

FWPE Guide for AFWCs

Audience: Academic Fieldwork Coordinators (AFWCs) who manage the fieldwork program at your school and need to access the Fieldwork Performance Evaluation (FWPE) tool.

Purpose: Walk through the steps to access, distribute and customize the new FWPE tool in Formstack

Need Assistance: Contact AOTA Customer Service, customerservice@aota.org



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FWPE Tool Summary

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The new FWPE tool is hosted in Formstack. It utilizes two Formstack products for the evaluation forms and CEU certificate.

- Formstack Forms House the FWPE evaluation forms including both mid-term and final evaluations
 - Distribute the mid-term evaluation via Portals or email or external systems (such as Exxat, eValue, and etc.)
 - Notification and confirmation emails are sent to FWEs/students automatically after the forms are completed
 - Collect the evaluation results/submissions
- **Formstack Documents** Generate and send the CEU certificate after the FWEs complete the final evaluation

Workflow Diagram

The following diagram shows how the system works.



Entire process with email screenshots

- 1. Share the MID-TERM eval link with the FEWs/students either in Portals, email or external systems (such as Exxat, eValue, and etc.). Below is the portal invitation email for the mid-term form
- 2. The FWEs/students completes the MID-TERM eval. As soon as they complete the mid-term eval, they would get the notification email (see below) you set up under the mid-term eval. This email includes the link for the final and a copy of their completed mid-term eval.

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Thank you for submitting your mid-term evaluation. Attached is a copy of your evaluation.

The link for your final evaluation is listed here.

You will also be receiving a reminder email before the completion of your fieldwork.

Regards,

3. Delayed confirmation/reminder email is sent for the final eval N weeks (this is the delayed time you set for the confirmation email under the mid-term form) after the mid-term eval is completed.

Please use the link below to complete the final evaluation for: (& STUDENT NAME 0)

Click here to enter your Final Evaluation

Thank you,

4. The FWEs/students completes the FINAL eval, they would receive the notification email (see below) you set up under the final form.

Thank you for submitting your final evaluation. Attached is a copy of your evaluation.

Regards,

5. FWEs receive the CEU certificate from Formstack Documents after the FWEs complete the final evaluation

Access the new FWPE tool

- If not enrolled, go to **AOTA Website** to sign up.
- If enrolled, 2 separate welcome emails from Formstack will be sent to you in 2 weeks: Formstack Forms and Formstack Documents
 - Formstack Forms: The product houses the FWPE forms
 - Formstack Documents: The product houses the AOTA certificate for the FWEs
 - o From "Noreply@formstack.com", please whitelist this email address
 - o Formstack Forms Login Link: https://www.formstack.com/admin
 - o Formstack Documents Login Link: https://admin.formstack.com/

Sample Formstack Forms Invite:	Sample Formstack Documents Invite:



formstack	formstack
Danielle Montano has created a new account for you at Formstack	
To access your new account, go to the login page and log in with the email address and temporary password below:	Danielle Montano has invited you to join Formstack
Email: danimontanotest@gmail.com	To access your new account, click the link below:
Password: MZxwn3u7	Accept Invitation
You can also log in automatically by clicking this link. If you have any questions about this account, please contact danimontano@gmail.com.	Our Support team is here for you if you have any problems. If you need help, please email support@formstack.com or contact us at help.formstack.com.
Happy Form Building! — The Formstack Team	- The Formstack Team
	© 2020 Formstack ID. All rights reserved. This is a customer service email. Formstack, 11671 Lantern Road, Suite 300, Fishers, IN 46038

- If additional users are needed, please contact AOTA Customer Service, <u>customerservice@aota.org</u>
- If you don't receive the welcome emails after 2 weeks of your enrollment, Please try "forgot your password" with your email address so you can set a new password. Below are the links for Forms (FWPE tool) and Documents (Certificate).
 - Forms: <u>https://www.formstack.com/admin/user/login?redirect=/account/dashboard</u>
 Documents: <u>https://admin.formstack.com/login?login_challenge=0f1a6d5f05c448128e35a37826a275</u> 2f
- All the users (1-5) under the same account share the same set of forms, notification, confirmation emails and CEU certificate. If you want to create different sets of notification, confirmation emails and/or CEU certificate, you should enroll for different accounts.



Initial FWPE Setup in Formstack Forms

There are the basic settings you need to complete in Formstack Forms. Please see the detail steps at each section.

- Mid-term form email setting: Update "From" email address and email signature
 - **2 notification emails** (one for FEW, one for student): The emails which FWEs/students would receive after they complete the mid-term evaluation
 - 2 confirmation emails (one for FEW, one for student): The delayed emails which FWEs/students would receive N weeks (N=the delayed time) after they complete the mid-term evaluation
- **Final form email setting**: Update "From" email address and email signature
 - **2 notification emails** (one for FEW, one for student): The emails which FWEs/students would receive after they complete the mid-term evaluation
- Create Portals with the mid-term form and add FWEs/students as the participants

FWPE Mid-term Form Updates: Update the email messages in Formstack account for the mid-term evaluation

- o Login to Formstack Account
- Go to "Forms" Page: one mid-term form and one final form for the program(s) your school offers

Dashboard	E Forms	📴 Workspace	DE Portals	♥ 0) 🛦 ጽ 🗢	Test Account	#1 ~ !!!
m	Your uncategr folder to stay	gorized 2 forms, 4 se orized forms don't have a h organized and give other u	ubmissions ome. Don't worry, you can <u>create</u> sers access to your forms!	3		nport Form	Create
:] Move To D Copy	Delete		SORT BY	Name	•
e New Folder		AOTA - Fieldwork I Created on Aug 25, 2020 by	Performance Evaluation y Rick Preston	n Final OTAS		1 UNRE	TTTAL
		AOTA - Fieldwork I Created on Aug 25, 2020 by	Performance Evaluation y Rick Preston	n Mid-term OT/	AS	2 UNRE	AD 3 TOTAL

- Locate the form titled either or both of the options below (depending on the programs at your institution).
 - ✤ AOTA Fieldwork Performance Evaluation Mid-term OTS
 - ✤ AOTA Fieldwork Performance Evaluation Mid-term OTAS

PLEASE DO NOT MAKE ANY COPIES OF THE FORMS!! Each form has a unique URL, the pre-populated URL for the final avaluation form will not work for the copied forms.

For each form, do the following:

- Go to **Settings** when hovering over the form
- o Choose "Email and Actions"
- Choose "Edit" on <u>Notification Email</u>
 Notification email is the email the students/FWEs would get automatically after they submit the mid-term evaluaton. The email includes a copy of the completed mid-term evaluation and a link to the final evaluation.

Notifica Notificatio	tion Emails (FOR YOU) In Emails are an easy way to keep yourself (and others) informed of any new	v submissions to your form.
Add a N	lotification Email	
	Notification Email All submitted data sent to: chrislronald@gmail.com	Ø Edit ≍ Logic



• Edit "**Email From**" field in notification email settings by choosing "**Custom Email**" and then entering your name and email address

Notification Email Se	ettings	
EMAIL NAME (optional)		
Notification Email		
EMAIL FROM	NAME	EMAIL ADDRESS
✓ Custom Address		mailing@aota.org
mailing@aota.org STUDENT EMAIL FIELDWORK EDUCATOR	'S EMAIL mstack.com (or the	default email address set in your account's
reply to that email add	oing the " From " address to the e dress.	email address field on the form will allow you to

- Customize the email message and/or add your signature.
 Do not remove the merged fields except {College or University}
- Choose "Edit" on each of the <u>Confirmation Emails</u>

Confirmation email is a delayed reminder email for the final evaluation. The email includes the link to final evaluation. The delayed time is counted from the moment the students/FWEs submit the mid-term evaluation and receive the notification email.

- Delay the email to the time preferred
 - OTS 5 or 6 weeks (12-week long FW in total) The means the FWEs/students will receive the confirmation email 5 or 6 weeks after they submit the mid-term evaluation
 - OTAS 3 or 4 weeks (8-week long FW in total) The means the FWEs/students will receive the confirmation email 3 or 4 weeks after they submit the mid-term evalua tion
 - The delayed timeframe can't adjusted for individual student. If one student is only going for part-time, that student will still receive the delayed reminder email at the same time as others
- Change "**reply/from**" email address by typing your email address
- Customize the email message and/or add your signature.
 Do not remove the merged fields except {\$college or University}

Note: do not change the (prepopulation) link the emails. This link is used to populate the mid-term data to the final evaluation form.

FWPE Final Form Updates: Update the email message for the final evaluation

• Final form only has the notification emails which will be sent to the students/FWEs automatically after the final form is submitted. Please refer to the instructions for the mid-term form.

Create Portals with mid-term form and add FWEs/students as the participants

Note: **Only the mid-term form should be added to the portals**. The Final will be sent automatically based on the "delay" specified on the notification email.

You may add participants to the same portal at a later date as the initial group if needed. The delayed email will follow the same cadence as the initial timing.

- Set up portals in Formstack for different groups of participants
 - Login to Formstack Account

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• Create 2 Portals (one for Students and one for Fieldwork Educators)

If your school doesn't require students completing self-evaluation, you don't need to create student portal.

- ✤ Go to "Portals"
- Choose "Create new Portal"
- Insert the name of the portal (Student OR Fieldwork Educator)
- Choose "Create Portal"
- Optional-Upload a Custom logo and write a description
- Save Settings
- Choose the Portal from the left that was just created
- Choose "Add your First Form"
- ✤ Add the MID-TERM form to portal.
- Add portal form description including any instruction to the FWEs/students
- Set deadline (optional specific date)
- Set Reminder (optional)
- Save Settings
- Click "Go Back"

Go Back
Portal Form Settings:
Portal Form Name (visible to participants)
AOTA - Fieldwork Performance Evaluation Mid-term OTAS
Current form name: AOTA - Fieldwork Performance Evaluation Mid-term OTA

Portal Form Description (visible to participants)

Portal Form Description

- Choose "Add participants" ONLY when you are ready to send form, the participants will receive an invite email as soon as they are added to the portal. If you have multiple groups of students go to fieldwork site at a different time, you may want to create different portals for them.
 - May add individually or in bulk via CSV
- ✤ <u>Track Participants</u>
- Below is the portal screen when the the students and/or FWEs would see



aotatestsubaccount.formstack.com/portals/R5y608c52604260f	f/mXe60db3f740f877
AOT	American Occupational Therapy Association
FWP This	E 2021 - Fieldwork Educator
jliu@aota.org	
AOTA - Fieldwork Performance Evaluation If 2 FWEs supervise one student, please designate one of them	Mid-term OTAS Open Form
DUE ON 07-10-2021 BY 12:00AM	deadline > DEADLINE IN 11 DAYS

Initial Setup for CEU certificate in Formstack Documents

When a FWE completes the final evaluation form, the FWE will receive a CEU certificate via email automatically. The CEU certificate and the email associated with the certificate are generated in Formstack Documents. You will need to customize the certificate and email before the final evaluation is due.

- Certificate: Update the school logo, signature block
- Email: Update signature block, college and university name

Update the certificate with your school's information including **logo**, **signature and name block**

- Login to Formstack Documents account
- Go to the "Documents" tab
- Hover over the document titled "AOTA Certification"
- From the "Edit" drop-down, choose "Manage File"

Z	AOTA Certification Created 08/18/2020	Active	Edit 🕶
_			ඬ Copy
			× Delete
			Permissions
			📥 Overview
			Manage File
			✿ Settings
			☑ Test
			Deliver
			≓ Merge

- From "New Version" choose "Edit in Office Online"
- Click on the logo in the upper left corner
- Choose "Insert" and then "Picture"
- Choose an image file of your organization's logo to attach
- Choose "insert"
- Resize logo to height 1.32" and width 1.83"
- Follow the same steps as above to **update the signature file in the lower left corner**
- Update signature block in lower left corner by typing in that space/deleting existing text



Do not change the date field, leave as {\$Date} unless you want to remove it

• Exit out of the editor by choosing the "X" in the upper right corner. Changes are auto-saved.

Setting up the email delivery for the certificate

- From the **Document** page, choose the "**Deliver**" tab
- Choose "edit" next to Email Update the custom email message from "Deliver" tab
- Scroll to "message" and customize the body of the email message with custom header information.
- Choose "Save Delivery" at the bottom right

Note: This email and certificate will be sent to the FW educator automatically after the final evaluation. It is a separate email from the copy of the evaluation results. Only the primary educator on the Mid-term form will receive the certificate.

Print a TEST certificate

After you complete updating the certificate, you may want to print a test certificate so you can make sure the certificate looks good to you.

- Log into Formstack Documents
- Click "Edit" and select "Test" Tab

AOTA Certification



- Fill out the required information for the certificate and click "Test Document"
- The PDF version of test certificate will be downloaded on your computer
- Review the certificate



Review FWPE Submissions

The submission data from all the portals will go to the same place.

- Go to "Forms"
- Hoover your mouse over the form you need to view the results and select "Submissions"
- You can export all or export individual submission in PDF, CSV, Excel or RTF format. By default you get one PDF if you export multiple submissions.

Additional resources for the submissions

- <u>Reviewing Submissions</u>
- Go to the "**Submissions**" tab by hovering over the form name on the form page
 - Sort by "read" or "unread"
 - o <u>Create custom filter /reports</u>
 - o Import data
 - o Share using link
 - o Mark all as "read/unread" and "favorite/unfavorite"
 - o Export
 - o Delete
 - o Choose columns to display and reorder
 - o Display Charts (Select Fields to create chart)
 - o Bar, pie, line
- <u>Scheduled Exports</u> in CSV attachment
 - o Can send to Formstack Users
 - o On a regular/automatic basis (daily, weekly, monthly)
 - Can choose since last send or all submissions

How to create a custom filter/report

Below is an example on how to create a custom filter/report based on the submission dates. You can also create reports based on any field from the evaluation form.

- On the "All Submissions" screen, click "Create Custom Filter"
- Give a name for the filter name, such as 2021 Submissions
- Select "Date Submitted" as the parameter, "Is After" as the conditional operator, select the date which is a day before your start date
- Click "+" to add another parameter
- Select "Date Submitted" as the parameter, "Is Before" as the conditional operator, select the date which is a day After your end date
- Click "Save and Search"



×

New filter

Filter Name							
Search for all records where	AII	▼ of the	following are true:				
Date Submitted	•	is after	•	12/31/2020		•	0 0
Date Submitted	•	is after	Ţ	1/1/2022		•	0 😑
				Canc	el	Save an	d Search

Export submissions to individual pdfs

By default, when you export the submissions to PDF, all the submissions are in one PDF. If you want to export each submission as a separate PDF file, please change the setting with the steps below:

- Go to "Forms"
- Hoover your mouse over the form you need to view the results and select "Settings"
- Go to "Advanced PDFs"
- Turn on "One Submission per PDF"

Exporting Multiple Submissions

Choose whether you want to export all submission data into one on the length of your form, one submission may take up multiple



Transfer the data from mid-term evaluation to final evaluation

If your student or FWE submitted the final evaluation with the mid-term form by mistake, you can follow the steps below to transfer the submission data from the mid-term form to final form.

- 1. Go to forms → mid-term form → submissions
- 2. Check the submission I need to transfer, click Export→CSV

1 of 3	3 Selecte	ed: 🗃 Mark As 🔄 Export	Delete			1
		Date Submitted	Portal Participant Email	STUDENT OR FIELDWORK EDUCATOR	STUDENT NAME	STUDENT EMAIL
	软	2020-12-17 17:41:01	jenniferr@functionalkidstherapylic.com	Fieldwork Educator	Rachael Underwood	runderwood11@aol.com
	12	2020-10-29 13:58:17	jenniferr@functionalkidstherapylic.com	Student	Rachael Underwood	rachael.m.underwood@wmich.edu
		2020-10-29 12:07:19	rachael.m.underwood@wmich.edu	Student	Rachael Underwood	rachael.m.underwood@wmich.edu

- 3. Go to Forms → final form → Submissions
- 4. Click Import Data

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All Submi	ssions 👻 Create Custom fill	ter Import data < Sharing
a citta		
/ Fille	red by. All Submissions	
of 94 Sel	ected: 🗎 Mark As 🛛 🖂 Export	O Resend to Integration Delete
	Date Submitted	STUDENT OR FIELDWORK EDUCATOR
1	2020-12-23 12:24:46	FIELDWORK EDUCATOR
	2020-12-23 11:10:01	STUDENT
	2020-12-23 03:13:30	STUDENT
	2020-12-22 09:37:04	FIELDWORK EDUCATOR

- 5. Select the file you exported at the step #2
- 6. Match the fields from the exported file to the final form (This part is very important) by dragging the correct final form fields to the blank fields on the left side.
- 7. The fields on the left side are the data from the exported file
- 8. The final form fields were listed at the right side of the screen
- 9. Most of the fields have been matched automatically except the fields below
 - Time: Submission time
 - Midterm or Final: Leave blank
 - Question 1 score: Question 1 Radio
 - o Question 2 score: Question 2 Radio
 - Question 3 score: Question 3 Radio

TOTAL NUMBER OF WEEKS	100	w TOTAL NUMBER OF W.	(H)	L FUNDAMENTALS OF PRACTICE
1. Adheres to the American Occupational	20		۲	1 Adheres to the Arme can Occupational Therapy
Therapy Association's Code of Ethics and all				1. Adheres to the American Occupational Therapy
(Examples: Medicare, Medicaid, client privacy,				Question 1 Comments
social media, human subject research)			(0)	2. Adheres to safety regulators and reports/docu
Question 1 Comments	10	SQuestion 1 Commerts		2. Adheres to safety regulations and reports/docur
2. Adheres to safety regulations and	100			Question 2 Comments
reports/documents incidents appropriately. (Examples fire safety OSHA regulations body			۲	3 Ensures the safety of erd and others during all
substance precautions, emergency				3. Ensures the safety of self and others during all
procedures)				Ountbox 3 Comments
Question 2 Comments		Overston 2 Comments		I - Fundamentals of Practice Comments
3. Ensures the safety of self and others during all fieldwork related activities by anticipating	14		H	8-BASIC TENETS OF OCCUPATIONAL THERA

o I. Fundamentals of practice comments: I-Fundamentals of Practice Comments

Question 3 Comments	-	Question 3 Comments	D)	Question 3 Comments
I. Fundamentals of Practice Comments	÷	-)	I - Fundamentals of Practice Comments
A Articulates the values halisfs and distinct	-		 -	II - BASIC TENETS OF OCCUPATIONAL THERAPY
erspective of the occupational therapy				4. Articulates the values, beliefs, and distinct perspective
profession to clients and other relevant parties clearly confidently and accurately (Examples)	_			4. Articulates the values, beliefs, and distinct perspective

- Repeat the same thing for Question 4-37
 - Total Final Total

0

- 1. AOTA Code of Ethics -- 1. (Final) AOTA Code of Ehics
- Repeat for score for 2-37



8. Obtains Information	+	(a) A. (Print) Hile Articulation (a) 7. (Print) Articulates the rate
7. Articulates rationale		 (a) 5. (Final) Veloa Arboutabon
6. Role Articulation		(a) 4 (Final) Afteruities Values.
5. Value Articulation		(m) 2 (Print) Sainty Helpinove
4 Arbculates Values		(an) 1. (Frank AOTA Code of Ethic (an) 2. (Frank AOTA Code of Ethic
3. Safety of Self/Other		D Pareful
Z. Safety Regulations	🚥 2. (Frait) Sakky Negulati. 💿	Patrifiel
1 AUTA Code of Ethics	we 1 (Final) A01A Cook of O	Can Friday Torki
TOTAL		All Fields

- Fieldwork Signature: Fieldwork Educator signature
- Student signature: Student Signature
- o Browser: Browser
- o IP address: IP Address
- o Unique ID: Leave blank
- o Location: Latitude
- Portal Participant Email: Leave blank
- 10. Click "Save Import"
- 11. Confirm the data is shown in the final submission correctly
- 12. Go back to the mid-term submission and delete the original submission

Export the FWPE submissions data

- 1. Log into Formstack Forms
- 2. Go to "Forms"
- 3. Hoover your mouse over the form you want to export the data and select "Submissions"
- 4. Click "Export All" and choose the format you want to export

		Create Scheduled Export
		Search Q
🗐 Mark All As	Export All	C Resend All to Integration 🗑 Delete All
	to PDF to CSV	Table Settings 🋱
	to Excel	AME
	to RTF Formstack Doc	cuments

How to create charts on the aggregate information for each FWPE item

You can easily create simply charts for each field on the evaluation form except the comments.

- Log into Formstack Forms
- Go to "Forms"
- Hoover your mouse over the form you want to see the data and select "Submissions"
- Click "Charts"
- Click "Select Fields" to choose the fields you would like to analyze



	0 submissions	Charts			
Submissions v Creat	e Custom filter < Sharing				
Filtered by: All Submis	ssions				
				tílí	
			Verifie	ve not added any charts	vet
			rouna	to not duded any charts	101
			Select th	e fields you want to show in a ch	iart.
			Select th	e fields you want to show in a ch	art.
lect All if	you want to	create char	Select th	e fields you want to show in a ch Select Fields	s on the e
lect All if	you want to	create char	Select If	I the fields	art. 5 on the e
lect All if Choose C	you want to harts to Displ	create char	Beled #	e field you want to show in a ch	s on the e
lect All if Choose C	you want to harts to Displ	create char ay	ts for al	seech full devote any characteristic set for the second set of the second	ar.
lect All if Choose C Choose which cl	you want to harts to Displ	create char ay	ts for al	search and added any charts of the fields	s on the e
Iect All if Choose C Choose which cl Select All STUDENT	you want to harts to Displ narts you'd like to displ OR FIELDWORK EDUCAT	create char	ts for al	I the fields	s on the (
Iect All if Choose C Choose which cl Select All STUDENT	you want to harts to Displ harts you'd like to displ or FIELDWORK EDUCAT	create char ay ay in the form submis	ts for al	I the fields	s on the e

.

• **Change the chart type and data aggregate type** if needed by hoovering your mouse over the chart and select the setting gear.

Cancel Save

If it is a number field, you can use Avg, Sum, Min, or Max.



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FAQ – Submissions

How does "Partial Submissions" work?

The evaluation form is auto-saved when the FWEs/students enter text into a field and then click out of the field either to another field or off the form completely. The data is saved even the FWEs/students don't use "Save and Resume Later" feature. All the incomplete submissions are shown under "Partial Submissions" Tab. d

F	l for	mstack 🖬 Dashboard	🗏 Forms 🛱 Workspace	¤ € Portals		NEW	} Ø	💧 🔔 💽 Derek John	son 🔻
F	orms	Tuncategorized A form 2	>		Build Conve	rsion Kit Settings	Share	Submissions 25	Analytics
s	Subm 25 sub	issions Partial Submissions 0 submissions	ions Charts						
All St	ubmissio	ons 👻 Create Custom filter 🔁 Import	data 🔰 < Sharing					Search	٩
0	Filtered	d by: All Submissions				° 1	Mark All As	s 📑 Export All 🗍 🗊 I	Delete All
0 of 2	25 Select	ted: 🗎 Mark As 🛛 🖻 Export 🛛 🗑 Delete						Table Set	tings 🎝
		Date Submitted	Portal Participant Email	Long Answer		Date/Time		Radio Button	
		2019-05-10 15:11:03		Aaa					
	\$	2019-05-10 15:10:56		Aa					
	\$	2019-05-10 15:09:34		Ghgg					
	5	2019-05-10 15:09:18		Gggg					
	\$	2019-05-10 14:58:46		Ggggg					

Can you send a link for partial submission so the FWE/student can continue the evaluation?

No, no link can be generated for the partial submissions. But you can export and send the partial submission to FEWs/students so they can have a record of the partial submission. Saved link can be generated when the "**Save and Resume Later**" button is used.

How do you know whether "Partial Submissions" is turned on for the FWPE forms?

Here are the steps to check whether the "partial submissions" is turned on for the FWPE forms:

- Log into Formstack Forms → Forms
- Hoover your mouse over the form you want to check and select "Settings"
- On left side menu, you will see a green check in front of "Partial Submissions" under "Plugins"



📕 forms	Dashboard	Forms	Workspace	Portals
Forms	Forms as of Augu	st 2021	AOTA - Fieldwork	Performanc 🖉
General			>	Basic Settings
Emails & Actions				
Welcome & Submission	n Message			FORM NAME
Security				AOTA - Fieldwork Perform
User Access				WARNING: If you've a
Approvals				
Integrations				FORM URL 🕜
Plugins				https://aotatestsubaccount
Partial Submiss	sions			LANGUAGE
Advanced PDFs				English

How do you enable "Partial Submissions" for the FWPE forms?

If you don't see the partial submissions enabled for your FWPE forms, you can follow the steps below to enable the feature.

- Log into Formstack Forms → Forms
- Hoover your mouse over the form you want to enable the feature and select "Conversion Kit"
- Locate "Partial Submissions" and click "Add"

Forms	Ducategorized	Toronto Lead Capture Form	0				Build	Conversion Kit	Settings	Share	Submissions	Analytics
.I- Conversion	Kit (ENABLED)											
A : A/B Te	esting			Add	f	Facebook Autofill						Add
Partial	I Submissions			Add	×	Field Bottlenecks						Link
Google	le Analytics			Add	ŝ	Campaign Tracking						Add

• Check "On" for Run mode

AOTA - Fieldwor	k Performanc 🖉 Build Conversion Kit Settings Share Submissions (a) Analytics
General	Partial Submissions
Emails & Actions	Run mode
Welcome & Submission Message	
Security	ON OFF OFF OFF OFF OFF OFF
User Access	(Recommended for configuring and troubleshooting)
Approvals	
Integrations	Unable to Capture: Ellin Unland and Signature fields will not be included in Partial Submissions. Other fields will still be contured
Plugins	nie opioau and Signature neius will not be included in nartial submissions. Other neius will suit be captured.
Partial Submissions	Settings
Advanced PDFs	Partial Submissions allows you to automatically capture all content the users enter in your form without needing them to submit the entire form.
	After you publish the form, you will start receiving partial submissions under the Submissions Tab > Partial Submissions.

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You can also set up an email digest of all of the partial submissions that come in during a • certain time period (Every 6, 12, or 24 hours).

How to send the final link to the second FWE who didn't complete the mid-term eval

- Go to the form on the "Forms" page •
- Choose "Submissions" when hovering over the Mid-term form name •



- Click the mid-term submission that the 1st FWE completed
- FWE to 2nd FWE

Ch	loose "Edit lange the fieldwork ema	ail address from the 1 st
	Submission 1 of 9	
		Export Delete Last Name Li
	FIELDWORK EDUCATOR CREDENTIALS	Phd
	FIELDWORK EDUCATOR'S EMAIL	danielle.montano@formstack.com
	COLLEGE OR UNIVERSITY	aota
	ARE THERE ADDITIONAL FIELDWORK EDUCATOR(S) WORKING WITH THIS STUDENT?	YesNo

Click "Save"

Midterm or Final

Click "resend notification email"

« Back to All Submission	5		
⁾ E Submission	1 of 4		
🖉 Edit 🕅 Resend	Notification Email	🖃 Export	Delete

Midterm 🔹

Click "Add all participants"



dditional emails	is to any of the current par	ticipants, as well as add any
HOOSE PARTICIPANTS		
Search for Emails		Add all participants
{\$103556955 STUDENT E	E • {\$103556958 FIE	LDWOR
DD CUSTOM EMAIL(S)		
List additional emails, senar	rated by commas	
List additional emails, sepai		

- Click "Send" to send the email to the 2nd FWE
- Click "Edit" again
- Change the fieldwork educator's email address to the 1st FWE so the data remains accurate

FAQs - Portal

Can the portals be reused?

Yes, you can remove the participants from the portal after the participants complete the mid-term evaluation and invite new participants to the same portal.

Where is the submission data for your portal?

The submission data from all the portals would go to the same place. You can locate them at submissions for the midterm form.



Should I add the FEW to the portal multiple times if the FEW supervises multiple students?

No, you only need adding the FWE's email in the portal ONCE even if he/she supervises multiple students. The midterm evaluation is a blank form. The FWE completes the mid-term evaluation for each student with the same link in the portal invitation email. The FWE will receive separate email for each student with unique link to the final evaluation after the mid-term evaluation is submitted.

Can I re-send an initial invite for the midterm evaluation?

Yes, you can resend the initial invitation email for the midterm evaluation with one of three ways below:

- 1. Go to the Portal the FWE belongs → Click "**Performance** " next to the mid-term → Find the FWE's email and click "Send Reminder"
- 2. Remove the FWE's email from the portal and re-add it back
- 3. Share the mid-term link outside of Formstack



If the FEW can't receive the invitation email from the portal, you can send the mid-term evaluation link outside of the portal by emailing the URL directly.

- Go to Forms
- Hoover your mouse over the mid-term form and select Share



How to resend the notification email

If anyone does not receive the delayed email or for any reason, you can resend the notification email which includes the link to the final evaluation and the PDF copy of the mid-term evaluation results.

- Go to the form on the "**Forms**" page
- Choose "Submissions" when hovering over the form name



Market Resend Notification Email

• Click "Add all participants"

/ Edit

Export

Delete



You can resend notifications to any of the current particip additional emails	pants, as well as add any
CHOOSE PARTICIPANTS	
Search for Emails	Add all participant
{\$103556955 STUDENT E • {\$103556958 FIELDW	VOR
ADD CUSTOM EMAIL(S)	
List additional emails, separated by commas	
Total: Resending email notifications to 2 people.	
Cancel	Send

• Click "Send"

How to update the mid-term submission and resend the notification email to FEW if the FEW submitted the eval as a student by mistake

If FWEs selects "Student" by mistake when they submit the mid-term evaluation, the system would consider it as a self-evaluation from a student. Therefore the notification email and the reminder email would be sent to the student instead of the FWE. Below are the steps to correct the submission in the backend.

- 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"
- Change the first field to "Fieldwork Educator" and add the fieldwork educator credentials

🖉 Edit 🛛 🖓 Resend Notific	cation Email 📑 Export 🗑 Delete
	PERSONAL INFORMATION
STUDENT OR FIELDWORK	Fieldwork Educator •
EDUCATOR	



FIELDWORK	
EDUCATOR	
CREDENTIALS	

- If your FEW sends you their signature file, you can upload it to the Fieldwork educator's signature section.
 Otherwise, you may want to add a note in the summary box why the submission doesn't have the FWE signature
- Click "Save"
- Click "Resend notification email" and Check the box for Fieldwork Educator's email

Resend Notification Emails

Select All		
[] {\$102319671 STUDENT EMAIL}		
{\$102319674 FIELDWORK EDUCATOR'S EMAIL}		
Add custom email(s)		
test@example.com, johndoe@example.com		
Resending email notifications to 0 people.		
	Cancel	Send

• Click "**Send**" so the fieldwork educator can receive a copy of the mid-term evaluation and the link for the final evaluation.

How to send the mid-term results and final evaluation link to a different FWE

If a student have 2 FWEs, one of them completes the mid-term evaluation. The other one needs to complete the final evaluation. Below are the steps:

- Go to the form on the "Forms" page
- Choose "**Submissions**" when hovering over the Mid-term form name

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

- Click the mid-term submission that the 1st FWE completed
- Choose "Edit"
- Change the **fieldwork email address** from the 1st FWE to 2nd FWE



Submission 1 of 9	
CEdit Transformed Resend Notification Email	Export Delete
FIELDWORK EDUCATOR CREDENTIALS	Phd
FIELDWORK EDUCATOR'S EMAIL	danielle.montano@formstack.com
COLLEGE OR UNIVERSITY	aota
ARE THERE ADDITIONAL FIELDWORK EDUCATOR(S) WORKING WITH THIS STUDENT?	Yes Yes No
Midterm or Final	Midterm •

- Click "Save"
- Click "resend notification email"

« Back to A	II Submissions
🔋 🔳 Sub	mission 1 of 4
🖉 Edit	ি Resend Notification Email

• Check the box for the fieldwork educator's email

L -	Select All	
	(\$97495694 STUDENT EMAIL)	
< <	{\$97495697 FIELDWORK EDUCATOR'S EMAIL}	
dd cus	ustom email(s)	
test@	t@example.com. johndoe@example.com	

- Click "Send" to send the email to the 2nd FWE
- Click "Edit" again
- Change the fieldwork educator's email address to the 1st FWE so the data remains accurate

FAQ – Documents

How to generate additional certificates if there are two or more FWEs for a student

If each FWE fills out their own evaluation form, each of them will receive the certificate automatically
In this case, you will receive more than one FWE evaluation for one student. If the fieldwork educators need to
split the hours, please make sure they only enter the weeks they qualify for on the form. For example, if 2 FWEs

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supervise one student for 8 weeks. Each of them only gets 4 weeks of CEU. Therefore, they should only enter 4 weeks on the forms. The certificate is generated with the information on the form automatically.

- If only one of them fill out the form, you will need generating the additional certificate manually. You have 2 choices:
 - 1. Send the certificate outside of Formstack
 - Log into Formstack Documents → AOTA Certification
 - Go to Manage File
 - Click to download

AOTA Certification



- Modify the certificate in Word
- Save as a PDF file

AOTA Certification

• Send the certificate via your email

2. Send the certificate in Formstack Documents

- Log into Formstack **Documents** → AOTA Certification
- Go to Merge → Upload Data
- Download the CSV template

Overview Manage File Settings Fi	eld Map Test Deliver Merge		
Merge Documents	% Integrate & Automate	🖨 Upload Data	😐 Manual Data Entry
Now that you have finished the setup of your document, the last step is to decide which data source you will use to populate your documents. You can populate your documents through a variety of Integrations, from using data from a Formstack form to integrating with a CRM, like Salesforce. Check out this help article about all of the integrations Formarch forcingents of the	Upload your data via a CSV Please upload a CSV (comma separated) file with the columns to your merge fields in your document clic	field names (columns) in the first row. On t k <mark>here t</mark> o download a CSV template for this	he next step, you will map the individual document.
watch this 2-minute video below.	Choose File No file chosen or Import from URL		
]	
Remotack c		Next Step: Match Fields	

- Fill in the data in the CSV template and Save
- Choose File: the template you saved above
- Click "Next Step: Match Fields"
- Check the merge fields
- Click "Merge the Data!"
- The certificate and the email will be sent to the fieldwork educator's email address you listed in the CSV file automatically



How to resend the 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.

2 of 3 Select	ed: 🔋 Mark As 🛛 🖃 Export 🛛 📿	Res	end to Integration	🛅 Delete
	Date Submitted		STUDENT OR FIE	ELDWORK EDUCATOR
I	2021-03-05 10:08:57		FIELDWORK EDU	JCATOR
Z	2021-03-04 11:17:38		FIELDWORK EDU	JCATOR
2	2021-02-26 15:11:37		FIELDWORK EDU	ICATOR

6. The certificate and the email will be auto-sent to the FWEs

How to disable the certificate auto-delivery

The PDU certificate will be auto-sent to the FWEs after the FWE completes the final evaluation. If you prefer using your existing systems (Exxat or other systems) sending out the certificate, you can disable the Formstack cerfiticate by following the steps below.

- Log into Formstack Forms
- Go to "Forms"
- Hoover your mouse over the final form and select "Settings"
- Click "Integration"-->"Formstack Documents"
- Check the "OFF" box

General	Formstack Documents	🤤 Rem	🤤 Remove	
Emails & Actions	Run mode			
Welcome & Submission Message				
Security	ON Form submission data will be sent to	 TEST Form submission data will be sent to 	OFF Form submission data will not be sent to	
User Access	Form submission data will be sent to Formstack Documents in production	Formstack Documents in test mode	Formstack Documents	
Approvals	mode		(Recommended for configuring and troubleshooting)	
Integrations				
Formstack Documents >				