



American
Occupational Therapy
Association

Fieldwork Performance Evaluation (FWPE) Training – Common Mistakes

March 5,, 2021

Platform - Formstack

- Formstack Forms – FWPE Tool
 - Mid-term Evaluation Form
 - Final Evaluation Form
- Formstack Documents – PDU Certificate
 - AOTA Certification

*** Please note: separate accounts

Common Mistakes in Setup

1. **Add final form to the portals**
2. **Make copies of the FWPE forms**
3. Misunderstand the emails associated to the forms
4. Add the FWEs' emails in the notification emails manually
5. Forgot to setup the certificate and email in Documents
6. Don't test the document after the certificate is modified

Mistake #1: Make Forms Copies

Problem

- Final form doesn't have the mid-term score
- Final submissions still goes to the original final form

Solution

- Delete the form copies, only keep the original copy of the forms when your account is set up

Mistake #2: Add final form to the portal

Problem

- FWEs and students receive the final form at the same time as the mid-term form
- Mid-term eval is submitted as final by mistake
- Final form doesn't have the mid-term score

Solution

- Remove the final form from the portal
- Migrate the data from final to mid-term, contact customerservice@aota.org
- Resend Notification Email so the FWEs and/or students receive the correct copy of mid-term eval and the link for final

Mistake #3: Add extra emails

Problem

- Send and/or Receive un-necessary emails

Solution

- Only update the original emails with your email signature and “From emails”

Mistake #4: Add email address manually

Problem

- FWEs and/or students don't receive the notification emails
- The submission goes to all the FWEs

Solution

- Don't change email to fields
- You only need to change From email address

Mistake #5: Forgot setting up certificate

Problem

- FWEs receive the certificate template with the wrong school logo and signature line

Solution

- Make sure to configure the certificate and the email in Documents
- Resend the certificate

Mistake #6: Without testing the certificate

Problem

- The logo on certificate is aligned correctly
- The certificate has multiple pages

Solution

- Always test the certificate after you make any changes to the certificate

Common Issues for FWEs

1. **Identify as student**
2. Don't receive the portal invitation emails
3. Receive the reminder email even the form is completed
4. Don't receive the notification emails
5. Save and Resume Later link is not working

FWE Issue #1: Identity as a student

Problem

- The form requires student's signature instead of the FWE's signature
- Don't receive the notification email or the delayed confirmation email after completing the mid-term

Cause

- Identify as a student

Solution

- Update the field to "Fieldwork educator" on the submission
- Resend Notification Email
- Re-submit the mid-term

FWE Issue #2: Don't receive the portal email

Problem

- Don't receive the mid-term invitation email

Cause

- Email is delivered to the junk folder
- Email is blocked by the FWEs' email server

Solution

- Check the junk folder and whitelist noreply@formstack.com
- Use a different email address or work with the IT team
- Share the mid-term link via an email outside the system

FWE Issue #3: Receive reminder email by mistake

Problem

- Receive the reminder email after the form is completed

Cause

- A bug in Formstack system, should be fixed now

Solution

- Disable the reminder email in Portal

FWE Issue #4: Don't receive emails after completing the forms

Problem

- No notification email after completing the mid-term
- No delayed confirmation email before the final
- No notification email and certificate after the final

Cause

- Identified as a student
- Email is delivered to the junk folder
- Email is blocked by the FWEs' email server

Solution

- Make sure FWE select “Fieldwork Educator”
- Check the junk folder and whitelist noreply@formstack.com
- Use a different email address or work with the IT team

FWE Issue #5: Save and Resume Later

Problem

- Link is blank
- Miss the most updated information

Cause

- Use unsupported web browser IE
- Didn't use the most recent saved link

Solution

- Use a support web browser, such as Edge, Chrome
- Always save the link

Questions or Support

AOTA Customer Service

customerservice@aota.org