Etrieve Central Forms User Guide for Students

Etrieve Central is an online forms system for PCC students to submit documents needed for financial aid/scholarships, housing, business office, and advising. Many of the required documents for financial aid can be submitted through the Etrieve Central system, and routed directly to the PCC Financial Aid Office. Other forms submitted through Etrieve Central include Housing Contracts (for returning students), Title IV Authorizations, and Direct Deposit forms.

The Etrieve Central system also allows PCC offices to send documents to a student's inbox for approval. Examples include Financial Aid Award Letters, Scholarship Agreements, and Declaration of Major.

This guide is intended to provide basic instructions for how users can access Etrieve Central, submit forms, approve forms, and review approval history. This guide also includes an overview of the Financial Aid Checklist, which allows students to track documents needed for the award year.

1. How To Access Etrieve Central:

- To access Etrieve Central, navigate to https://etcentral.prattcc.edu
- Login with PCC username and password



NOTE: Etrieve Central works with most modern web browsers, but Google Chrome is recommended. Users may experience issues if using Internet Explorer.

• Once logged in, the user will see the Etrieve Central home screen (screenshot below)

Home Etrieve Central	×	
← → C ≜ Secure	https://etcentral.prattcc.edu/#	୍ 🖈
🛄 Apps 🗋 New Tab 🥖	Etrieve Content 🧭 Etrieve Central 🏉 Etrieve Security	
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Inbox	>	
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Forms	>	
Drafts	>	
elf-Service		
My Documents	>	
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- INBOX: This is where users see forms that have been submitted for their approval/review. ..... etfieve | CENTRAL ACTIVITY: This is where users Forms Flow find the list of forms they have submitted or reviewed in the Inbox > past. > Activity FORMS: This is where users ADMIN and DEV . find the list of forms they can submit. Forms Employee Forms 🔻 Custodial/Maintenance Request DRAFTS: This is where users Drafts find a list of forms they have Data Request Form started, but not yet submitted. Facilities Use Form Self-Service MY DOCUMENTS: This is Request for Leave A My Documents where users see their forms Stationary Request (including attachments) after they have been final approved.
- Below is a diagram showing each component of the Etrieve Central home screen:

#### 2. How To Submit Forms:

 Select the "Forms" option in the home screen to display a list of forms that can be submitted:



• If a form is selected from the list, it will populate in the form viewer on the right side of the window where the user can enter all necessary information and submit:

>	Forms × Bachelor's and Master's Degree Confirmation	PRATT Electronic Consent				
>	Child Support Verification	Community College				
	Direct Deposit - Student					
	Electronic Consent Ford	School 'sar: Name: Student ID:				
>	Financial Aid Contract					
>	Grant Overpayment Resolution	I hereby give consent to receive and submit my financial aid information electronically (i.e. "Missing" forms, financial aid award letters, financial aid status in irrmation istudent loan documents, student loan disbursement information,				
	Homeless Verification	etcetera).				
>	Identity and Statement of Educational Purpose	I certify that information that I provide to the Financial and a flice is factual and complete. I understand that if I purposely give false or misleading information, I may be fined, contence to prison, or both.				
	Independent Status Appeal	By clicking the Submit button, I understand that I have given contact the receive and submit my financial aid				
	Independent Status Confirmation	Information electronically. I understand that if I choose not to give electronic consent, I am responsible for staying updated on my				
	Low Income Verification	financial aid status. I understand declining electronic consent may significantly increase the time it takes to process my financial aid.				
	No Parental Information	Please select Choose				

- General Info about forms:
  - Some fields in a form will be pre-populated with information that is specific to the user. For example: In the form shown above, the Student's name and Student ID number are pre-populated so the user does not have to enter them.
  - Some fields are auto-formatted to standardize input (examples below):
    - Phone Numbers: (___) ___- ext _____
    - Account numbers: __-__-
    - Time: --:-- --
    - Date: mm/dd/yyyy
  - Some fields are required, meaning the user cannot submit until the required fields are filled out.
  - Some forms require attachments, such as receipts or other documentation, before they can be submitted.

• Once all necessary information has been entered, click the "Submit" button below the form to route it to an approver.

School Year: -Please Select-	Name:	Student ID:
l hereby give consent to award letters, financial a etcetera).	o receive and submit my financial aid in aid status information, student loan doo	formation electronically (i.e. "Missing" forms, financial uments, student loan disbursement information,
I certify that information give false or misleading	that I provide to the Financial Aid Offic information, I may be fined, sentenced	e is factual and complete. I understand that if I purpos I to prison, or both.
By clicking the Submi information electronic	t button, I understand that I have giv ally.	en consent to receive and submit my financial aid
l understand that if I c financial aid status. I u process my financial a	hoose not to give electronic consen Inderstand declining electronic cons aid.	t, I am responsible for staying updated on my sent may significantly increase the time it takes to
Please select Choose	v	

• If a user tries to submit a form without filling out required fields, all required fields will become highlighted in red and a message will show, similar to the one below:

Community College	
Commonly Concyc	REQUIRED FIELD
School Year: Name:	Student ID:
-Please Select-	
I hereby give consent to receive and submit my award letters, financial aid status information, s etcetera).	r financial aid information electronically (i.e. "Missing" forms, financial a student loan documents, student loan disbursement information,
I certify that information that I provide to the Fir give false or misleading information, I may be fi	ined, sentenced to prison, or both.
By clicking the Submit button, I understand information electronically.	that I have given consent to receive and submit my financial aid
I understand that if I choose not to give elect financial aid status. I understand declining o process my financial aid.	tronic consent, I am responsible for staying updated on my electronic consent may significantly increase the time it takes to
Please select Choose	
	Form is not submit

### 3. Reviewing forms and approval history:

• After a form has been approved/declined/processed, the submitter will receive a notification via email. The student can view his/her finalized forms, along with all attachments, comments, and approval history by going to the "Activity" area of Etrieve Central. Some documents may also be viewable in the "My Documents" area :

etfieve   CENTRAL		
Flow	< <u></u>	PRATT C Direct Deposit
1 Inbox	> Q Search	Community College
Activity	> Package Items	,
	Direct Deposit - Student	chool Year: Student ID Student Name
orms		2018-2019
Forms	>	Date of Birth Student's Phone
Drafts	>	
Self-Service	1	How would you like your financial aid disbursement distributed Direct Deposet •
My Documents	>	Account Type Checking V
<		History CLOSE 2LLEGE hereinafter called PCC. to initiate Deposits (credit entries) redit entry in error to my account indicate below and the franceal STORY: to credit and or deat the same to such account. This PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written indication from mo of termination in such PCC has received written in
		meteriorea 06-13-2019, 2-28:46 pm Received 06-13-2019, 2-28:46 pm
		06-13-2019, 2:31:15 pm Approved
		06-13-2019, 2:31:16 pm Workflow Ended ormation is provided causing the disbursement to be returned by the Issued a check.
		IConfinent Save

#### 4. Approving forms in the Inbox

• Some forms are sent to a student's inbox for approval. For example: Award Letters and Scholarship Agreements are generated by the Financial Aid Department, and sent to the student for approval. Likewise, Declaration of Major forms are generated and sent to the student by the Student Success Center, or other PCC Staff. When a form is sent, the student will receive an email notification (screenshot below)

From: etrieve@prattcc.edu [mailto:etrieve@prattcc.edu] Sent: Wednesday, June 19, 2019 3:59 PM To: the second secon		
The workflow package 'Declaration of Major -	has been submitted by	and is available
To access it, please click here.		

• The Declaration of Major below is an example of a form that is sent to a student for approval. When following the link from the email (above), the student will be able to review the form and approve as necessary.

<b>PKAI</b> Community	College	Declaration of M
Search for Student (witho	out dashes)	
First Name	Last Name	
Email	Student ID	
STUDENT INSTRUCTION	NS - Please fill in the Major and Degree In	formation below, and then click "Appro
STUDENT IN STRUCTION the bottom of School Year:	NS - Please fill in the Major and Degree Ini the form window to return it to the Stude Term:	formation below, and then click "Appro nt Success Center for processing.
STUDENT INSTRUCTION the bottom of School Year: 2019-2020	NS - Please fill in the Major and Degree Init the form window to return it to the Stude Term: V Fall	formation below, and then click "Appro- nt Success Center for processing.
STUDENT INSTRUCTION the bottom of School Year: 2019-2020 Please select Academic I Associate in Applied Scient Select a Major: Agriculture Power Technolo	NS - Please fill in the Major and Degree In the form window to return it to the Stude Term:	formation below, and then click "Appro nt Success Center for processing.
STUDENT INSTRUCTION the bottom of School Year: 2019-2020 Please select Academic I Associate in Applied Scient Select a Major: Agriculture Power Technolo Please select one catego	NS - Please fill in the Major and Degree In the form window to return it to the Stude Term: ▼ Fall Degree: ce ce ce ce ce ce ce	formation below, and then click "Appro- nt Success Center for processing.
STUDENT INSTRUCTION the bottom of School Year: 2010-2020 Please select Academic I Associate in Applied Scient Select a Major: Agriculture Power Technolo Please select one catego © Earn an Assoc	NS - Please fill in the Major and Degree In the form window to return it to the Stude Term: Fall Degree: Ce Pay	formation below, and then click "Appro nt Success Center for processing.
STUDENT INSTRUCTION the bottom of School Year: 2019-2020 Please select Academic I Associate in Applied Scient Select a Major: Agriculture Power Technolo Please select one catego © Earn an Assoc © Earn an Assoc	AS - Please fill in the Major and Degree In the form window to return it to the Stude Term: Term: Tell Degree: co Pay ry that best describes your educational of bociate's Degree from PCC and then transforciate's Degree from PCC and work	formation below, and then click "Appro nt Success Center for processing.

• The student will be able to review the document and then select whether they approve or Decline. Other options are available as well (see screenshot below)



# 5. Financial Aid Checklist and Forms

 Etrieve Central includes a checklist of required forms for students who will be accepting scholarships, student loans, grants, or other types of financial aid. The checklist can be accessed in the forms area under the area named "Financial Aid Checklist – START HERE" (screenshot below).

low	Forms X	DDATT
Inbox Activity	Financial Aid Checklist - START HERE  A Financial Aid Checklist	Community Col
	Financial Aid Forms	Choose the year
Forms	Additional Loan Request	Documents you need to complete Student Asset
elf-Service	Bachelor's and Master's Degree Confirmation Child Support Verification	Title IV Authorization     Independent Status Appeal     Independent Status Confirm
My Documents	> Direct Deposit - Student	Professional Judgement     Identity and Statement of Ed
<	Electronic Consent Form	<ul> <li>SAP Appeal - Summer</li> <li>SAP Appeal - Fall</li> </ul>
	Financial Aid Contract	SAP - Summer Academic Pl     Notarized Conv of Birth Certi

• The when the award year is selected from the dropdown, a list of required documents populates. The list will include a clickable list of documents under the heading "Documents you need to complete". When the student submits a needed form, it will be moved to the list of completed documents.

<b>PRATT Community College</b>	FA Fo	rms Checklist	
Choose the year			
2018-2019 🔻			
Documents you need to complete (click on the name to open the form) Student Asset Title IV Authorization Independent Status Appeal Independent Status Confirmation			
Professional Judgement     Identity and Statement of Educational Purpose     SAP Appeal - Summer     SAP Appeal - Fall     SAP - Summer Academic Plan     Notarized Copy of Birth Certificate (must be mailed)     Parent Signature Mission	$\left  \right\rangle$	List of c Student submit	locuments the t needs to for 2018-2019
Scholarship SAP Appeal (must be mailed)     Official High School Transcript (must be mailed)     Entrance Counseling     Copy of Selective Service Registration (must be mailed)     Free Application for Federal Student Aid     Notarized Copy of Social Security Card (must be mailed)	J		
Documents that you have completed for this academic year:   Electronic Consent Form  Grant Overpayment Resolution  Unusual Enrollment  Electronic Consent Form  Sap Appeal - Spring  ACH Direct Deposit Form	~	List of docu student has submitted f	ments the s already for 2018-2019