Softdocs etrieve - Form Instructions
OPC Supplemental Payment Request

Direct link to form: https://dom.etrieve.cloud/central/forms/268

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. A requestor starts/opens the form and their DU ID, full name, & email autofill.
2. The requestor completes all sections.
3. If the requestor is NOT a Budget Manager, Director, or Dean, then form routes to one.
4. If the requestor is a Budget Manager, Director, or Dean, then they sign form.
5. The requestor receives an email confirming submission.
6. If the employee is staff, Vice President receives an email notification to e-sign.
7. If the employee is faculty, Provost receives an email notification to e-sign.
8. OPC reviews to loop in additional approvers + complete "office only" area.
9. Data is aggregated for reporting.
10. The requestor receives an email confirming completion.
11. 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:

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

Supplemental Payment Request

Form started by: staff or faculty

Use this form to authorize payment to a Dominican University employee and attach all available supporting documentation

Employee Information (who receives stipend)

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

Is this compensation for their faculty or staff role? *

| Staff - Administrative Responsibilities | ⌄ |

Requestor Information (who is filling out form)

Requestor Full Name

Marjorie Luce

Autofill based on person completing form

Requestor DU Email

mluce1@dom.edu

Autofill based on person completing form

Are you the budget manager, director, or dean? *

No

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

1st Approver: Budget Manager, Director, or Dean (BM/D/D) 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

BM/D/D Name Search *

peterson

BM/D/D Search Results *

BM/D/D DU Email

benpeterson@my.dom.edu

confirm email is correct

Karley Peterson - kpeterson1@my.dom.edu

Kay Braymer Peterson - kbpeterson@dom.edu

Madeline Peterson - mpeterson@my.dom.edu

Pete Peterson - ppeterson@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!!**

BM/D/D Name Search *

Pete Peterson

BM/D/D Search Results *

Pete Peterson - ppeterson@dom.edu

click arrow to see search results

BM/D/D DU Email

ppeterson@dom.edu

confirm email is correct

2nd Approver: 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 *

VP DU Email

ekleinfeldt@my.dom.edu

confirm email is correct

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

Sponsoring Department & Funding Information

Sponsoring Department *

Information Technology

Account # *

04.0404.0404

Grant-Funded? *

Yes

PI/CO-PI related? *

No

Split over multiple accounts? *

Yes

List Additional Account #s *

04.0101.0101, 04.0202.0202

Duration of Assignment

Effective Start Date *
11/22/2025

End Date *
12/25/2025

Expected Hours *
45
per week or total

Stipend Details

Stipend Type *
Grant

Justification for Stipend *
Hard worker

Requested Payment Amount *
$ $100.00

# of Payments *
5
months

Total Stipend Amount
$500.00

Supporting Documentation

Please attach supporting documentation here *
PDF and JPEG only

✓ FERPA.pdf 🖉 🗑   ✕

Please attach supporting documentation here *
PDF and JPEG only

Drag and drop files here to upload

— OR —

+ Browse Files   ✕

Add Additional Supporting Document

⬇ Save | + Add Attachment(s) ✈ Submit

DON'T FORGET TO SUBMIT!

✓ Supplemental Payment Request V1 submitted

Your form has been submitted and will be processed soon.

Signature   ✕

✏ Draw   ⌨ **Type**

Full Name

Marjorie Luce

Preview

Marjorie Luce

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

Cancel   **Create Signature**

Signatures

Budget Manager/Director/Dean Signature *
I understand that this constitutes my legal signature on this document.

Marjorie Luce   ✏

BM/D/D Signature Date *

11/22/2025   📅

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

DON'T FORGET TO APPROVE!

Form errors:

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

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. ✕

Draft form:

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

etrieve

Submissions   Forms

🔍 Search   I←

Drafts ① ▾   Edit

Directory Photo Opt Out   11/17/2025

Available Forms ▾   Collapse all

Drafts ① ▾   ✕

Delete Selected   Unselect All

☑ Directory Photo Opt Out   11/17/2025 🗑

🗑 Delete Draft   ⬇ Save | + Add Attachment(s)   ✈ Submit