Fieldwork Performance Evaluation (FWPE) Training – Submissions
March 12, 2021

Platform - Formstack

- Formstack Forms – FWPE Tool
  - ➢ Mid-term Evaluation Form
  - ➢ Final Evaluation Form

- Formstack Documents – PDU Certificate
  - ➢ AOTA Certification
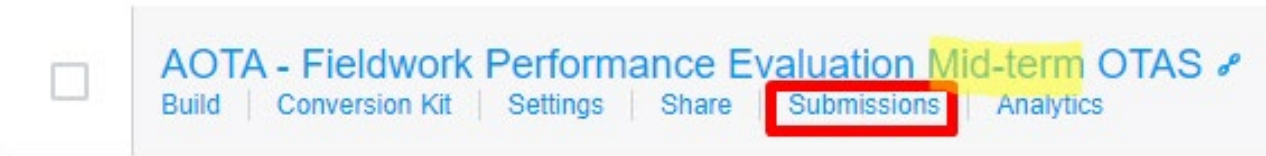
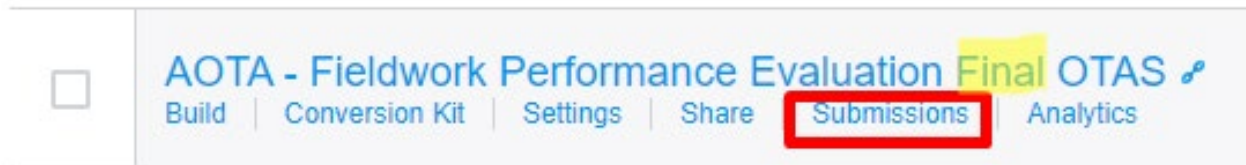*** Please note: separate accounts

Agenda

1. Where are the submissions

2. How to make changes to the submissions

3. Review submissions

4. Mark submissions

5. Create custom filters/reports

6. Data export

7. Create charts

8. Share data with others

9. Resend the PDU certificate

10. Transfer data

Where are the submissions

- **Mid-term submission**

AOTA - Fieldwork Performance Evaluation Mid-term OTAS
Build | Conversion Kit | Settings | Share | Submissions | Analytics

- **Final submissions**

AOTA - Fieldwork Performance Evaluation Final OTAS
Build | Conversion Kit | Settings | Share | Submissions | Analytics

How to make changes to the submissions

- Log into Formstack Forms
- Go to "**Forms**"
- Hoover your mouse over the mid-term submission and select "**Submissions**"
- Click the submission you need to change
- Click "**Edit**"
- Make the changes and click "**Save**"
- Click "**Resend Notification Email**" so the FWE or Student will receive a copy of the updated submission
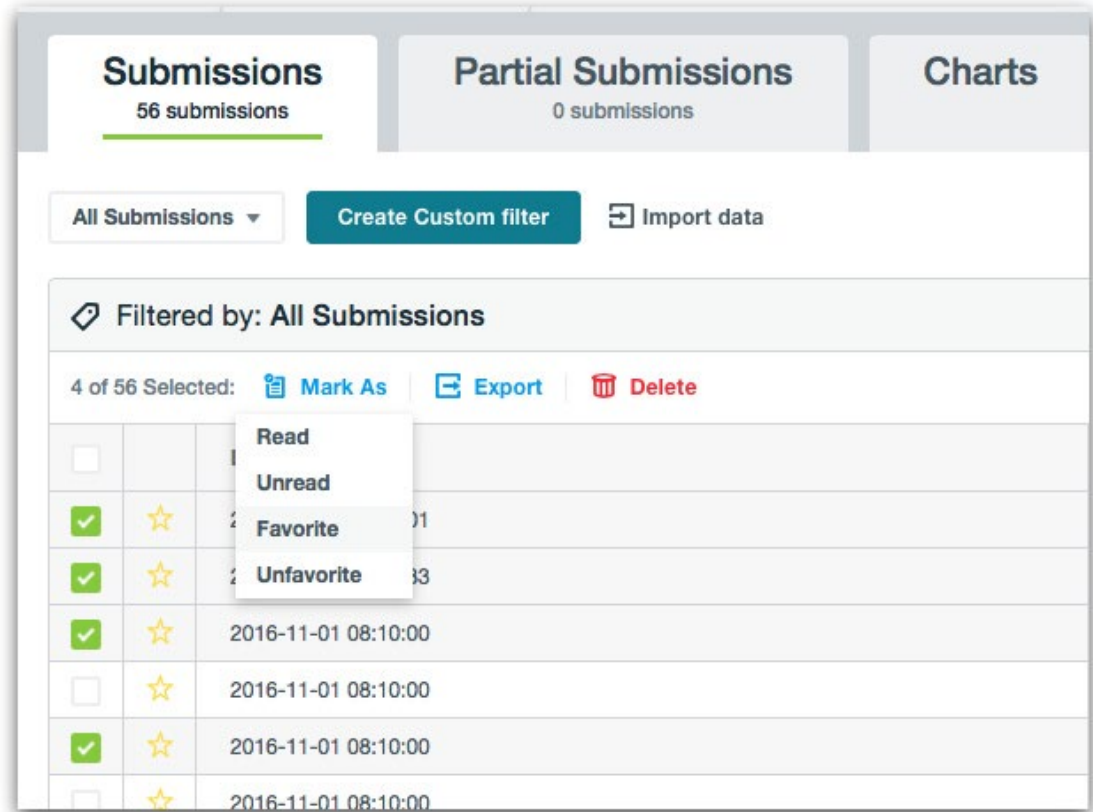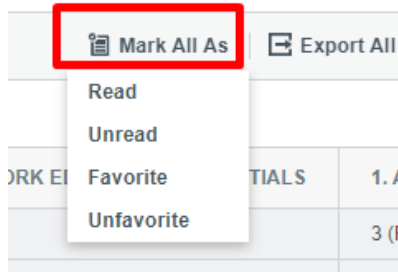
AOTA

Review Submissions

- **New/Unread submissions** - **Bold**
- Read submissions
- Submission with failed integrations – Highlighted in Red
- Change the data display by clicking on the "**Table Settings**", click and drag the fields (see pic on the right)
- Delete submission
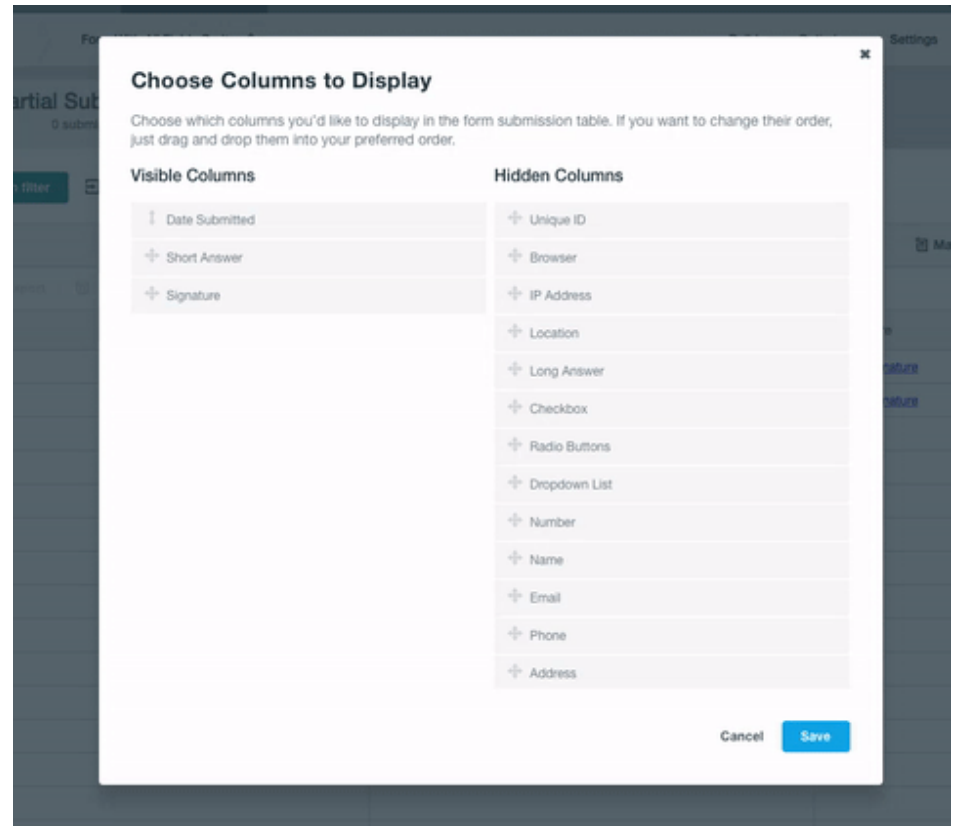
Mark Submissions

- Read
- Unread
- Favorite
- Unfavorite
- One or all

Create Custom Filters/Reports

System reports

- All Submissions
- Read
- Unread

Customer reports

- Students
- Fieldwork Educator
- Failed
- Favorites

Steps to create a custom filter

- Add a filter name
- Choose the condition option
- Add the filters (up to 5)

New filter ✕

Filter Name

Favorite

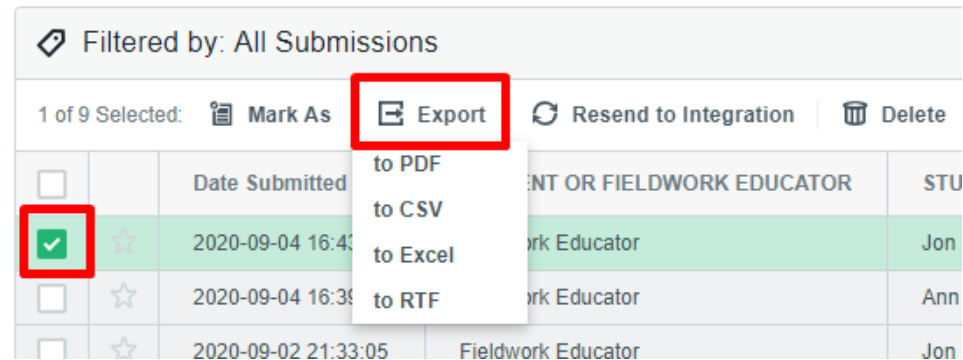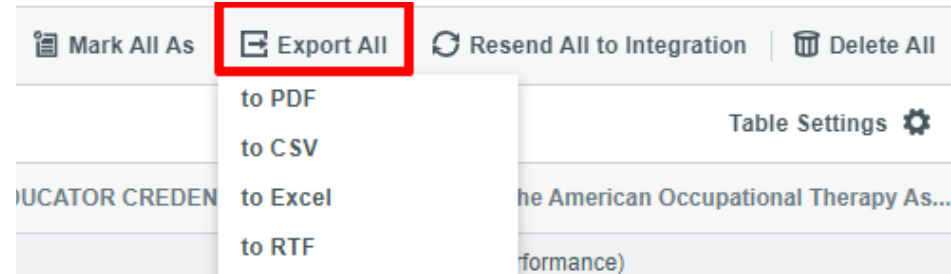Search for all records where **All** ▾ of the following are true:

| Favorite | ▾ | is | ▾ | Yes | ▾ | ➕ ➖ |

Cancel **Save and Search**

Note: Custom Reports are only visible to the user who creates them
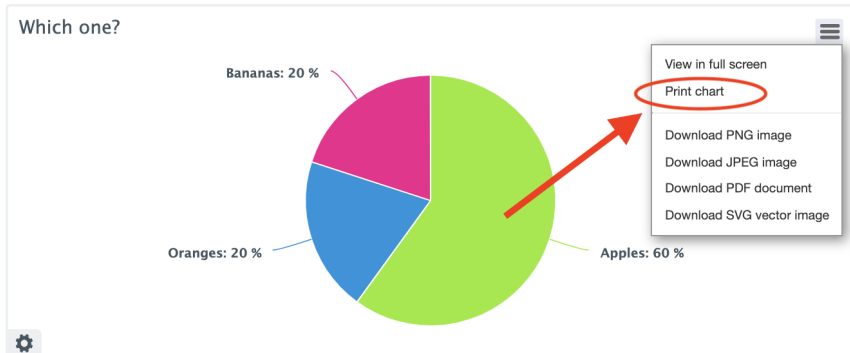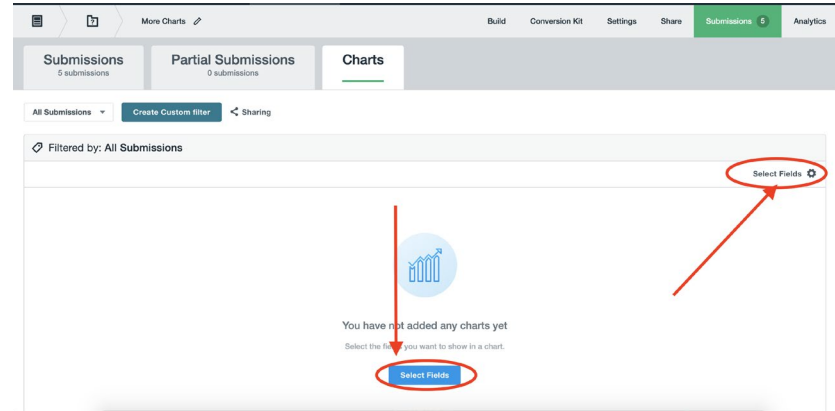
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Data export

- Export formats: PDF, Excel, CSV, RTF(Word)

- Export all submissions

- Export one or some submissions

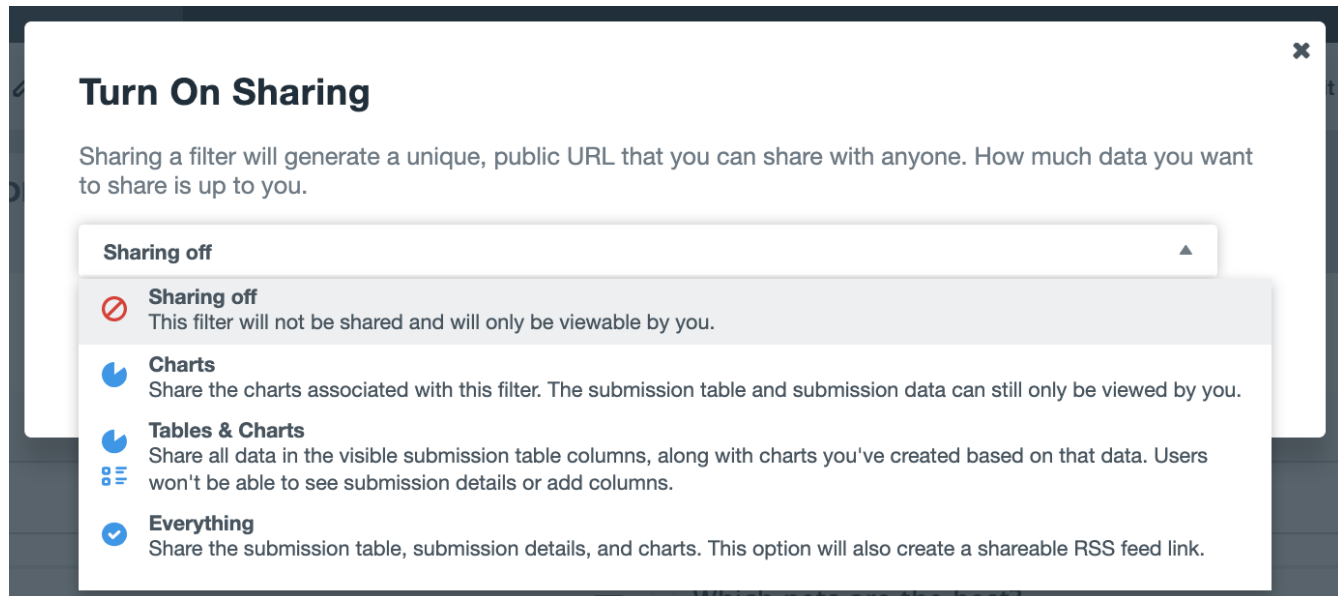- Export submission reports

Create charts

Question types can create charts

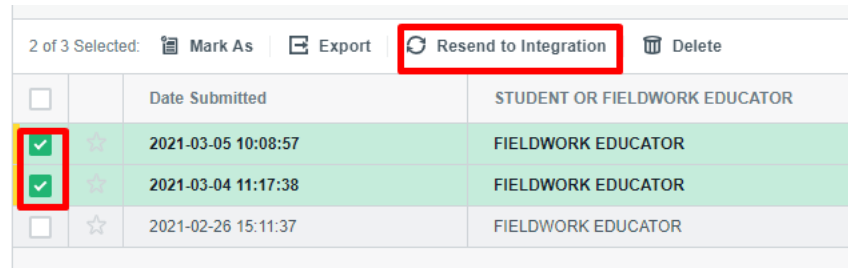- Dropdown list
- Checkbox
- Radio button
- Matrix
- Number
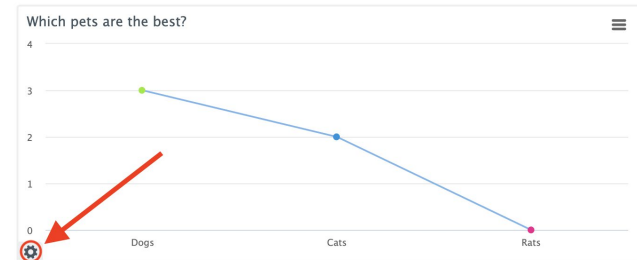
Share data with others

- Charts only
- Tables and Charts
- Everything

Resend the PDU certificate

1. Log into **Formstack Forms**
2. Go to **Forms**
3. Hoover your mouse over the **final form** and select "**Submissions**"
4. Check the box(es) in front of the submission(s) you want to resend the certificate
5. Click **Resend to Integrations**, if you see a dropdown list, select **Formstack Documents**.
6. The certificate and the email will be auto-sent to the FWEs

Transfer Submission Data

1. Export the submission from the source form in both CSV and PDF format

2. Import the submission to the destination form from the CSV file
   Make sure to map the fields correctly

3. Compare the imported data with the PDF file and make changes as needed

4. Delete the original data from the source form

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Questions or Support

AOTA Customer Service

customerservice@aota.org