



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)

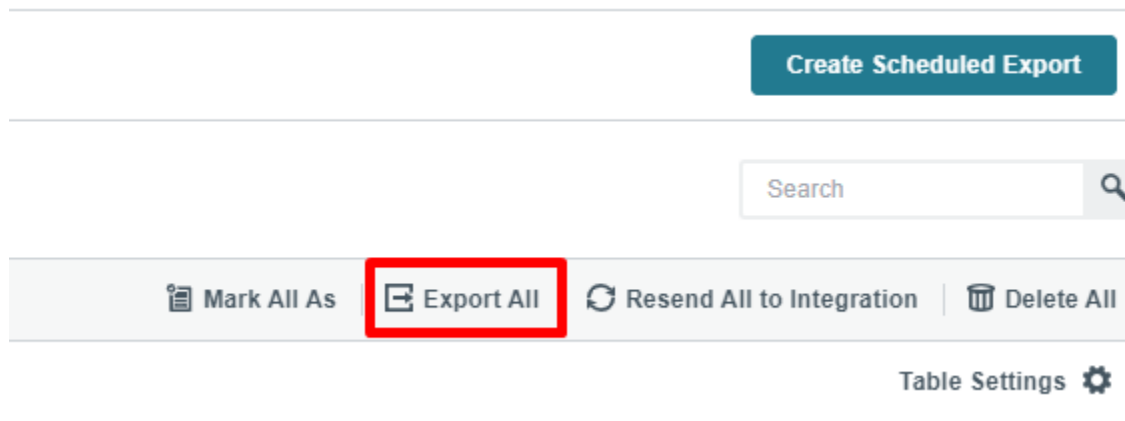
Validate submissions for the current cycle

- 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 both mid-term and final form
- ✓ Confirmation emails for mid-term form
- ✓ Certificate in Documents
- ✓ Certificate email in Documents

The screenshot displays an email configuration interface. At the top, there are three columns: 'EMAIL FROM', 'NAME', and 'EMAIL ADDRESS'. The 'EMAIL FROM' dropdown is set to 'Custom Address', 'NAME' is 'Junhua Liu', and 'EMAIL ADDRESS' is 'jlu@aota.org'. A yellow warning box below states: 'Emails are sent from noreply@formstack.com (or the default email address set in your account's SMTP Settings). Mapping the "From" address to allow you to reply to that email address.' Below this, the 'TO' field is set to 'FIELDWORK EDUCATO...'. The 'SUBJECT' field is 'AOTA - Fieldwork Performance Evaluation Final OTAS'. Under 'CONTENTS', the 'Custom Message' radio button is selected. The 'MESSAGE' section shows a rich text editor with a toolbar. The email body text reads: 'Hi FIELDWORK EDUCATO... Thank you for submitting your final evaluation. Attached is a copy of your evaluation. Regards, Junhua Liu, Academic Fieldwork Educator, AOTA'. The signature 'Junhua Liu, Academic Fieldwork Educator, AOTA' is highlighted with a red box.

Create New Portal(s)

- Copy the existing portal
- Add participants
- Delete the old portals

FWPE 2021 - Fieldwork Educator 1 form, 1 participant [Copy Portal](#) [Settings](#) [View Portal](#)

Forms
Add the forms that you would like to share on your Portal.

[Add a Form](#)

	OTA - Fieldwork Performance Evaluation Mid-term OTAS If 2 FWEs supervise one student, please designate one of them complete the form.	0/1 COMPLETE	Edit	Performance	
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Participants
Who should be assigned to fill out this Portal?

[Add Participants](#)

Questions or Support

AOTA Customer Service

customerservice@aota.org