

## 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](mailto:customerservice@aota.org)

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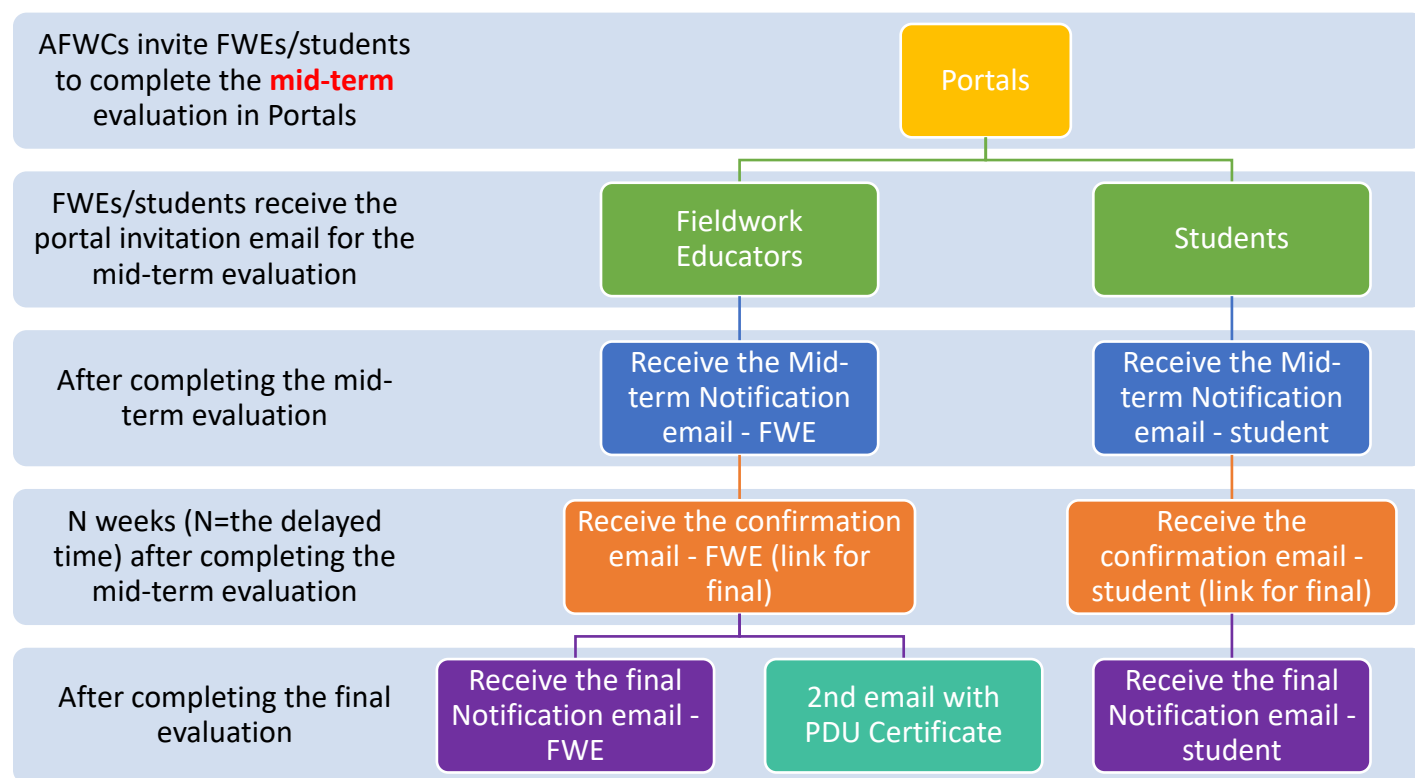
## FWPE Tool Summary

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.

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:

[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.

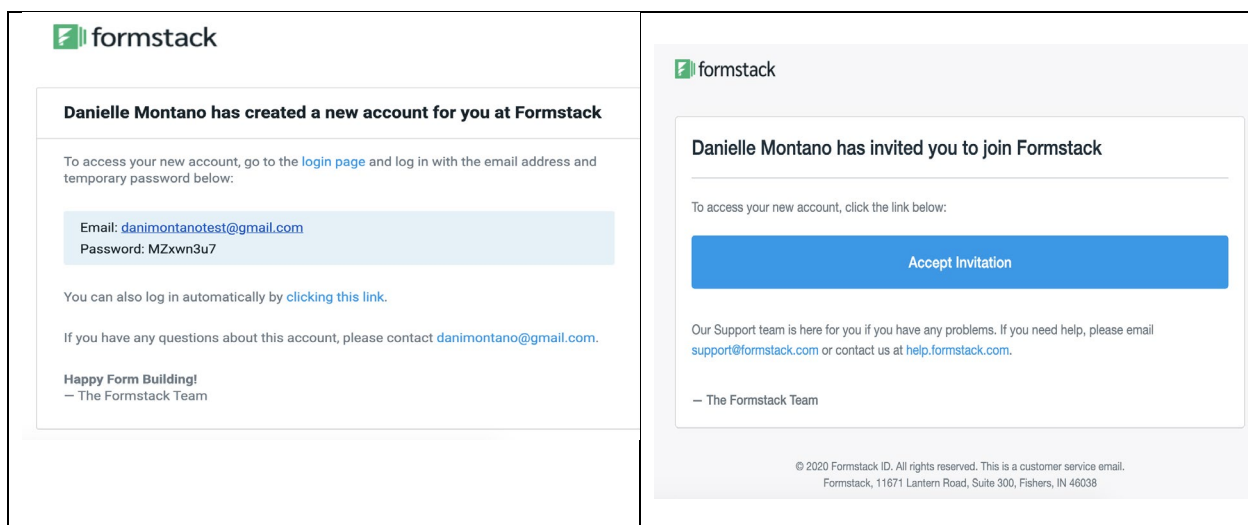
Regards,

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
  - From "[Noreply@formstack.com](mailto:Noreply@formstack.com)", please whitelist this email address
  - Formstack Forms Login Link: <https://www.formstack.com/admin>
  - Formstack Documents Login Link: <https://admin.formstack.com/>

<a href="#">Sample Formstack Forms Invite:</a>	<a href="#">Sample Formstack Documents Invite:</a>
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- If additional users are needed, please contact AOTA Customer Service, [customerservice@aota.org](mailto:customerservice@aota.org)
- **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: <https://www.formstack.com/admin/user/login?redirect=/account/dashboard>
  - ❖ Documents: [https://admin.formstack.com/login?login\\_challenge=0f1a6d5f05c448128e35a37826a2752f](https://admin.formstack.com/login?login_challenge=0f1a6d5f05c448128e35a37826a2752f)
- **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.

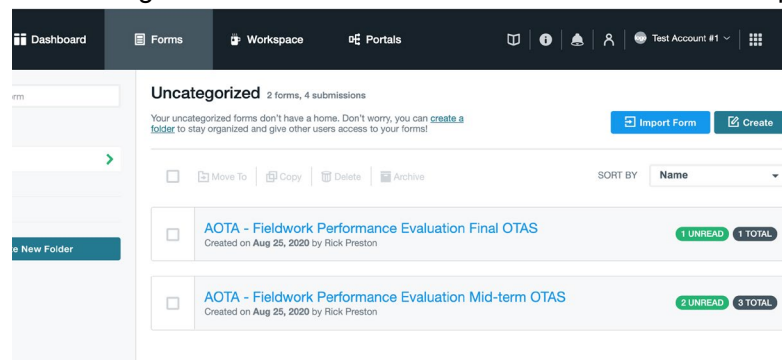
## Initial FWPE Setup in Formstack Forms

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

- [Login](#) to Formstack Account
- Go to “**Forms**” Page: **one mid-term form and one final form** for the program(s) your school offers



- Locate the form titled either or both of the options below (depending on the programs at your institution).
  - ❖ ACTA - Fieldwork Performance Evaluation **Mid-term OTS**
  - ❖ ACTA - 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 evaluation form will not work for the copied forms.

**For each form, do the following:**


- Go to **Settings** when hovering over the form
- Choose “**Email and Actions**”
- Choose “**Edit**” on [Notification Email](#)

**Notification email is the email the students/FWEs would get automatically after they submit the mid-term evaluation. The email includes a copy of the completed mid-term evaluation and a link to the final evaluation.**

### Notification Emails (FOR YOU)

Notification Emails are an easy way to keep yourself (and others) informed of any new submissions to your form.

[Add a Notification Email](#)

	<p>Notification Email All submitted data sent to: chrisonald@gmail.com</p>	<a href="#">Edit</a>	<a href="#">Logic</a>	<a href="#">Test</a>	<a href="#">-</a>
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- Edit “**Email From**” field in notification email settings by choosing “**Custom Email**” and then entering your name and email address

**Notification Email Settings**

EMAIL NAME (optional)

EMAIL FROM	NAME	EMAIL ADDRESS
<input checked="" type="checkbox"/> Custom Address <input type="text" value="mailing@aota.org"/> STUDENT EMAIL FIELDWORK EDUCATOR'S EMAIL	<input type="text" value=""/>	<input type="text" value="mailing@aota.org"/>

Formstack.com (or the default email address set in your account's SMTP Settings). Mapping the "From" address to the email address field on the form will allow you to reply to that email address.

- 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 [Confirmation Emails](#)  
**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 evaluation
    - 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

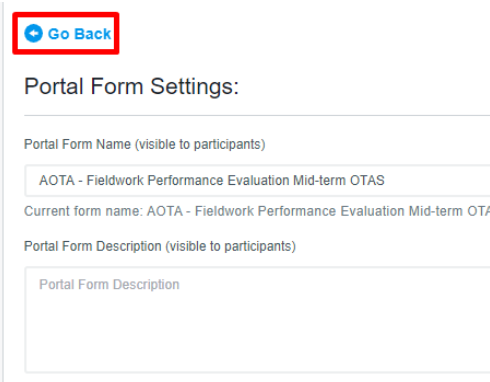
**Note: Only the mid-term form should be added to the portals. The Final will be sent automatically based on the "delay" specified on the notification email.**

**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

- 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.

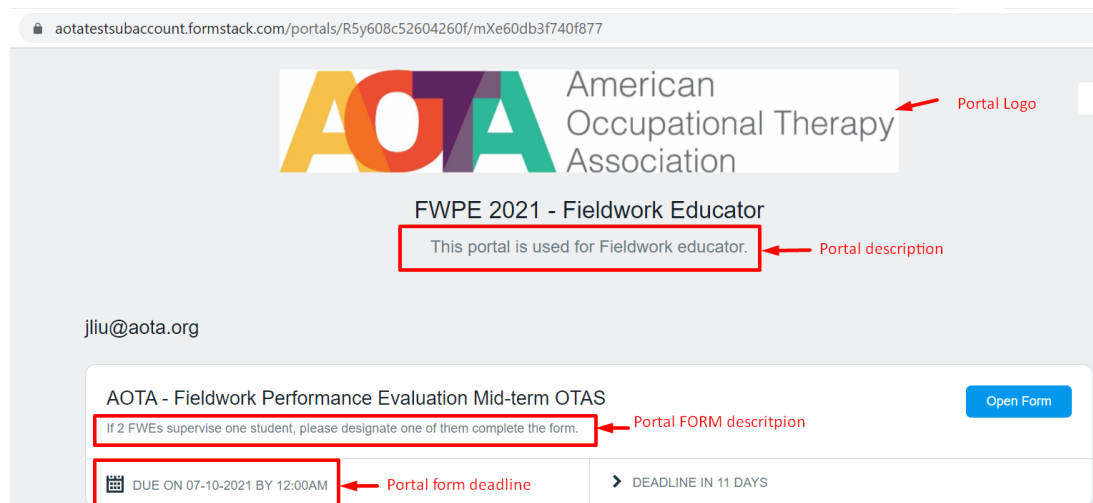
- ❖ Go to **"Portals"**
- ❖ Choose **"Create new Portal"**
- ❖ Insert the name of the portal (Student OR Fieldwork Educator)
- ❖ Choose **"Create Portal"**
- ❖ *Optional-Upload a Custom logo and write a description*
- ❖ Save Settings
- ❖ Choose the Portal from the left that was just created
- ❖ Choose **"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"**



The screenshot shows a 'Go Back' button with a left-pointing arrow, highlighted with a red box. Below it is the 'Portal Form Settings' section, which includes a text input field for 'Portal Form Name (visible to participants)' containing 'AOTA - Fieldwork Performance Evaluation Mid-term OTAS', a line of text showing 'Current form name: AOTA - Fieldwork Performance Evaluation Mid-term OTA', and another text input field for 'Portal Form Description (visible to participants)'.

- ❖ 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
- ❖ [Track Participants](#)
- ❖ Below is the portal screen when the the students and/or FWEs would see





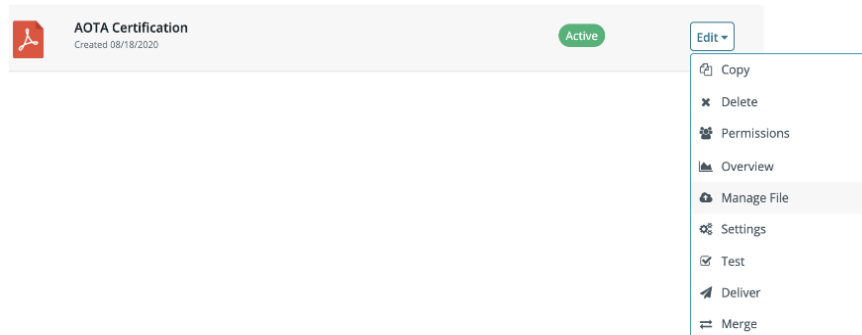
## Initial Setup for CEU certificate in Formstack Documents

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"**



- 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

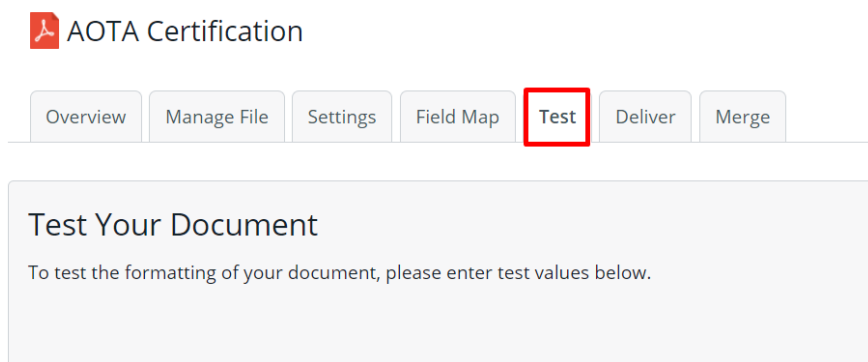
- From the **Document** page, choose the “**Deliver**” tab
- Choose “**edit**” next to Email Update the custom email message from “**Deliver**” tab
- Scroll to “**message**” and customize the body of the email message with custom header information.
- Choose “**Save Delivery**” at the bottom right

*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



- 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

- [Reviewing Submissions](#)
- Go to the "**Submissions**" tab by hovering over the form name on the form page
  - Sort by "**read**" or "**unread**"
  - [Create custom filter /reports](#)
  - [Import data](#)
  - [Share using link](#)
  - Mark all as "read/unread" and "favorite/unfavorite"
  - Export
  - Delete
  - Choose columns to display and reorder
  - [Display Charts](#) (Select Fields to create chart)
  - Bar, pie, line
- [Scheduled Exports](#) in CSV attachment
  - Can send to Formstack Users
  - 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

2021

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

Date Submitted

is after

12/31/2020

Date Submitted

is after

1/1/2022

Cancel

Save and 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 or the length of your form, one submission may take up multiple

One Submission Per PDF

## 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 Selected		Mark As	Export	Delete			
<input type="checkbox"/>	Date Submitted	Portal Participant Email	STUDENT OR FIELDWORK EDUCATOR	STUDENT NAME	STUDENT EMAIL		
<input checked="" type="checkbox"/>	2020-12-17 17:41:01	jenniferr@functionalkidstherapyllc.com	Fieldwork Educator	Rachael Underwood	runderwood11@aol.com		
<input type="checkbox"/>	2020-10-29 13:58:17	jenniferr@functionalkidstherapyllc.com	Student	Rachael Underwood	rachael.m.underwood@wmich.edu		
<input type="checkbox"/>	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**

All Submissions ▼ Create Custom filter Import data ← Sharing

Filtered by: All Submissions

0 of 94 Selected: Mark As Export Resend to integration Delete

<input type="checkbox"/>	Date Submitted	STUDENT OR FIELDWORK EDUCATOR
<input type="checkbox"/>	2020-12-23 12:24:46	FIELDWORK EDUCATOR
<input type="checkbox"/>	2020-12-23 11:10:01	STUDENT
<input type="checkbox"/>	2020-12-23 03:13:30	STUDENT
<input type="checkbox"/>	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
  - Question 2 score: Question 2 Radio
  - Question 3 score: Question 3 Radio

The screenshot shows a matching interface with two columns. The left column contains fields from an exported file, and the right column contains fields from the final form. Red boxes and arrows indicate the following matches:

- TOTAL NUMBER OF WEEKS** (left) is matched to **1. Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations** (right).
- Question 1 Comments** (left) is matched to **2. Adheres to safety regulations and reports/incidents appropriately** (right).
- Question 2 Comments** (left) is matched to **3. Ensures the safety of self and others during all fieldwork related activities by anticipating** (right).
- Question 3 Comments** (left) is matched to **I. Fundamentals of Practice Comments** (right).
- I. Fundamentals of Practice Comments** (left) is matched to **1. Fundamentals of Practice Comments** (right).

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

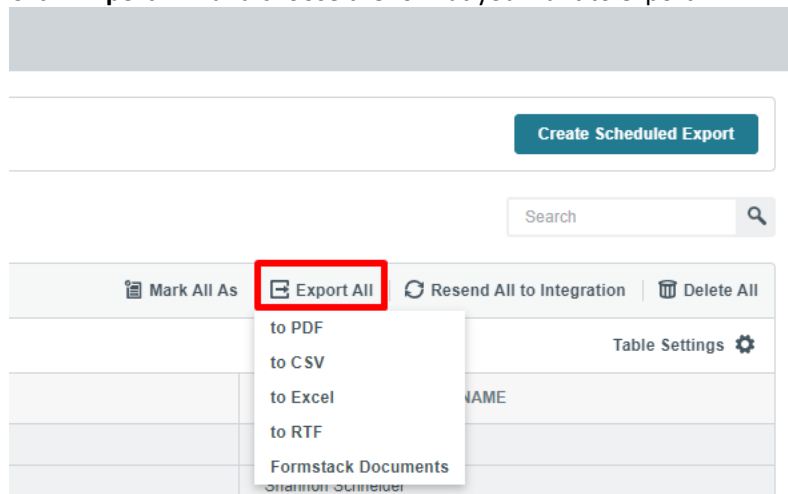
- Repeat the same thing for Question 4-37
  - Total - Final Total
  - 1. AOTA Code of Ethics -- 1. (Final) AOTA Code of Ethics
  - Repeat for score for 2-37



- Fieldwork Signature: Fieldwork Educator signature
  - Student signature: Student Signature
  - Browser: Browser
  - IP address: IP Address
  - Unique ID: Leave blank
  - 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

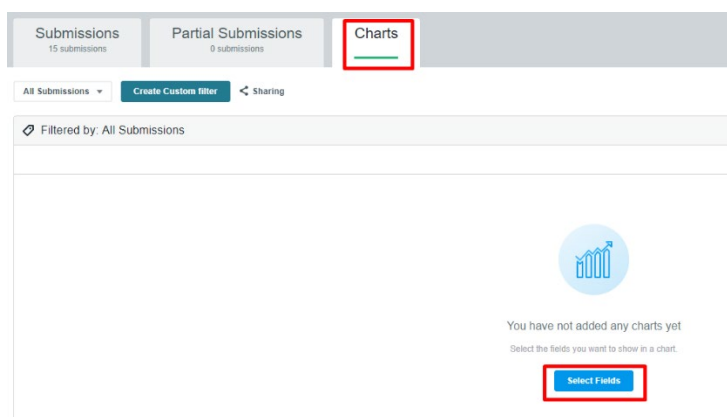
1. Log into Formstack Forms
2. Go to **"Forms"**
3. Hoover your mouse over the form you want to export the data and select **"Submissions"**
4. Click **"Export All"** and choose the format you want to export



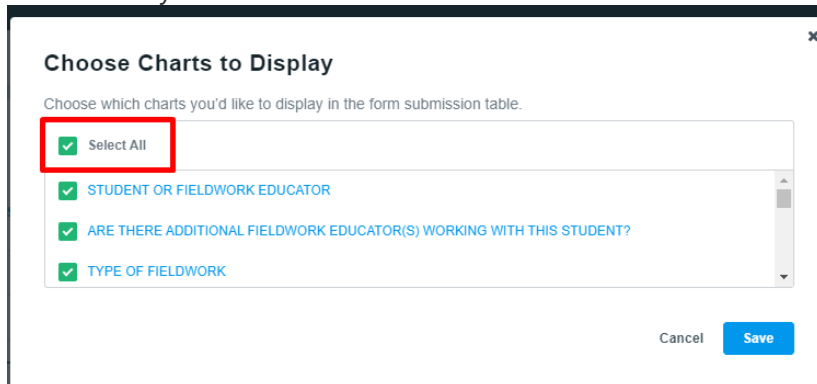
## How to create charts on the aggregate information for each FWPE item

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

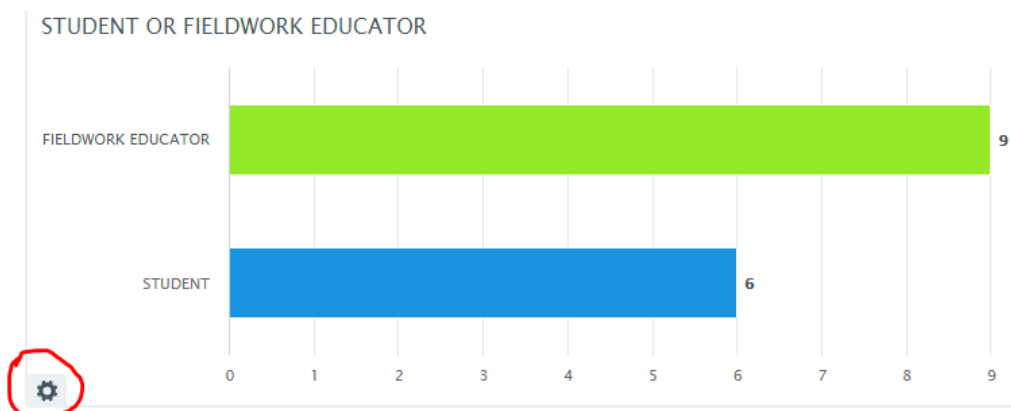
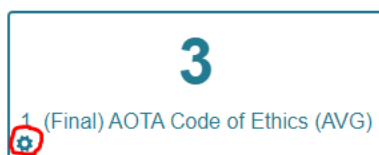


- **Select All** if you want to create charts for all the fields on the eval



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

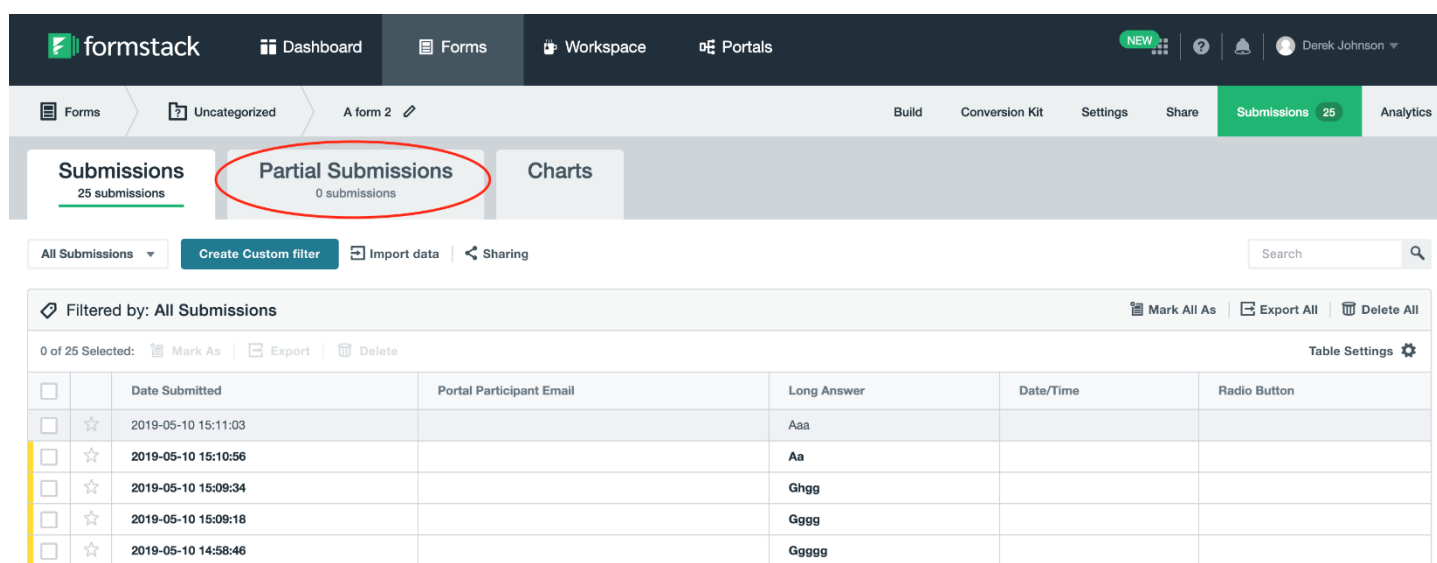
*If it is a number field, you can use Avg, Sum, Min, or Max.*



## 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



	Date Submitted	Portal Participant Email	Long Answer	Date/Time	Radio Button
<input type="checkbox"/>	2019-05-10 15:11:03		Aaa		
<input type="checkbox"/>	2019-05-10 15:10:56		Aa		
<input type="checkbox"/>	2019-05-10 15:09:34		Ghgg		
<input type="checkbox"/>	2019-05-10 15:09:18		Gggg		
<input type="checkbox"/>	2019-05-10 14:58:46		Ggggg		

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

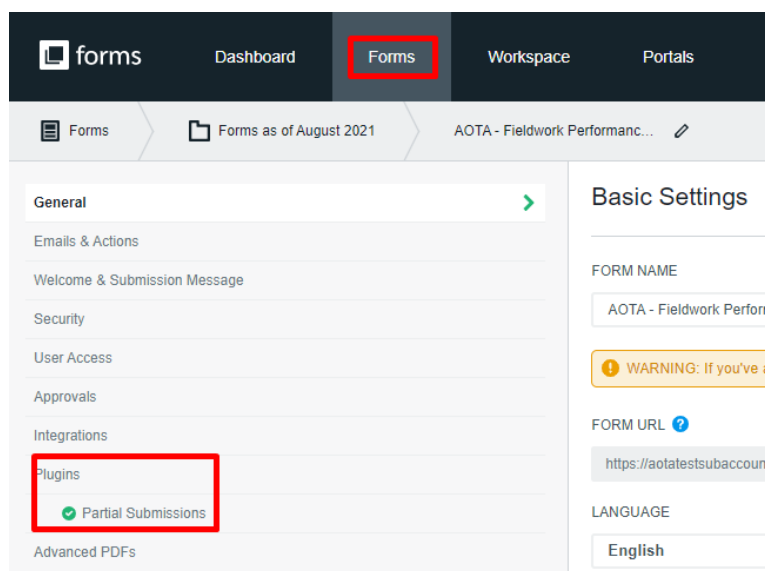
No, no link can be generated for the partial submissions. But you can export and send the partial submission to FEWs/students so they can have a record of the partial submission. Saved link can be generated when the **“Save and Resume Later”** button is used.

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**
- Hover 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”**

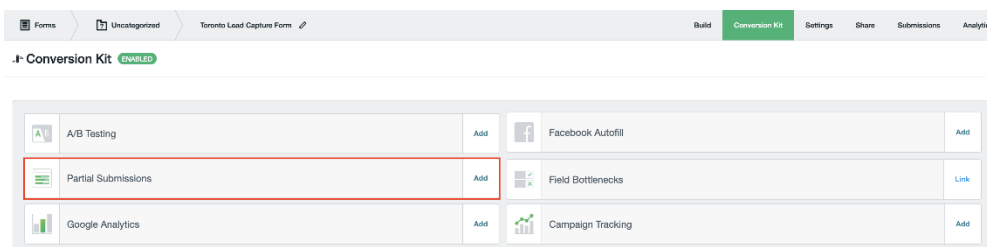




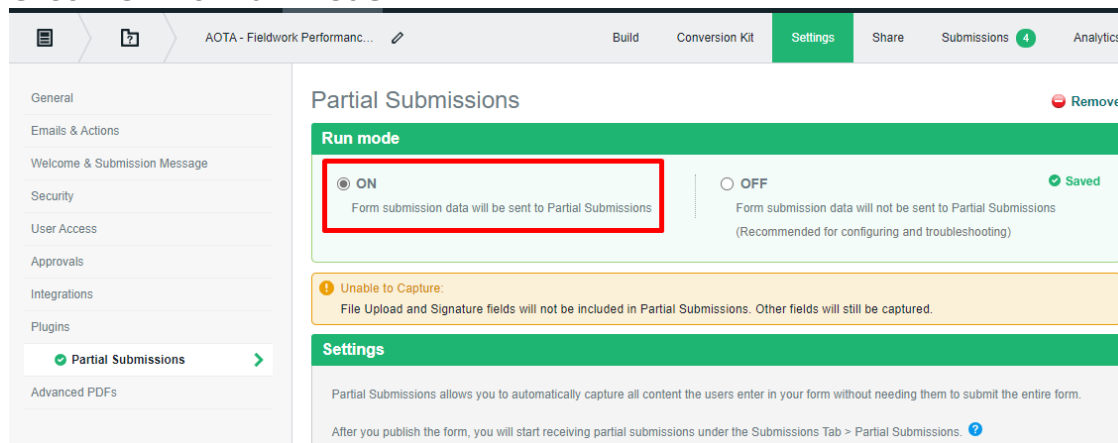
How do you enable “Partial Submissions” for the FWPE forms?

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”**



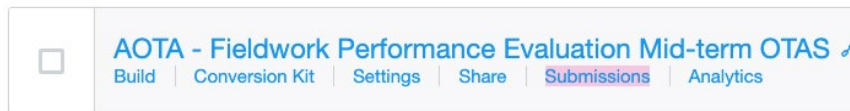
- Check **“On”** for **Run mode**



- 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



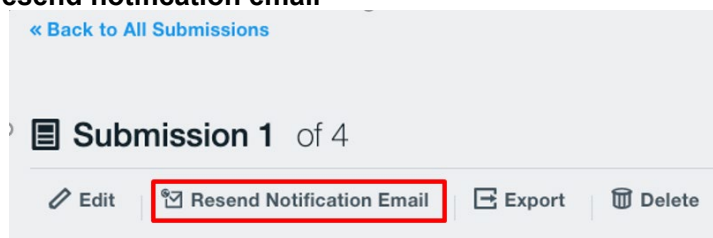
- Click the mid-term submission that the 1<sup>st</sup> FWE completed
- Choose **"Edit"**
- Change the **fieldwork email address** from the 1<sup>st</sup> FWE to 2<sup>nd</sup> FWE

Submission 1 of 9

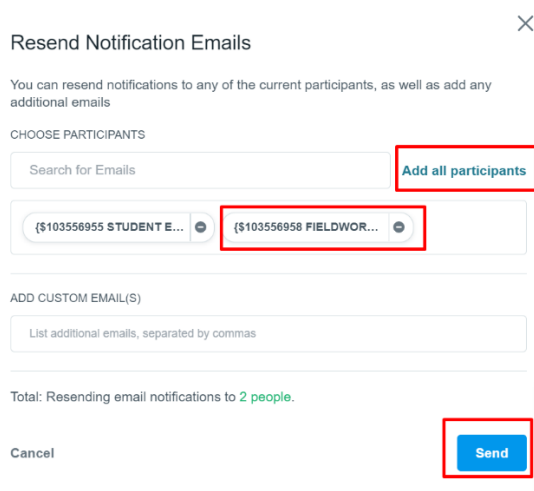
[Edit](#) [Resend Notification Email](#) [Export](#) [Delete](#)

LAST NAME	Li
FIELDWORK EDUCATOR CREDENTIALS	Phd
FIELDWORK EDUCATOR'S EMAIL	<a href="mailto:danielle.montano@formstack.com">danielle.montano@formstack.com</a>
COLLEGE OR UNIVERSITY	aota
ARE THERE ADDITIONAL FIELDWORK EDUCATOR(S) WORKING WITH THIS STUDENT?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Midterm or Final	Midterm

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



- Click **"Add all participants"**



- Click **“Send”** to send the email to the 2<sup>nd</sup> FWE
- Click **“Edit”** again
- Change the fieldwork educator’s email address to the 1<sup>st</sup> 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 mid-term 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 mid-term 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:

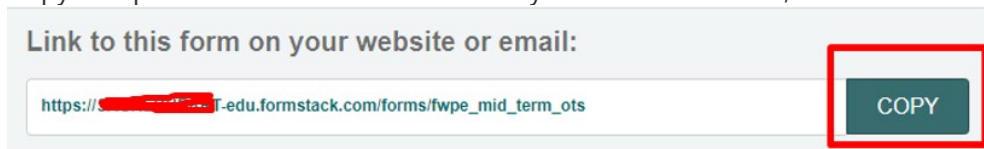
1. Go to the Portal the FWE belongs → Click **“Performance”** next to the mid-term → Find the FWE’s email and click **“Send Reminder”**
2. Remove the FWE’s email from the portal and re-add it back
3. Share the mid-term link outside of Formstack

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**



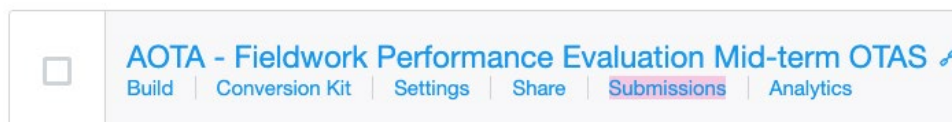
- Copy and paste the link in email or other systems such as Exxat, eValue



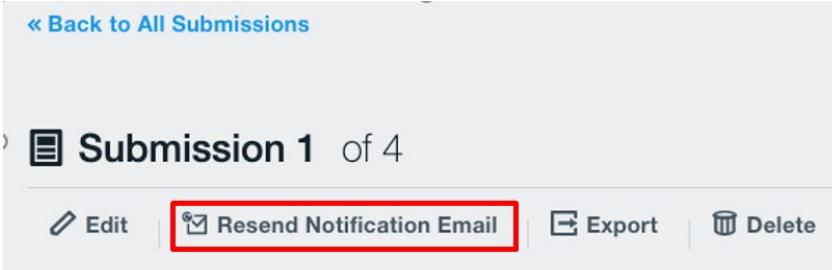
## How to resend the notification email

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



- Click the submission that you would like to resend the notification email
- Choose “**resend notification email**”



- Click “**Add all participants**”

✕

### Resend Notification Emails

You can resend notifications to any of the current participants, as well as add any additional emails

CHOOSE PARTICIPANTS

Add all participants

{\$103556955 STUDENT E...}
{\$103556958 FIELDWOR...}

ADD CUSTOM EMAIL(S)

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"**
- Hover 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 Notification Email
📄 Export
🗑 Delete

### PERSONAL INFORMATION

STUDENT OR FIELDWORK EDUCATOR	<div style="border: 1px solid red; padding: 5px; display: inline-block;">                     Fieldwork Educator ▾                 </div>
-------------------------------------	---

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**.

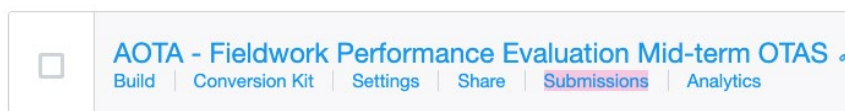
Cancel
Send

- 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



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

Submission 1 of 9

[Edit](#) [Resend Notification Email](#) [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?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Midterm or Final		Midterm

- Click **“Save”**
- Click **“resend notification email”**

[« Back to All Submissions](#)

Submission 1 of 4

[Edit](#) [Resend Notification Email](#) [Export](#) [Delete](#)

- Check the box for the fieldwork educator’s email

Resend Notification Emails

Select All

(\$97495694 STUDENT EMAIL)

(\$97495697 FIELDWORK EDUCATOR'S EMAIL)

Add custom email(s)

test@example.com, johndoe@example.com

Resending email notifications to 1 people.

[Cancel](#) [Send](#)

- Click **“Send”** to send the email to the 2<sup>nd</sup> FWE
- Click **“Edit”** again
- Change the fieldwork educator’s email address to the 1<sup>st</sup> FWE so the data remains accurate

## FAQ – Documents

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

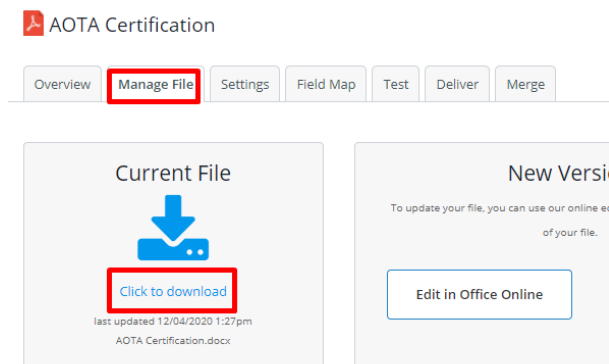
- If each FWE fills out their own evaluation form, each of them will receive the certificate automatically. In this case, you will receive more than one FWE evaluation for one student. If the fieldwork educators need to split the hours, please make sure they only enter the weeks they qualify for on the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

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

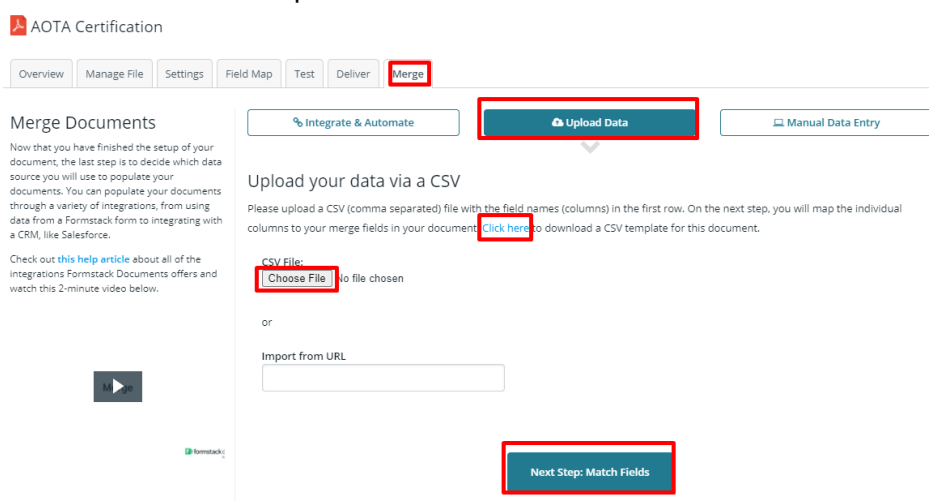
- Log into **Formstack Documents** → **AOTA Certification**
- Go to **Manage File**
- **Click to download**



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



- 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 Selected: <span>📄 Mark As</span> <span>📄 Export</span> <span>🔄 Resend to Integration</span> <span>🗑️ Delete</span>			
<input type="checkbox"/>	<input type="checkbox"/>	Date Submitted	STUDENT OR FIELDWORK EDUCATOR
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2021-03-05 10:08:57	FIELDWORK EDUCATOR
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2021-03-04 11:17:38	FIELDWORK EDUCATOR
<input type="checkbox"/>	<input type="checkbox"/>	2021-02-26 15:11:37	FIELDWORK EDUCATOR

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 certificate 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

Emails & Actions

Welcome & Submission Message

Security

User Access

Approvals

Integrations

● Formstack Documents >

### Formstack Documents Remove

Run mode

**ON**  
Form submission data will be sent to Formstack Documents in **production mode**

**TEST**  
Form submission data will be sent to Formstack Documents in **test mode**

**OFF**  
Form submission data will not be sent to Formstack Documents  
(Recommended for configuring and troubleshooting)