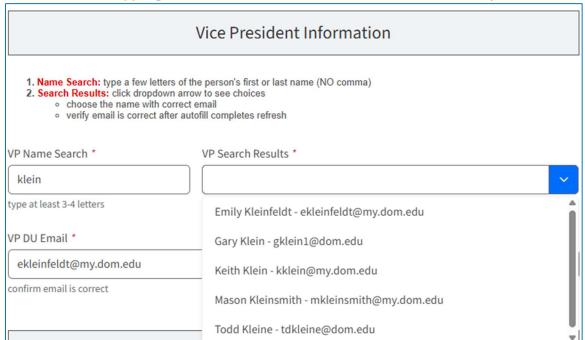
**DON'T FORGET TO APPROVE!**

**Example screenshots (supervisor again):**

**Preview after typing some letters in search box with results in dropdown box**

## Vice President 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 is correct after autofill completes refresh

VP Name Search *

klein

type at least 3-4 letters

VP DU Email *

ekleinfeldt@my.dom.edu

confirm email is correct

VP Search Results *

Emily Kleinfeldt - ekleinfeldt@my.dom.edu

Gary Klein - gklein1@dom.edu

Keith Klein - kklein@my.dom.edu

Mason Kleinsmith - mkleinsmith@my.dom.edu
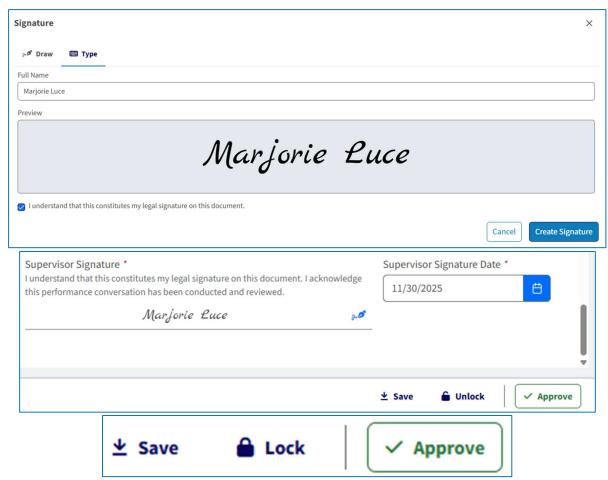
Todd Kleine - tdkleine@dom.edu

**An email will autofill after you type in search term.**
**Once you choose the correct name from dropdown list, the email will refresh.**
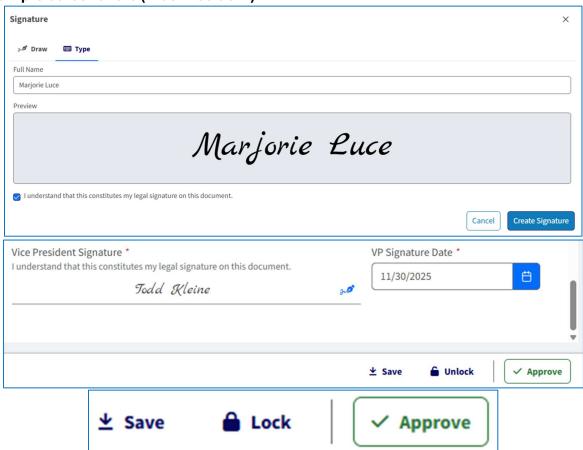**Make sure email is correct!!**

VP Name Search *

Todd Kleine

type at least 3-4 letters

VP Search Results *

Todd Kleine - tdkleine@dom.edu

click arrow to see search results

VP DU Email

tdkleine@dom.edu

confirm email is correct

**Signature**                                                                 ✕

🖊 Draw        ⌨ Type

Full Name

Marjorie Luce

Preview

_Marjorie Luce_

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

Cancel     **Create Signature**

---

Supervisor Signature *

I understand that this constitutes my legal signature on this document. I acknowledge this performance conversation has been conducted and reviewed.

_Marjorie Luce_   🖊

Supervisor Signature Date *

11/30/2025     📅

⬇ Save     🔒 Unlock  |  ✓ Approve

---

⬇ **Save**     🔒 **Lock**  |  ✓ **Approve**

**DON'T FORGET TO APPROVE!**

**Example screenshots (Vice President):**

Signature ✕

✍ Draw    ⌨ Type

Full Name

Marjorie Luce

Preview

*Marjorie Luce*

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

Cancel    **Create Signature**

---

Vice President Signature *

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

*Todd Kleine* ✍

VP Signature Date *

11/30/2025   📅

⬇ Save    🔒 Unlock  |  ✓ Approve

---

⬇ **Save**    🔒 **Lock**  |  ✓ **Approve**

**DON'T FORGET TO APPROVE!**

**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).