# eForms Tutorial

Welcome to etrieve 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.

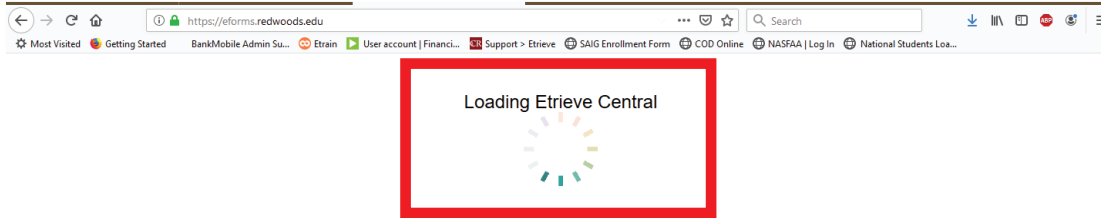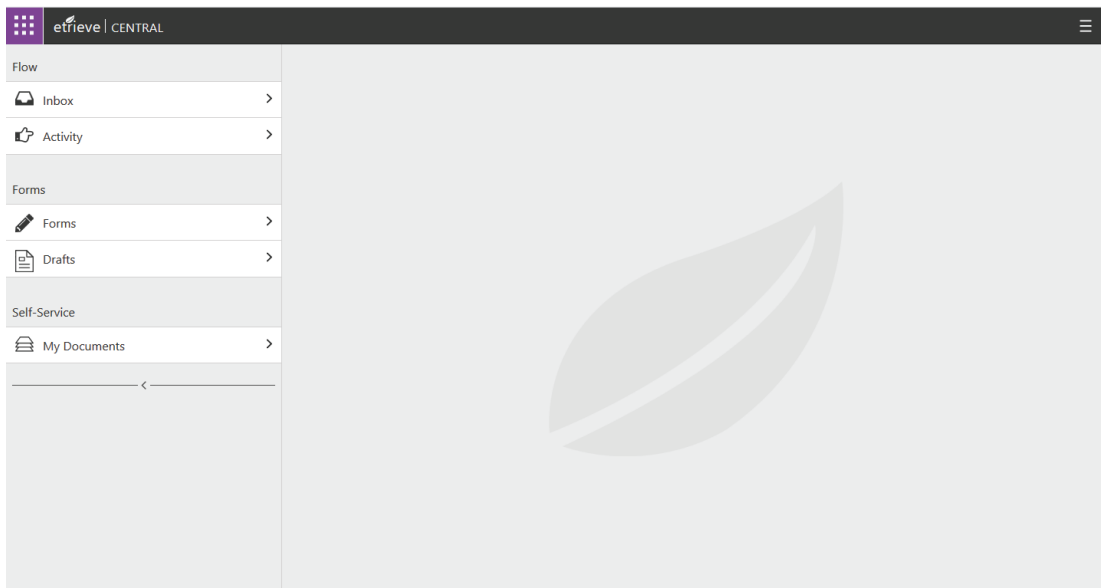*Note: text displayed in blue are links.*

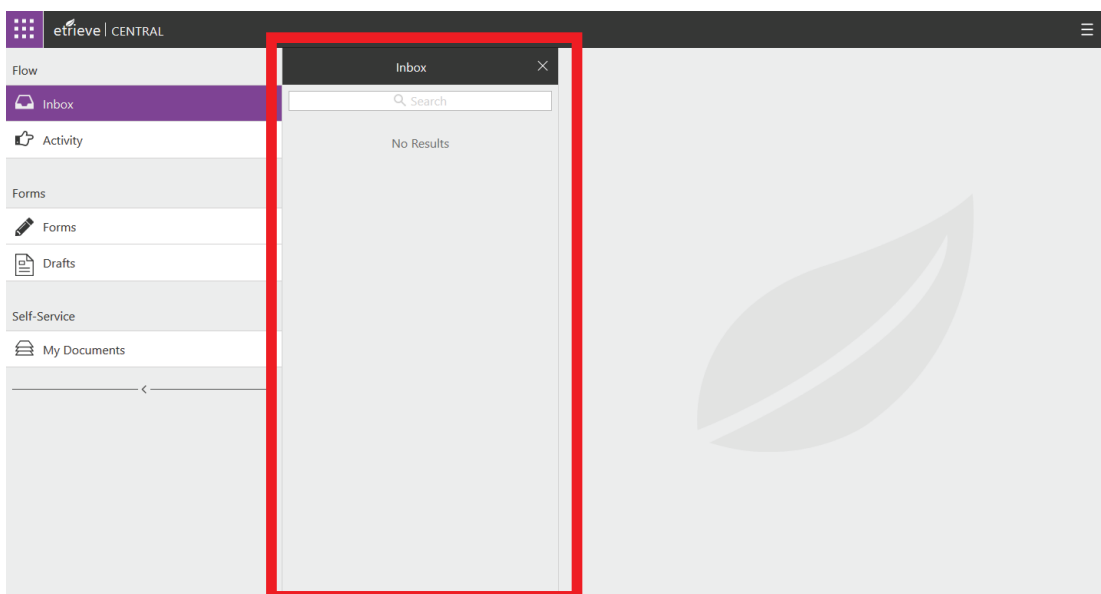## *Table of Contents*

# 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.
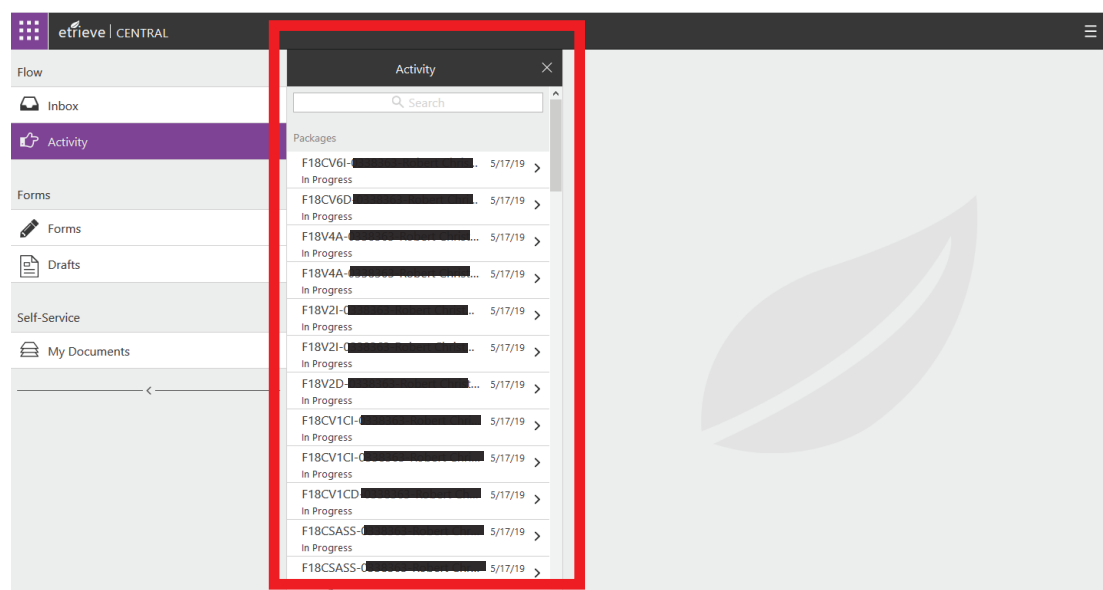
**Activity:** Students can click on "Activity" to review the status of submitted forms as they move through the process.

Students should periodically check the activity of their forms to know if they have been received and reviewed.
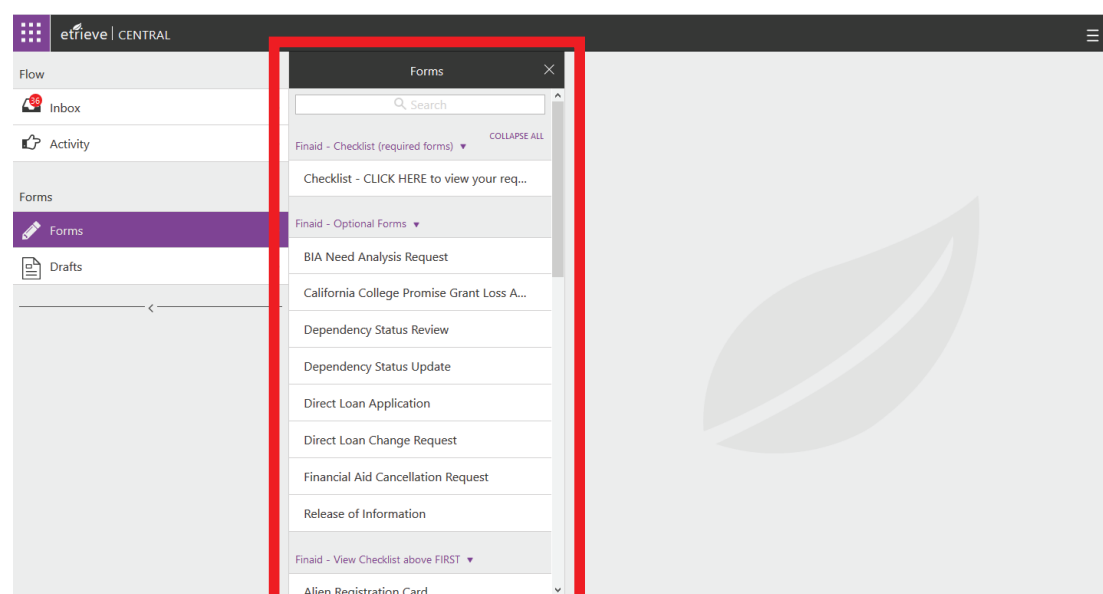
**Forms:** Students can click on "Forms" to access all required and optional eForms.

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.
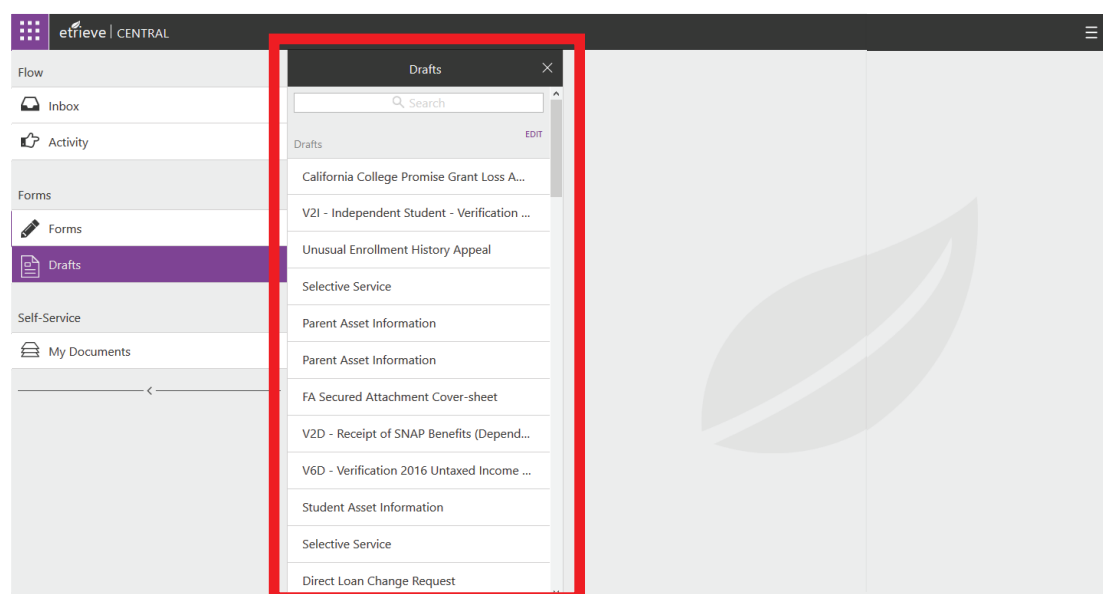
**Drafts:** Students can click on "Drafts" to access their unfinished forms.

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
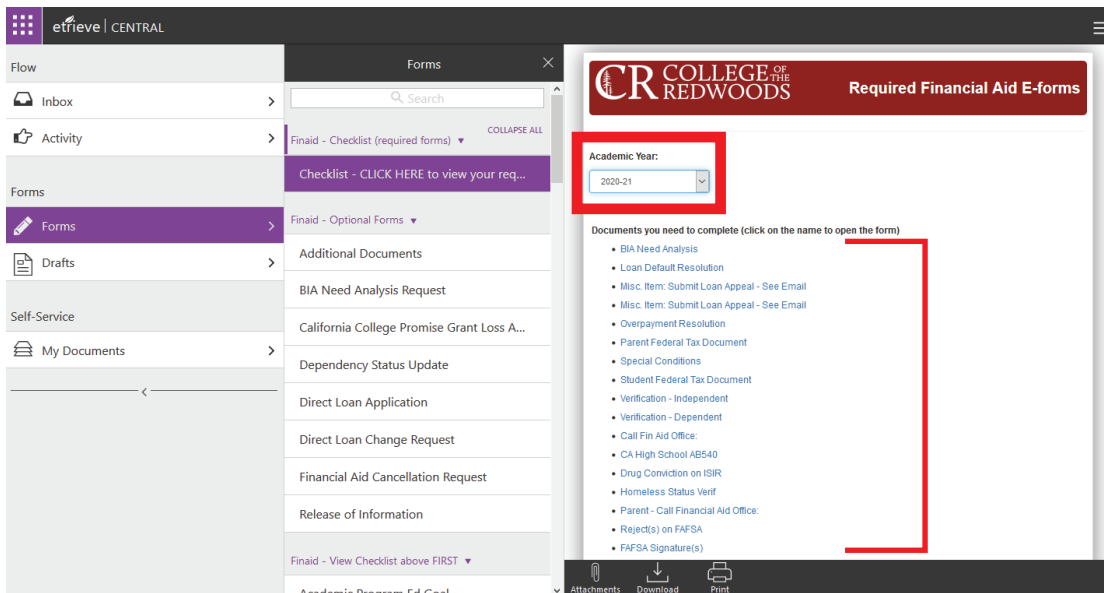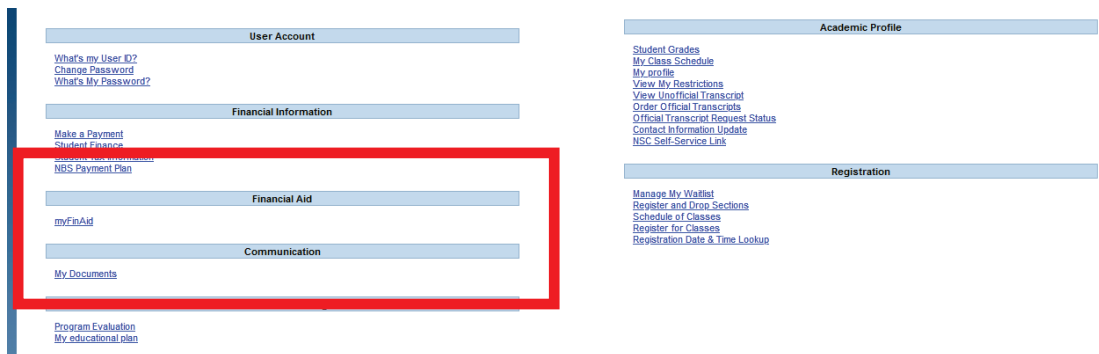


## Check Student Email

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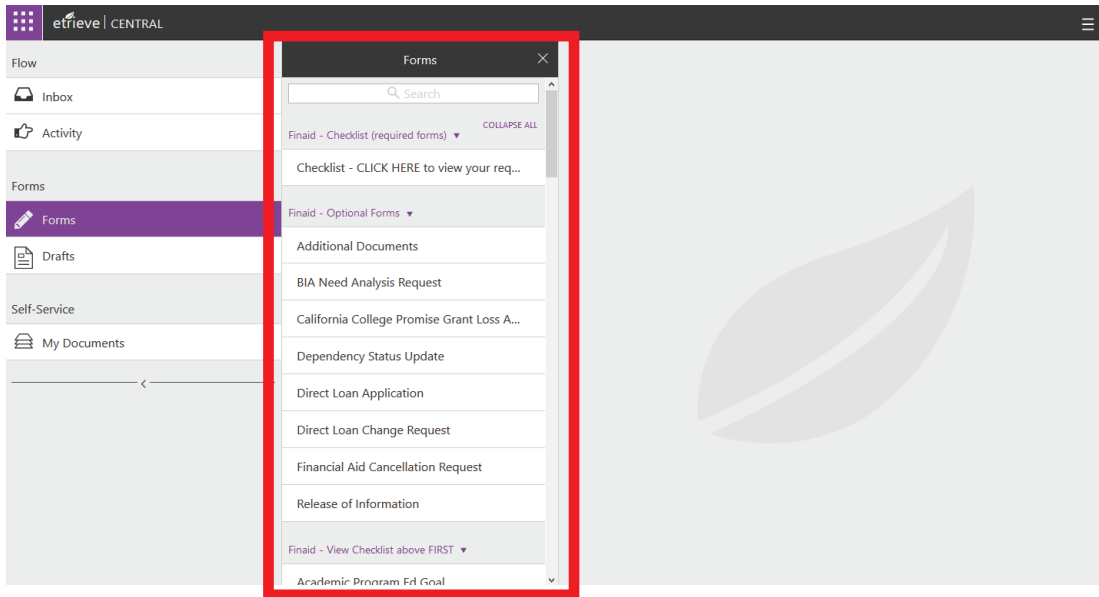Visit: https://www.redwoods.edu or Call: 707-476-4100 to find contact information for the department.

# Submitting an eForm



**Step 1.**

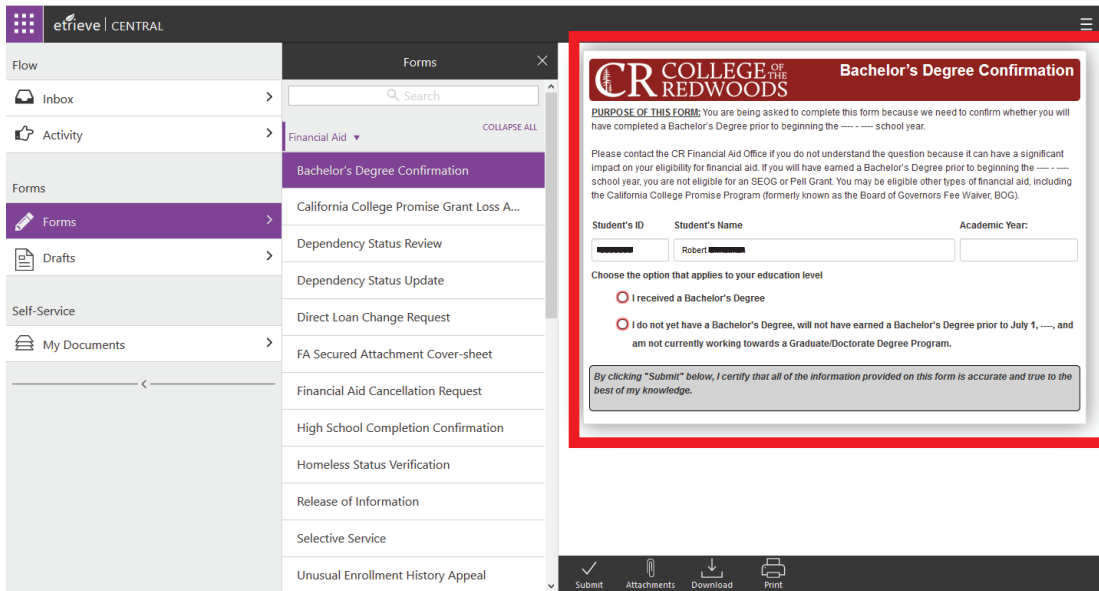Click on "Forms" to access optional and required forms.

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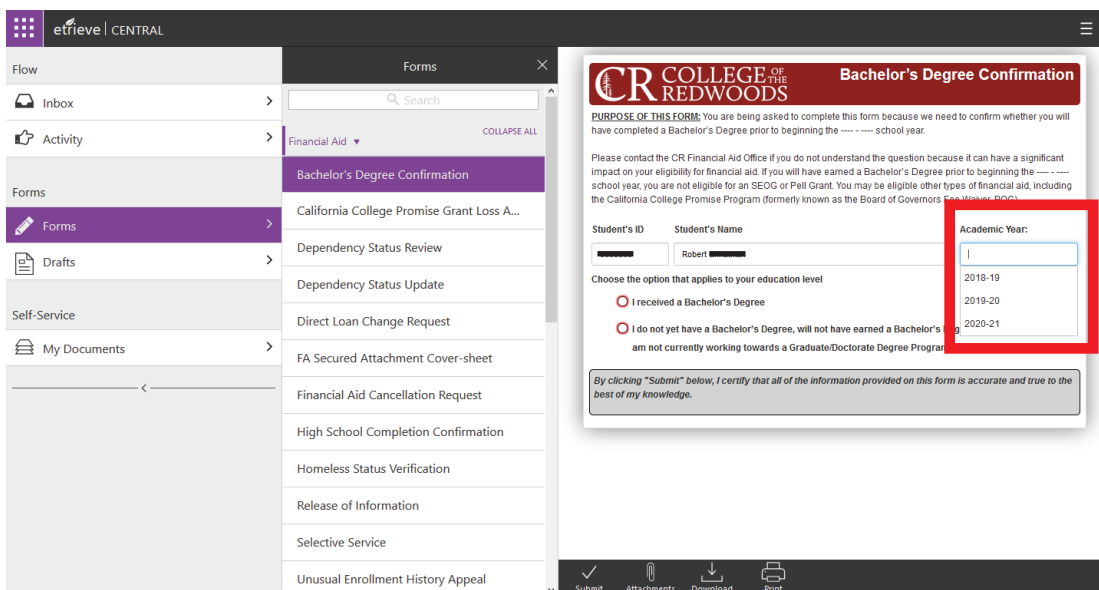


**Step 2.**

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.

## 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



## Step 5.

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



## Step 6.

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

# Submitting eForms with Attachments



**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.



**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."
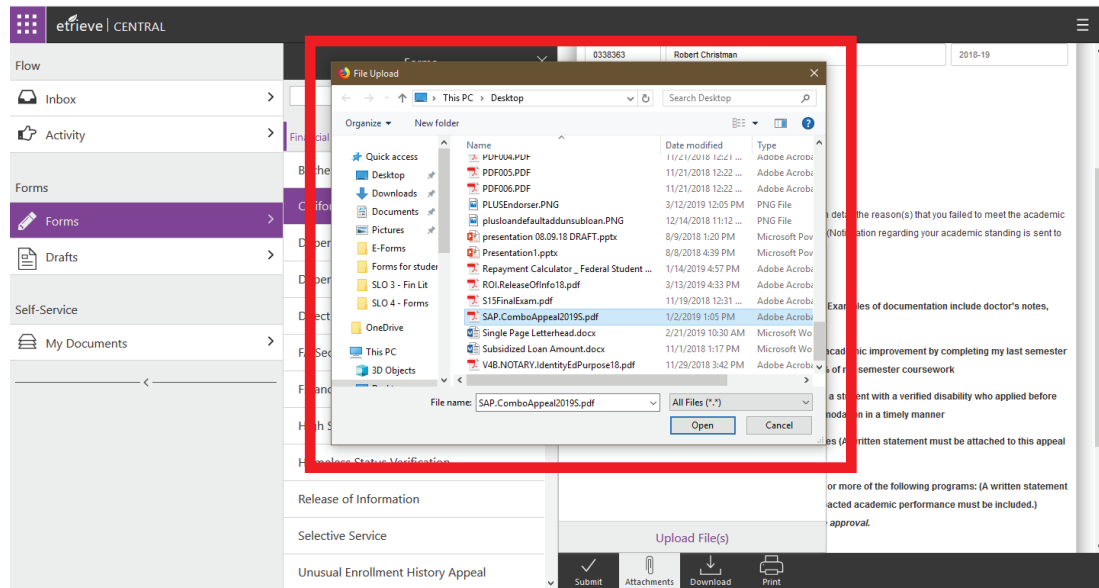


**Step 2.**

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.
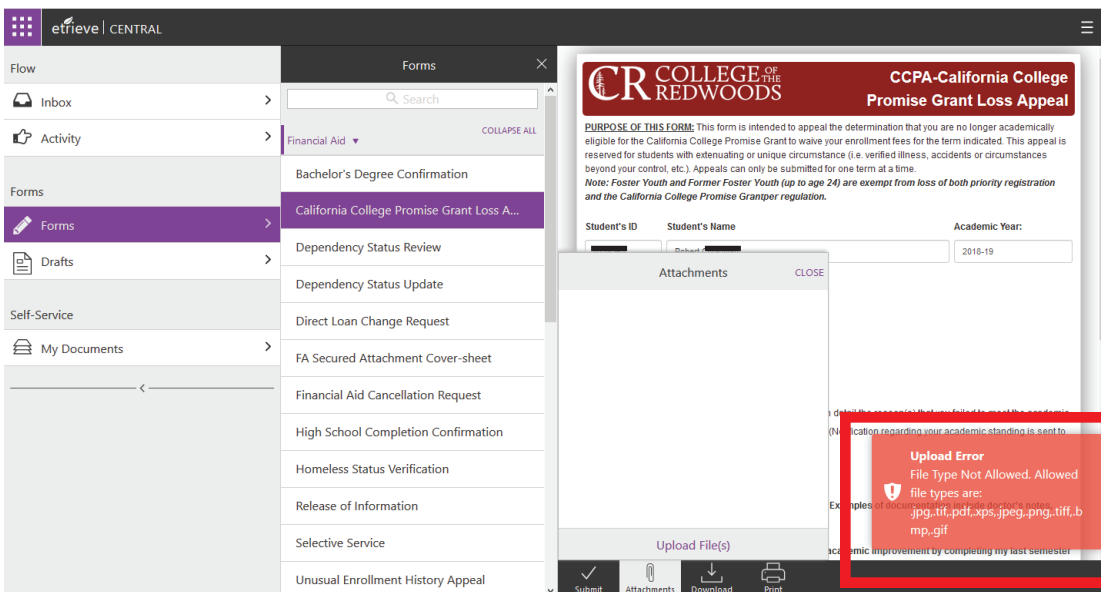


## Warning:

The only file types allowed are:

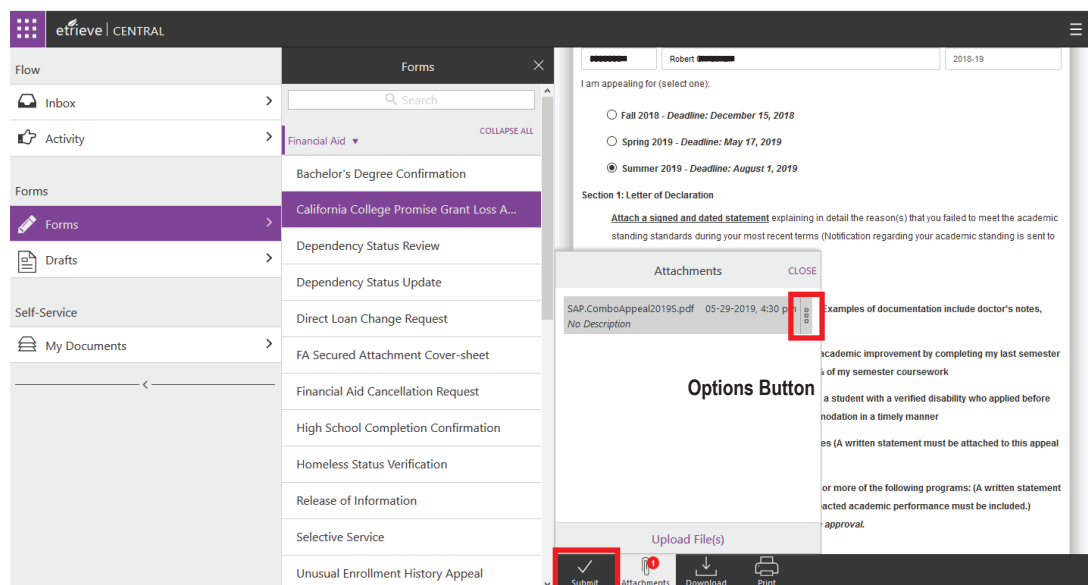.PDF, .Jpg, .Jpeg, .Tif, .Tiff, .xps, .bmp, & .gif

**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.
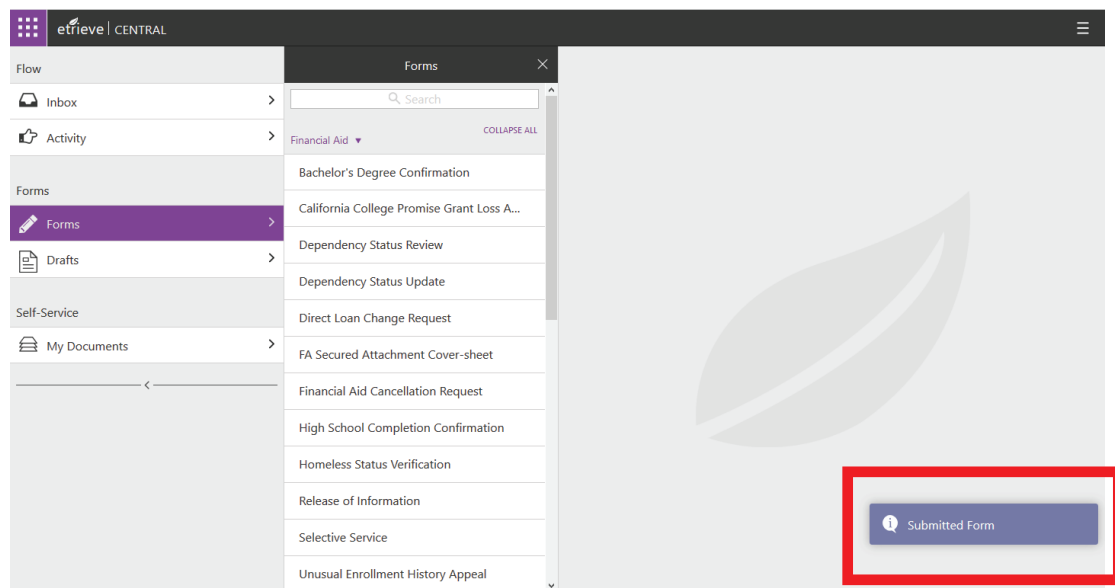
## Step 5.

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.

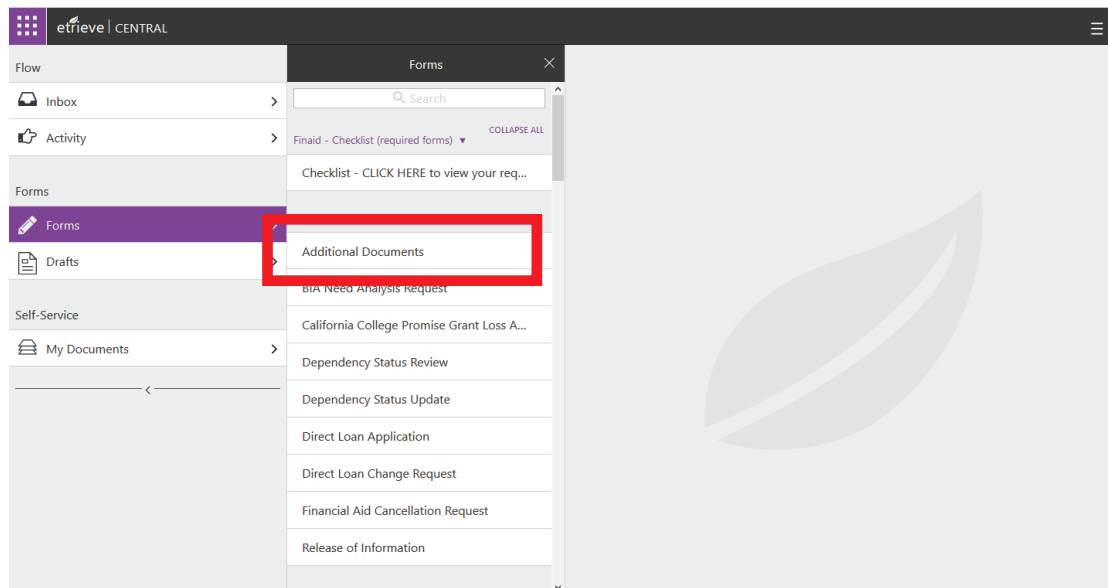# *Using the Additional Documents eForm*

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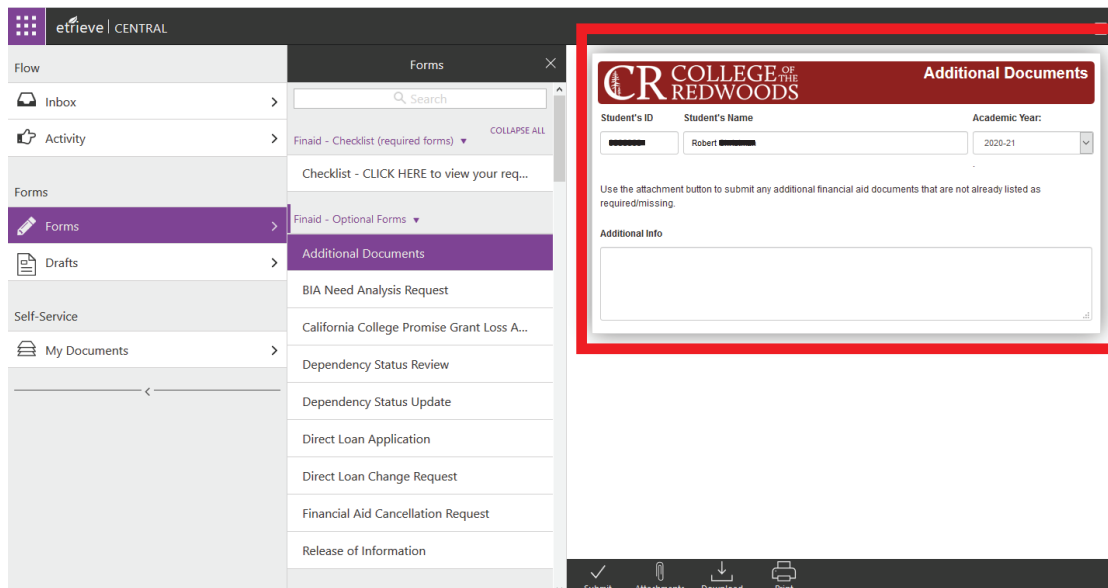
**DO NOT SEND AN EMAIL WITH AN ATTACHMENT**: please use the Additional Documents eForm to upload and send us documents.



**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.

## Step 3.

Select the academic year you are submitting for.

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

## Step 4:

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

## Step 5.

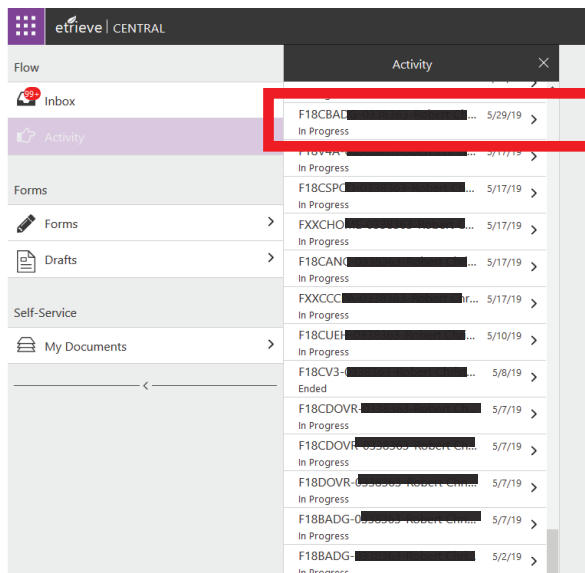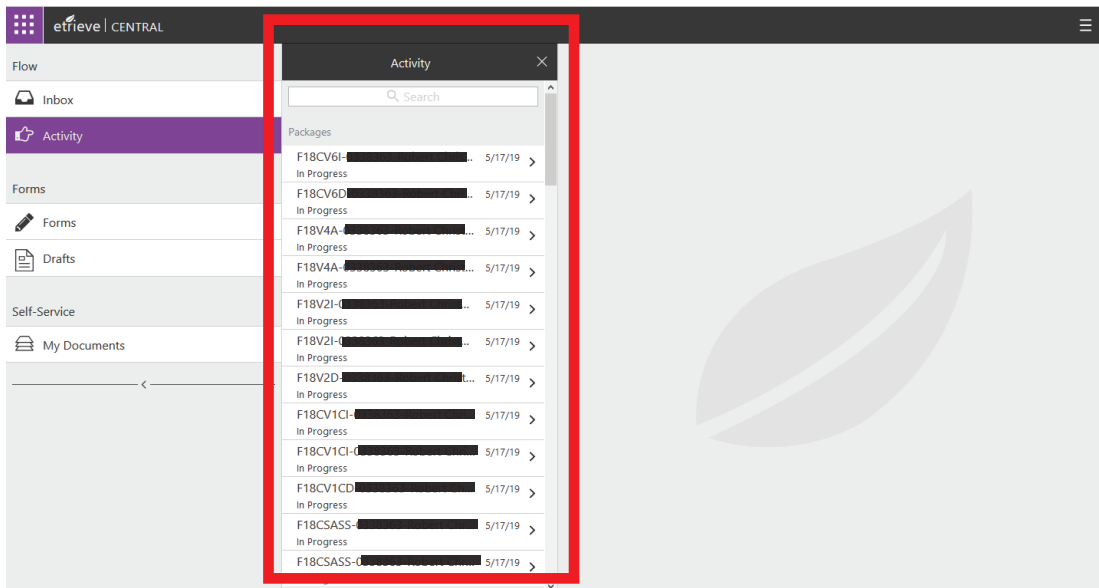Use the "Attachments" button to select and upload a file.

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.
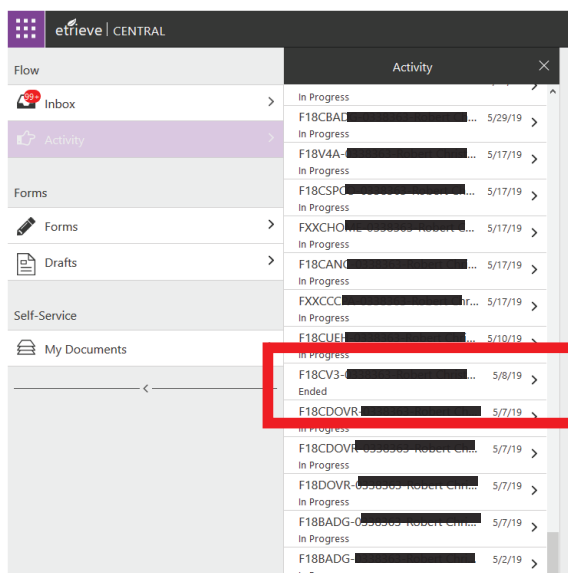
## Status: "In Progress"

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.

**Lets take a closer look**

F18CBADG...    5/29/19    >

In Progress

## 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.

**Lets take a closer look**

F18CV3-033...    5/8/19    >

Ended

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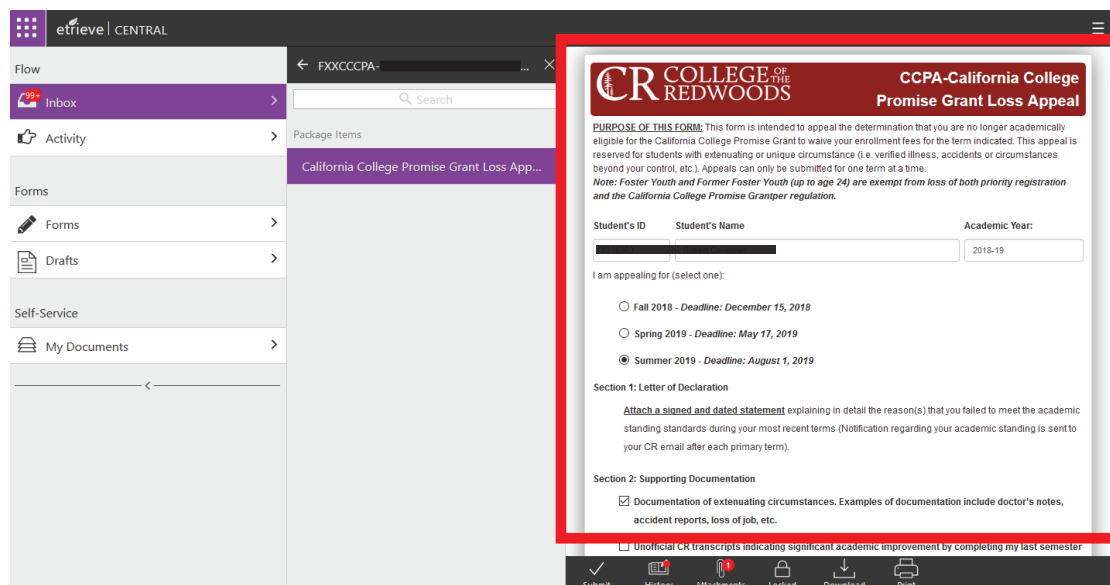
The form will remain in the student's inbox until corrected and resubmitted
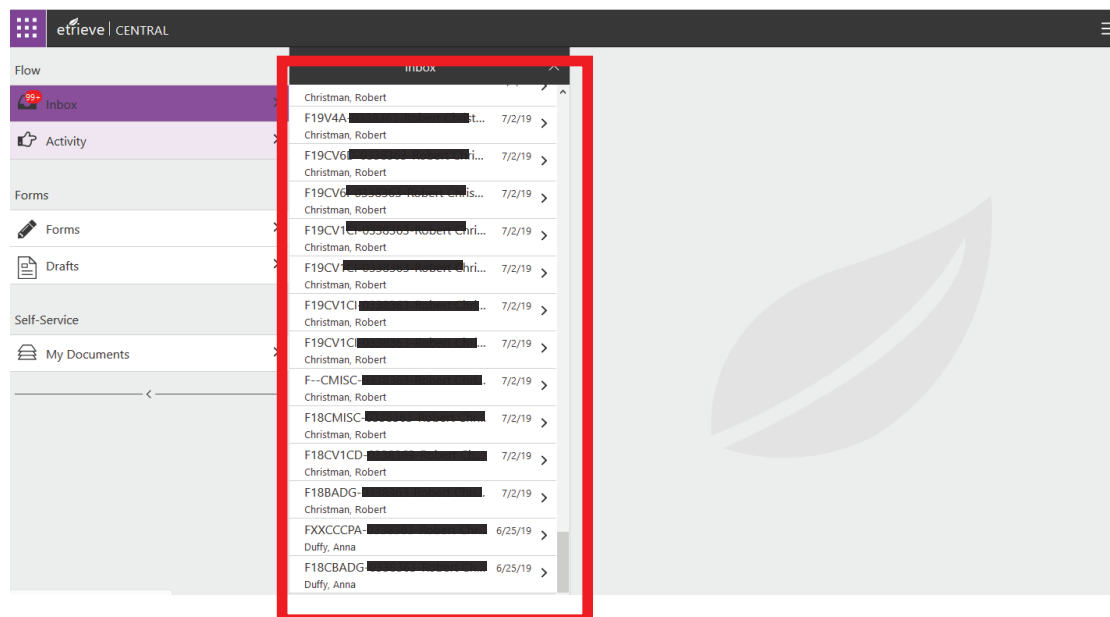


**Inbox**

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.

## 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.



## 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.



## 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.
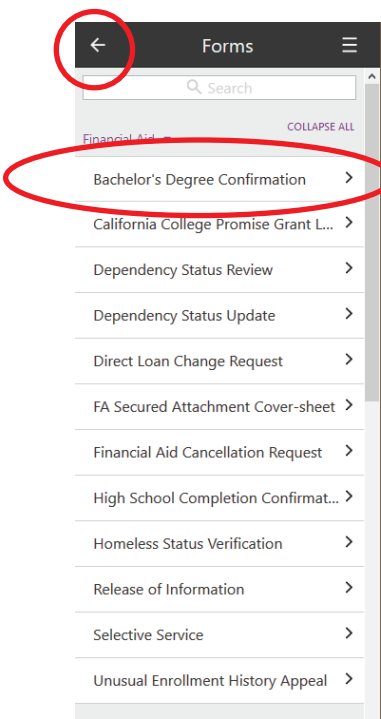
# *Navigating Mobile Menu*
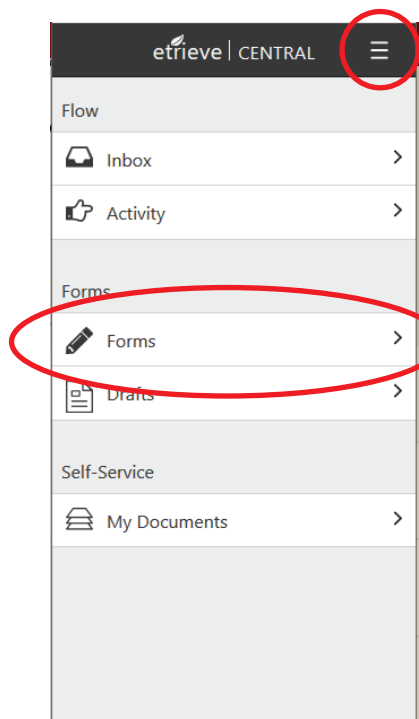
## Main Menu

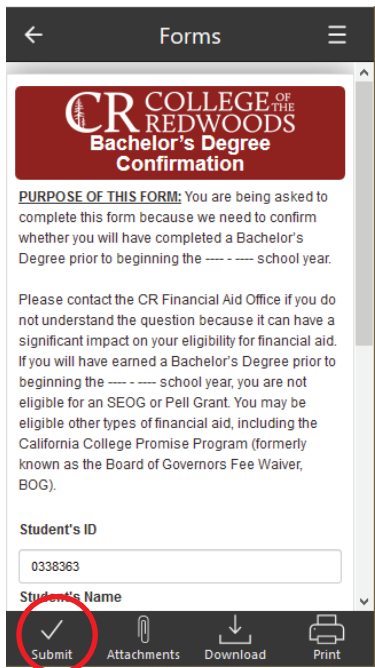Students can click on any of the options to view them.

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

## Forms Page

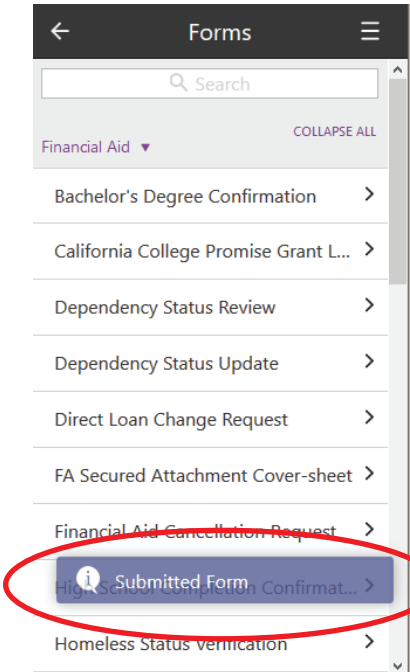Students can view forms and select the form they need to fill out.

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.

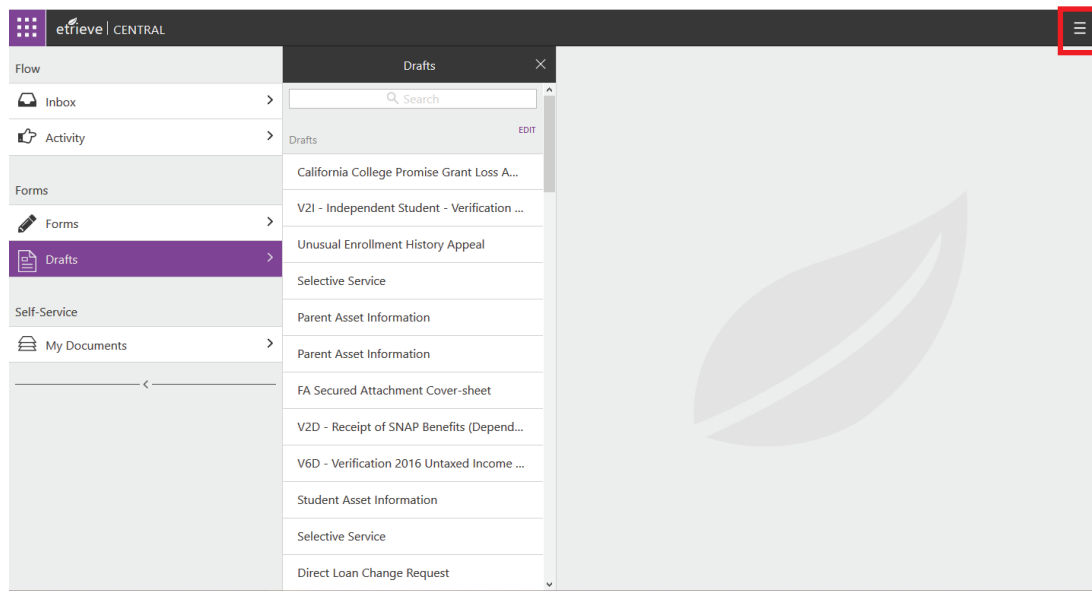Students can use the "Submit" button to submit their form.

## Submission

After selecting "Submit" a student will see a submission message that says "Submitted Form."
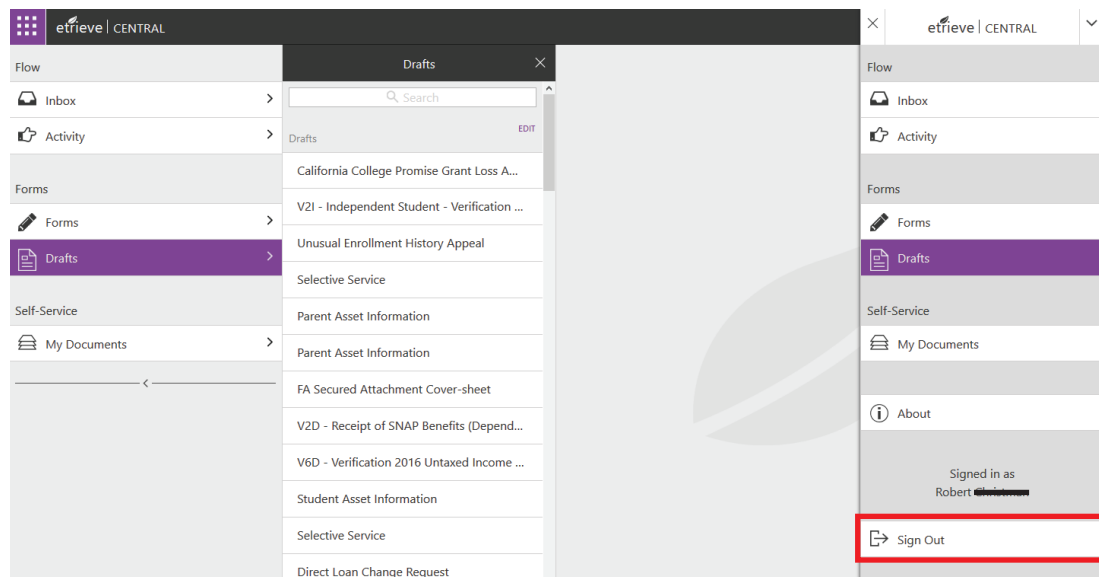
# Logging out of eForms



**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.