

eForms Tutorial

Welcome to retrieve eForms, our platform for submission of electronic forms. Multiple departments at College of the Redwoods use this platform for the submission of forms. This tutorial was created by the Financial Aid Department and therefore the tutorial may have an emphasis on financial aid specific forms. Please contact the department requesting the submission of an eForm for more information or questions.

Note: text displayed in [blue](#) are links.

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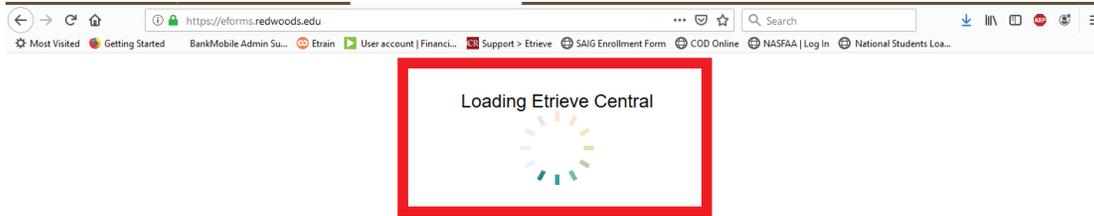
Getting Started:

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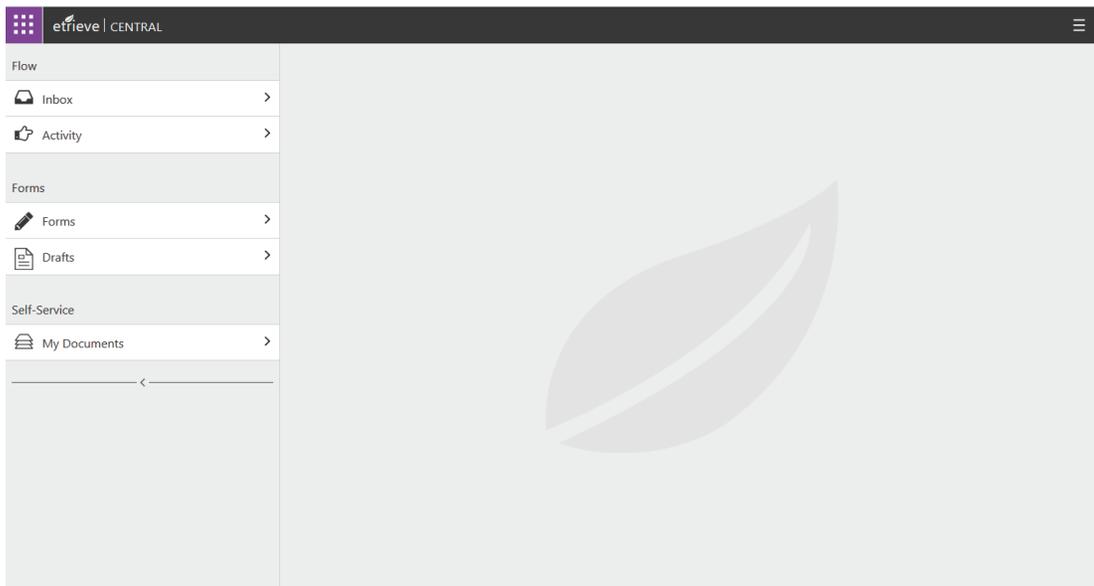
Navigating eForms



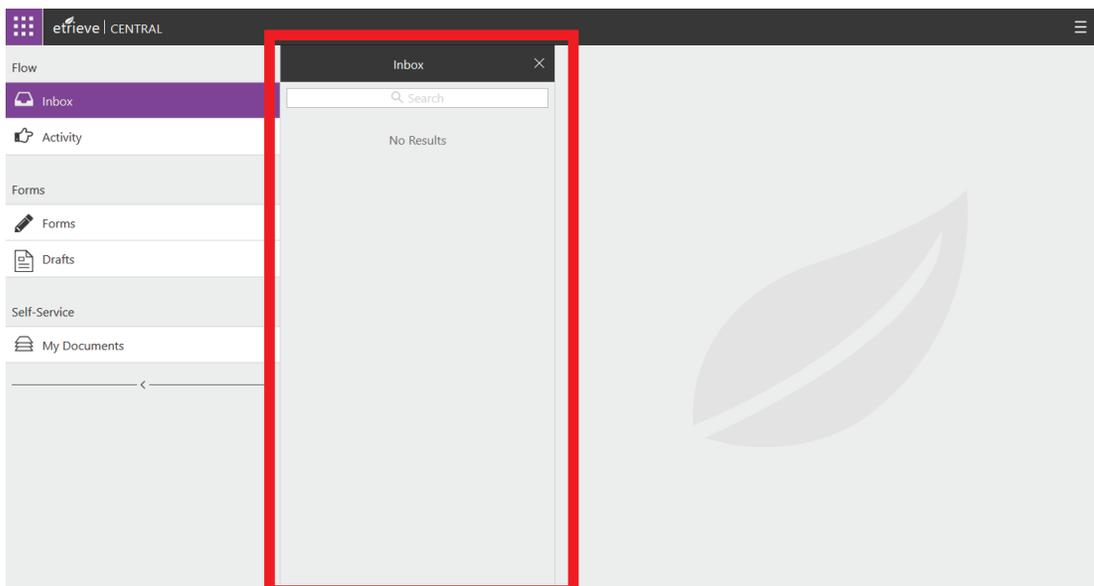
After logging into eForms, a loading screen will appear:

“Loading Etrieve Central”

Please be patient as the eForm module loads.

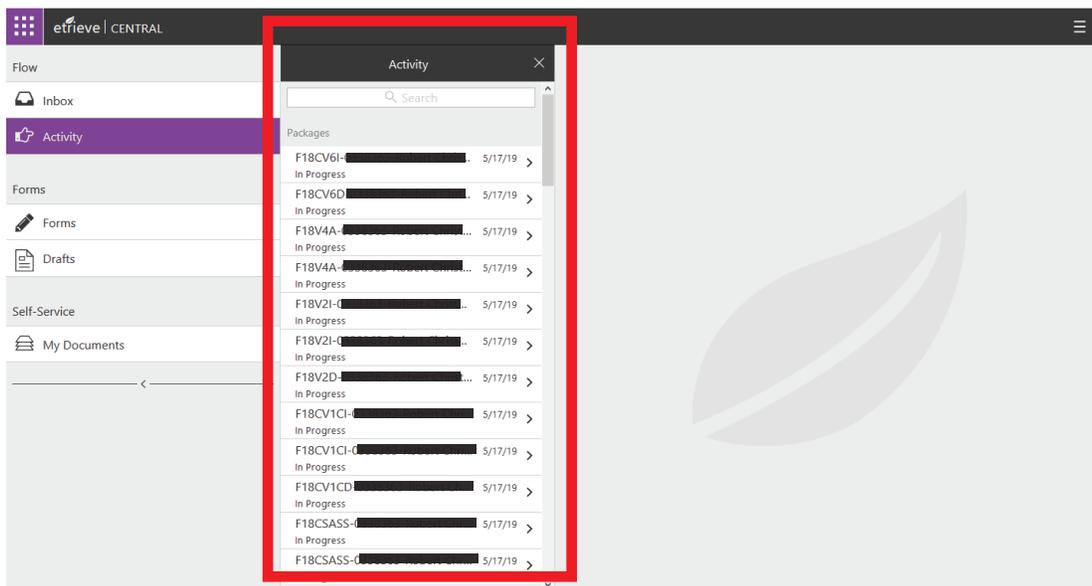


Once the eForms module loads, the student will see a variety of options, such as **Inbox**, **Activity**, **Forms** and **Drafts**.



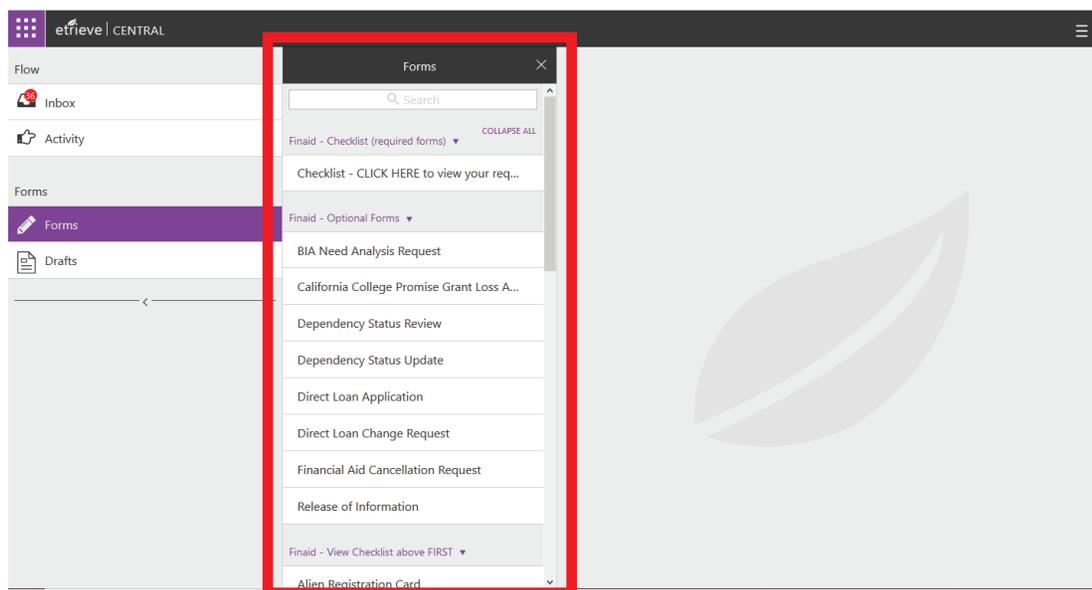
Inbox: Students can click on “Inbox” to access any returned eForms that need correcting or resubmitting. See the “[Returned eForms](#)” section of the tutorial to learn more.

Students should periodically check their eForms inbox.



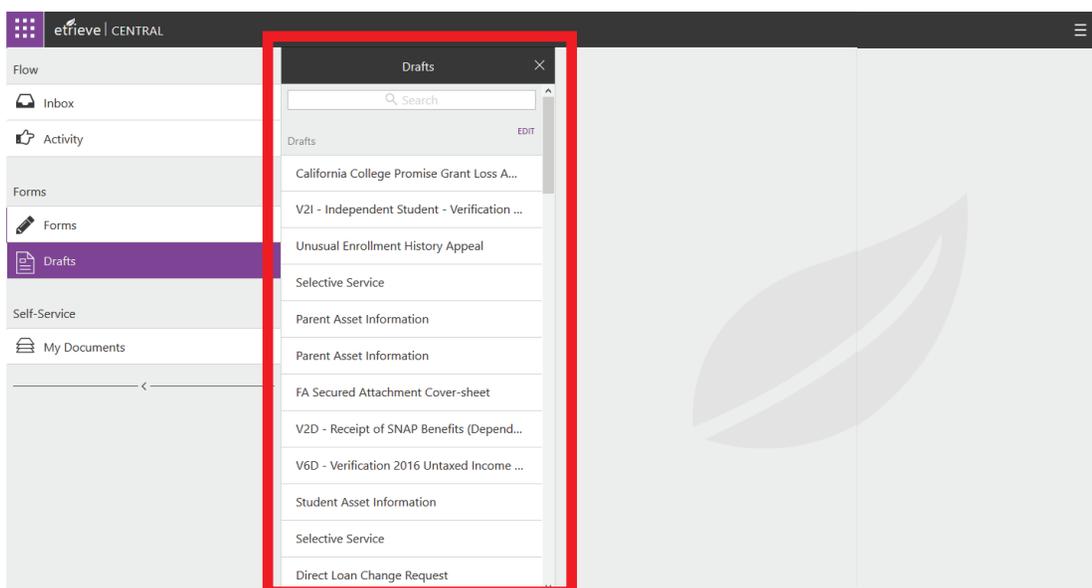
Activity: Students can click on “Activity” to review the status of submitted forms as they move through the process.

Students should periodically check the activity of their forms to know if they have been received and reviewed.



Forms: Students can click on “Forms” to access all required and optional eForms.

Financial Aid Students should check their myFinAid in WebAdvisor, their student email account or the eForm checklist for information about which forms they need to submit to complete their financial aid file.



Drafts: Students can click on “Drafts” to access their unfinished forms.

Students who start a form, but are unable to finish in one sitting, can resume their forms by clicking on drafts and selecting the unfinished form.

Determining which eForms to Submit

We have reviewed your 2020-21 Financial Aid application. Additional information is required before we can determine your eligibility for financial aid. You may reply to this email or call us at (707) 476-4102 if you need further information about how to provide the correct documents. Your file will remain ON HOLD until all requested information has been received.

PLEASE SUBMIT THE FOLLOWING DOCUMENTS:

Students will now use etrieve to submit all financial aid documentation electronically. Click on the item(s) listed below to open the document(s). Note: You may be prompted to log in to retrieve. Refer to this [etrieve](#)

- o [Verification\(I\) Form](#)
- o [Submit Student 2018 Federal Tax Documentation using the Student 2018 Federal Tax Documentation Form.](#)

You can use the myFinAid section in WebAdvisor to see which documents have been 'received' and which documents are still listed as missing. If you have already submitted the requested documents, it may take 1-2 weeks after documents have been received before they are updated as 'received' in our system.

Expect it may take several weeks after submitting all required forms/documentation before you receive an email response regarding the status of your financial aid file.

To allow enough processing time to meet federal deadlines, it is recommended that all required documents be submitted well before the end of your last semester at CR for the 2020-21 academic year (which includes Fall 2020, Spring 2021, Summer 2021).

ADDITIONAL INFORMATION MAY BE REQUIRED AFTER YOUR FILE IS REVIEWED AGAIN.

It is very important to check your [redwoods.edu](#) email inbox on a regular basis. You must also keep informed of deadlines and other important updates that are posted on the [financial aid webpage](#). If you are considering requesting a student loan, scholarship or workstudy, be aware that these awards require additional steps beyond what is requested in this email.

Please let us know if you need assistance. Our Financial Aid Staff looks forward to helping you meet your educational goals!



Check Student Email

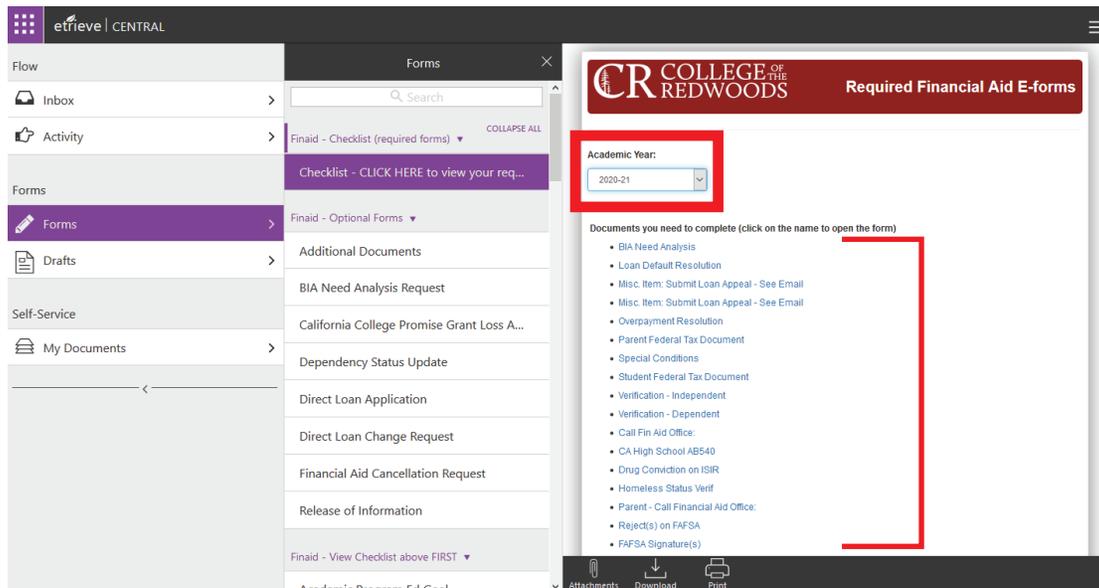
Many departments will inform students via their student email regarding the submission of required eForms.

Check WebAdvisor

Some departments' required eForms will be posted on WebAdvisor.

Check eForms

Some departments will have their required eForms on a checklist found in eForms at the very top.



Contact the Department

If you are unsure of which eForms you need to submit, please contact the department for more information. Submitting unnecessary eForms may delay processing.

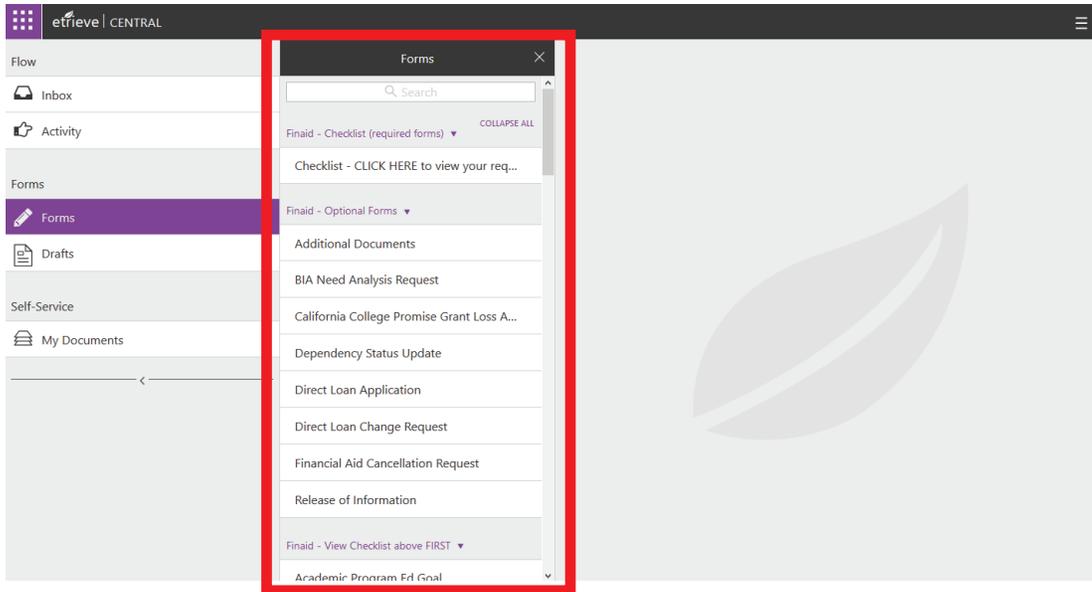
Visit: <https://www.redwoods.edu> or Call: 707-476-4100 to find contact information for the department.

Submitting an eForm

Step 1.

Click on “Forms” to access optional and required forms.

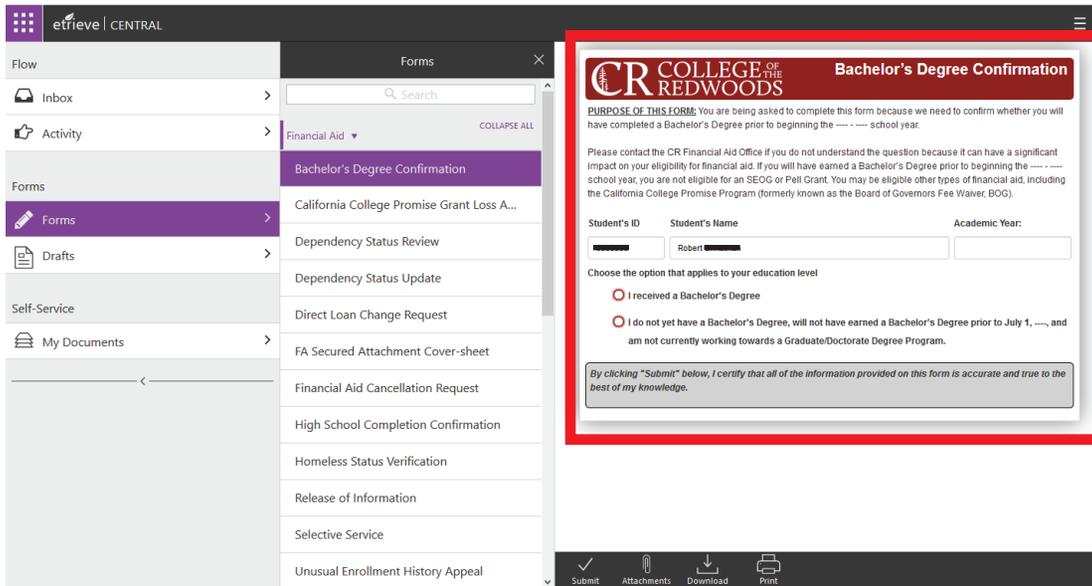
If applicable, a student’s eForms checklist can also be found here.



Step 2.

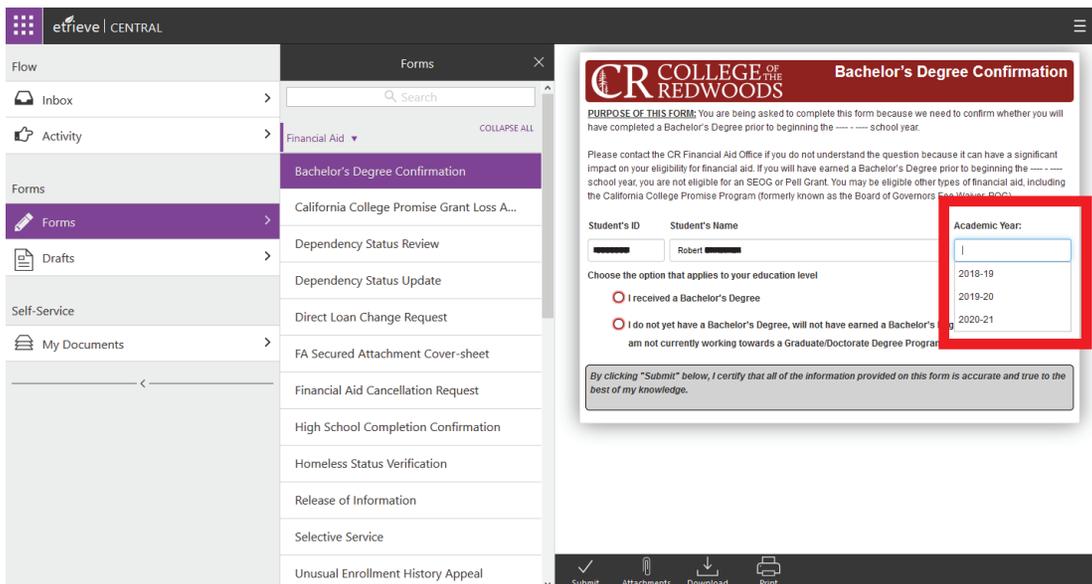
Click on the form you need to fill out.

The form will display the title, purpose, your CR ID and Name.



Step 3.

Click on the Academic Year box and select the academic year for which you are filling out the form.



etrieve | CENTRAL

Flow

Inbox

Activity

Forms

Forms

Drafts

Self-Service

My Documents

Forms

Financial Aid

Bachelor's Degree Confirmation

California College Promise Grant Loss A...

Dependency Status Review

Dependency Status Update

Direct Loan Change Request

FA Secured Attachment Cover-sheet

Financial Aid Cancellation Request

High School Completion Confirmation

Homeless Status Verification

Release of Information

Selective Service

Unusual Enrollment History Appeal

CR COLLEGE OF THE REDWOODS Bachelor's Degree Confirmation

PURPOSE OF THIS FORM: You are being asked to complete this form because we need to confirm whether you will have completed a Bachelor's Degree prior to beginning the 2018 - 2019 school year.

Please contact the CR Financial Aid Office if you do not understand the question because it can have a significant impact on your eligibility for financial aid. If you will have earned a Bachelor's Degree prior to beginning the 2018 - 2019 school year, you are not eligible for an SEOG or Pell Grant. You may be eligible other types of financial aid, including the California College Promise Program (formerly known as the Board of Governors Fee Waiver, BOG).

Student's ID: [Redacted] Student's Name: Robert [Redacted] Academic Year: 2018-19

Choose the option that applies to your education level

I received a Bachelor's Degree

Name of College: Humboldt State University Month/Year: 12/2017 City, State: Eureka, CA

I do not yet have a Bachelor's Degree, will not have earned a Bachelor's Degree prior to July 1, 2019, and am not currently working towards a Graduate/Doctorate Degree Program.

By clicking "Submit" below, I certify that all of the information provided on this form is accurate and true to the best of my knowledge.

Submit Attachments Download Print

Step 4.

Fill out the form according to the directions provided on the form.

Some eForms have skip logic built in, so as you answer questions, the form may adjust.

Some eForms require attachments, see [page 9](#)

Step 5.

Once the form has been filled out, click on "Submit" to submit the form.

etrieve | CENTRAL

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Student's ID: [Redacted] Student's Name: Robert [Redacted] Academic Year: 2018-19

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Name of College: Humboldt State University Month/Year: 12/2017 City, State: Eureka, CA

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By clicking "Submit" below, I certify that all of the information provided on this form is accurate and true to the best of my knowledge.

Submit Attachments Download Print

Step 6.

You will see a "Submitted Form" message displayed after clicking on submit.

etrieve | CENTRAL

Flow

Inbox

Activity

Forms

Forms

Drafts

Self-Service

My Documents

Forms

Financial Aid

Bachelor's Degree Confirmation

California College Promise Grant Loss A...

Dependency Status Review

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Submitted Form

Submitting eForms with Attachments

The screenshot shows the etrieve CENTRAL interface. On the left is a navigation menu with 'Forms' highlighted. The main content area displays the 'California College Promise Grant Loss Appeal' form. The form header includes the CR College of the Redwoods logo and the title. Below the header is a 'PURPOSE OF THIS FORM' section. The form contains several sections: 'I am appealing for (select one):' with radio buttons for Fall 2018, Spring 2019, and Summer 2019; 'Section 1: Letter of Declaration' with a text area; and 'Section 2: Supporting Documentation' with a checked checkbox for 'Documentation of extenuating circumstances'. A red box highlights the 'Section 2' area.

Step 1.

Fill out the form according to the directions.

Note: Some forms have links to fillable PDFs that will need to be filled out and attached.

This screenshot shows the same form as the previous one, but with an error message. A red box highlights the top right corner of the form, where a message reads: 'Form is not submittable'. Another red box highlights the 'Section 2: Supporting Documentation' area, which contains a checked checkbox for 'Documentation of extenuating circumstances'. The error message is a red banner with a shield icon and a white exclamation mark.

Attention:

Forms that require an attachment will not submit until the student attaches the required document.

The student will receive two error messages: “You must attach documentation” and “Form is not submittable.”

This screenshot shows the 'Attachments' dialog box open over the form. The dialog box has a title bar 'Attachments' and a 'CLOSE' button. It contains a list of files with columns for 'Name', 'Size', and 'Type'. Below the list is an 'Upload File(s)' button. At the bottom of the dialog box, there are icons for 'Submit', 'Attachments', 'Download', and 'Print'. A red box highlights the 'Attachments' icon in the bottom navigation bar.

Step 2.

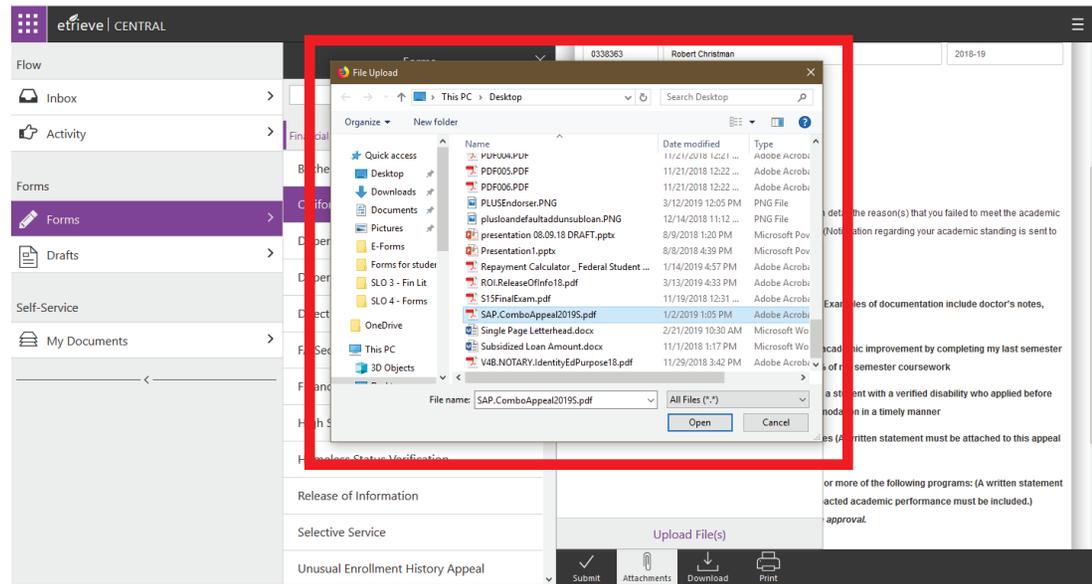
Click on the “Attachments” button to open the attachments option box.

Then click on “Upload File(s)” to open the File Upload dialog box.

Step 3.

Use the File Upload dialog box to navigate and select the file you want to upload and attach to your eForm.

Click “Open” to upload the file and attach.

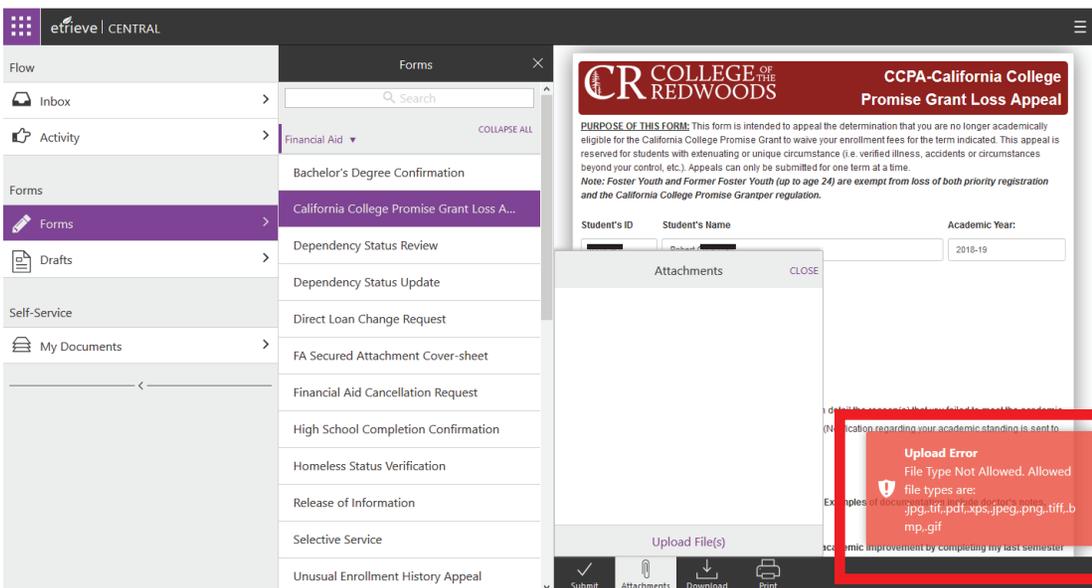


Warning:

The only file types allowed are:

.PDF, .Jpg, .Jpeg, .Tif, .Tiff, .xps, .bmp, & .gif

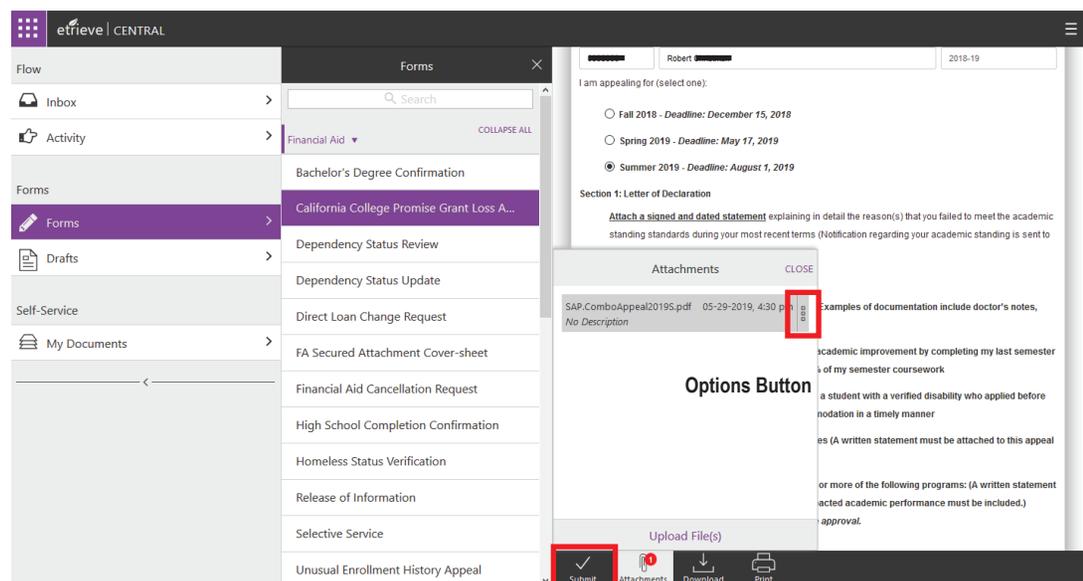
Word Documents and Password Protected PDFs are Not Allowed

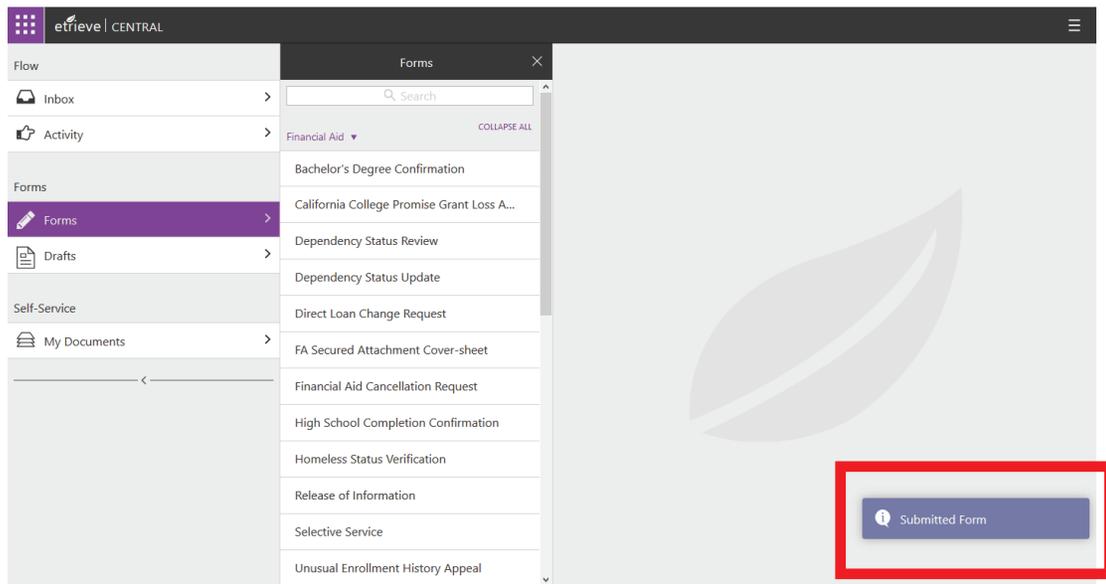


Step 4.

You will see your document attached. If you need to delete your attachment, use the options button directly to the right of the attachment name.

Once attachment has been uploaded, click the “Submit” button.





Step 5.

A “Submitted Form” message to indicate that the form has been successfully submitted.

How to Convert a Paper Document to Digital

To submit a document that is in paper format, students may use a scanner or a camera on a smart phone. Please check with the office in which you are submitting a paper document for, to ensure that it may be submitted electronically. Some laws require certain forms to have a “wet” signature and paper submission may be the only option.

Scanner Use:

Students may access scanners on all campuses and sites of College of the Redwoods. Scanners are located in the libraries and student services offices. Please contact the campus or site for more information, including hours of operation and availability.

Smart Phone Camera:

Students may use the camera from a smart phone to take a clear photo of the paper document that needs to be submitted. Students may use the smart phone to access, take/upload photos of documents, and to submit eForms.

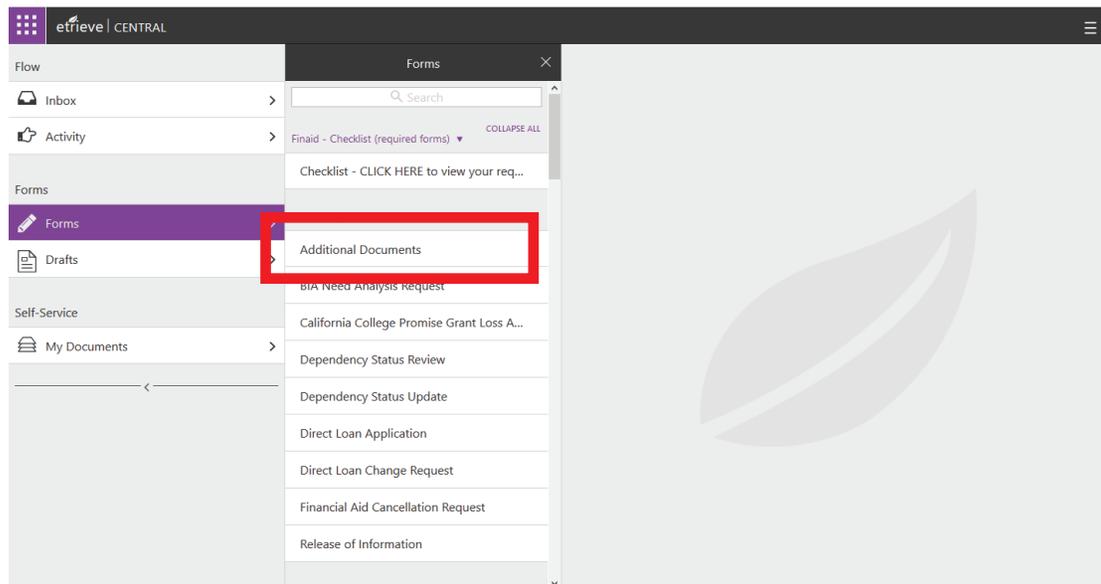
Using the Additional Documents eForm

Purpose:

Need to upload and send us something?

The “Additional Documents” eForm allows students who need to submit a document to the Financial Aid Office that isn’t a form or cannot be submitted with any of our current forms.

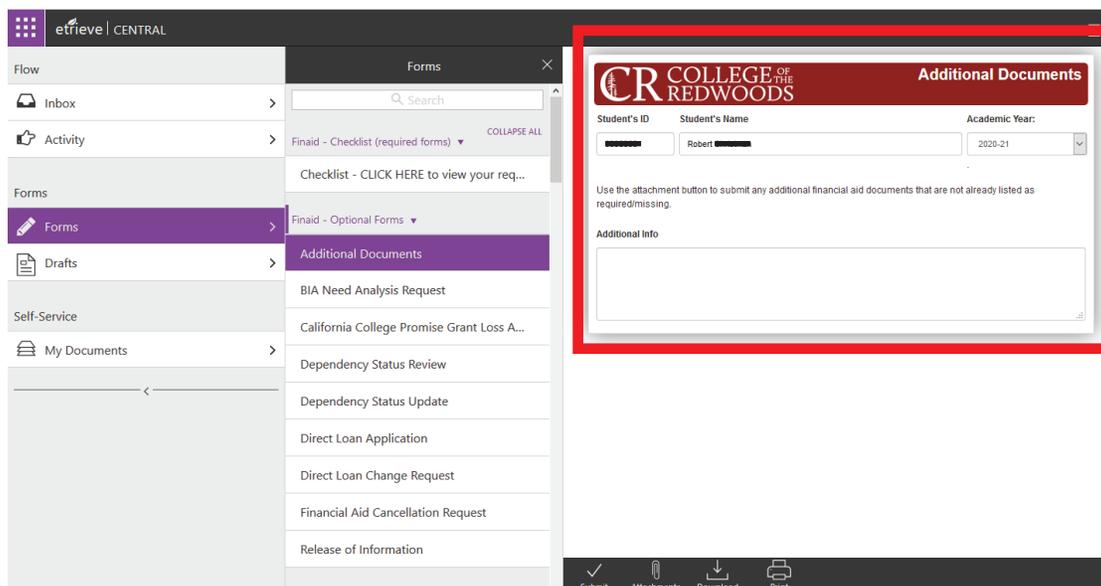
DO NOT SEND AN EMAIL WITH AN ATTACHMENT: please use the Additional Documents eForm to upload and send us documents.



Step 1:

Click on “Forms” to access all available forms.

Then locate the:
“Additional Documents”



Step 2.

Click on the “Additional Documents” to open the form.

The screenshot shows the 'etrieve | CENTRAL' interface. On the left is a navigation menu with sections: Flow (Inbox, Activity), Forms (Forms, Drafts), and Self-Service (My Documents). The 'Forms' section is expanded, showing a search bar and a list of form types. The 'Additional Documents' form is open, displaying fields for Student's ID, Student's Name, and Academic Year. The 'Academic Year' dropdown is highlighted with a red box, showing '2020-21' selected. Below the form, there is a text area for 'Additional Info' and a footer with 'Submit', 'Attachments', 'Download', and 'Print' buttons.

Step 3.

Select the academic year you are submitting for.

Not sure what year? Please contact the Office of the eForm.

This screenshot is similar to the previous one, but the 'Additional Info' text area is highlighted with a red box. The 'Academic Year' dropdown is no longer highlighted.

Step 4:

Click on the “Additional Info” text area and leave a brief statement about the attachment you are submitting.

This screenshot shows the 'Additional Documents' form with the 'Submit' and 'Attachments' buttons highlighted with red boxes. The 'Additional Info' text area is no longer highlighted.

Step 5.

Use the “Attachments” button to select and upload a file.

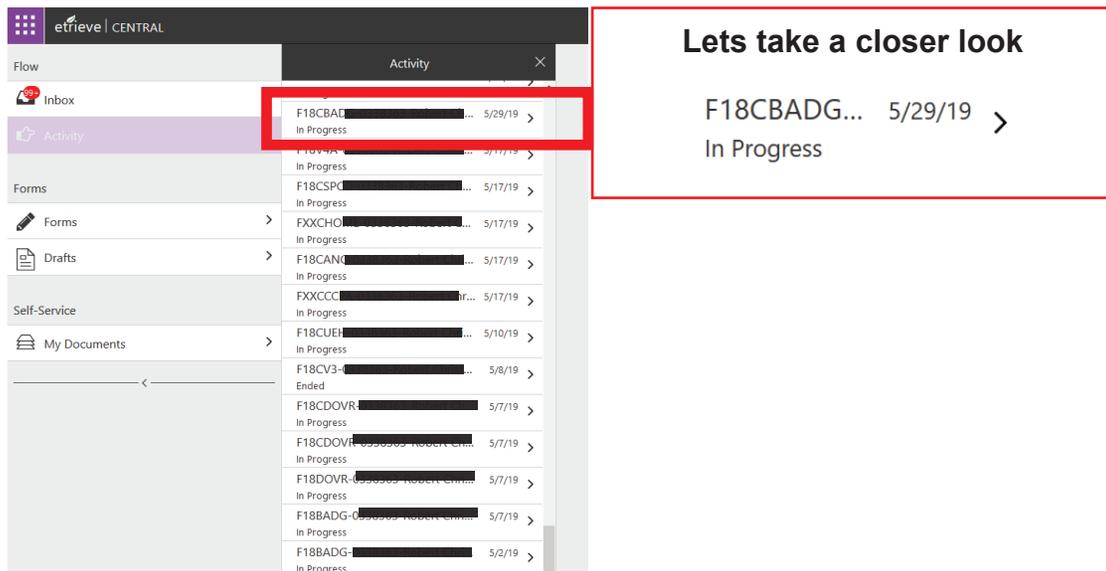
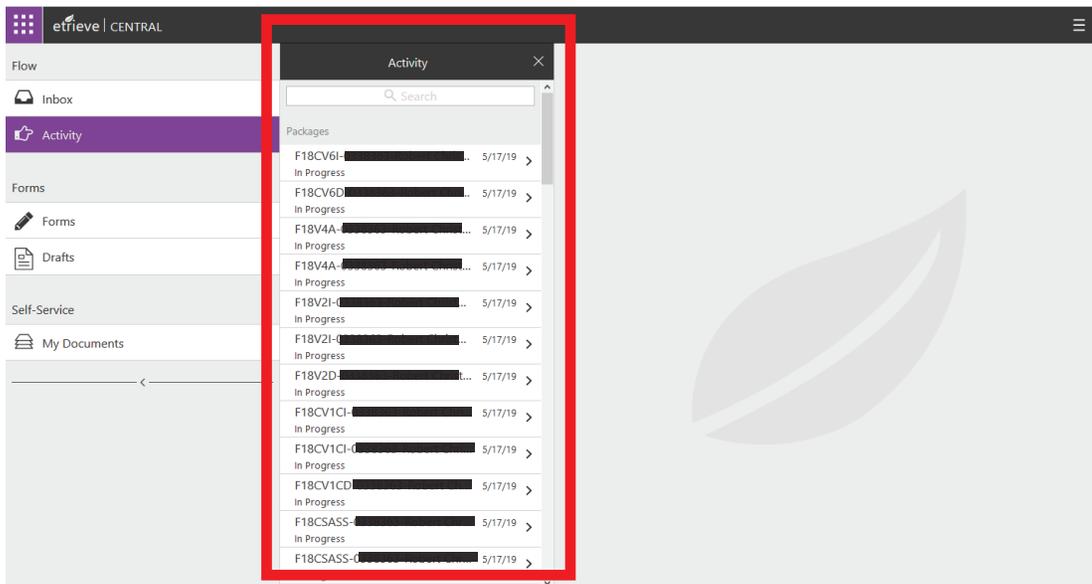
Use the “Submit” button to submit attachment.

Understanding Your eForm Status

After Submitting a Form

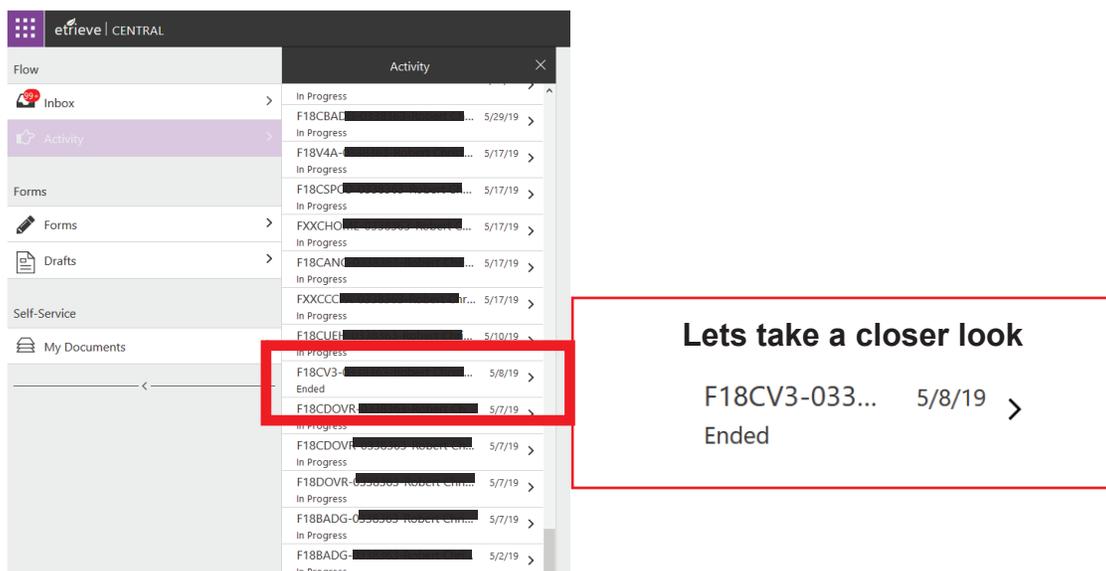
Once you have submitted a Form, students can click on “Activity” and view the current status of that form.

Financial Aid eForms: Please allow 1-2 weeks after submission for forms to be fully accepted and tracked.



Status: “In Progress”

After clicking on “Activity” you will see forms that are labeled “In Progress” this means you have submitted the form and the form is waiting to be looked at by Office Staff.



Status: “Ended”

If the student’s form has a status of “Ended” this means the form has been accepted by Office Staff.

Financial Aid eForms: The Form will then be tracked into the student’s file and will show up as received in myFinAid.

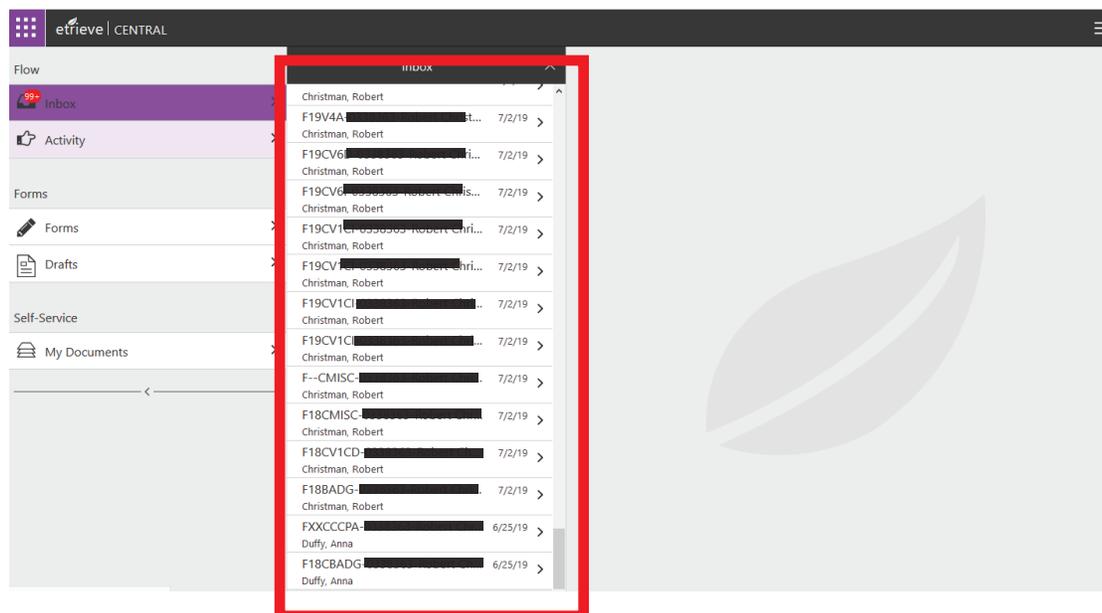
Returned eForms

Purpose:

The eForm inbox allows Office Staff to return an eForm when there is something wrong with the form.

Students will receive an eForm back with a history comment letting the student know what's wrong with the form. The student can make corrections to the form and resubmit.

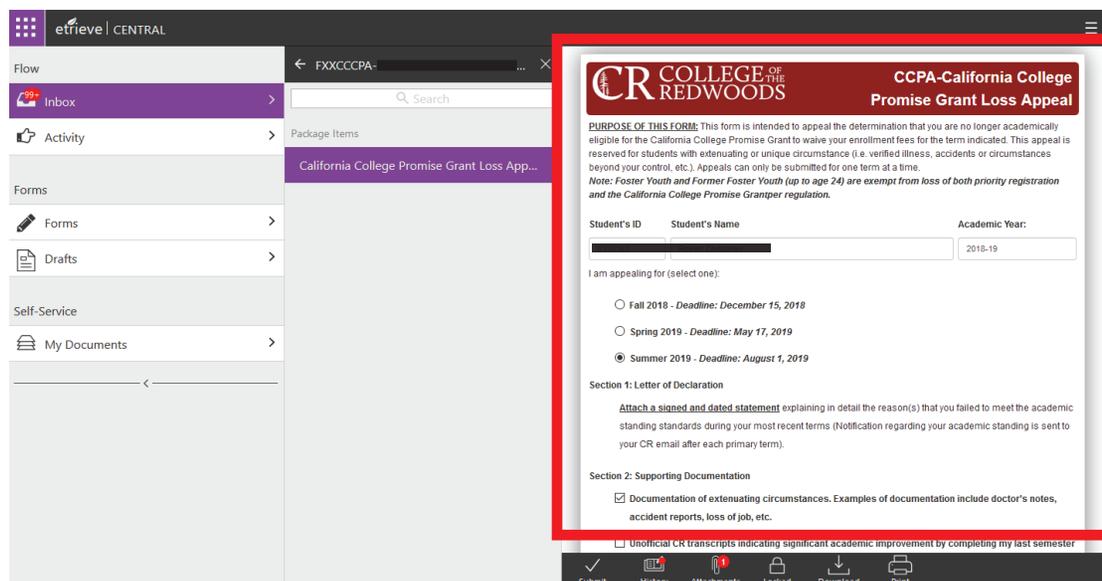
The form will remain in the student's inbox until corrected and resubmitted



Inbox

When a student has a returned eForm, the inbox will display a number which indicates the amount of returned forms.

Note: this notification number will not change until the form has been resubmitted.



Viewing the Returned Form

Students can click on the eForm to view and make any corrections that are needed.

Comments by the Staff can be found in "History." A notification symbol will let the student know there is comment.

etrieve | CENTRAL

Flow: FXCCCCPA-0338363-Robert Christma...
 Search: [Search]
 Package Items: California College Promise Grant Loss App...

CR COLLEGE OF THE REDWOODS
CCPA-California College Promise Grant Loss Appeal

PURPOSE OF THIS FORM: This form is intended to appeal the determination that you are no longer academically eligible for the California College Promise Grant to waive your enrollment fees for the term indicated. This appeal is reserved for students with extenuating or unique circumstance (i.e. verified illness, accidents or circumstances beyond your control, etc.). Appeals can only be submitted for one term at a time.
Note: Foster Youth and Former Foster Youth (up to age 24) are exempt from loss of both priority registration and the California College Promise Granper regulation.

Student's ID	Student's Name	Academic Year
[Redacted]	Robert Christma...	2018-19

History (CLOSE)

Package History	Audit History
FLOW - FA3 Received	05-29-2019, 4:28:23 pm
Duffy, Anna Note in History	06-25-2019, 9:14:37 am
Duffy, Anna Return to a Previous User	06-25-2019, 9:14:46 am
Robert Christman Received	06-25-2019, 9:14:46 am

Comment: [Text Area] Save

Submit History Attachments Locked Download Print

History

A student can click “History,” to access the history of the form including any comments by Staff.

A student can see when they submitted the form, the comment, and when the form was returned.

Gmail

Search mail [Search]

Compose

Inbox 5

etrieve@redwoods.edu Tue, Jun 25, 9:17 AM

To access it, please click here.

etrieve@redwoods.edu to me Tue, Jun 25, 9:18 AM

CAUTION: This message was sent from an external sender and did not originate from College of the Redwoods. If you are unsure of the authenticity of the sender, DO NOT click any links or download any attachments.

The workflow package 'FXCCCCPA-[Redacted]-FA3' has been Returned by Duffy, Anna and is available for your review.

Comments: Note in History

To access it, please [click here](#).

Reply Forward

Student Email Message

When a form is returned, the student will also receive a student email letting them know that a form was returned.

The email will include a comment by Staff and a link to the returned form.

etrieve | CENTRAL

Flow: FXCCCCPA-[Redacted]
 Search: [Search]
 Package Items: California College Promise Grant Loss App...

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Note: Foster Youth and Former Foster Youth (up to age 24) are exempt from loss of both priority registration and the California College Promise Granper regulation.

Student's ID	Student's Name	Academic Year
[Redacted]	[Redacted]	2018-19

I am appealing for (select one):

- Fall 2018 - Deadline: December 15, 2018
- Spring 2019 - Deadline: May 17, 2019
- Summer 2019 - Deadline: August 1, 2019

Section 1: Letter of Declaration

Attach a signed and dated statement explaining in detail the reason(s) that you failed to meet the academic standing standards during your most recent terms (Notification regarding your academic standing is sent to your CR email after each primary term).

Section 2: Supporting Documentation

- Documentation of extenuating circumstances. Examples of documentation include doctor's notes, accident reports, loss of job, etc.
- Unofficial CR transcripts indicating significant academic improvement by completing my last semester

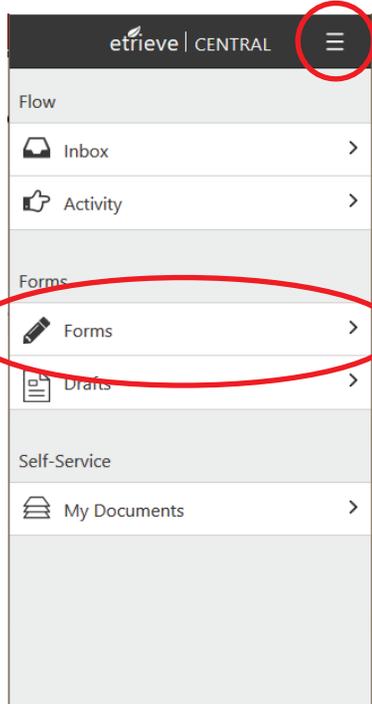
Submit History Attachments Locked Download Print

Email Link

When the student clicks the link in their student email, they will be directed to log into eForm.

Once logged into eForms, the student will be redirected to the particular form in their inbox for reviewing and resubmission.

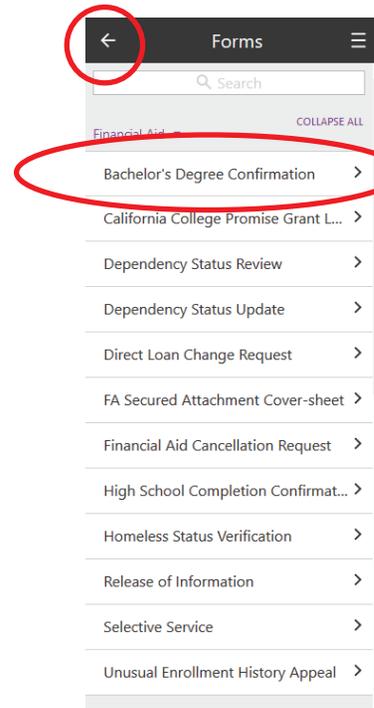
Navigating Mobile Menu



Main Menu

Students can click on any of the options to view them.

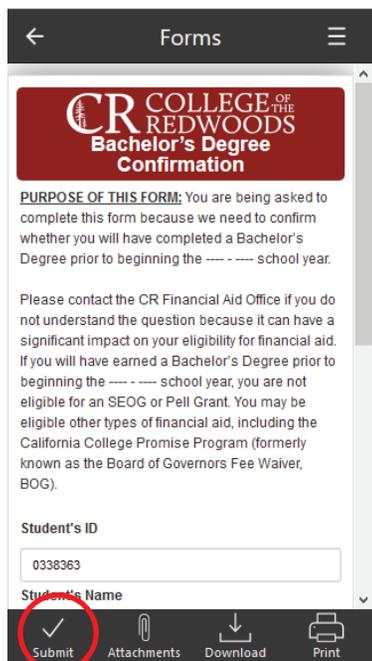
To log off of eForms students will need to click on the menu expander and select “Sign Out.”



Forms Page

Students can view forms and select the form they need to fill out.

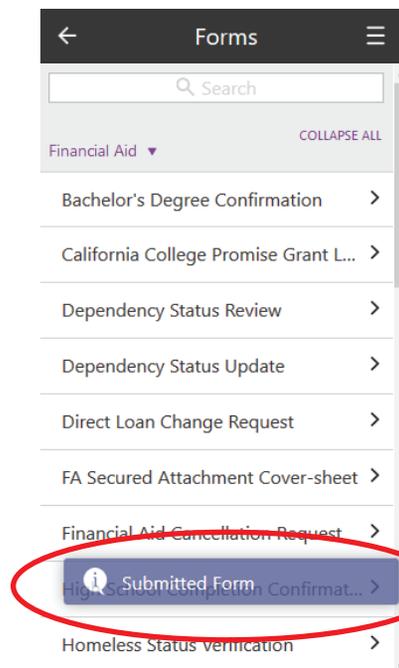
Students can use the back arrow to return to the main menu.



Forms

Forms will display as normal. Students will need to make sure to scroll through and fill out the form fully.

Students can use the “Submit” button to submit their form.



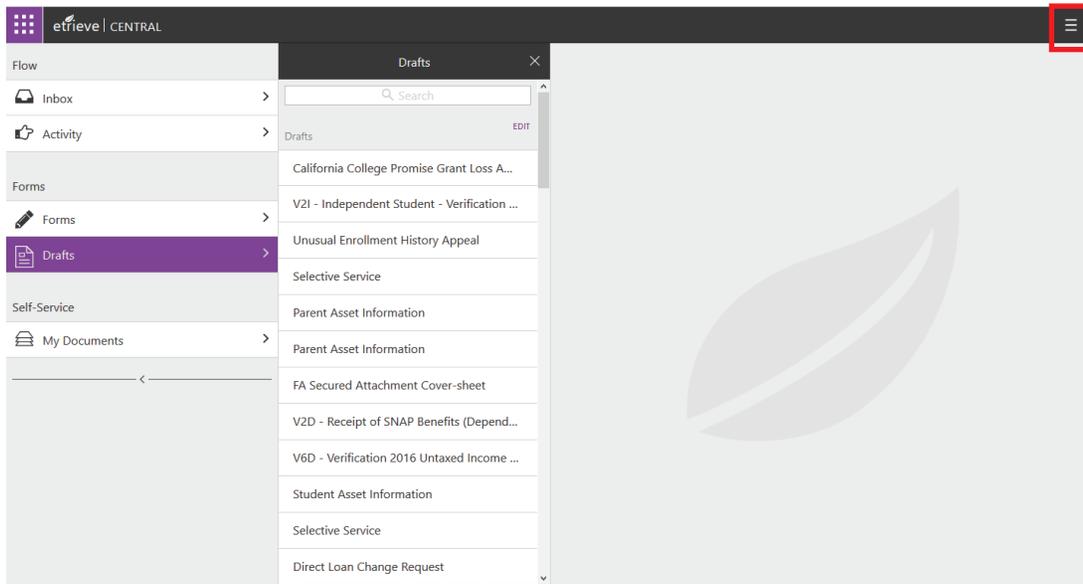
Submission

After selecting “Submit” a student will see a submission message that says “Submitted Form.”

Logging out of eForms

Step 1.

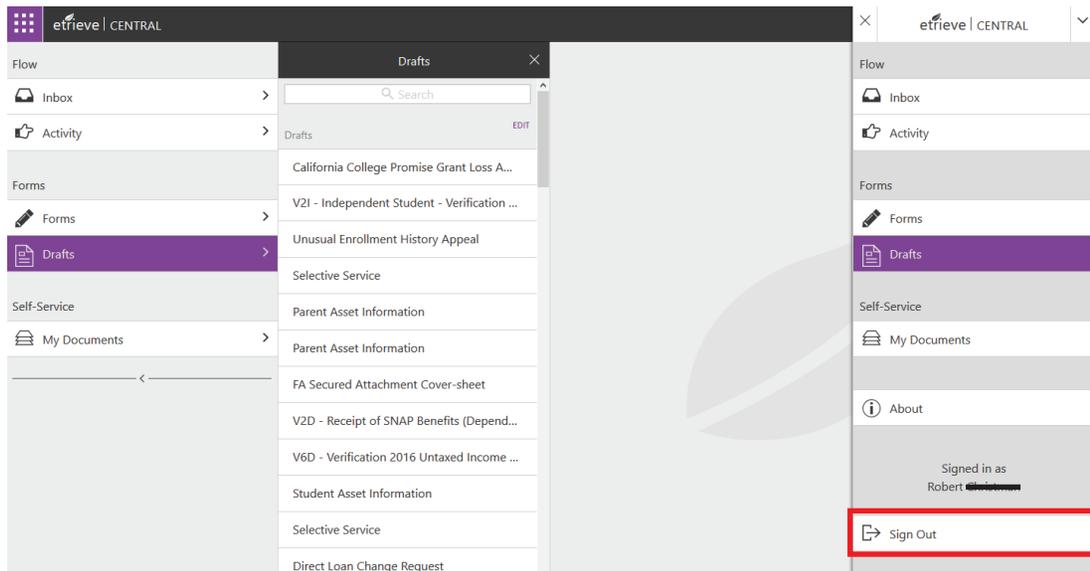
Click on the menu expander in the upper right-hand corner.



Step 2.

The eForm menu will expand.

Click on “Sign Out” to sign out of eForms.



Step 3.

If the student signs out successfully they will see a message that says “You are now logged out.”

Students can click on the “Log Back In” button to return to the eForms login screen.

