

Softdocs etrieve - Form Instructions

SFC Staff Professional Development Grant Application

Direct link to form: <https://dom.etrive.cloud/central/forms/330>

The screenshot displays the etrieve software interface. At the top left, it says "etrive | CENTRAL". Below this are tabs for "Submissions" and "Forms". A search bar is present with the text "Search". On the left side, there is a navigation menu with several categories: "Career Programs & Employer Relations", "Information Technology", "International Student Services", "Office of Justice, Equity and Inclusion", "Office of People and Organizational Culture", "Office of the Registrar", "School of Education", and "Staff Council". The "Staff Council" category is expanded, showing "Staff Professional Development Grant Application". The main content area shows the form titled "Staff Professional Development Grant Application V1" with a status of "Draft saved". The form header includes the Dominican University logo and "DOMINICAN UNIVERSITY Staff Council 7900 W. Division St, River Forest, IL 60305". Below the header is a blue banner with the text "Staff Professional Development Grant Application". Underneath, it says "Form started by: staff". The form body contains introductory text: "Grants are intended as a complement to and not in lieu of departmental or unit professional development funds. Examples of professional development activities include attending conferences or workshops, enrolling in on-line courses, certificates, or membership to professional organizations. If you have any questions regarding the application process, please email Staff Council (staffcouncil@dom.edu)."

Process:

1. Staff completes professional development grant application BEFORE an activity to indicate how much funding will be provided at the departmental or school level and how much money is requested from Staff Council.

At the bottom right of the form, there are buttons for "Save", "Add Attachment(s)", and "Submit".

Alternate access:

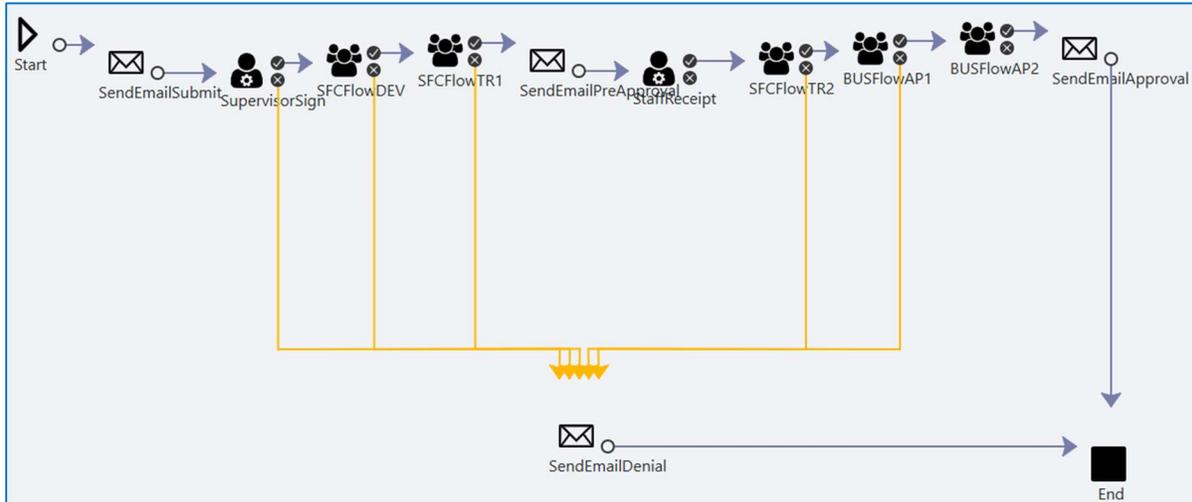
1. Open Softdocs etrieve: <https://dom.etrive.cloud/central>
2. Click on "Forms"
3. Scroll down to "Staff Council" (or use search box)
4. Click on desired form

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

Workflow process:

1. Staff starts form and their information autofills.
2. Staff completes their sections and signs.
3. Staff & Staff Council receive an email confirming submission.
4. Supervisor receives an email notification to approve/deny.
5. Staff Council Development Committee receives an email notification to approve/deny.
6. Staff Council Treasurer receives an email notification to approve/deny (pre-allocation).
7. Form returns to Staff until they can add actual cost & submit receipts (pre-approval email sent w/instructions, cc Supervisor & Staff Council).
8. Staff Council Treasurer receives an email notification to approve/deny (allocation).
9. Business Office receives an email notification to approve/deny (starts payment).

10. Business Office receive email notification to review (after check issued).
11. If denied, notifications to: Staff, Supervisor, Staff Council.
12. If approved (after payment issued), notifications to: Staff, Supervisor, Staff Council.
13. Form files in Softdocs etrieve Content (document repository).



Submissions: Once someone touches a form (submitted, reviewed, approved, denied, or signed), then they can check the status at any time via their Submissions tab in etrieve Central. The form is viewable as it is filled out at that moment in time. It will show which step in the workflow it is at and the status. Each column can be sorted or filtered.

etrieve CENTRAL				
Submissions		Forms		
<input type="text" value="Search"/> Needs Review In Progress Completed Clear all				
Package Name	Workflow	Step	Status	
Return to Work Certification V1 - Marjorie Luce - [REDACTED]	Return to Work Certification	End	Completed	
Directory Change Request V1 - Marjorie Luce [REDACTED]	Directory Change Request	End	Completed	
Directory Change Request V1 - Marjorie Luce [REDACTED]	Directory Change Request	End	Completed	
Student Employment Work Authorization V2 - Marjorie Luce [REDACTED]	Student Employment Work Authorization	End	Completed	

Needs Review = YOU need to act
In Progress = SOMEONE ELSE needs to act
Completed = All done!

Draft form:

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

The screenshot shows the 'Forms' tab interface. At the top, there are two tabs: 'Submissions' and 'Forms', with 'Forms' being the active tab. Below the tabs is a search bar with a magnifying glass icon and the text 'Search'. Underneath the search bar is a 'Drafts' section with a dropdown arrow and a blue circle containing the number '1'. To the right of this section is an 'Edit' link. Below the 'Drafts' section is a list of draft forms. The first entry is 'Directory Photo Opt Out' with a date of '11/17/2025'. Below this list is an 'Available Forms' section with a dropdown arrow and a 'Collapse all' link.

From the form list, click “edit,” checkmark draft to delete, click trash icon. Or simply hover over the draft form name, then click trash icon.

The screenshot shows the 'Drafts' dropdown menu. At the top, there is a 'Drafts' section with a dropdown arrow and a blue circle containing the number '1'. To the right of this section is a close button (X). Below this section are two buttons: 'Delete Selected' in red and 'Unselect All' in blue. Below these buttons is a list of draft forms. The first entry is 'Directory Photo Opt Out' with a date of '11/17/2025' and a trash icon.

When a draft is open, it can also be deleted using trash icon at bottom of form.

The screenshot shows the bottom of a form. It features four buttons: 'Delete Draft' with a red trash icon, 'Save' with a blue download icon, '+ Add Attachment(s)' with a plus icon, and 'Submit' with a blue paper plane icon.

Form errors:

All boxes with red asterisk must be completed to “submit” a form. If all required fields are completed & error message still appears, submit an IT Support Ticket using link on page 1.

The screenshot shows a form field labeled 'Employee Signature Date *'. The field is empty and has a red asterisk. Below the field is a red error message: 'Employee Signature Date is required'. At the bottom of the form, there is an 'Add Attachment(s)' button and a red error message box that says: 'The form failed to submit due to validation errors. Please check the form and try again.'

Example screenshots:



DOMINICAN UNIVERSITY
Staff Council
7900 W. Division St, River Forest, IL 60305

Staff Professional Development Grant Application

Form started by: staff

Grants are intended as a complement to and not in lieu of departmental or unit professional development funds. Examples of professional development activities include attending conferences or workshops, enrolling in on-line courses, certificates, or membership to professional organizations. If you have any questions regarding the application process, please email **Staff Council** (staffcouncil@dom.edu).

Process:

1. Staff completes professional development grant application BEFORE an activity to indicate how much funding will be provided at the departmental or school level and how much money is requested from Staff Council.
2. Dean or Unit Supervisor provides statement supporting Staff participation and indicating that expenses for activity cannot be fully met at the departmental or school level.
3. Staff Council reviews for approval or denial.
4. If approved, form routes back to Staff to attach expense receipt(s) AFTER attending the conference or workshop (within 30 days of activity).
5. Staff Council Treasurer and Business Office review for Staff reimbursement.

Grant Criteria:

- Full-time staff and Part-time 30 staff may apply for grants up to \$1000. Part-time (less than 30) staff may apply for grants up to \$650.
- Part-time staff members must have worked a minimum of 1 year in order to be eligible to apply.
- Preference will be given to staff members who have not received a grant in the previous year.
- Grants must be requested for future/upcoming opportunities.
- Grant funds may only be used by the person who requested them.
- Grant funds may only be used for the professional development opportunity for which they were requested.
- Grant funds must be used within the fiscal year in which they were allocated. For full-time staff members, preference will be given to those who have been employed by the University for a full year.

Employee Information

Employee DU ID <input type="text" value="6 [REDACTED]"/>	Employee Full Name <input type="text" value="Marjorie Luce"/>
Employee DU Email <input type="text" value="mluce1@dom.edu"/>	Employee Status <input type="text" value="Full Time"/>
Employee Department <input type="text" value="Information Technology"/>	Employee Position Title <input type="text" value="Director of Web and Application Services"/>
Years in Current Position <input type="text" value="8"/>	Years at Dominican <input type="text" value="18"/>

Supervisor Full Name	Supervisor DU Email
Marjorie Luce	mluca1@dom.edu
Supervisor Position Title	
Vice President of Information Technology and CIO	

Have you received funding from a professional development grant in the past? *

Yes

List any activities you participated in or items you received through funding from a Professional Development Grant in the past. Include year grant was received.

ARMA Conference 2025

List any activities you participated in or items you received through funding by your department/school this fiscal year.

ICRM meeting

Professional Development Opportunity

Please provide a statement describing the professional development activity including:

- How will your attendance or participation enhance your knowledge and skills for your position here at Dominican University?
- How will you communicate this professional development opportunity to relevant audiences within the Dominican University community?
- Please indicate if you have a role with the sponsoring organization. For example, if you will assist on a planning committee, co-teach a class, present a workshop, etc.

Statement of Professional Development Opportunity *

Exam prep classes for PMP credentials

Date(s) of Professional Development Opportunity *

3/15/26 or 3/15/26-3/18/26 or 3/15/26, 4/15/26, 5/15/26

Proposed Expenses Budget

Registration? *

Yes

Proposed Registration Cost *

\$ \$265.50

Travel (ex: plane or train ticket)? *

Yes

Proposed Travel Cost *

\$ \$410.00

Shuttle/Rental Car? *

No

Driving Personal Car? *

Yes

Proposed Mileage Cost *

\$ \$72.50

Mileage Cost Calculation: **number of miles x reimbursement rate**

Example: 100 miles times \$0.72 rate = \$72.50 cost

See [Business Office website](#) for current mileage reimbursement rate

Parking Fees? *

Yes

Proposed Parking Fees Cost *

\$ \$45.00

Accommodations (ex: hotel)? *

Yes

Proposed Accommodations Cost *

\$ \$275.00

Meals? *

Yes

Proposed Meals Cost *

\$ \$25.00

If you anticipate other expenses, please provide details and individual cost(s) below. You can "add" as many expense lines as you want.

Proposed Expense Description

Checked baggage

Proposed Expense Cost

\$ 25.00



Proposed Expense Description

Hotel staff tips

Proposed Expense Cost

\$ 20.00



Add Additional Proposed Expense

Proposed Other Expenses Cost

\$45.00

Proposed Expenses Summary

Proposed Total Expenses

\$1,000.00

Requested Grant Amount

\$1,000.00

Have any of these expenses already been paid by you or your department? *

Yes

Amount paid by Dept/Individual *

\$ 100.00

Requested Grant Amount: full-time staff max \$1000; part-time (30) staff max \$1000; part-time staff (less than 30) max \$650

Funding Advance: considered on a case-by-case basis

Signatures

Employee Signature *

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

Employee Signature Date *

Signature ✕

Draw Type

M Luce

Clear

Draw OR Type your signature

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 * ✕ Employee Signature Date *

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

M Luce

03/15/2026

03/15/2026 at 05:29 PM EST

Delete Draft Save + Add Attachment(s) Submit

DON'T FORGET TO SUBMIT!

Staff Professional Development Grant Application
V1 submitted

Your form has been submitted and will be processed soon.

Example screenshots - SIGNATURES & APPROVE/DENY:

Supervisor Acknowledgment

As supervisor of the Professional Development Grant Applicant:

- I support the employee's participation in the requested professional development opportunity
- I confirm that expenses for this program/activity cannot be fully met at the departmental or school level

Supervisor Statement of Support *

I am 100% in support of this opportunity. Departmental funds for external education are currently limited to \$100 and her completion of this would be a boon to our group.

Is department contributing funds? * Department Account # *

Yes ▼

04.0404.0404

Amount Department Already Paid * Amount Department Will Pay *

\$ \$0.00

\$ \$100.00

Approve

Supervisor Signature * Supervisor Signature Date *

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

Pete Peterson

03/15/2026

📅

Approved? *

Yes ▼

Deny

Supervisor Signature * Supervisor Signature Date *

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

Pete Peterson

03/15/2026

📅

Approved? * Denial Reason *

No ▼

The department has funds to cover this.

DON'T FORGET TO CLICK APPROVE OR DECLINE!

[Save](#)

[Unlock](#)

✕ Decline

✓ Approve

Partial

Staff Council Committee Member Signature *	SC CM Signature Date *
I understand that this constitutes my legal signature on this document.	03/15/2026
<i>Sam Garcia</i>	
Approved? *	
Partial	
Partial Approval Reason *	
Staff Council only has \$500 left in budget for this fiscal year, so only able to approve partial request.	

Example screenshot – etrieve email pre-approval

Your form is pre-approved: Staff Professional Development Grant Application V1 - Ma...

 Etrieve
To  Luce, Marjorie

  Reply  Reply All  Forward  

Wed 3/25/26 3:25 PM

Greetings,

Your grant request was pre-approved by the Staff Professional Development Committee.

It was approved in full, UNLESS a reason for partial approval is given here:

AFTER you complete this professional development opportunity, but no later than 30 days after, please submit the actual cost details and receipts. If you choose not to complete this professional development opportunity, please return to the form anyway and DECLINE it.

1. Return to your etrieve Central Submissions: <https://dom.etrieve.cloud/central>
2. Locate the form you already submitted (do NOT start a new form):
 - o Staff Professional Development Grant Application V1 - Marjorie Luce - 
3. Fill out the following sections:
 - o Actual Expenses
 - o Actual Expenses Summary
 - o Receipts
4. Submit form again

Respectfully,
Dominican University
7900 W Division St
River Forest, IL 60305

Actual Expenses

Registration? *

Yes

Actual Registration Cost *

\$ \$265.50

Travel (ex: plane or train ticket)? *

Yes

Actual Travel Cost *

\$ \$378.56

Shuttle/Rental Car? *

No

Driving Personal Car? *

Yes

Actual Mileage Cost *

\$ \$54.00

Mileage Cost Calculation: number of miles x reimbursement rate

Example: 100 miles times \$0.72 rate = \$72.50 cost

See [Business Office website](#) for current mileage reimbursement rate

Parking Fees? *

Yes

Actual Parking Fees Cost *

\$ \$45.00

Meals? *

Yes

Actual Meals Cost *

\$ \$24.12

Accommodations (ex: hotel)? *

Yes

Actual Accommodations Cost *

\$ \$265.89

If you had actual other expenses, please provide details and individual cost(s) below. You can "add" as many expense lines as needed.

Actual Expense Description

Checked baggage

Actual Expense Cost

\$ 25.00



Actual Expense Description

Hotel staff tips

Actual Expense Cost

\$ 20.00



Add Additional Actual Expense

Actual Other Expenses Cost

\$45.00

Actual Expenses Summary

Actual Total Expenses

\$978.07

Difference Between Requested & Actual Grant Amount

\$21.93

Please note that any remaining funds will be returned to the Staff Development account for reallocation.

How would you like to receive funds from the Business Office? *

eCheck



eCheck

Paper check - campus mail

Paper check - pick up in Stars Connect

Paper check - via US mail

Receipt(s)

Please attach receipt *
PDF and JPEG only

Drag and drop files here to upload

— OR —

+ Browse Files

×

Receipt(s)

Please attach receipt *
PDF and JPEG only

✓Test Attachment.pdf✎🗑×

Please attach receipt *
PDF and JPEG only

✓Test Attachment.pdf✎🗑×

Please attach receipt *
PDF and JPEG only

Drag and drop files here to upload

— OR —

+ Browse Files

×

Add Additional Receipt

DON'T FORGET TO CLICK SUBMIT!

↓ Save🔒 Unlock

✓ Submit

Staff Council Treasurer Signature *
 I understand that this constitutes my legal signature on this document.

Jason Heart

SC Treasurer Signature Date *
 03/15/2026

Approved? *
 Partial

Partial Approval Reason *
 Staff Council only has \$500 left in budget for this fiscal year, so only able to approve partial request.

Staff Council Office Use Only

Employment Status * Active | **Inactive Date** | **Staff Council Account # *** 04.0101.0101

SC Notes

[Save](#) | [Unlock](#) | [Decline](#) | [Approve](#)

Business Office Use Only

Check Number * 1234 | **Paid Date *** 03/15/2026 | **Amount *** \$ 978.07

BUS Notes

[Save](#) | [Unlock](#) | [Approve](#)