American
Occupational Therapy
Association

Fieldwork Performance Evaluation (FWPE) Training – Start A New Cycle
March 26 & April 30, 2021

Platform - Formstack

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

- Formstack Documents – PDU Certificate
  - ➢ AOTA Certification

*** Please note: separate accounts

NOT To Do List for a New Cycle

- Do NOT copy forms

- Do NOT delete submissions from the current cycle

To Do List for a New Cycle

- Validate all the submissions from the previous year

- Archive the submission data from the previous cycle (Optional)

- Create new submission reports

- Review settings for forms and certificate

- Create new portal(s)

Validate submissions for the current cycle

- Delete the test evals

- Confirm all the evals are received

- Confirm all the evals are submitted correctly

- Confirm all the certificates are sent correctly

Archive submissions for the current cycle

Export the submissions for the current cycle (both mid-term and final)

1. Log into Formstack Forms
2. Go to "Forms"
3. Hoover your mouse over the form and select "Submissions"
4. Click "Export All"
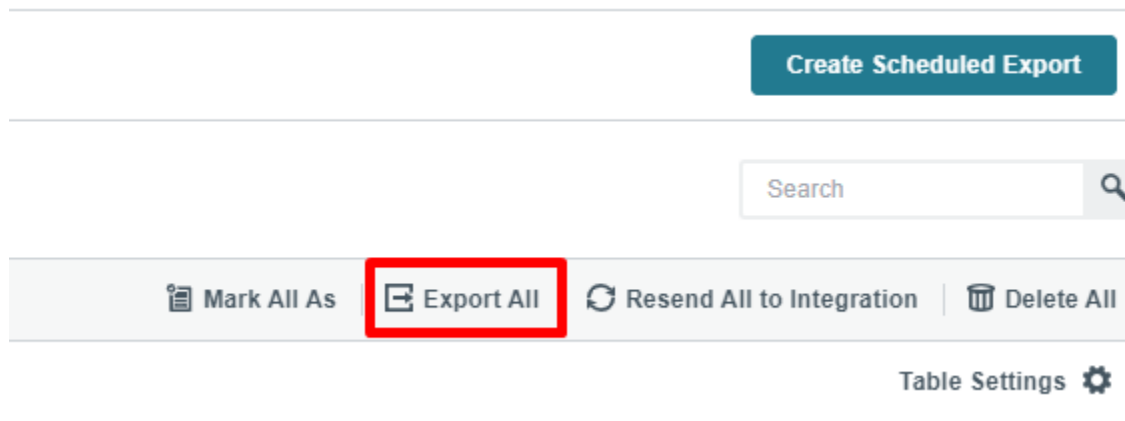
Create New Submission Reports

- Create one for the current cycle

Filter Name

2020 Cycle

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

Date Submitted ▾ | is before ▾ | 3/26/2021 📅

Cancel **Save and Search**

- Create one for the new cycle

Filter Name

2021 Cycle

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

Date Submitted ▾ | is after ▾ | 3/26/2021 📅

Date Submitted ▾ | is before ▾ | 3/26/2022 📅

Cancel **Save and Search**

Review the Settings

Email signature and From Email address

- ✓ Notification emails for <u>both mid-term and final form</u>
- ✓ Confirmation emails for mid-term form
- ✓ Certificate in Documents
- ✓ Certificate email in Documents

Create New Portal(s)

- Copy the existing portal

- Add participants

- Delete the old portals

Questions or Support

AOTA Customer Service

customerservice@aota.org