

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

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Where are the submissions

Mid-term submission



Final submissions





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



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

Choose which columns you'd like to display in the form submission table. If you want to change their order, just drag and drop them into your preferred order,		
Visible Columns	Hidden Columns	
1 Date Submitted	+ Unique ID	
+ Short Answer	+ Browser	
+ Signature	+ IP Address	
	+ Location	
	+ Long Answer	
	+ Checkbox	
	-1- Radio Buttons	
	In Dropdown List	
	-th Number	
	+ Name	
	+ Email	
	+ Phone	



Mark Submissions

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

	🗐 Mark All As	Export All	
	Read		
	Unread		
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	Unfavorite		3 (F

S	56 sub	missions	Partial Submissions 0 submissions	Charts	
All S	ubmissi	ons 🔻 Cre	ate Custom filter 🔁 Import data		
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4 of 5	6 Selec	ted: 📋 Mark A	s i Export i Delete		
		Head I Upread			
~	*	² Favorite	11		
~	*	2 Unfavorite	33		
~	*	2016-11-01 08:10:00			
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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		х
Filter Name Favorite		
Search for all records where All • of the following are true:		
Favorite • is •	Yes	• 0 0
	Cance	Save and Search

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



Data export

- Export formats: PDF, Excel, CSV, RTF(Word)
- Export all submissions
- Export one or some submissions
- Export submission reports

📋 Mark All As	Export All	C Resend All to Integration 🗊 Delete All
	to PDF to CSV	Table Settings 🍄
UCATOR CREDEN	to Excel	he American Occupational Therapy As
	to RTF	formance)

Filtered by: All Submissions						
1 of 9	Select	ed: 📋 Mark As	🗄 Export	${\cal G}$ Resend to Integration ${\ensuremath{\overline{m m}}}$	Delete	
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	\$	2020-09-04 16:39	to RTF	ork Educator	Anr	
	54	2020-09-02 21:33	:05 Field	work Educator	Jon	



Create charts

Question types can create charts

- Dropdown list
- Checkbox
- Radio button
- Matrix
- Number









Share data with others

- Charts only
- Tables and Charts
- Everything

Turn On Sharing

Sharing a filter will generate a unique, public URL that you can share with anyone. How much data you want to share is up to you.





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Resend the PDU certificate

- 1. Log into Formstack Forms
- 2. Go to Forms
- Hoover your mouse over the final form and select "Submissions"
- Check the box(es) in front of the submission(s) you want to resend the certificate
- 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
- 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



AOTA Customer Service

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