

Softdocs etrieve - Form Instructions

OPC Strategic Performance Review

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

The screenshot displays the Softdocs etrieve interface. On the left is a sidebar with a search bar and a list of forms under the 'Forms' tab. The 'Strategic Performance Review' form is highlighted. The main content area shows the form title 'Strategic Performance Review V1' with a 'Draft saved' status. Below the title is the Dominican University logo and address. The form is titled 'Strategic Performance Review (staff only)' and indicates it was started by a supervisor. A section titled 'Purpose of This Review' explains the form's role in the continuous feedback model. Below this is an 'Employee Information' section with instructions for a name search and search results. At the bottom, there are input fields for 'Employee Name Search' and 'Employee Search Results', along with 'Save', 'Add Attachment(s)', and 'Submit' buttons.

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 *

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

verify ID is correct

Employee

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 *

type at least 3-4 letters

Employee Search Results *

▼

click arrow to see search results

Employee DU ID

verify ID is correct

Employee DU Email

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.

Marjorie Luce

Employee Signature Date *

11/30/2025

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 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

VP DU Email *

ekleinfeldt@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!!

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.

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 button labeled "Available Forms" with a dropdown arrow and a blue "Collapse all" button.

The screenshot shows a modal titled "Drafts" with a count of "1" and a dropdown arrow. To the right of the modal title is a blue "X" button. Below the title, there are two buttons: "Delete Selected" in red and "Unselect All" in blue. 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 first column of the table has a checked checkbox.

The screenshot shows the footer of the form. It contains three buttons: "Delete Draft" with a red trash icon, "Save" with a blue download icon, and "Add Attachment(s)" with a blue plus icon. To the right of these buttons is a large blue "Submit" button with a white arrow icon.