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**A&R FORMS TO ETRIEVE  
(SOFTDOCS)**



# WHY THE CHANGE?

- **Current Processes/Challenges**
- **2 step Process to Submit Request**
- **Incomplete Submissions**
- **Missing Information**
- **Inaccurate Information**

## Benefits

- **Single Step Submission**
- **Autofill (name, ID, address, etc.)**
- **More checks/balances**
- **Easier Tracking for A&R**



# WHAT IS ETRIEVE (SOFTDOCS)?

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- Secure, web-based platform for forms, workflow, and document management.
- Provides a central location to submit, track, and manage requests.
- Largely replaces paper-based processes with digital forms and automated routing.





## Students with Portal Access



If you can log in to the Mt. SAC Student Portal, you must submit your forms by clicking the links below, which can also be found under your [Student Self Service](#) card.

This is the recommended method because some of your personal information will be **automatically prefilled**, helping ensure accuracy and faster completion.

- [AB13 \)Out of State Tuition Exempt Request Form](#)
- [AB540 California Nonresident Tuition Exemption Request](#)
- [Graduation and Certificate Application](#)
- [Duplicate Certificate Request](#)
- [Duplicate Diploma Request](#)
- [Enrollment Verification/Proof of Non-Enrollment](#)
- [Grade Option Request](#)
- [Level Transfer Request](#)
- [Petition for Exceptional Action](#)
- [Reinstatement to Credit Class](#)
- [Request for Excused Withdrawal](#)
- [Request for Late Add](#)
- [Request for Priority Registration for Student Parent](#)
- [Request to Change Legal Address](#)
- [Request to Change Personal Information](#)
- [Residency Reclassification](#)
- [Section Transfer](#)
- [Security Block](#)
- [Transcript Evaluation](#)



## Users and Students without Portal Access

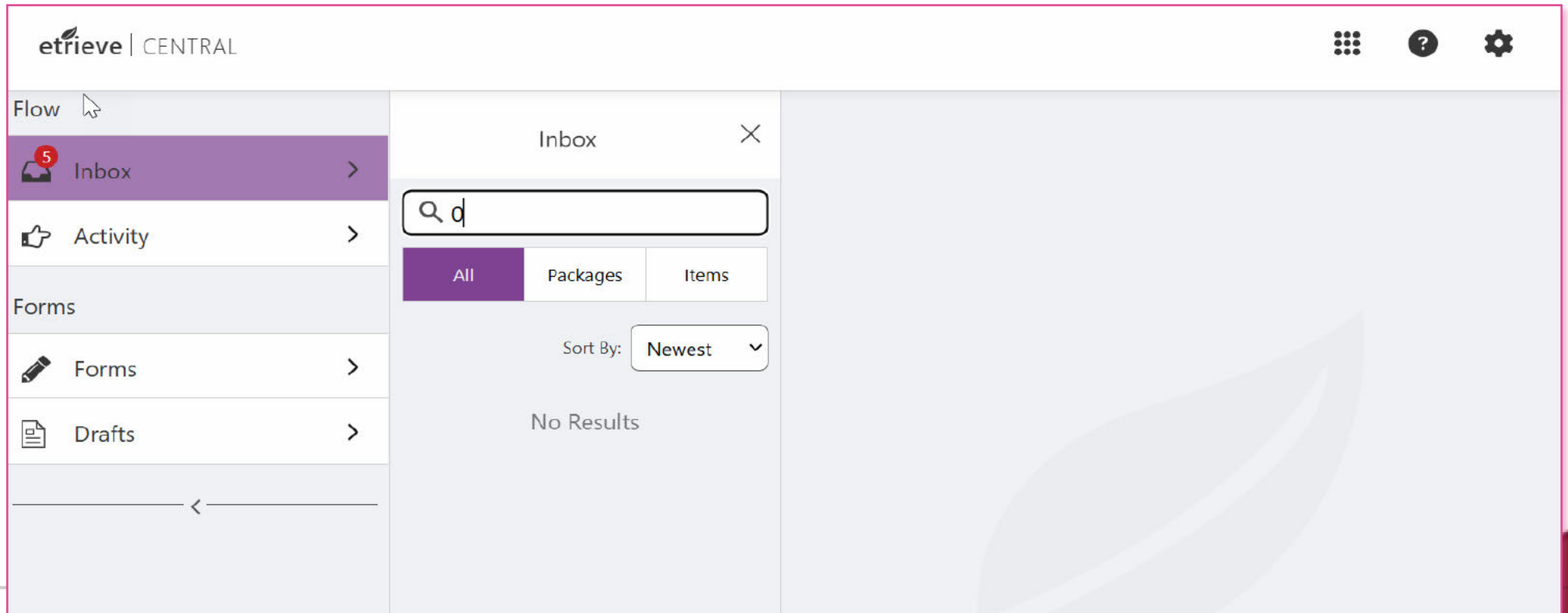


If you do **not** have access to the Mt. SAC Student Portal, you may submit your request using the direct form links below.

- Duplicate Certificate Request
- Duplicate Diploma Request
- Excused Withdrawal Request
- Petition for Exceptional Action

# USER DASHBOARD OVERVIEW

- Central hub for all activity.
- Main sections: Inbox, Activity, Drafts, Forms.
- Notification system keeps you updated.



# INBOX

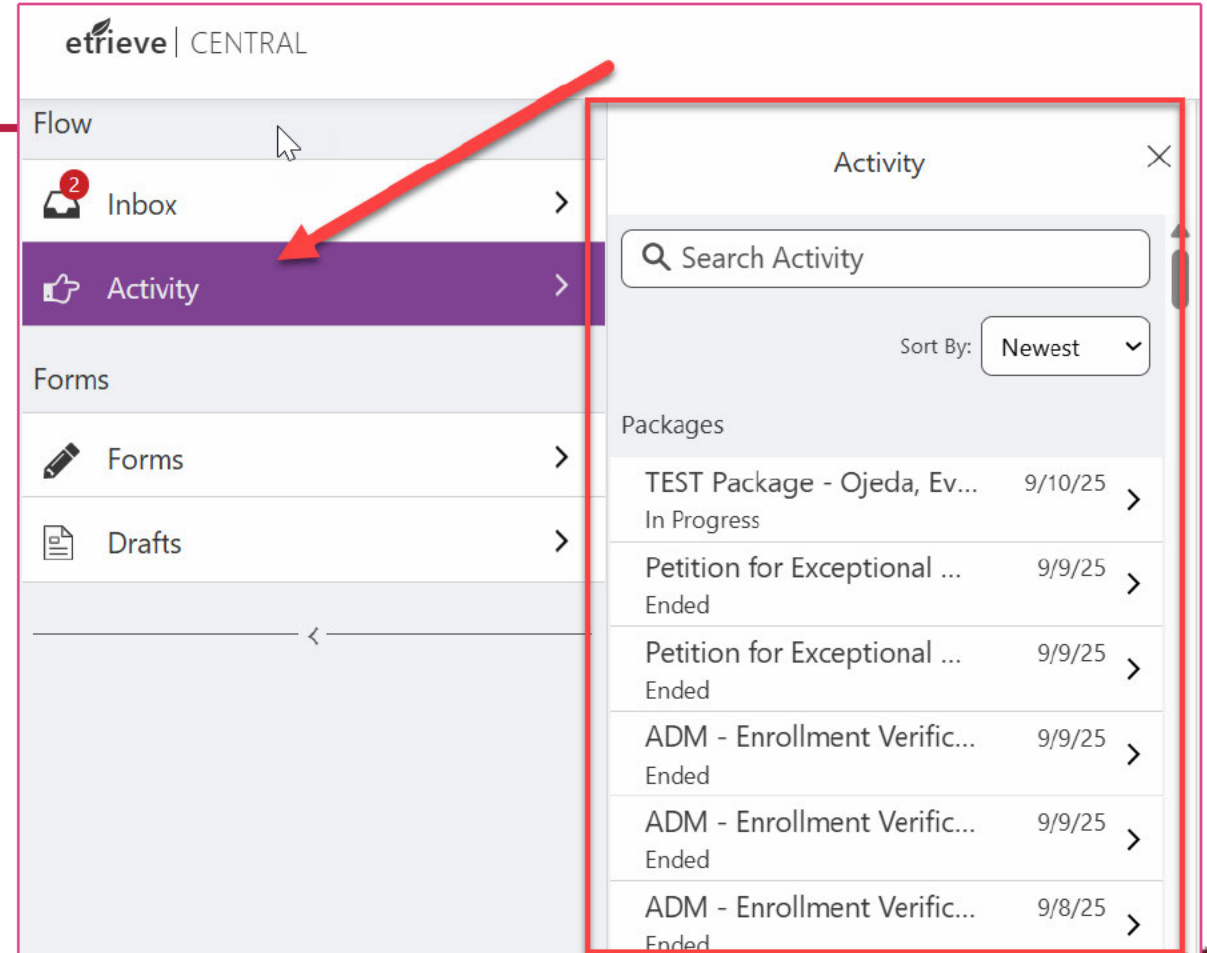
- Displays items waiting for your review or action.
- Approve or deny requests.
- Items remain until you take **action**.

The screenshot shows the 'retrieve | CENTRAL' interface. On the left, a 'Flow' menu is visible with 'Inbox' highlighted in purple and a red arrow pointing to it. Below 'Inbox' are 'Activity', 'Forms', and 'Drafts'. On the right, the 'Inbox' view is expanded, showing a search bar, a 'Sort By: Newest' dropdown, and a list of packages. A red box highlights the expanded view.

Package Name	Date
TEST Package -... Ojeda, Evelyn	9/10/25
ADM - Transcri... Bean, Ron	9/8/25

# ACTIVITY

- Shows items you've already interacted with.
- Useful for tracking status after submission.
- Review history of requests.



etrieve | CENTRAL

Flow

- Inbox
- Activity**

Forms

- Forms
- Drafts

Activity

Search Activity

Sort By: Newest

Packages

TEST Package - Ojeda, Ev...	9/10/25	In Progress
Petition for Exceptional ...	9/9/25	Ended
Petition for Exceptional ...	9/9/25	Ended
ADM - Enrollment Verific...	9/9/25	Ended
ADM - Enrollment Verific...	9/9/25	Ended
ADM - Enrollment Verific...	9/8/25	Ended

# DRAFTS

- Contains forms started, not yet submitted.
- Save drafts to complete later.
- Resumes where you left off

The screenshot shows the 'etrieve | CENTRAL' interface. On the left, a navigation menu lists 'Flow' (Inbox, Activity) and 'Forms' (Forms, Drafts). The 'Drafts' item is highlighted in purple, with a red arrow pointing to it. On the right, a 'Drafts' modal window is open, displaying a search bar and a list of draft items: 'Level Transfer', 'Request for Late Add', 'Student Wellness Center Packet', 'Form Data for Employee Wellness C...', 'Form Data for Employee Wellness C...', 'Banner Student and FA Account Req...', and 'Banner Student and FA Account Req...'. The 'Level Transfer' item is highlighted in purple.

# NOTIFICATIONS

- Alerts you when action is required.
- Email notifications sent to your inbox.
- In-app notifications appear when logged in.

**From:** Etrieve Softdocs Forms <etrieveoftdocsforms@mtsac.edu>  
**Sent:** Thursday, August 28, 2025 2:58 PM  
**To:** Bean, Ron <rbean@mtsac.edu>  
**Subject:** Action Needed – Late Add Request for Student

This is an automated message sent via the Mt.SAC Admissions and Records Office's new online form submission system.

The student below has submitted a Late Add Request for your course:

Student Name: Bean, Ron - [REDACTED]  
Term: Fall 2025  
CRN: 20010

To review and respond to the request:

1. Open the form using the link below.
2. Complete the required fields.
3. Select "Approve" or "Decline" from the toolbar to submit your response.

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

Your response is necessary for the Admissions and Records Office to proceed with the request. Thank you for your time and support of our students.

-Admissions and Records Team



# FORM EXAMPLE: REQUEST FOR LATE ADD - INSTRUCTIONS



## Request for Late Add

### Eligibility Requirements

Please fill out this form to request a late add for a CREDIT course. Before you proceed, ensure you meet the following requirements:

- **Add Code:** If you have an add code from the course instructor, please enter it below.
- **Credit Course Requirement:** The course you wish to add must be a CREDIT course.
- **One Course Per Submission:** You may submit a request for only one course at a time. If you need to add multiple courses, please submit a separate form for each.
- **Processing Time:** Your request will first be sent to the instructor for authorization and then to Admissions & Records (A&R) for final approval. Please allow up to 2 weeks for processing, and be sure to check your student email for updates.
- **Term Restrictions:** The course you wish to add must be from the current term or the previous term. If the course is from any other term, you will need to contact the Admissions and Records office for further assistance.

Please note: If these requirements are not met, your request will be denied.



# FORM EXAMPLE: REQUEST FOR LATE ADD – TERM AND COURSE SELECTION

## Course Information

### Select Term for Late Add Request

Summer 2025

1. For winter or summer intersessions, students should add classes by the expiration date on the Add Authorization Code provided by the instructor. The expiration date varies by class.
- 2 The late add period for intersession is 22% of the class. Students must use this Late Add form to add a class. It must be signed by the instructor, verifying that the student has been in attendance during the first 22% of the class. This request will be sent for signature to the listed instructor, once completed and submitted.

NOTE: For late add requests, the instructor must approve/sign this form (once submitted) indicating that the student has been in attendance since the beginning of the class (first 22% of the class). Students may NOT add classes after this time frame unless there is a clear exceptional circumstance.

Course CRN

10888

Course Name

Earth Science Laboratory

Instructor Name

Kingsbury, Sadie

Instructor Email

skingsbury@mtsac.edu

Add Code (Obtain from Instructor)



# FORM EXAMPLE: REQUEST FOR LATE ADD – COHORT SELECTION AND ACTION BAR

Cohort/Corequisite Course Number 1 Information

The course you selected requires an additional course that you must take during the same term. Please select a course from the list.

Course CRN	Course Name
<input type="text" value="10889"/>	<input type="text" value="Earth Science Laboratory"/>

Instructor Name	Instructor Email
<input type="text" value="Kingsbury, Sadie"/>	<input type="text" value="skingsbury@mtsac.edu"/>

Add Code (Obtain from Instructor)

Submit Attachments Download Print



# FORM EXAMPLE: EMAILS TO STUDENT AND INSTRUCTOR

## Late Add Request Submitted

 Etrieve Softdocs Forms  
To: Bear, Ron

Thu 9/11/2025 1:51 PM

Dear Bear, Ron,

This message confirms that your Late Add Request has been successfully submitted through the Admissions and Records Office's online form system.

Your request will now follow the appropriate review and approval process:


1. Instructor Review – The form has been routed to your course instructor for review and decision.
2. Admissions and Records Review – Form will then be forwarded to the Admissions and Records Office for final decision.

Please allow up to 2 weeks for the full review and processing of your request.

You will receive updates via your student email, so we encourage you to check it regularly for notifications or additional instructions.

-Admissions and Records Team

## Action Needed – Late Add Request for Student

 Etrieve Softdocs Forms  
To: Bear, Ron

Thu 9/11/2025 1:51 PM

This is an automated message sent via the Mt.SAC Admissions and Records Office's new online form submission system.

The student below has submitted a Late Add Request for your course:

Student Name: Bear, Ron - 

Term: Summer 2025

CRN: 10888 10889

To review and respond to the request:

1. Open the form using the link below.
2. Complete the required fields.
3. Select "Approve" or "Decline" from the toolbar to submit your response.

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

Your response is necessary for the Admissions and Records Office to proceed with the request. Thank you for your time and support of our students.

-Admissions and Records Team

# FORM EXAMPLE: REQUEST FOR LATE ADD – PROFESSOR RESPONSE

Instructor Use Only	
<b>Course CRN</b>	<b>Course Name</b>
10007	Intro to Nutrition Science
<b>To Be Completed by the Instructor:</b>	
This form is used to request to add the course after census date.	
If you do not support the Late Add, please <b>decline</b> the request.	
If you do support the Late Add, please <b>approve</b> the request.	
<b>Has the student been in attendance since the first or second week of the semester, or the first 22% of a short-term class?</b>	
<input type="radio"/> Yes	
<input checked="" type="radio"/> No	
This student is not eligible for a Late Add. The student must have attended the course since the first or second week of the semester, or the first 22% of a short-term class.	
Please decline this request.	
<b>Approval/Denial Comments</b>	
<input type="text"/>	



# FORM EXAMPLE: REQUEST FOR LATE ADD – A&R APPROVAL OR DENIAL

A&R Use Only

Admissions and Records Decision

Approved

Processed in Banner

Approve Decline Return History Attachments Locked Download Print

A&R Use Only

Admissions and Records Decision

Denied

Denial Reason

You have a time conflict. Time conflicts are not allowed.

Approve Decline Return History Attachments Locked Download Print



# TRANSITION FROM SMARTSHEET TO ETRIEVE FORMS FOR A&R

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- [Admissions Forms v3.mp4](#)
- [Page Title](#)
- Go live! —
  - FEBRUARY 23 —



# TRANSITION FROM SMARTSHEET TO ETRIEVE FORMS FOR A&R

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- Communication
  - All Division Meeting: February 10 (George will provide slides)
  - AMAC (January 26)
  - Cabinet (Melba will schedule)
  - ILT (George will reach out)
  - SS Leadership Team (1/22) ████████
  - Student Services Managers & Admin (Feb 5)
  - All Manager's (Feb 5)
  - Counselor Deans Meeting (George/Francisco)
  - PAC (Melba will reach out)
  - FLEX (Opening) (slides to be added)
- Email
  - Communication: Email: Preview (George will draft)
  - Monday Minute (George will draft to provide to Kelly)

