Clinical Performance Instrument (CPI) 3.0

Director of Clinical Education

Academic Coordinator of Clinical Education

Associate Director of Clinical Education

Administrative Staff

User Guide

10/14/2025

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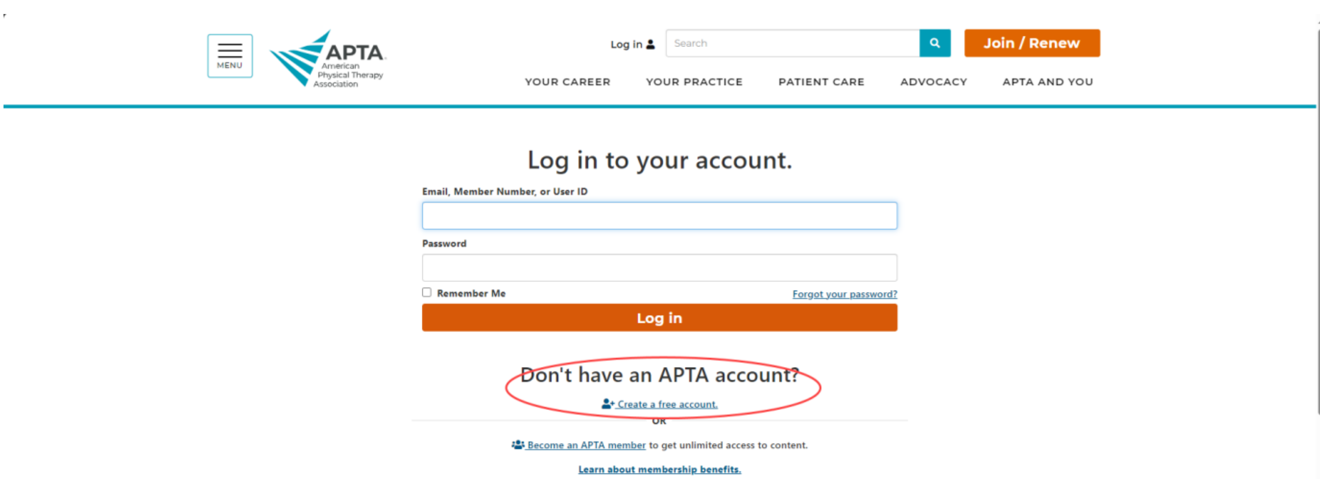
Login

Go to https://cpi.apta.org

Click **Login**.

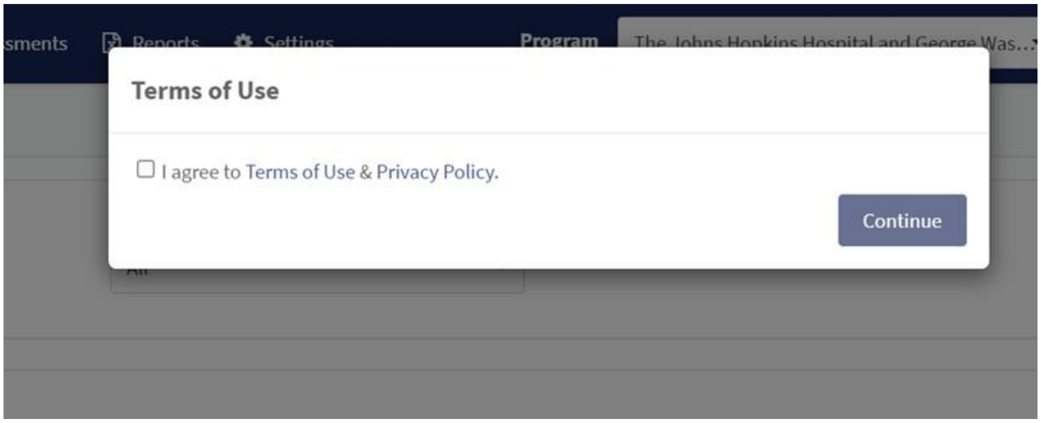
Log in to your account using your APTA login credentials.



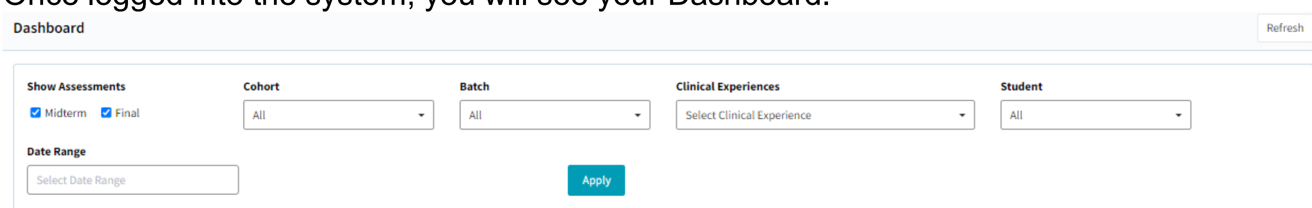
For login questions/issues: Email membersuccess@apta.org or call 800-999-2782 (APTA). This includes situations of multiple APTA accounts, password reset, and updating email addresses.

Users can also update their email address themselves by going to [Contact Information](#). Please do not create a new account if one currently exists in the system.

Agree to the **Terms of Use**.



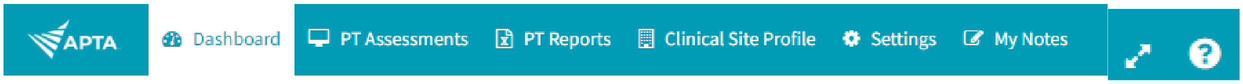
Once logged into the system, you will see your Dashboard.

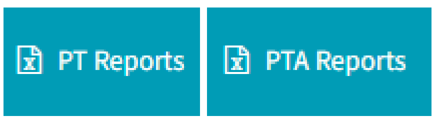
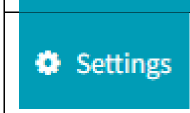
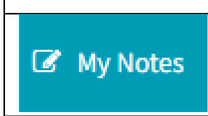
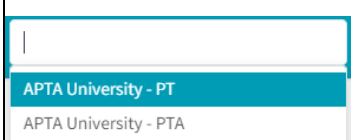
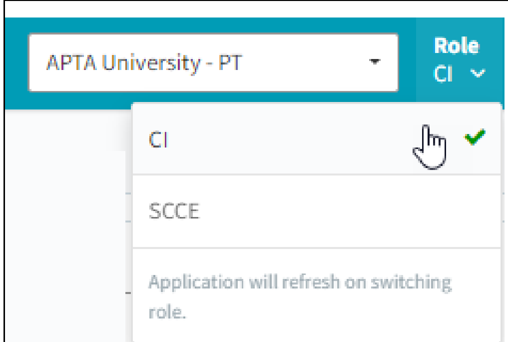
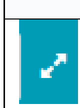


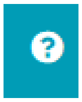
Program Staff (DCE/ACCE, ADCE, Admin Staff) can see aggregated data for the program(s) they are associated with on the graphs on the dashboard by selecting responses for each filter.

System Overview

Menu Icons



	The **Dashboard** shows a comprehensive and dynamic view of student competency levels. Use the dashboard filters to sort information by Mid-Term or Final Assessment, Cohort, Batch, Clinical Experience and Student.
	The **Assessments** page is where Active Student and CI CPI evaluations can be viewed and the DCE sign-off occurs.
	The **Reports** page provides a quick snapshot of the completed Student and CI CPI evaluations and a way to download the information into an Excel Spreadsheet.
	The **Clinical Site Profile** is where the CSIF lives. This page shows all completed CSIF profiles.
	The **Settings** tab is where your clinical experiences are set up, your program users are managed, and your list of sites are kept.
	The **My Notes** area is available for all users to keep private notes while in the CPI 3.0.
	This dropdown is used to switch between multiple programs to which you are associated.
	This dropdown is visible to switch between multiple roles with a specific program to which a user is associated. If it is not visible the user has only 1 role associate with that program.
	Click to **enter/exit full screen**.

	This question mark allows you access to **User Guides**. *Note: As part of the program staff, you have access to all user guides*.
	Click your **User name dropdown** to: • View your user profile • Log Out of the system

Program Users

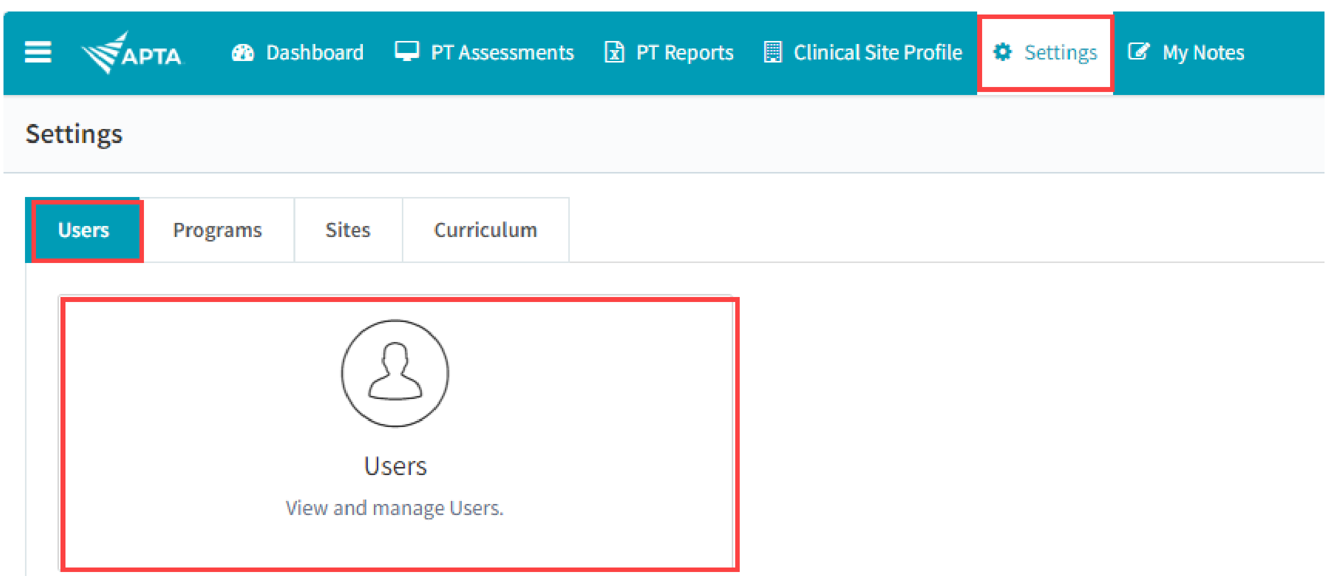
The Users page allows you to add, view and manage all individuals associated with your program. This includes DCEs, ADCEs, Adjunct Faculty, Administrative Staff, and Students. With the multiple roles release (June ’24) you can view and manage CIs and SCCEs as well. These 2 roles can only be added in the Sites area.

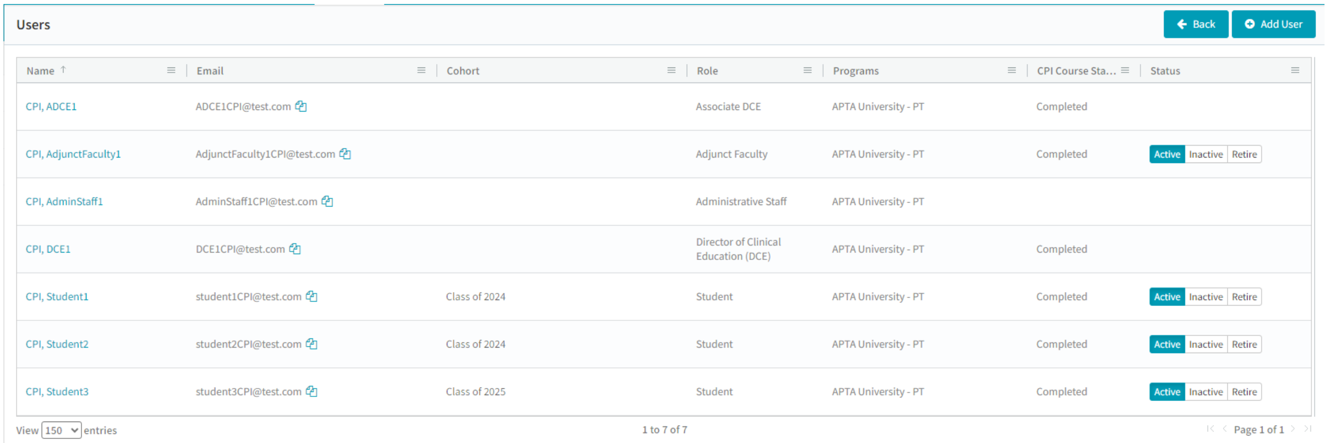
DCE/ACCE, ADCE, Administrative Staff	Permissions to create and review clinical experiences.
Adjunct Faculty	View only permissions for completed assigned CPI evaluations
Students	Complete CPI evaluations. View only permissions to review CI evaluation.
SCCEs	Manage Site CSIFs and can review assessments for their specific sites.
CIs	Assess students at clinical experiences associated with their specific sites.

View Program Users

View current program users, user’s role, and CPI Training completion status of users associated with your program.

1. Click **Settings.**
2. Click **Users**, followed by the **Users** icon.





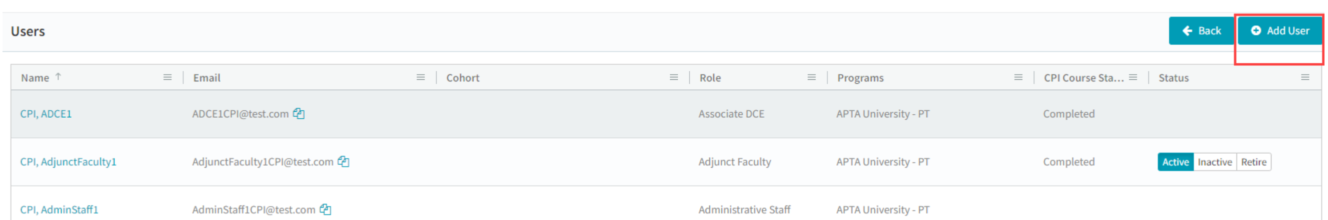
Note:

- The CPI Course Status column will remain blank until the user's first login to the CPI 3.0.
- Administrative Staff **do not** need to complete the CPI 3.0 training.
- Clinical Instructors are **not** to be added to this Users section. Instructions for adding Clinical Instructors are included in the Sites section.

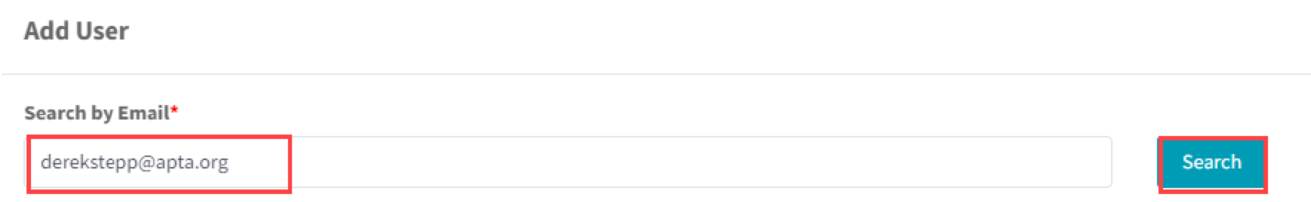
Adding New Program Users

This process is specifically for adding Program Staff to the CPI. We will discuss the process for adding students in the Creating Clinical Experience section of this user guide (Adding Students as Users). SCCEs and CIs are added in the Sites tab of the portal and discussed in the Setting Up Clinical Experiences section of this guide (Setting Up Clinical Experiences).

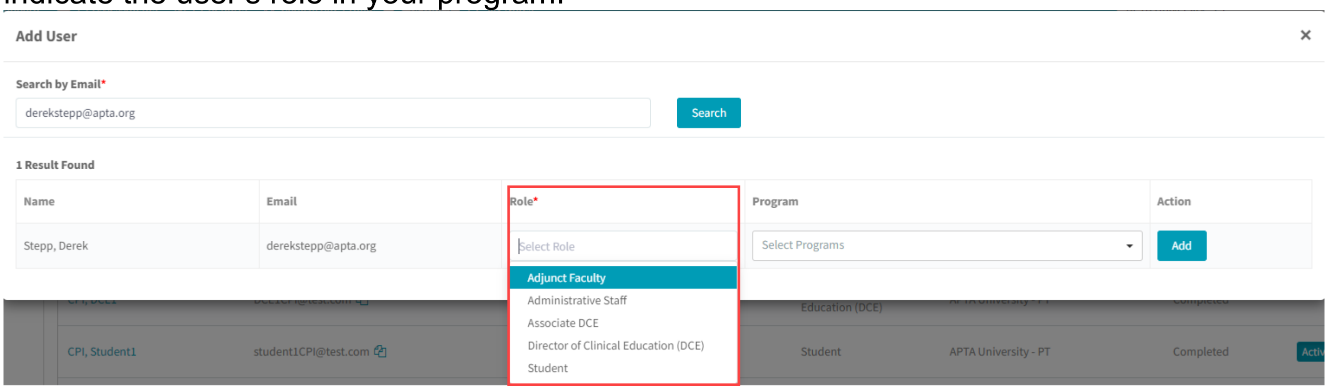
For information about Multiple Roles go to Guide to Multiple Roles.



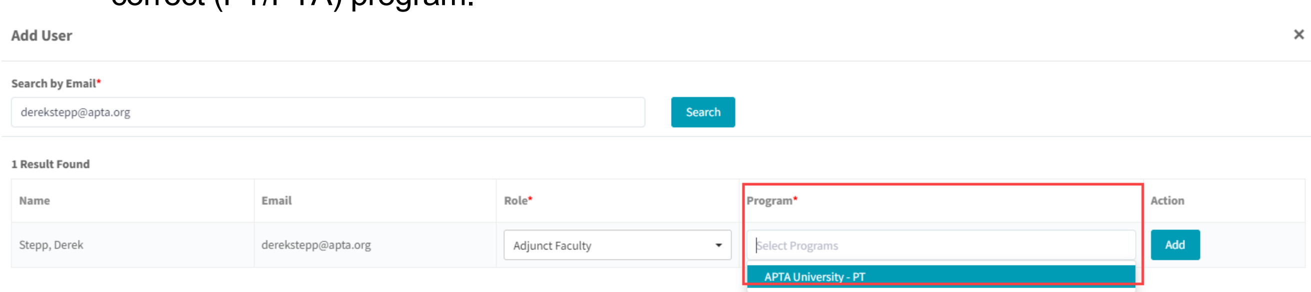
1. On the Users page, click **Add User** located on top right of the screen.
2. In the pop-up, enter the email associated with user's APTA (member or non- member) account on which they completed (or plan to do) the training and click **Search**. If you receive a "No User Record Found" error, there is not an APTA account associated with that email address.



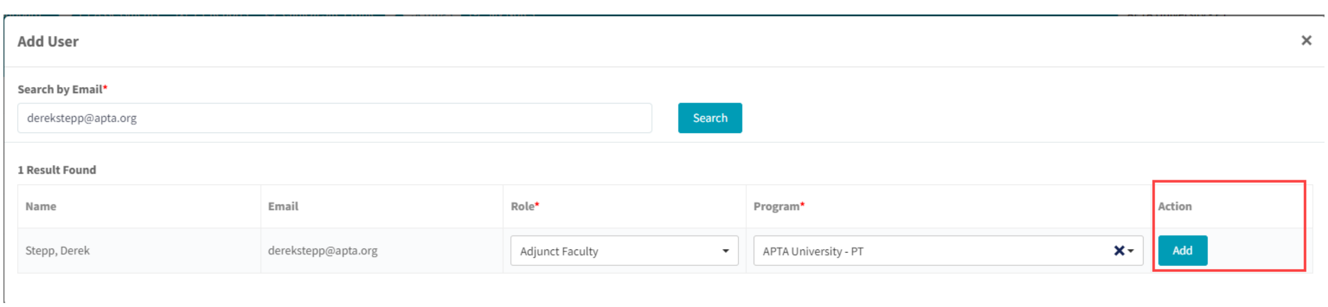
3. When the results populate, select the role from drop-down list to indicate the user's role in your program.



4. Select your program from the drop-down list – make sure that they are added to the correct (PT/PTA) program.



5. Click **Add.**



Email Discrepancies and Log-In Issues

If a user logs in with a different email address than the one with which they have been added into the system, they will receive the following error: "You are currently not assigned a user role, program, or clinical site in the CPI 3.0 system. Please contact the DCE associated with the affiliated program to obtain access."

Role	Situation	Resolution
CI	Training completed on different email	Delete from site and re-add with correct email. OR Have them re-register for the correct CPI 3.0 training with the email in the system and reach out to CPI Support.
Student	Training completed on different email	*If CI has not started assessment:* Delete from site and re-add with correct email. OR *If CI has started assessment:* Have them re-register for the correct CPI 3.0 training with the email in the system and reach out to CPI Support.
CI or student	Two APTA accounts with same email	Use Member ID to log in and change email address for one of the accounts (can contact Member Success to get ID if not known) If receiving same error: see above for solutions.

If a user attempts to log in and gets an error saying that they have not completed the CPI 3.0 training, please have them confirm that they completed the correct training for their role. The training that they completed will be listed on their certificate, which users receive at the end of training. CPI 3.0 does not allow users to log in until they complete the correct training for their assigned user role. They must complete the correct training prior to logging in.

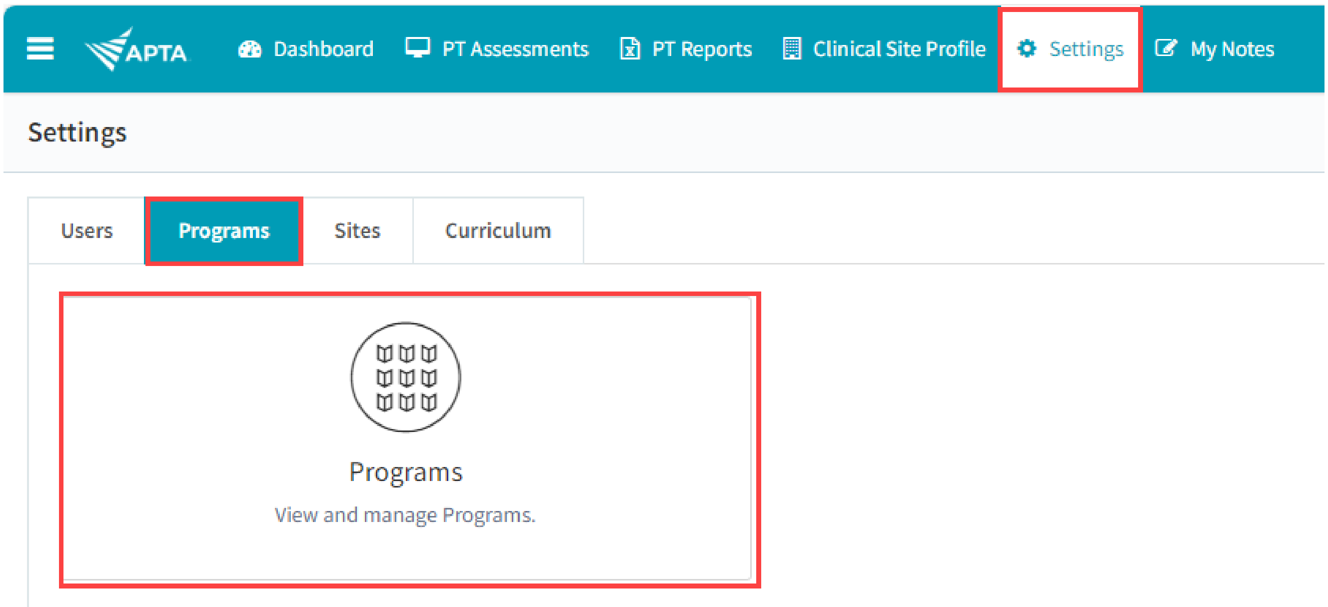
If the certificate says that they completed the correct training, please escalate to CPI Support. It is likely that the training did not push over to the APTA database correctly and that we will have to manually push it through.

Program Details

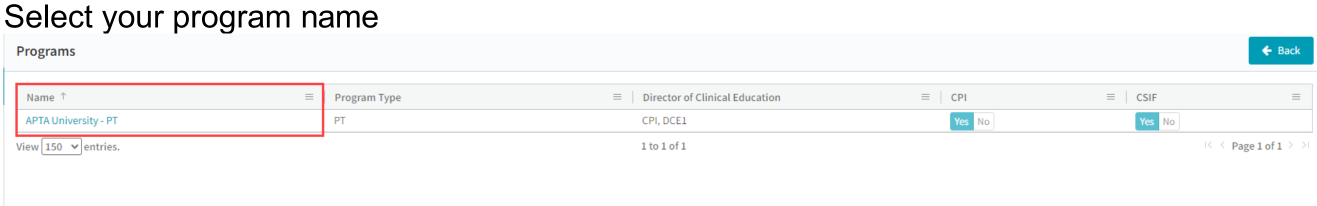
The Program page allows you to update your program information, including address, phone number and email address. Also on this page is the ability to control how you would like to share the CI CPI with your students and whether you want to require comments for each criterion on the CPI.

Updating Program Details

1. Click **Settings.**
2. Click **Program**, followed by the **Program** icon.



3. Select your program name



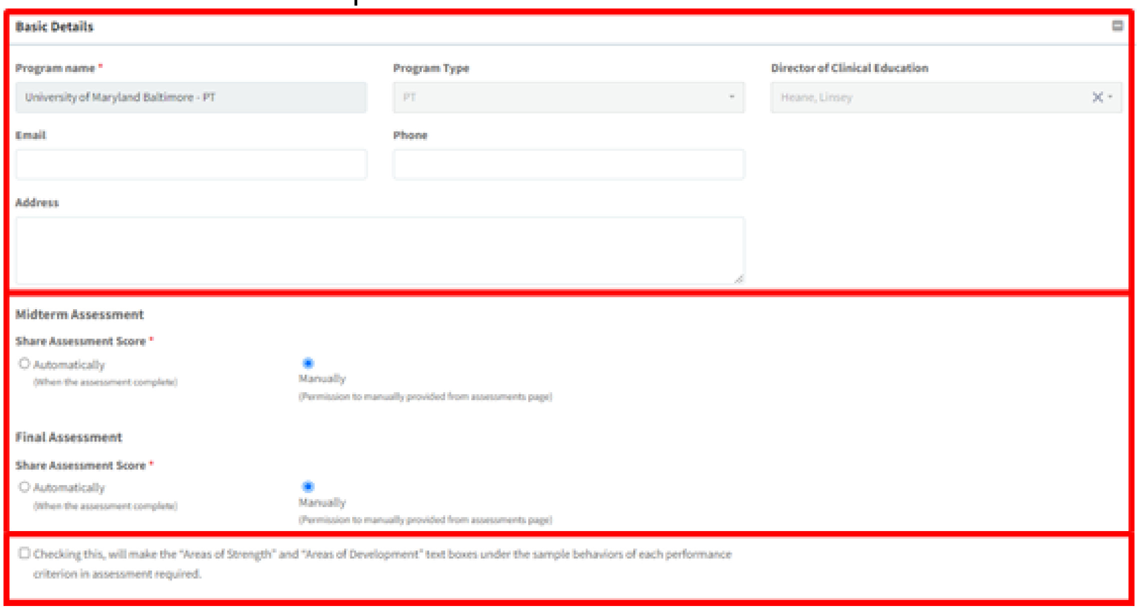
4. Review and update basic program details.
5. Set the CI CPI Evaluation sharing preferences automatically or manually. The difference is explained in the table below.

Automatically	Once the CI submits their CPI evaluation of their student, and the student has completed their evaluation, the CI evaluation will be released to the student.

Manually	Once the CI submits their CPI evaluation of their student, and the student has completed their self-evaluation, a checkbox will appear on the PT/PTA Assessments page. This box will need to be checked in order for the CI CPI evaluation to be shared with the student. (The checkbox is only visible to DCEs.)

Please note: The Student CPI evaluation will be shared with the CI upon submission independently of the choice selected here. The program default is to manually share CI assessments.

6. Set the requirement for comments to substantiate each rating for a criterion on the CPI.
   - Checking this will make the “Areas of Strength” and “Areas of Development” text boxes under the sample behaviors of each performance criterion in assessment required.



7. Click the Save button in the upper right corner of the page.

Setting Up Clinical Experiences

Setting up the clinical experiences in the CPI 3.0 can occur in two ways, manually in the system or via a spreadsheet import. However, both processes do require actions to be completed in the system first.

The general workflow for setting up your clinical experiences is as follows:

1. Creating/Adding Clinical Sites
    - The process for adding CIs to the clinical sites is discussed in the Manual and Automatic/Spreadsheet process for creating the clinical experiences.
2. Creating the Cohorts
3. Creating Clinical Experiences and releasing to Students and CIs
    - Manual Process
    - Automatic/Spreadsheet Process

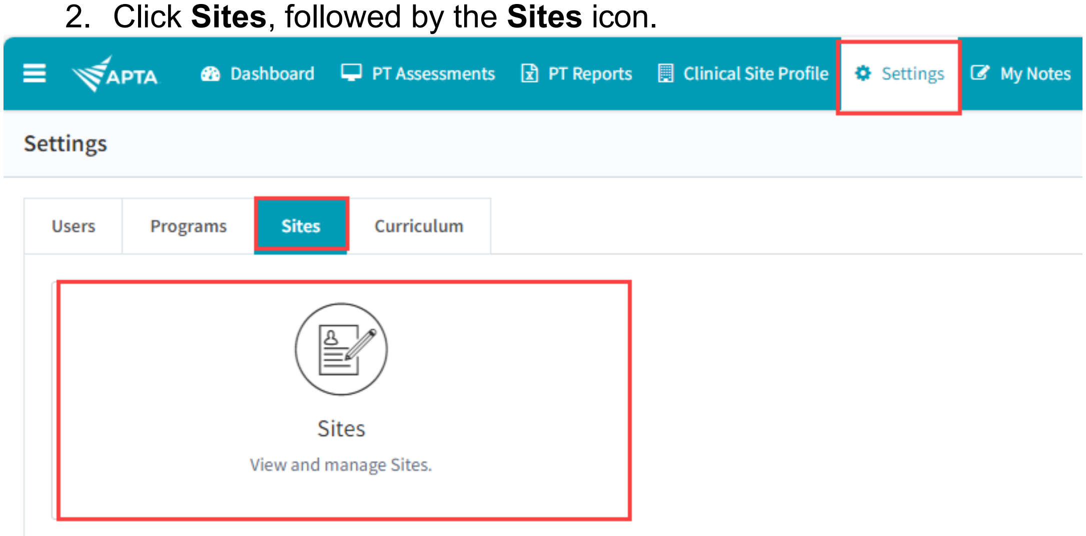
The next set of instructions will follow this workflow.

Step 1: Creating and Adding Clinical Sites

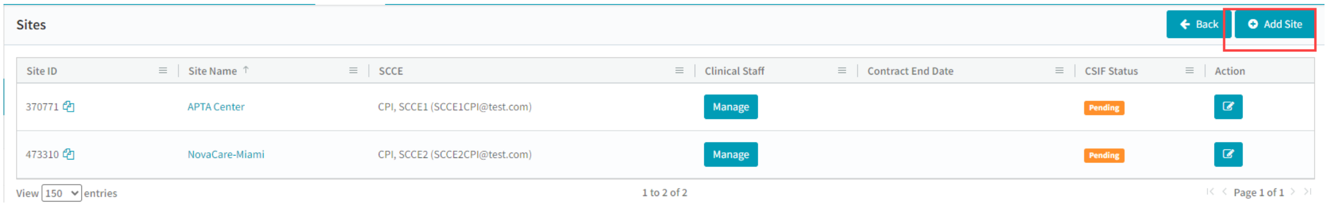
Clinical sites must be manually added to your program prior to setting up your clinical experiences. This is a manual process in order to reduce the potential for duplication and incorrect data.

Note: APTA is currently developing site naming guidelines to keep site names consistent across programs. Please fill out this form with your request to update an existing site's name and our team will review it--we will be posting all updated site names to the Clinical Education Hub every other Wednesday. Please let us know if you have yet to be added to the Hub.

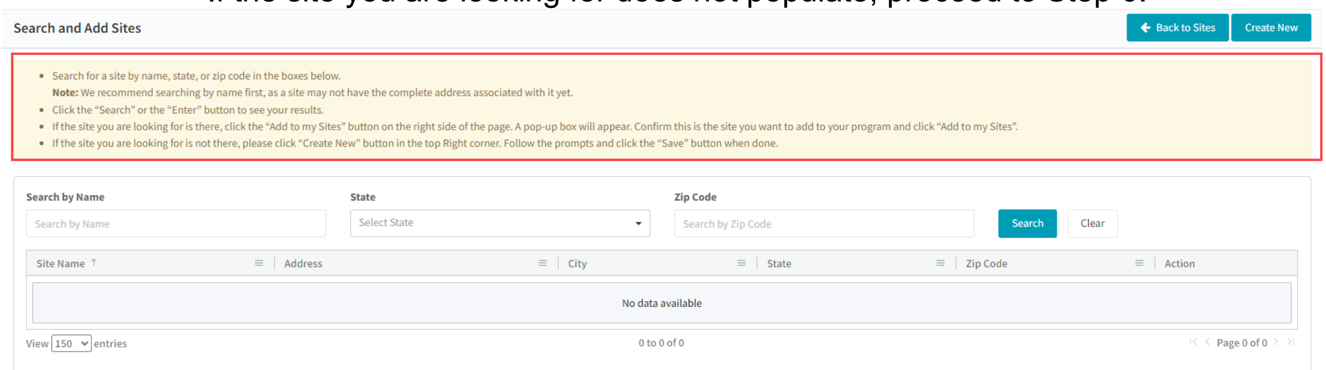
1. Click **Settings** from the top menu bar.
2. Click **Sites**, followed by the **Sites** icon.



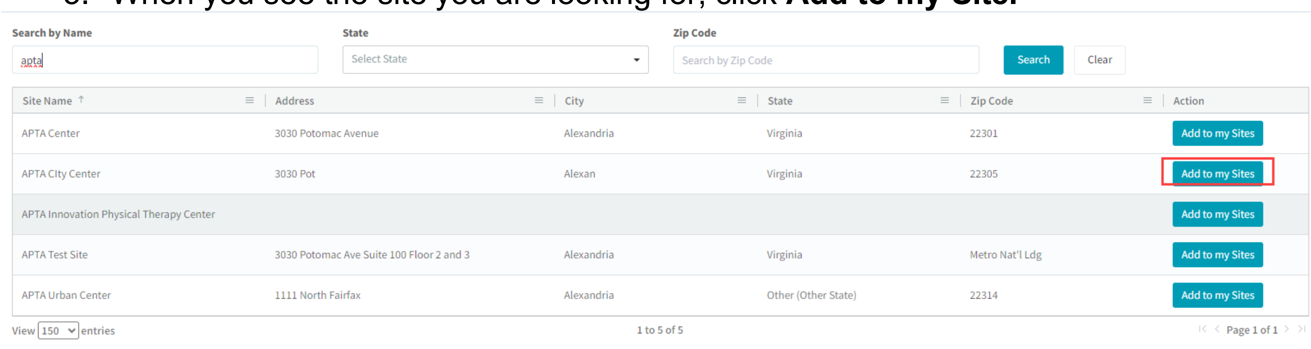
3. Click **+ Add Site** in the top right corner of your screen.



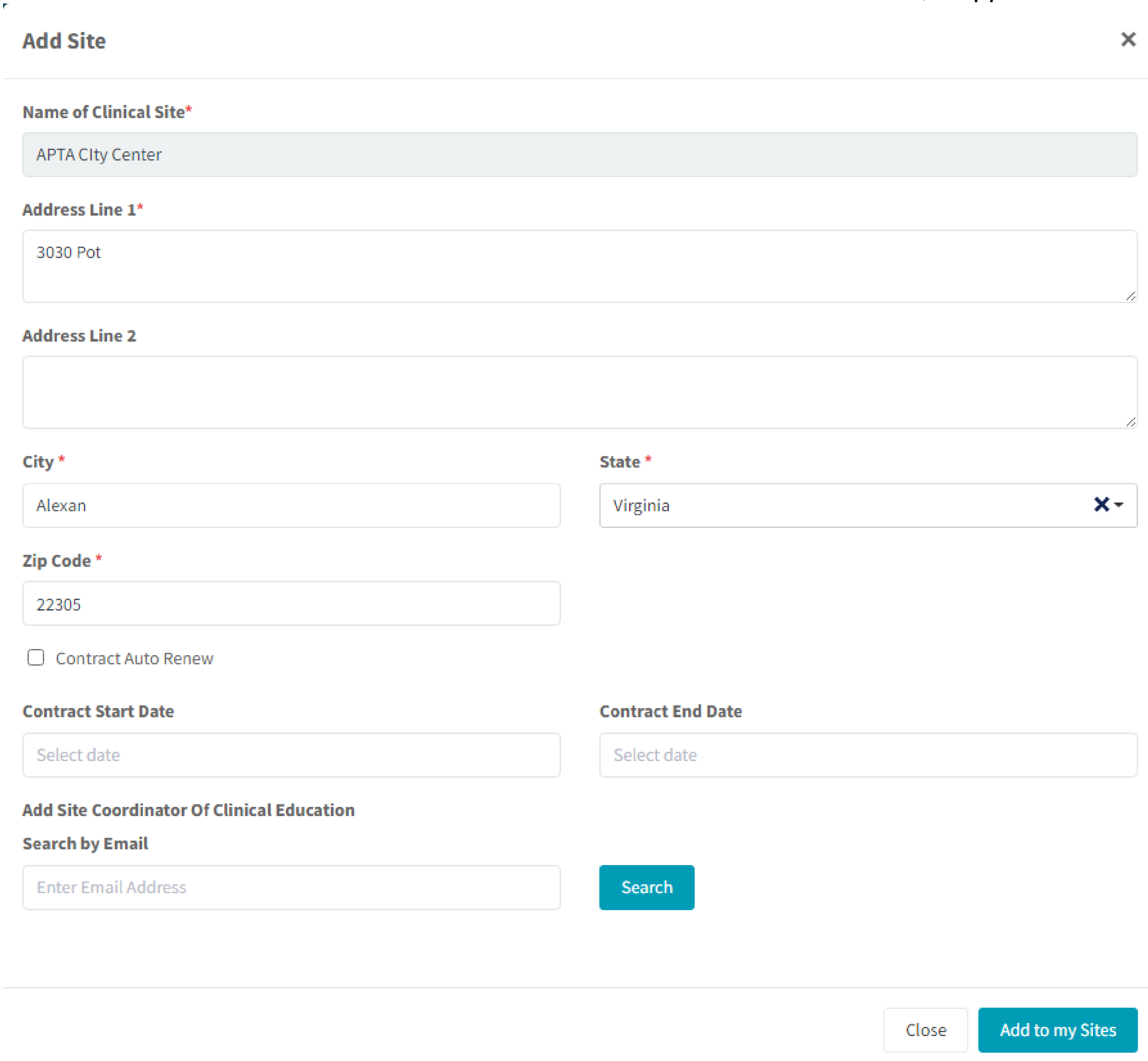
4. Follow the instructions on the Search and Add Sites screen to search for your site.
   - If the site you are looking for populates, proceed to Step 5.
   - If the site you are looking for does not populate, proceed to Step 9.



5. When you see the site you are looking for, click **Add to my Site.**

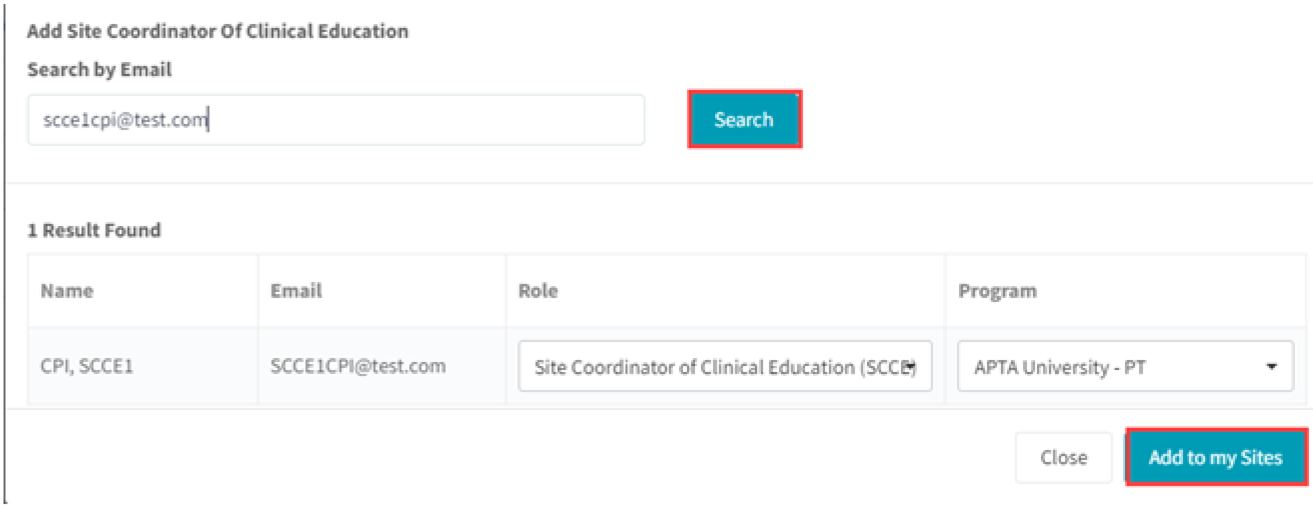


Confirm the site address. Add the SCCE email address and contract dates, if applicable.



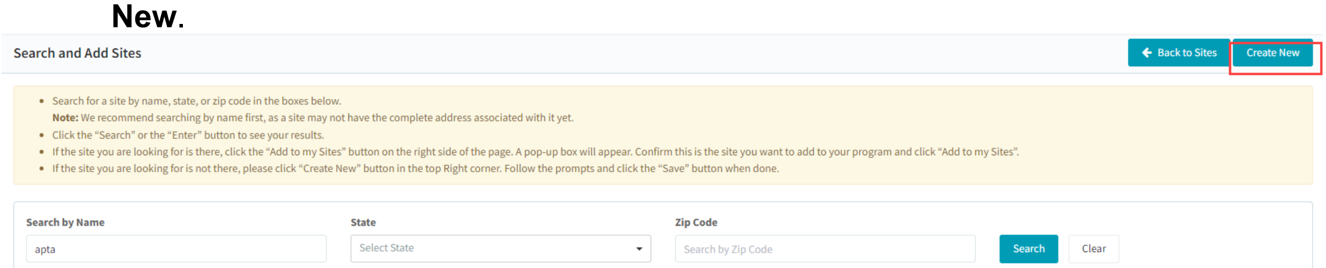
6. After entering the SCCE's email address, click **Search** to have their name populate.

    - If they will also serve as a CI, plan to use the Multiple Roles feature. See the Guide to Multiple Roles.

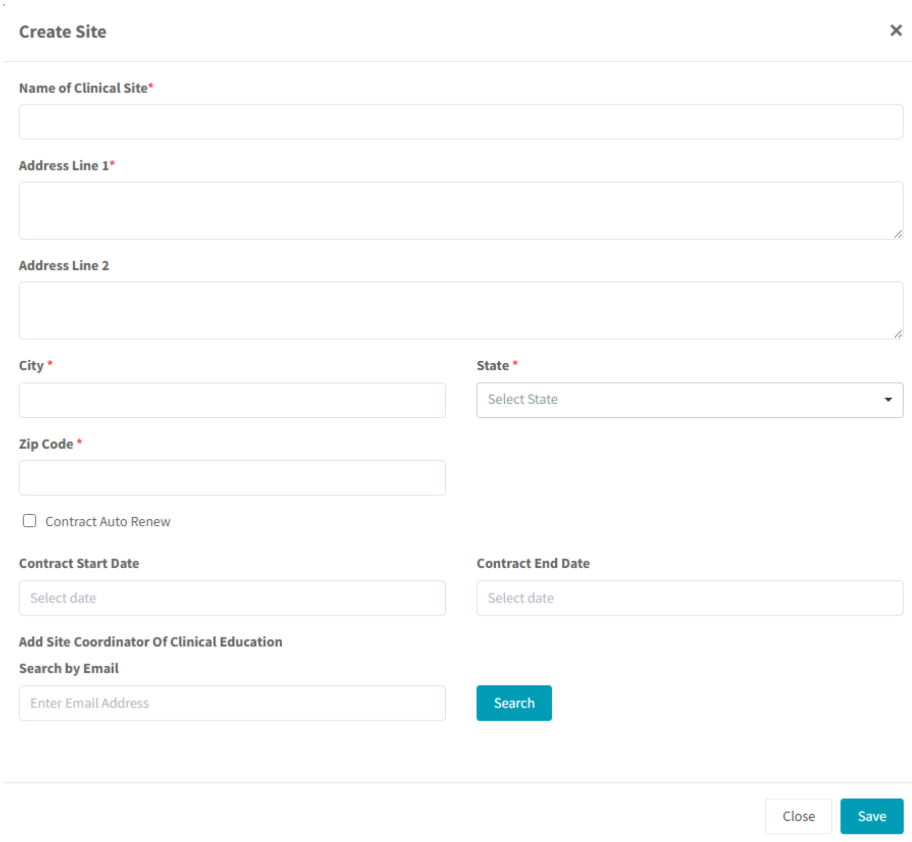


7. Then click **Add to my Sites** (shown in the image above)**.** The clinical site will now appear in your list of sites.

8. If you do not see the specific site you are looking for, you will need to add the site to the system. At the top right corner of the page, click **Create New**.



9. Enter the Clinical Site name and address (required fields), contract dates (if applicable, not required), and the SCCE email address (not required).

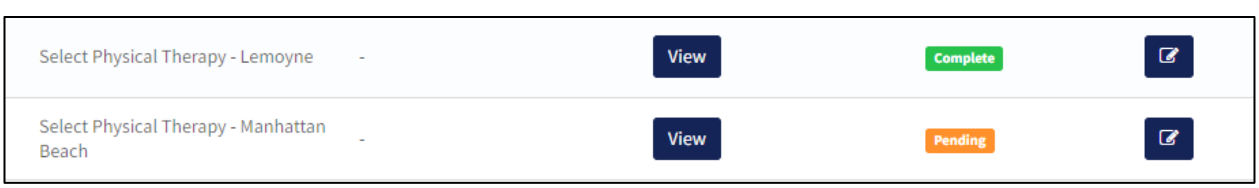


After entering the SCCE's email address, click **Search** to have their name populate. If they will also serve as a CI, plan to use the Multiple Roles feature. See the Guide to Multiple Roles.

10. Click **Save** (shown in the image above). The clinical site will now appear in your list of sites.

Notes:

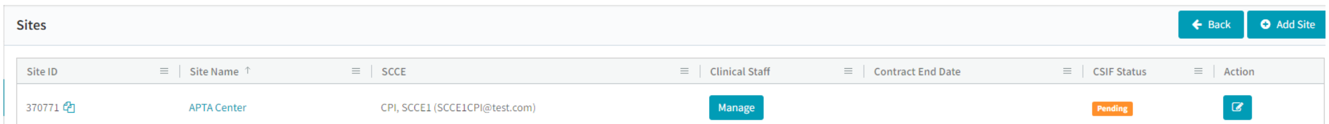
- If the SCCE can serve as a CI for PT/PTA students, give them a secondary role of CI. You can use the same email address and add them under the Manage Clinical Staff button discussed later. (Also see Guide to Multiple Roles)
- The process for adding CIs to the clinical sites is discussed in the Manual and Automatic/Spreadsheet process for creating the clinical experiences.
- On the Sites page, there are status buttons that will either say Pending or Complete. This refers to the status of the CSIF, which will be discussed later in this guide. These statuses do not affect your clinical experiences.



Manually add SCCE to a Site

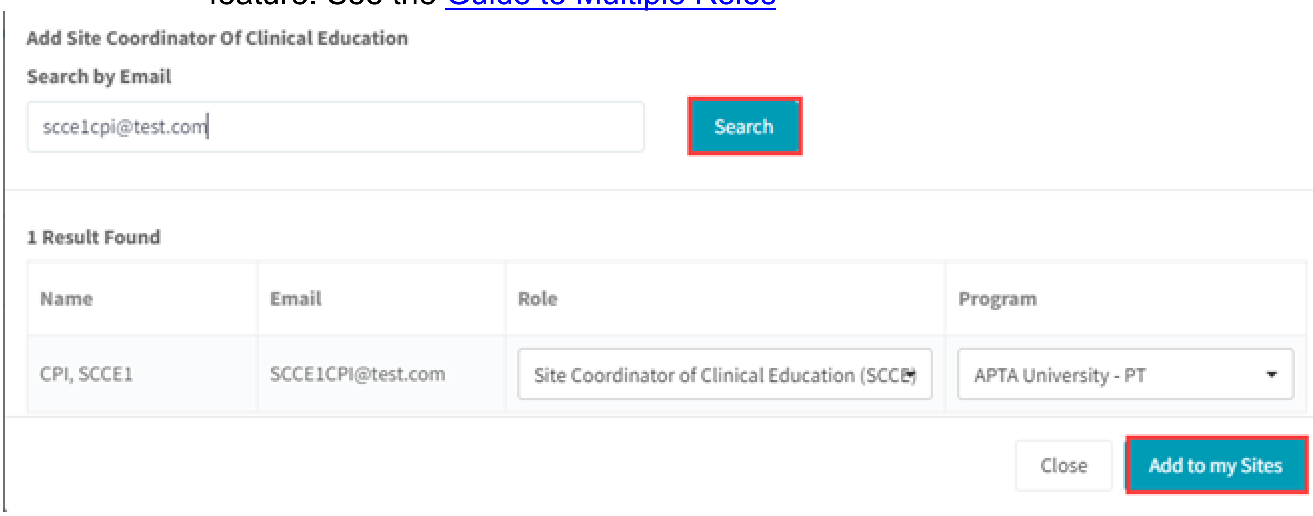
To add a SCCE to a site after it is created, go to the Site list.

1. Click **Settings** from the top menu bar.
2. Click **Sites**, followed by the **Sites** icon.



3. Click on the Site name where you will be adding a SCCE.
   Note: You can have more than 1 SCCE per site listed.
4. Add the SCCE email address

   - After entering the SCCE's email address, click **Search** to have their name populate and if they will also serve as a CI, plan to use the Multiple Roles feature. See the [Guide to Multiple Roles]



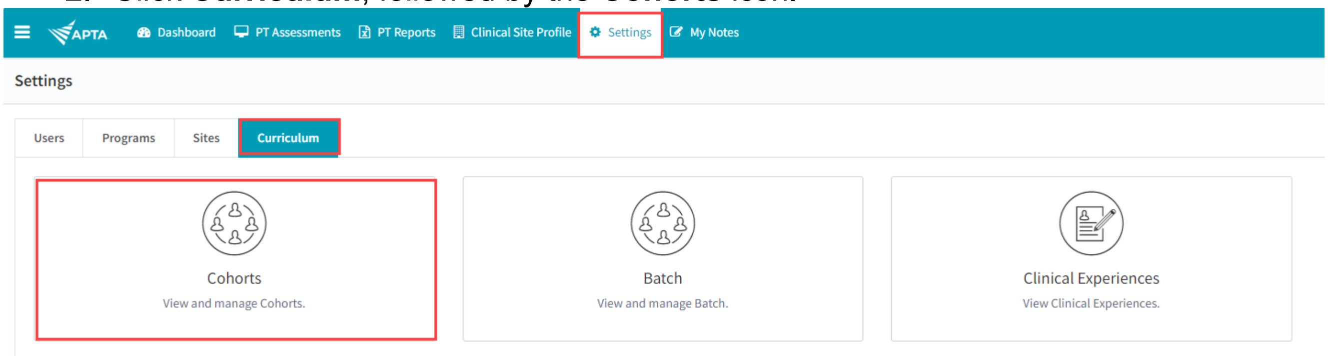
5. Click **Save** (shown in the image above). The SCCE name will appear in the 3rd column for the site.

- **NOTE**: If the SCCE can serve as a CI for PT/PTA students, give them a secondary role of CI. You can use the same email address and add them under the Manage Clinical Staff button discussed later. (Also see [Guide to Multiple Roles])

Step 2: Creating Cohorts

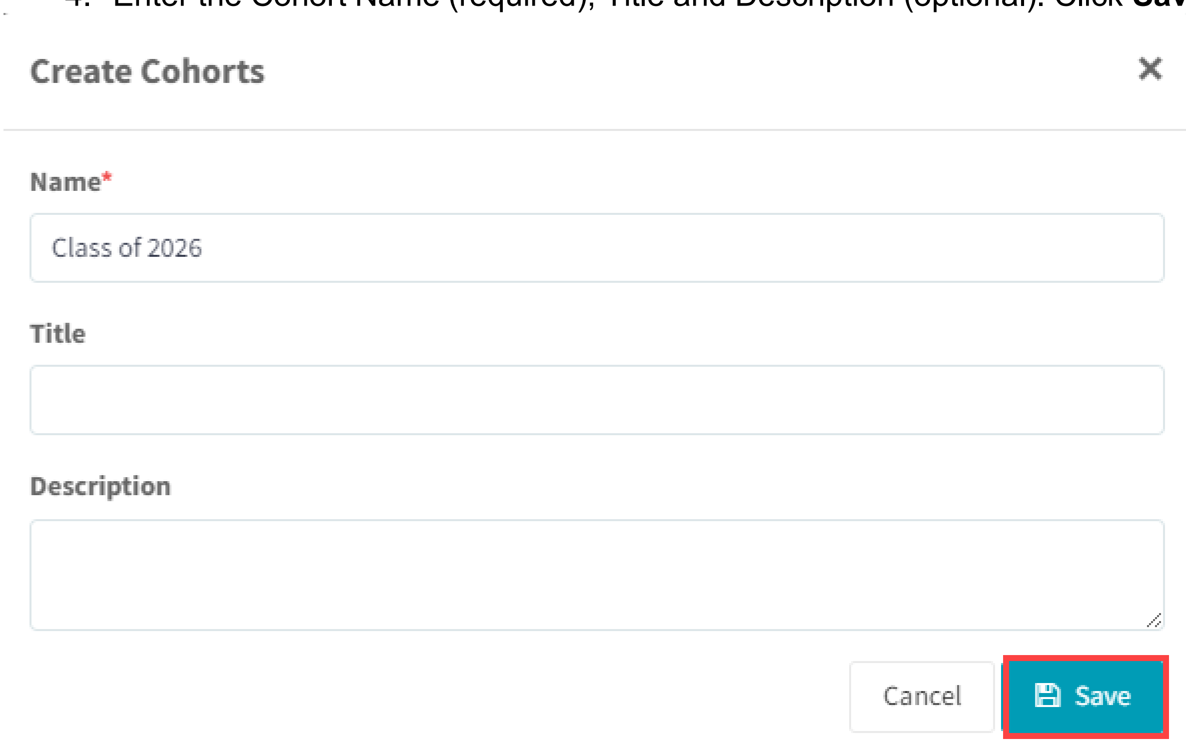
The Cohorts area allows you to name your cohorts, example Class of 2024 or Cohort 25. This is required prior to being able to add students (manually or automatically) to the CPI 3.0.

1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Cohorts** icon.



3. Click **+ Create** in the top right corner.

4. Enter the Cohort Name (required), Title and Description (optional). Click **Save**.



Step 3: Creating Clinical Experiences

Now that the Clinical Sites and Cohorts are in the system, the clinical experiences can now be created. As mentioned, there are two methods for creating the experiences, manually and automatically/spreadsheet. The first to be discussed is the manual process, then the automatic process will be discussed.

NOTE: Make sure that new clinical experiences are created for each rotation—you cannot re-use clinical experiences that have been created.

Manual Process for Creating Clinical Experiences

The general workflow with the manual process is as follows:

1. Add/Create clinical sites.
2. Create cohort.
3. Add students as users.
4. Create batches.
5. Add CIs to their sites.
6. Add students to their clinical experience sites and pair with CIs.

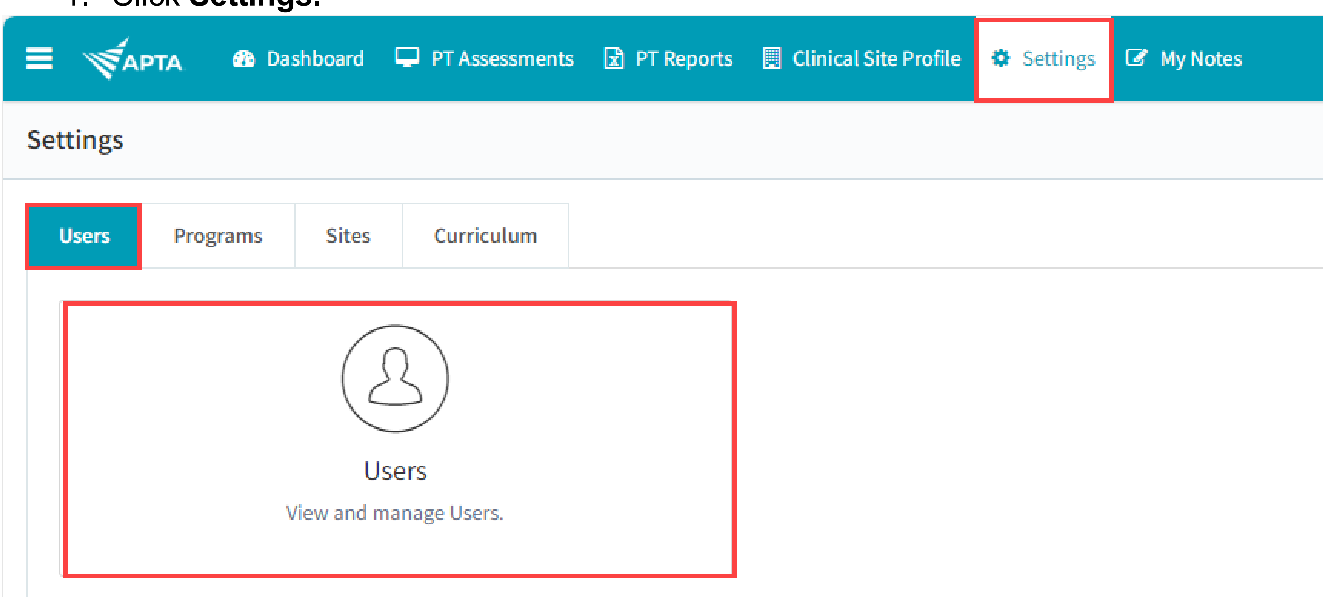
Steps 1 and 2 were discussed previously and this section will pick up at Step 3.

Adding Students as Users

Upon completion of this process, all your students will be listed on the Users page with and assigned to their Cohort.

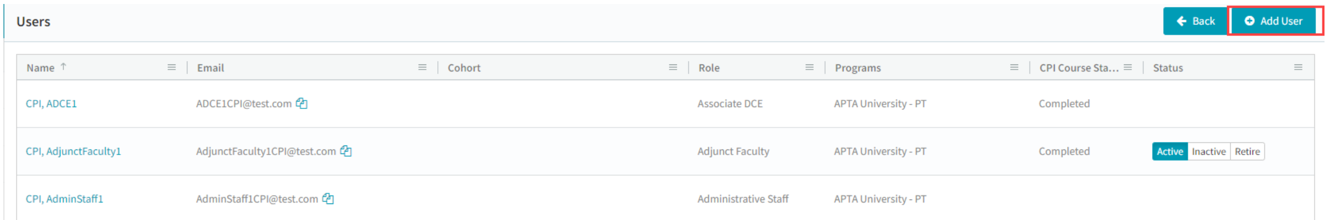
Please note: The CPI Course Completion Status column, on the users page, will be updated the first time your student logs into the CPI 3.0.

1. Click **Settings.**

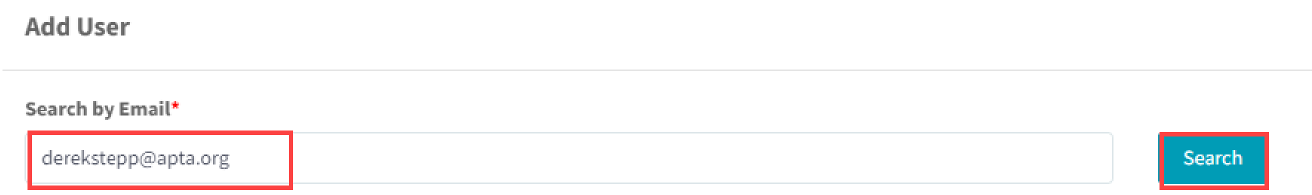


2. Click **Users**, followed by the **Users** icon.

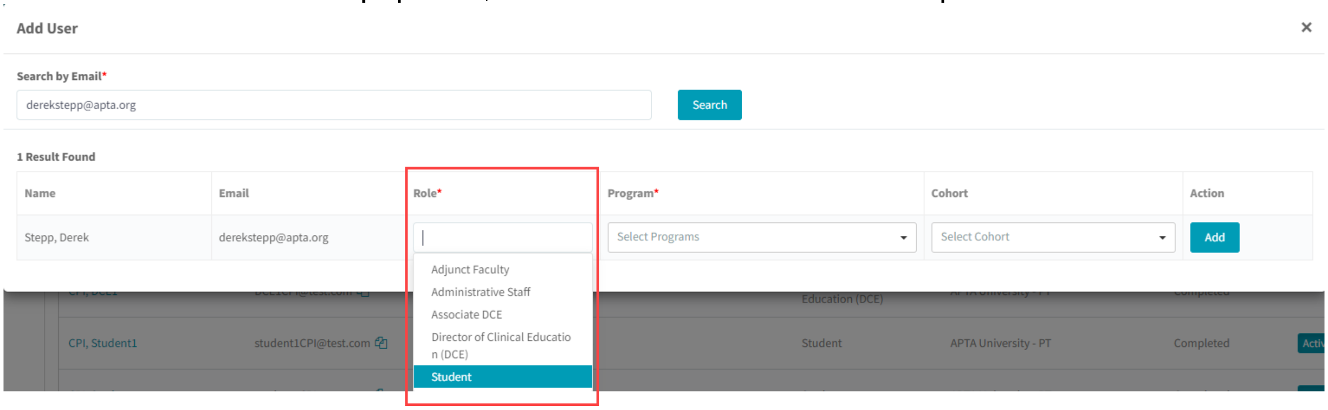
3. On the Users page, click **Add User** located on top right of the screen.



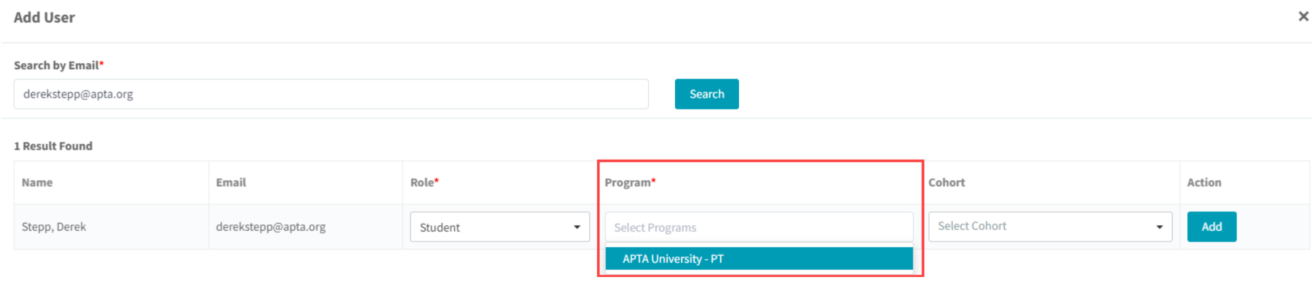
4. In the pop-up, enter the email associated with student's APTA (member or non- member) account and click **Search**.



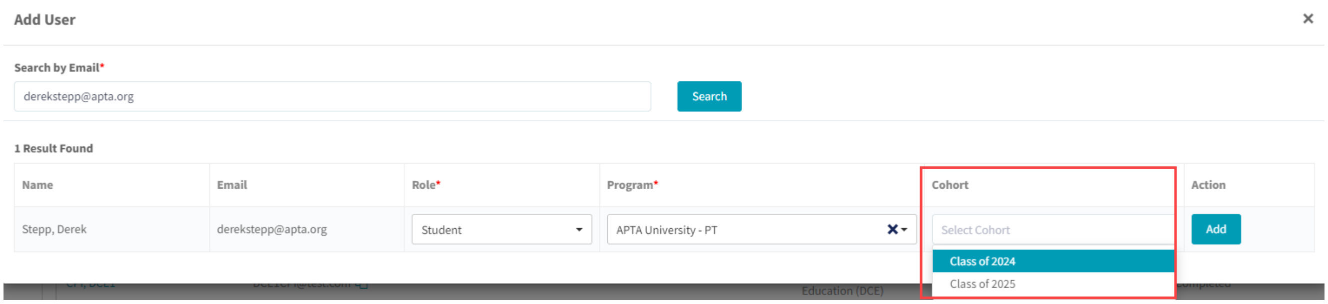
5. When the results populate, select the student role from drop-down.



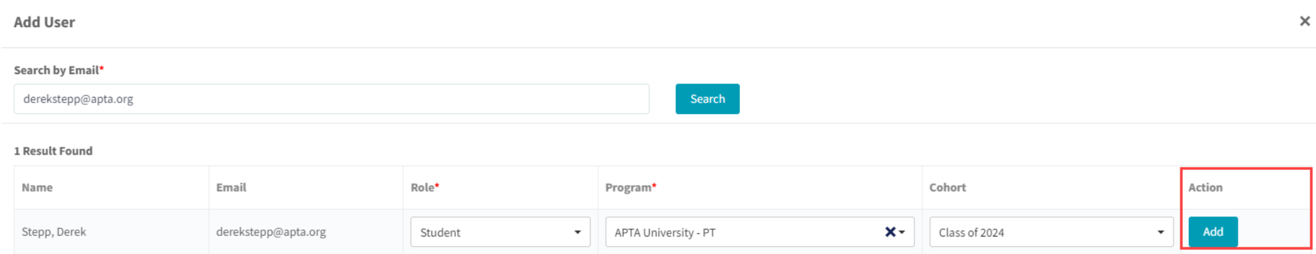
Select your program from the drop-down list.



6. Select the Cohort for your student.



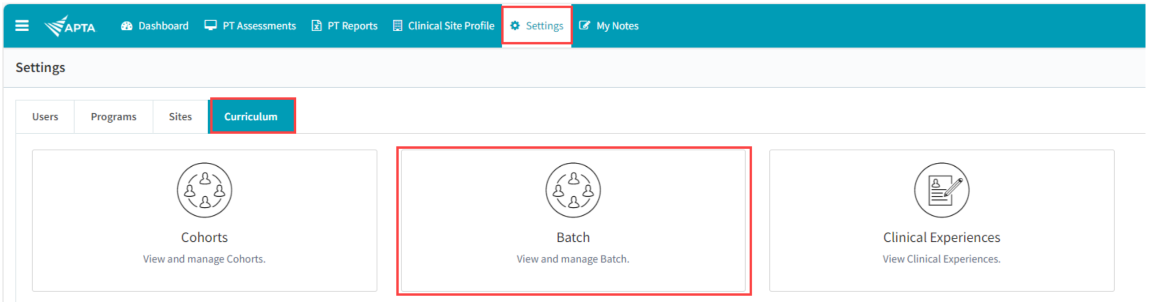
7. Click **Add.**



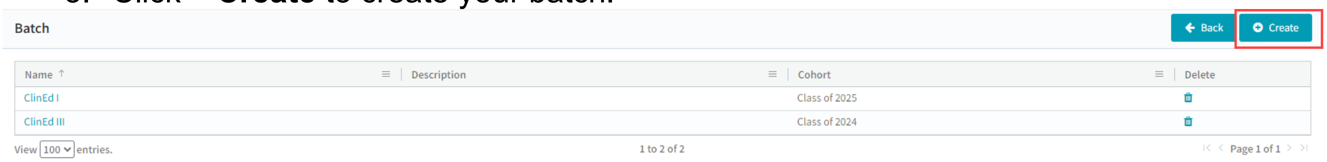
Creating Batches

Batches are available to help group your students, secondary to the cohorts, by their clinical experiences. For example, a student in the Class of 2025 (cohort) is in their second clinical experience (batch). Batches are commonly named by the course code of the clinical experience, but they can be named in any way to help you and other program staff.

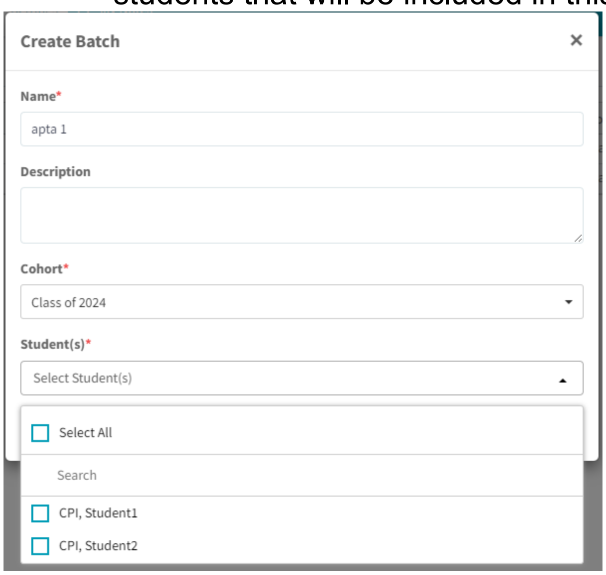
1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Batches** icon.



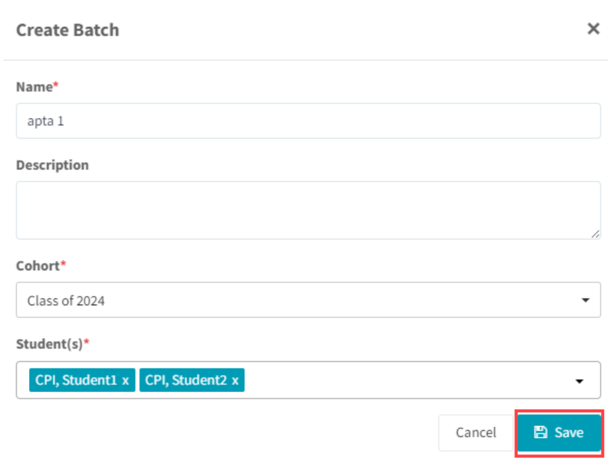
3. Click **+ Create** to create your batch.



4. Enter batch name and a description (optional). Select the cohort and the students that will be included in this batch**.**



5. Click **Save.**



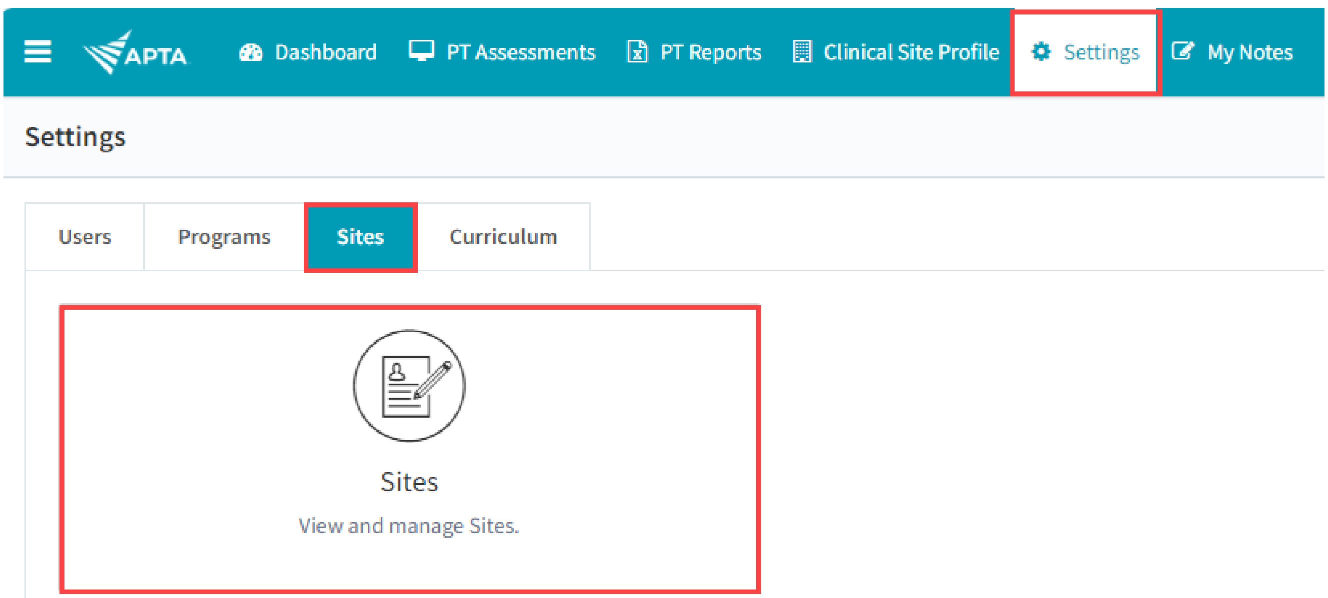
Adding CIs to Sites

Please note: This process can also be performed in conjunction with creating the clinical sites.

STOP: If your CI is also the SCCE for this clinical site, please refer to the above instructions for adding the SCCE to the site. See the Guide to Multiple Roles.

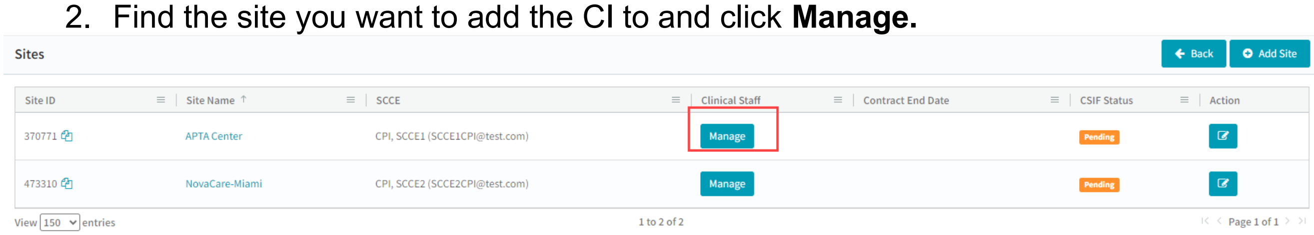
For this next step, it will be important to have the email address associated with the CI's APTA account. If you do not have the correct email address, you will receive a No Results Found message. In these circumstances, please reach out to the CIs to obtain their correct email address.

1. Click **Settings** from the top menu bar.

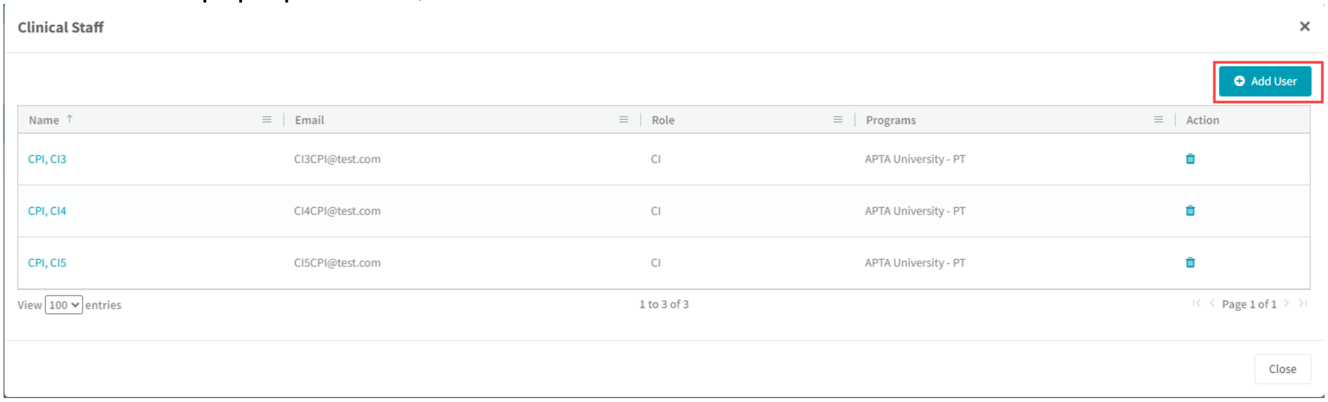


Click **Sites**, followed by the **Sites** icon.

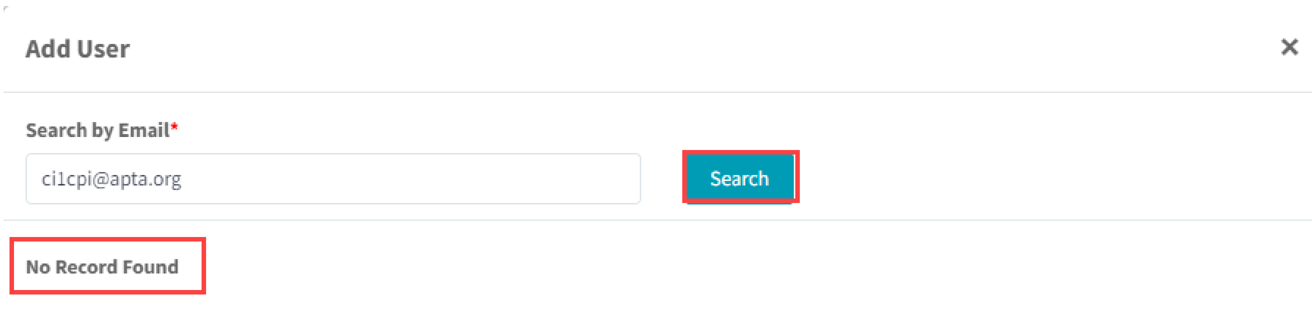
2. Find the site you want to add the CI to and click **Manage.**



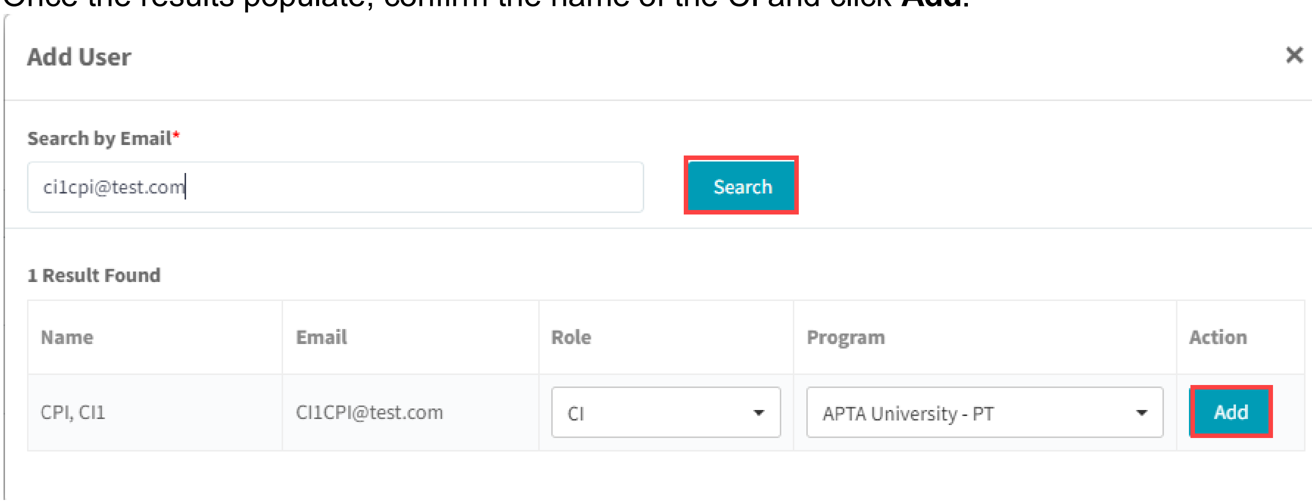
3. In the pop-up window, click **+ Add User.**



4. Enter the email address of the CI and click **Search.**
   - If 'No Results Found' appears after clicking Search, please reach out to the CI to obtain the email address associated with their APTA account.



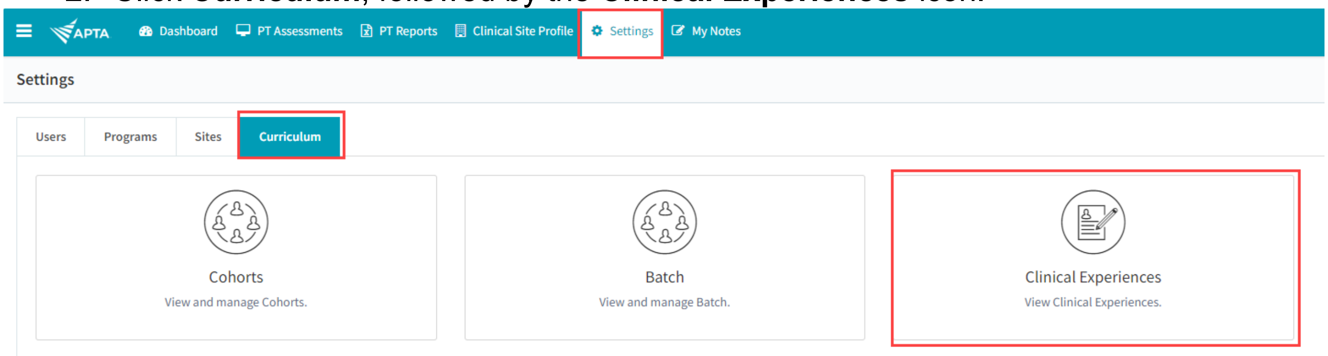
5. Once the results populate, confirm the name of the CI and click **Add**.



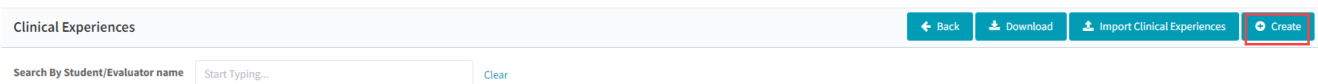
Pairing Students and CIs

Now that the sites, students, and CIs are in the system, this next set of instructions covers linking all of them together.

1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Clinical Experiences** icon.

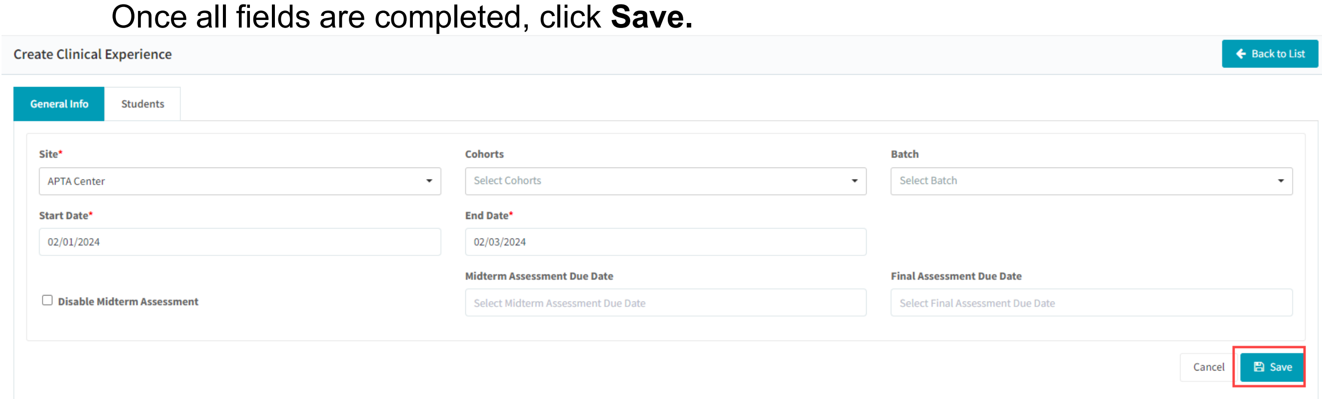


3. Click **+ Create** to create a single clinical experience.

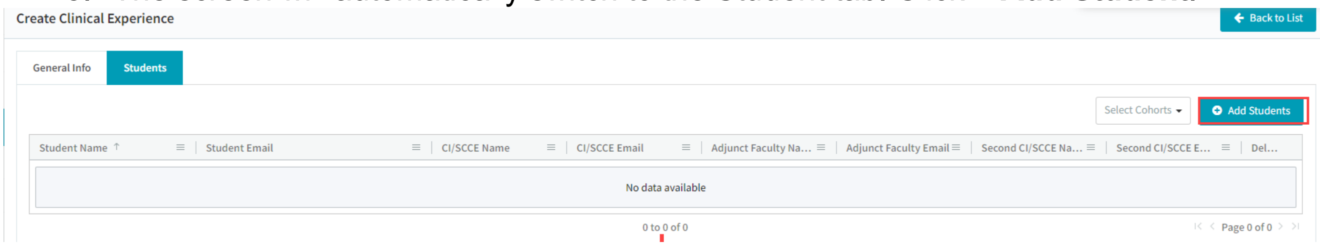


4. Select the Site Name, Cohort and Batch. Enter the clinical experience start and end dates. Although listed, the Midterm and Final due dates are not required.
   - If this clinical experience does not require a midterm, check the checkbox to disable the midterm.

   Once all fields are completed, click **Save.**

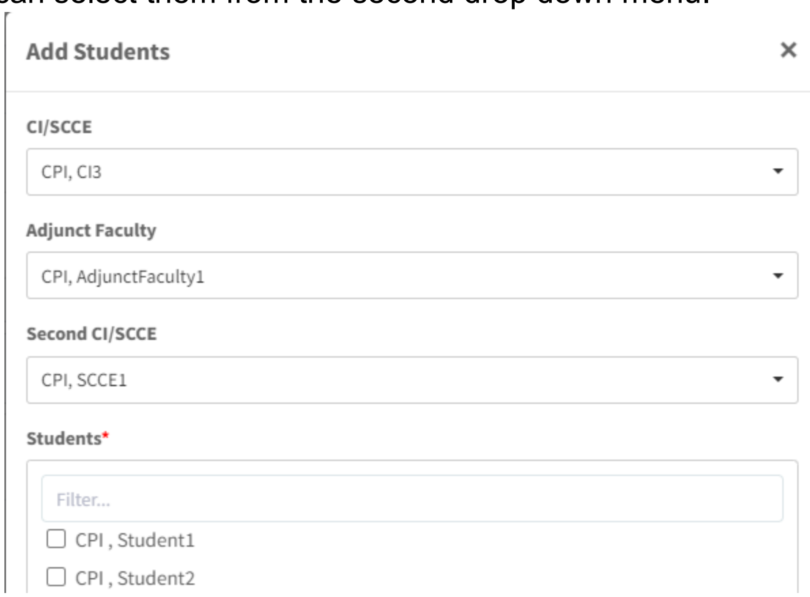


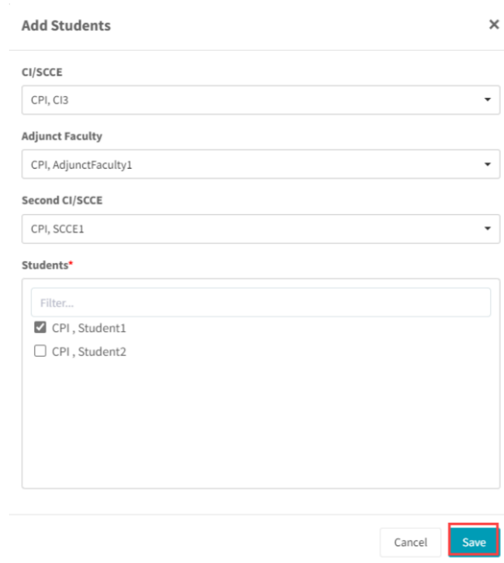
5. The screen will automatically switch to the Student tab. Click **+ Add Student**.



6. In the pop-up window, select the CI from the first drop-down menu and choose the student from the list of students at the bottom.

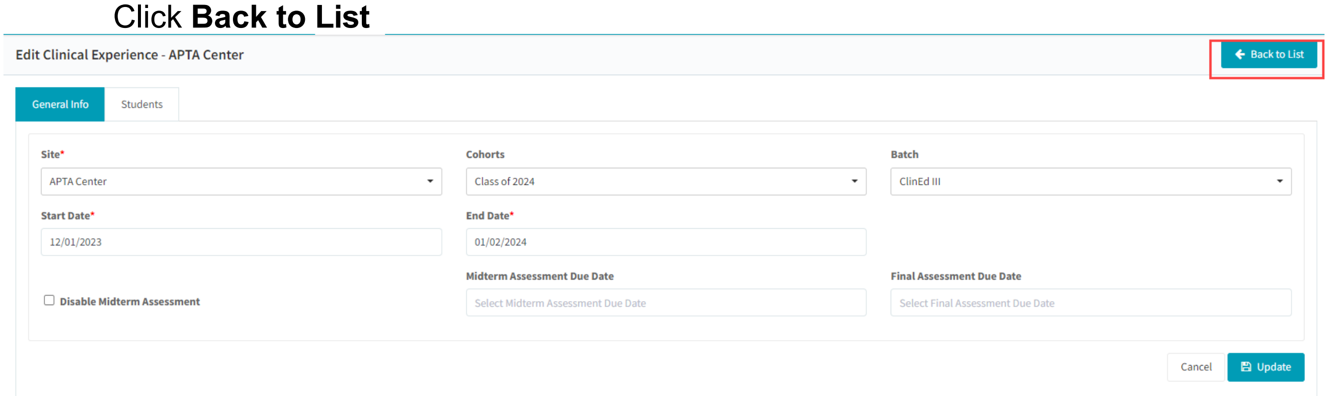
    - If your student will have a second CI, make sure they have been added to the site first, then you can select them from the third drop down menu.
    - If you will have an adjunct faculty member review the CPI of a student, make sure they have been added to the Users page, then you can select them from the second drop down menu.





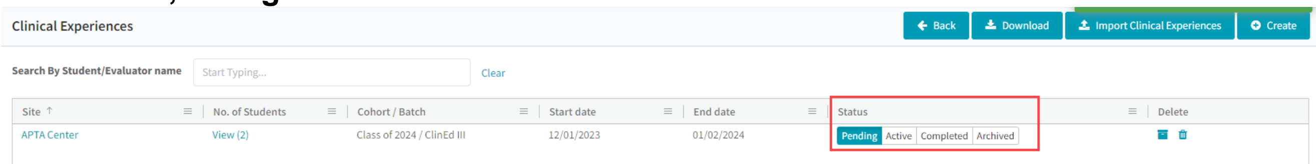
7. Once all fields are filled out, click Save.
8. Upon clicking save, the entry will appear. If you want to make any changes, simply click on the student's name and the pop-up will reappear.

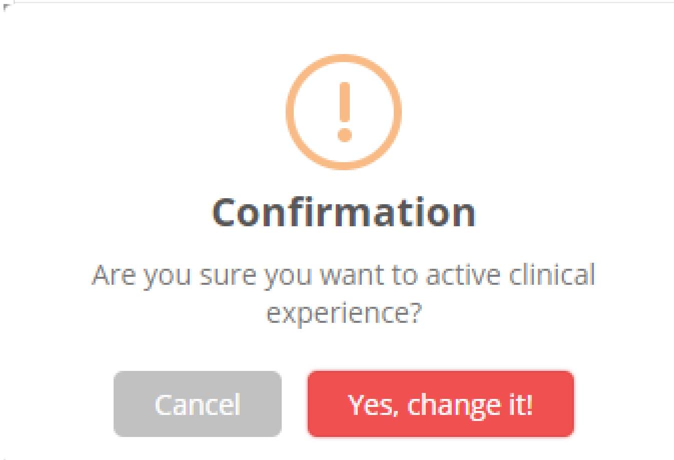
   Click **Back to List**



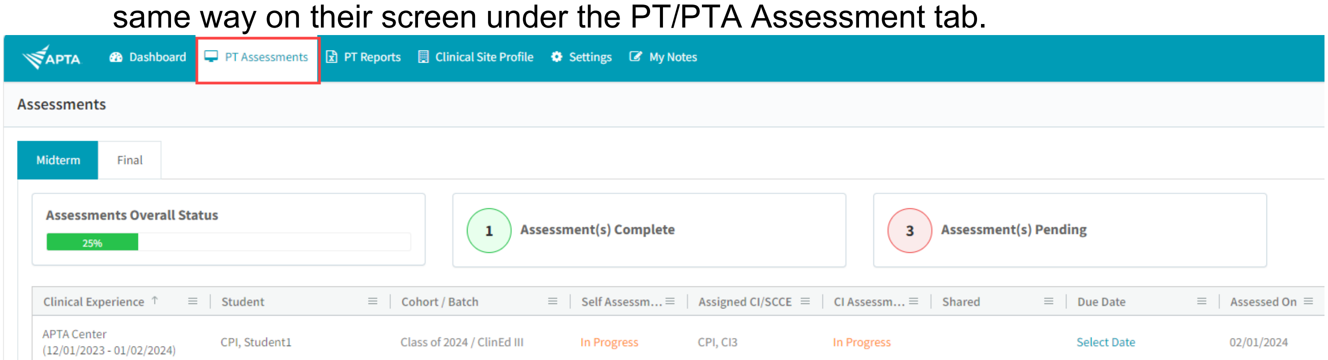
9. Once you finish creating the clinical experience, it appears on the main list as Pending. To release the CPI Assessment to your student and their CI, switch the experience to **Active**.

   When you make this switch, you will receive a confirmation pop-up, click **Yes, change it!**





10. To confirm the release, click PT/PTA Assessments in the top ribbon, and you will see the active evaluation. Your student and their CI will see it the same way on their screen under the PT/PTA Assessment tab.



Automatic/Spreadsheet Process for Creating Clinical Experiences

The general workflow with the automatic process is as follows:

1. Add/Create clinical sites.
2. Create cohort.
3. Obtain and complete spreadsheet.
4. Import spreadsheet to create clinical experiences.
5. Release clinical experiences to students and CIs.

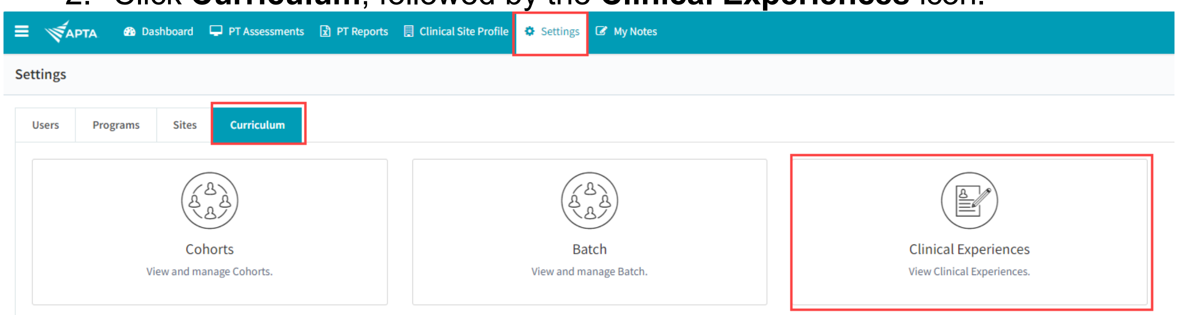
Steps 1 and 2 were discussed previously and this section will pick up at Step 3.

Obtaining and Completing Import Spreadsheet

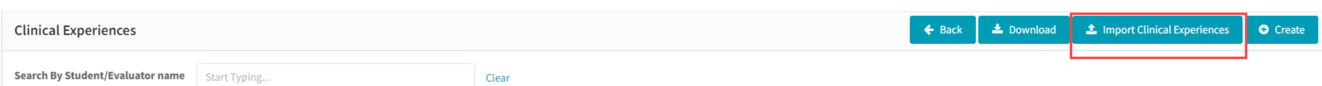
We have designed the import spreadsheet that must be used in order to properly import clinical experiences into the system.

1. Click **Settings** from the top menu bar.

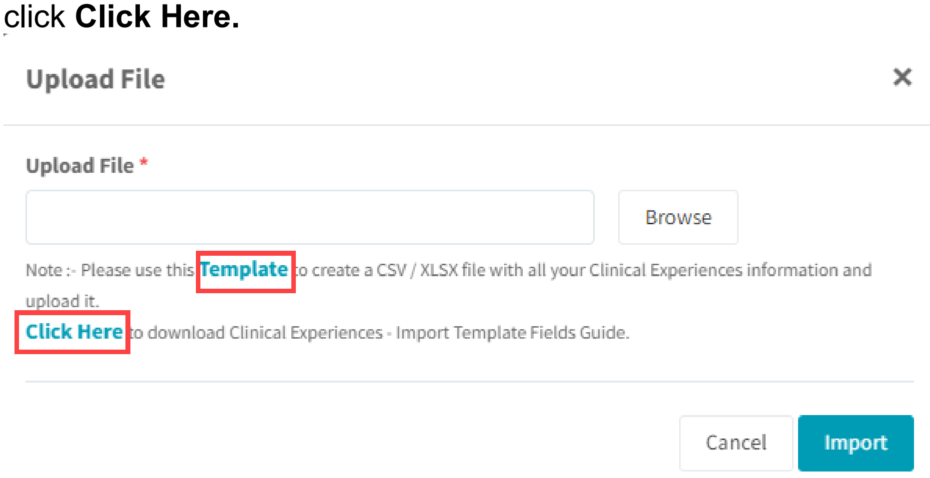
2. Click **Curriculum**, followed by the **Clinical Experiences** icon.



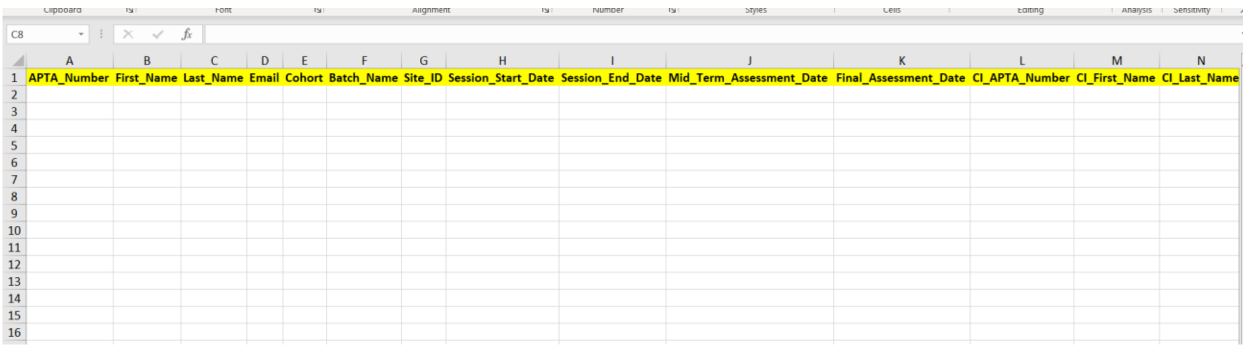
3. Click Import Clinical Experiences



4. Click **Template** to download the spreadsheet template. Also linked here is the list of required fields for the spreadsheet as guidance. To access it, click **Click Here.**



The downloaded template will open to Excel. Once you open the spreadsheet, you will see the highlighted headers. Do not alter the yellow highlighted template fields. If your program does not require the information requested in the template, leave the field blank. You will not be able to upload the template if the yellow highlighted fields have been altered.

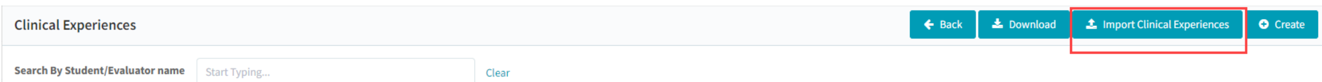


The following columns are required:

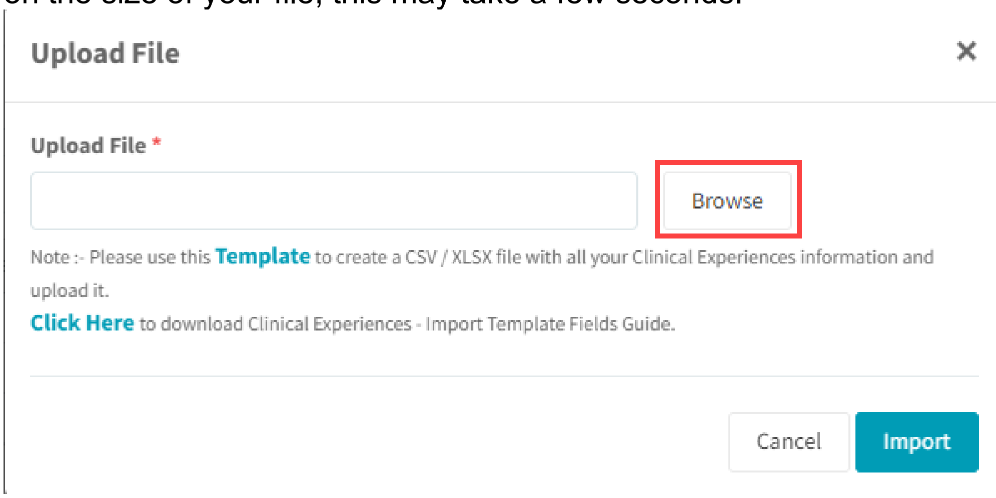
- B – Student First Name
- C – Student Last Name
- D – Student Email Address
- E – Student Cohort (must already be named in the system)
- F – Student Batch
- G – Site ID
    - This ID is found on the Sites page in the first column.
- H – Session Start Date
- I – Session End Date
- M – CI First Name
- N – CI Last Name
- O – CI Email Address

Import Spreadsheet

1. Once you have your data in your spreadsheet and are ready to import your data, save your spreadsheet and navigate back to Clinical Experience page in the CPI 3.0 (Settings > Curriculum > Clinical Experiences).
2. Click Import Clinical Experiences



3. Click **Browse** and find your spreadsheet, then click **Import**. Depending on the size of your file, this may take a few seconds.



4. Once the system finishes reviewing your spreadsheet, you will receive a preview screen. This screen will tell you if there are any invalid rows in your spreadsheet and the very last column, the system will tell you the error.

   In this example below, please note:

   - The first row indicates a Valid status. This means there are no errors in the data and the information can be imported into the system.
   - The second row is highlighted in red, and the last column has a status of Invalid with the reason that the CI/SCCE email does not exist in the system. In this situation, you will need to contact the CI to obtain the email address associated with their APTA account.

Clinical Experience Import Data

×

Apta ...	First...	Last...	Email	C..	Batc...		Sess...	Sess...	Mid ...	Fina...	CI/S... ↓	CI/S...	CI/S...	CI/S...	Status
[redacted]	Stacey	Schwartz	staceyschwartz@apta.org	Class of 2024	PTH 124 - Fall Clinical	37077111/01/2023		12/31/2023			[redacted]	Steven	Chesbro	stevenchesbro@apta.org	Valid
[redacted]	Chase	Kuhn	chasekuhn@apta.org	Class of 2025	PTH 121 - Fall Clinical	15222511/01/2023		01/31/2024				Doreen	Stiskal	doreenstiskal@apta.org	Invalid (CI/SCCE Email does not exist in the system,)

1 to 2 of 2

Page 1 of 1

☐ Skip Invalid Records

Cancel | Submit

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Possible error messages that can be received include:

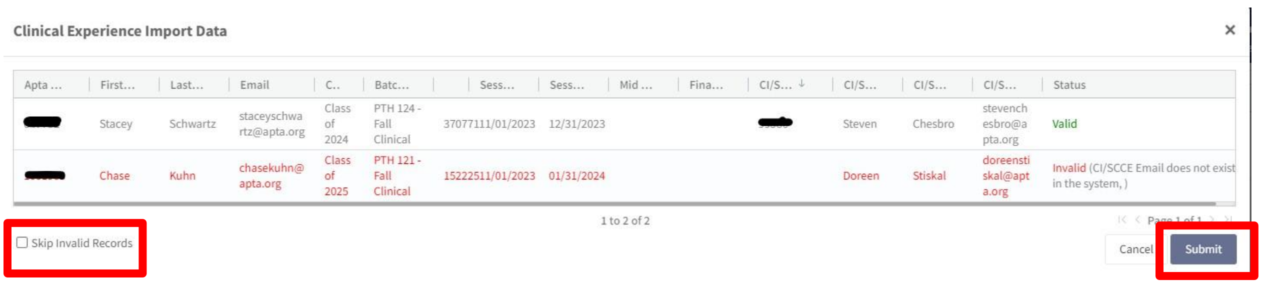
- Email does not exist in the system –
  Student email address does not match an APTA account. Please contact the student to either make an APTA account or provide you with the email address they used to make their APTA account and complete the training in the APTA Learning Center.

- Cohort does not exist in the system –
  Please follow the instructions for adding cohorts to the system, then repeat import.

- Site ID does not exist in the system –
  Please confirm on the Sites page that the site ID entered into your spreadsheet is correct.

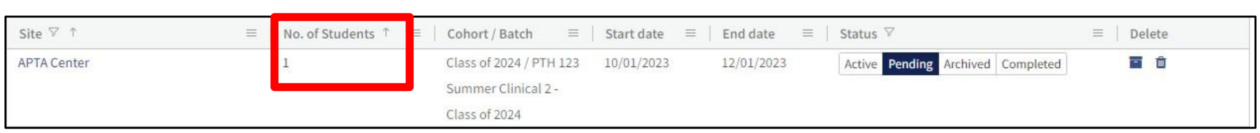
- CI/SCCE email does not exist in the system –
  CI email address does not match an APTA account. Please contact the CI to provide you with the email address they used to make their APTA account and complete the training in the APTA Learning Center.

5. You do have the option to check the box to **Skip Invalid Records** and click **Submit.** This will import all Valid records into the CPI 3.0.

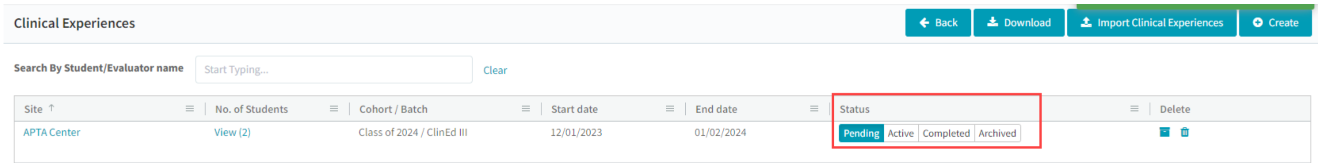


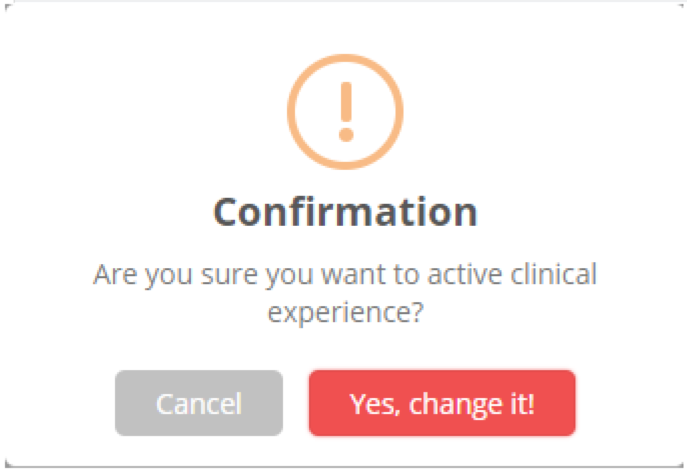
6. Once you finish importing the clinical experiences, they will appear on the main list as Pending. Please check to make sure students are paired with their CI. You can do this by clicking the number in the second column and it will show you the pairing.

   - If your student has a second CI, please use the instructions in the manual process to add the second CI to the clinical experience.



7. To release the CPI Assessment to your student and their CI, switch the experience to **Active**. When you make this switch, you will receive a confirmation pop-up, click **Yes, change**





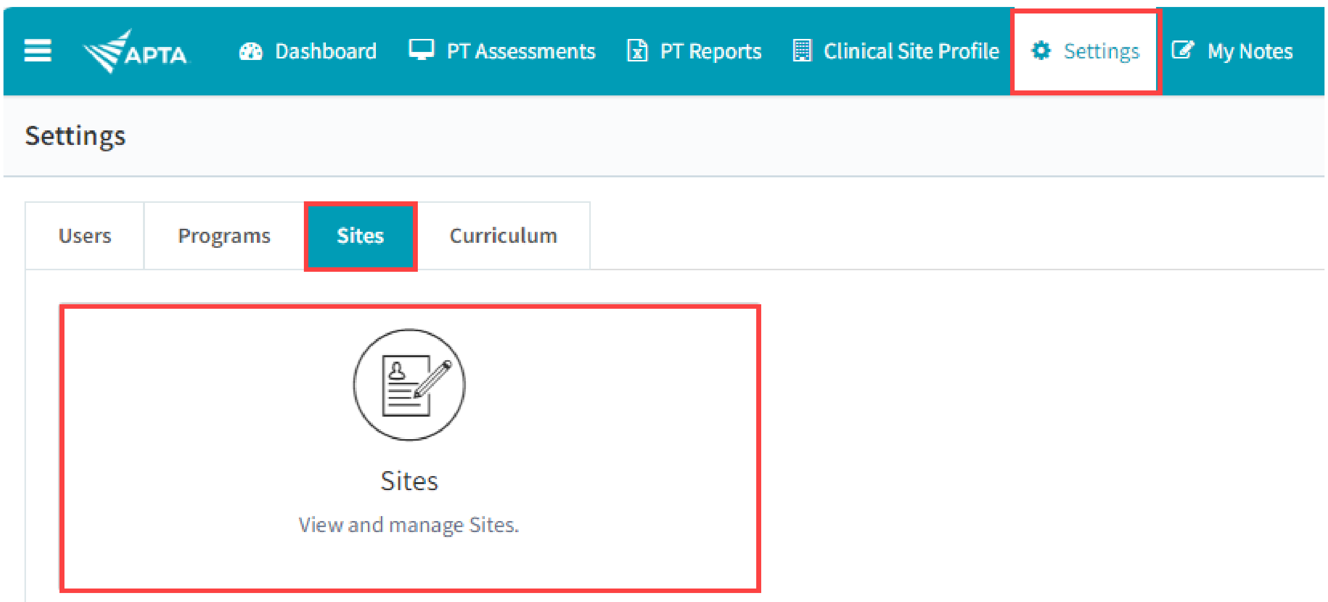
8. To confirm the release, click **PT/PTA Assessments** in the top ribbon, and you will see the active evaluation. Your student and their CI will see it the same way on their screen under the PT/PTA Assessment tab.

Adding a Second CI

When adding a second CI to a clinical experience, it is important to note that the two CIs will be working on a single assessment. The portal does not support multiple users simultaneously working on an assessment. CIs will need to coordinate and add their rating and comments at different times so when they click "Save as Draft," their work will be saved in the assessment. Click “Save as Draft” regularly to refresh the page and save the contents.

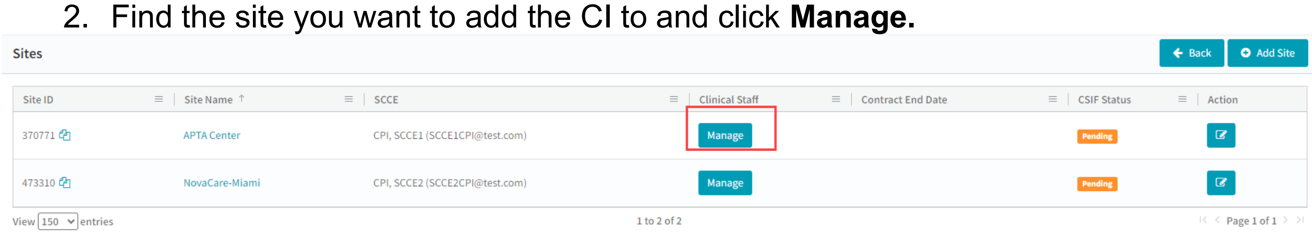
The CIs will have to agree on a rating for each criterion. If one CI submits the assessment, the other CI will no longer be able to edit it, so make sure they confirm with each other prior to submission. Please have each CI sign off on their individual comments so that they can be differentiated during assessment review.

1. Click **Settings** from the top menu bar.

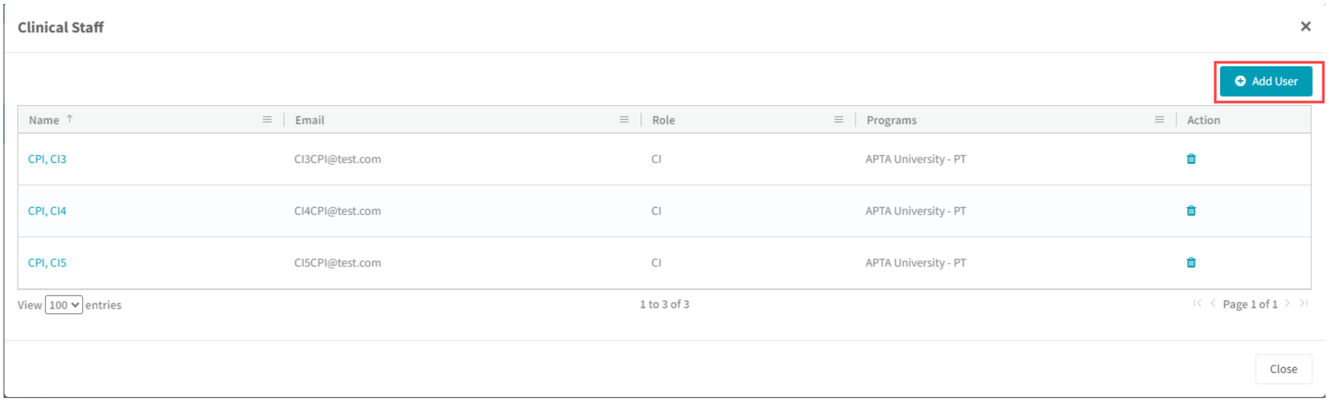


Click **Sites**, followed by the **Sites** icon.

2. Find the site you want to add the CI to and click **Manage.**

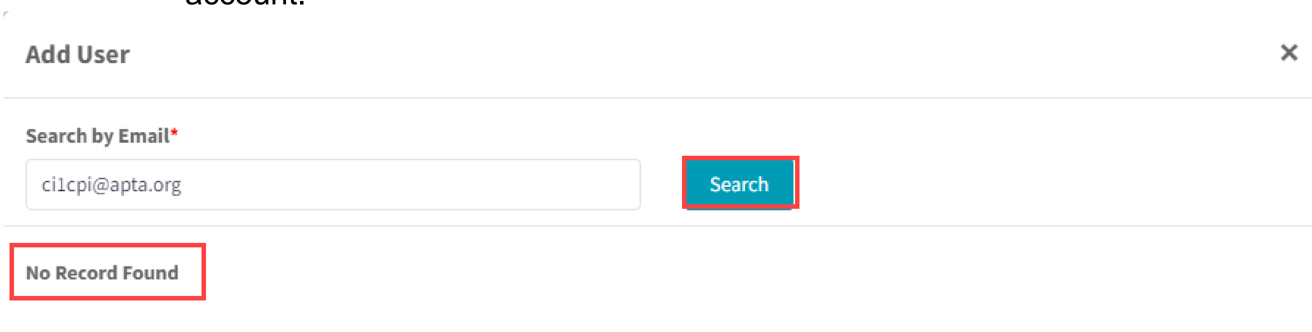


3. In the pop-up window, click **+ Add User**

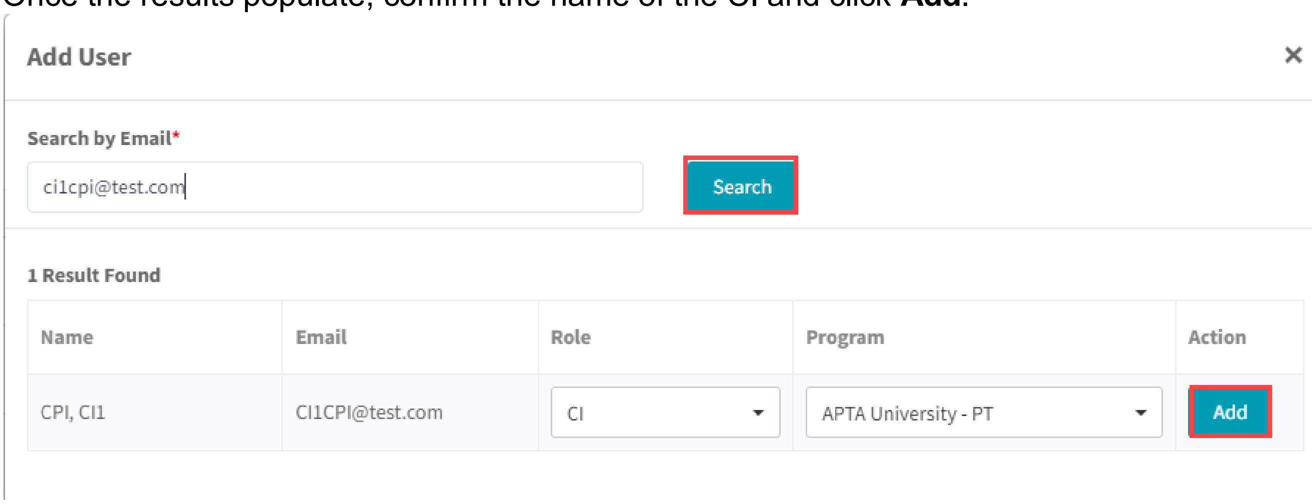


Enter the email address of the CI and click **Search.**

- If 'No Results Found' appears after clicking Search, please reach out to the CI to obtain the email address associated with their APTA account.



4. Once the results populate, confirm the name of the CI and click **Add**.



5. Click **Settings** from the top menu bar.
6. Click **Curriculum**, followed by the **Clinical Experiences** icon.

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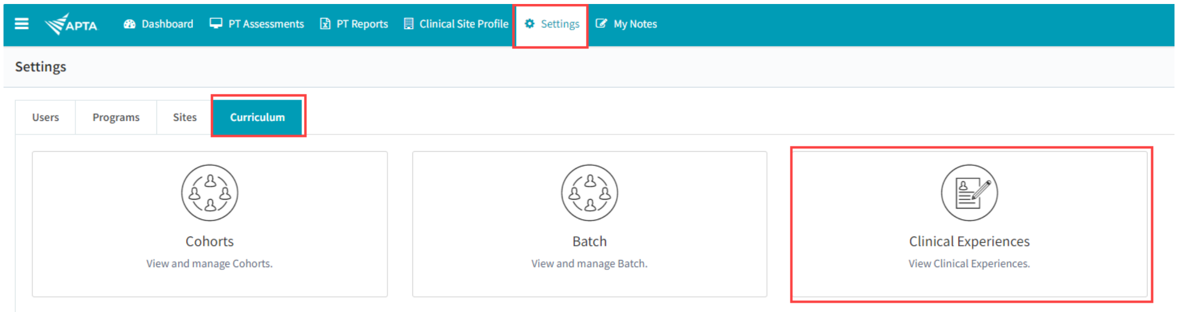
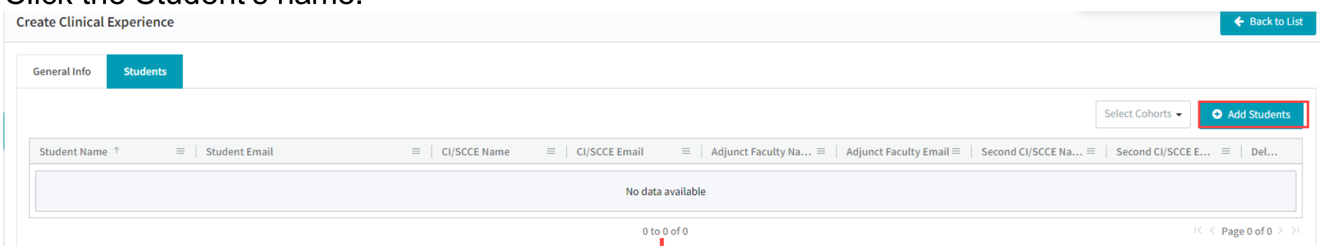
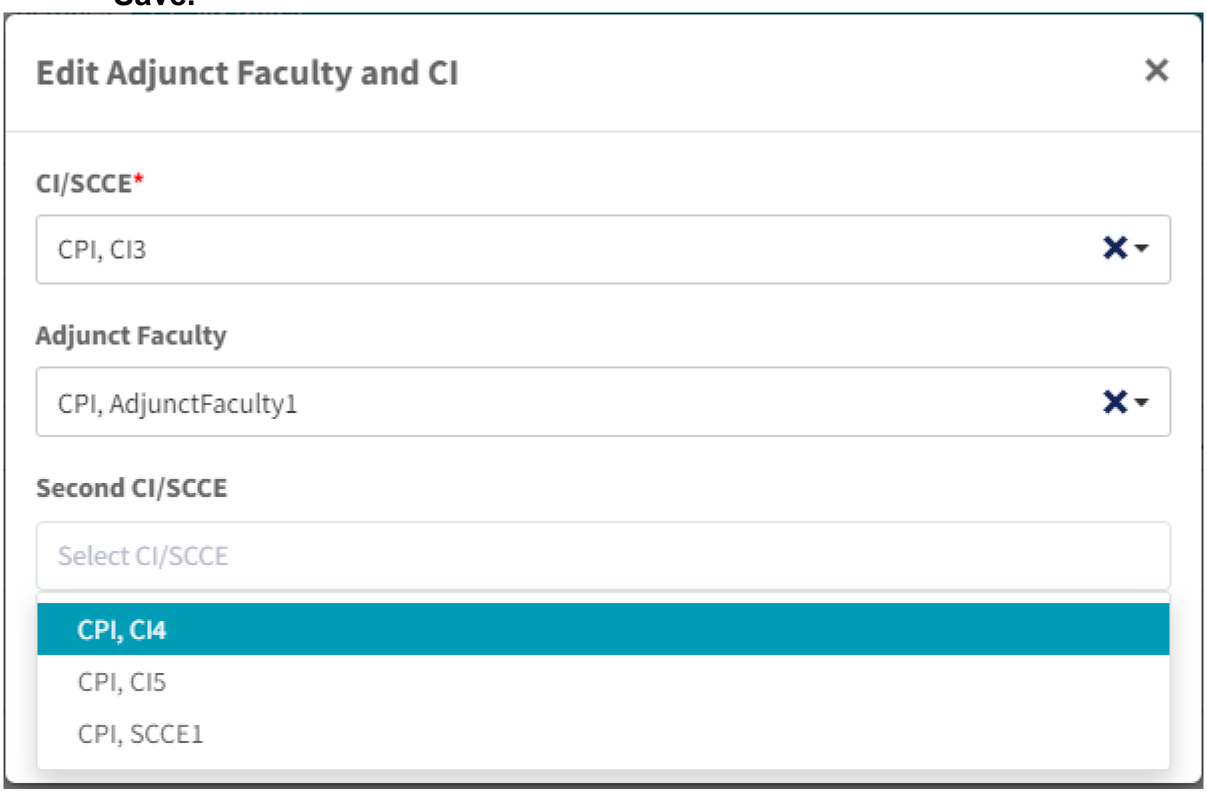


7. Find and click the site name then switch to the student tab.

Click the Student's name.



8. In the pop-up window, select the CI from the third drop-down menu, then click **Save.**



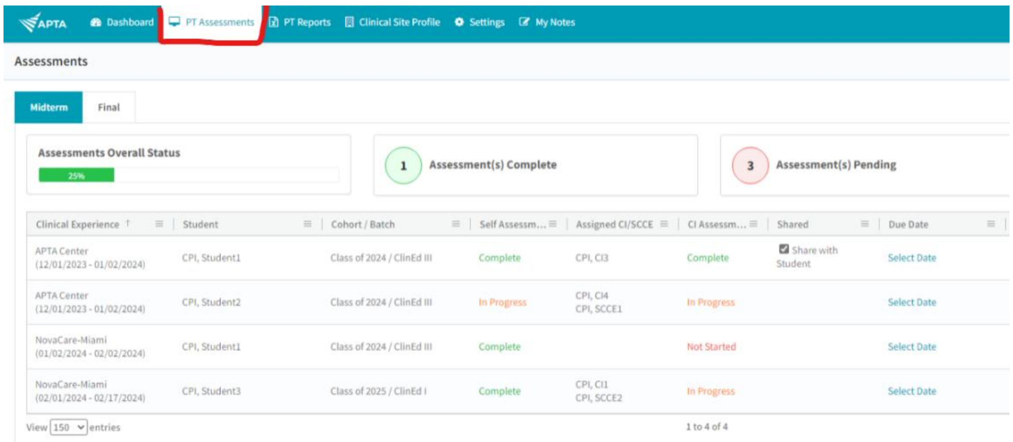
Note: If you need to make a new CI the first listed, select the new CI as CI/SCCE and hit Save. Then, you can go back in and the system will have updated so that you can add the original CI under Second CI/SCCE.

PT/PTA Assessments

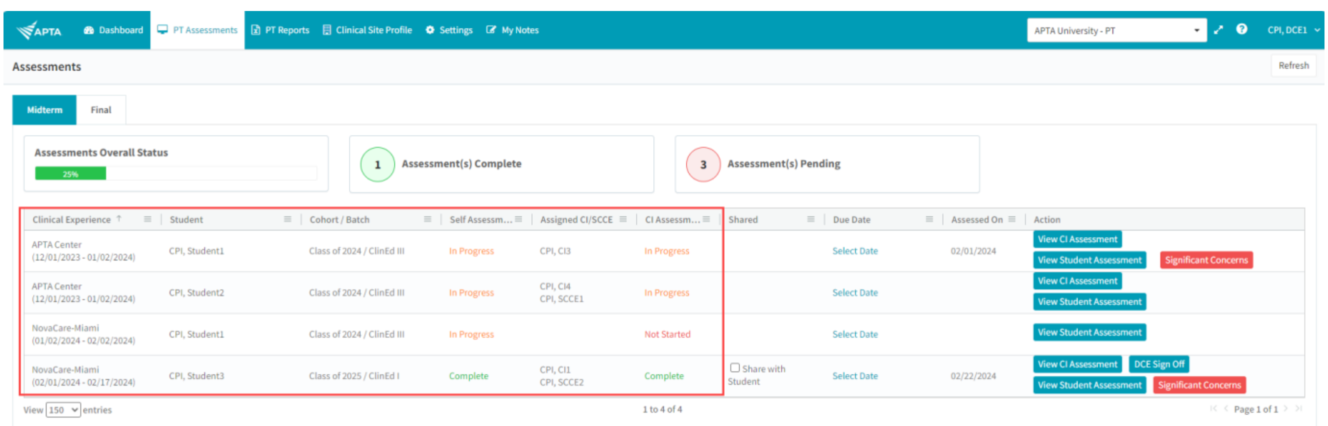
Now that your Clinical Experiences are created and the assessments are released to your student, you can track the progress of your student and CI on the PT/PTA Assessments page.

Viewing Assessments

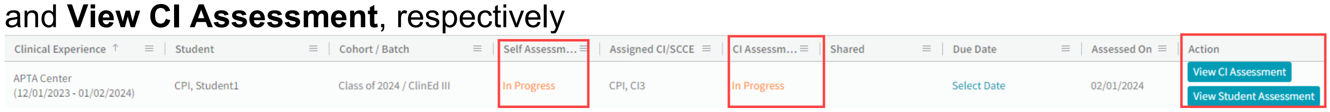
1. Click **PT/PTA Assessments** at the top of your screen.



2. Once on the screen, you will see each of the clinical experiences for your students, including their site, experience dates, cohort and batch, status of their self-assessment, the CI name(s), and the status of the CI Assessment.

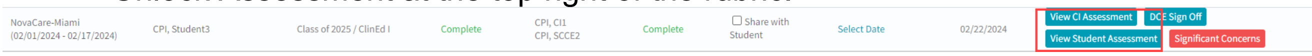


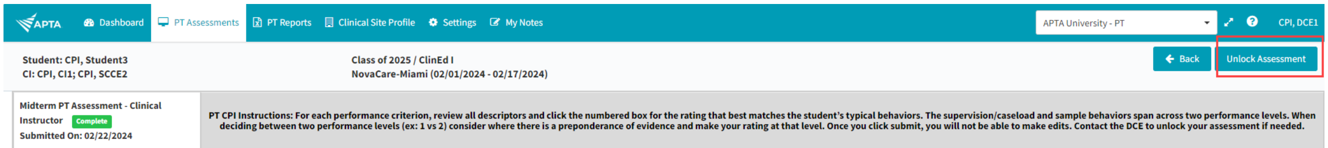
3. Once the student and CI have started their assessments, the status will change from Not Started to In Progress. When the status changes to In Progress, you will see a button that says **View Student Assessment** and **View CI Assessment**, respectively



4. Upon completion of the assessments, the status will change to Complete, and the assessments can be reviewed in its entirety.

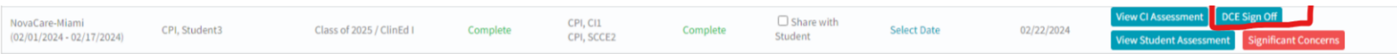
5. If a student or CI need to make edits to a submitted assessment, you may **unlock the assessment** by clicking View Assessment and then Unlock Assessment at the top right of the rubric.



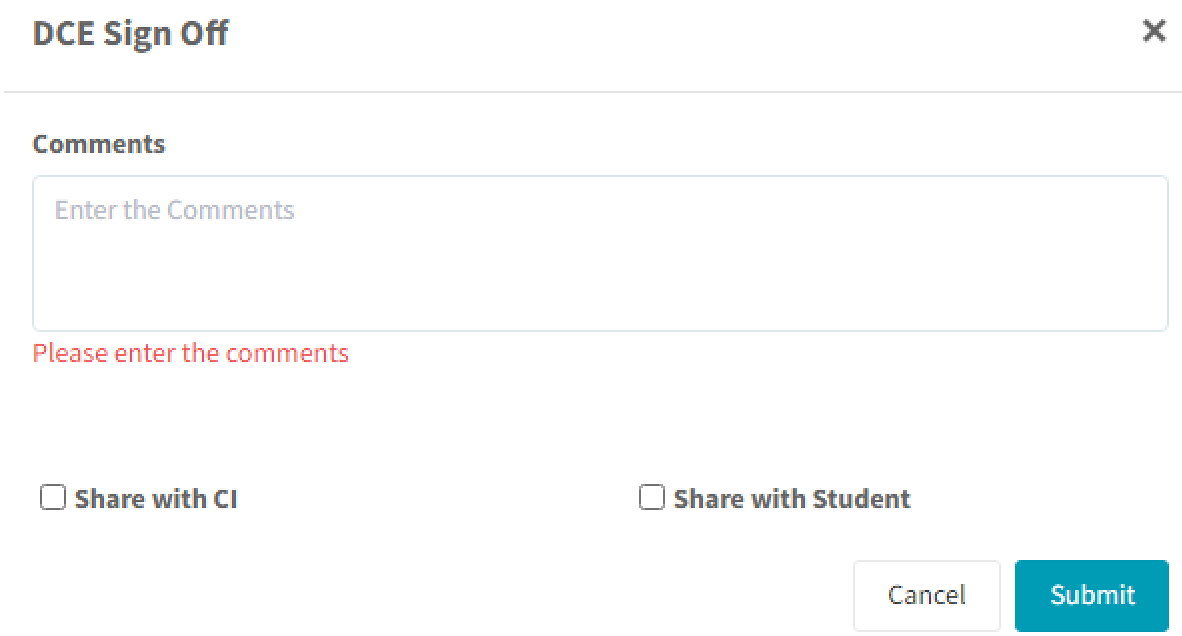


DCE Sign Off

1. After reviewing the Student and CI Assessment, click **DCE Sign Off.**



2. Provide your comments and select if you want to share the comments with the Student and/or CI, then click **Submit.**



3. Upon clicking Submit, the DCE Sign Off button will turn green to indicate that the sign off process is complete.

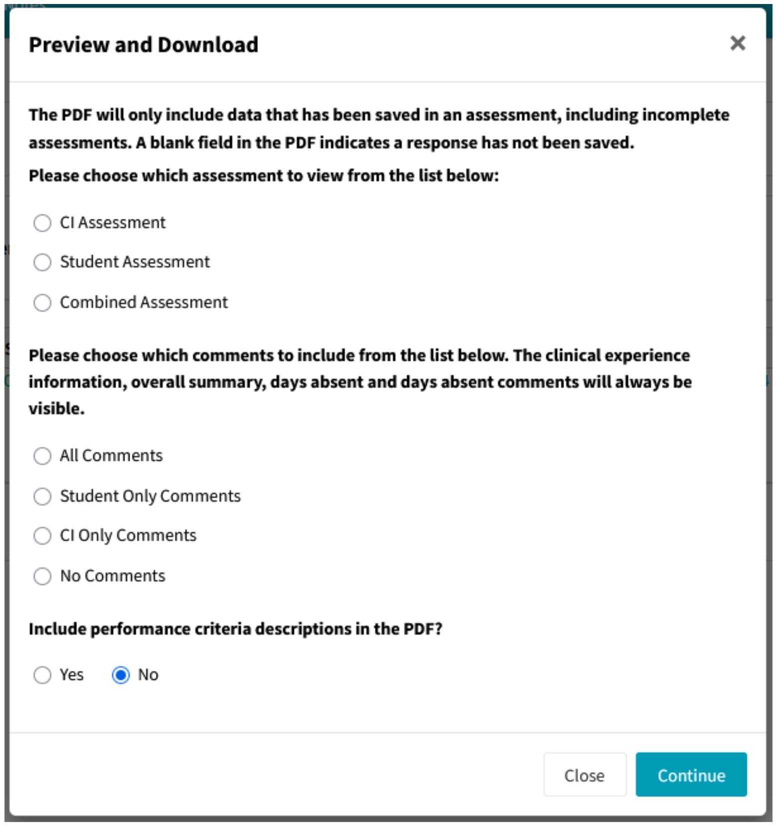
Viewing Combined Assessments

This feature provides the ability for authorized users to view, download and print the assessment reports with validations of what is shown based on user role and whether the assessment has been started or completed. The types of assessment can be selected as well as which comments are listed can be selected and are based on user role.

1. The "PDF" button will appear for all appropriate users on the midterm and final Assessment tab. When the "PDF" button appears for each user will follow the current system logic.
    a. The "PDF" button will appear for the DCE, ADCE, and SCCE once either the CI or student has started an assessment.
    b. The "PDF" button will appear for Admin Staff once an assessment has been completed.
    c. The "PDF" button will appear for the CI when the CI has started their assessment. The CI will not be able to see the student assessment or the combined assessment until both the CI and student have submitted their assessment.
    d. The "PDF" button will appear for the Student when the Student has started their assessment. The Student will not be able to see the CI assessment or the combined assessment until both the CI and student have submitted their assessment, and the school has shared it with them either manually or automatically, following the current logic.

Clinical Experience	Student	Cohort / Batch	Self Asse...	Assigned CI/SCCE	CI Assess...	Shared	Due Date	Assessed On	Action
APTA Hospital - Outpatient (10/23/2023 - 12/15/2023)	CPI, Student1	Class of 2024 / DPT 2530 (2024)	Complete	CPI, CI1	Complete	☑ Share with Student	08/03/2024	07/10/2024	View CI Assessment DCE Sign Off View Student Assessment Significant Concerns PDF

2. Clicking the "PDF" button (for DCE, ADCE, Admin Staff, SCCE, and Adjunct Faculty) will open a sub-menu where they can select which assessment type and comments they want to view. The clinical experience information at the top of the assessment PDF, student and CI assessment ratings, overall summary, number of days absent, days absent comments, and assessment submission dates will always be visible.
    a. The assessment type options are as follows:
        i. CI Assessment (Will be disabled if CI has not started assessment)
        ii. Student Assessment (Will be disabled if student has not started assessment)
        iii. Combined Assessment (Will be disabled if CI & Student assessments are not complete)
    b. The sub-menu options are below:
        i. All comments
        ii. Student Only Comments
        iii. CI Only Comments
        iv. No Comments
    c. There is also an option to include descriptions of each performance criteria.


Preview and Download ×

The PDF will only include data that has been saved in an assessment, including incomplete assessments. A blank field in the PDF indicates a response has not been saved.

Please choose which assessment to view from the list below:

- ◯ CI Assessment
- ◯ Student Assessment
- ◯ Combined Assessment

Please choose which comments to include from the list below. The clinical experience information, overall summary, days absent and days absent comments will always be visible.

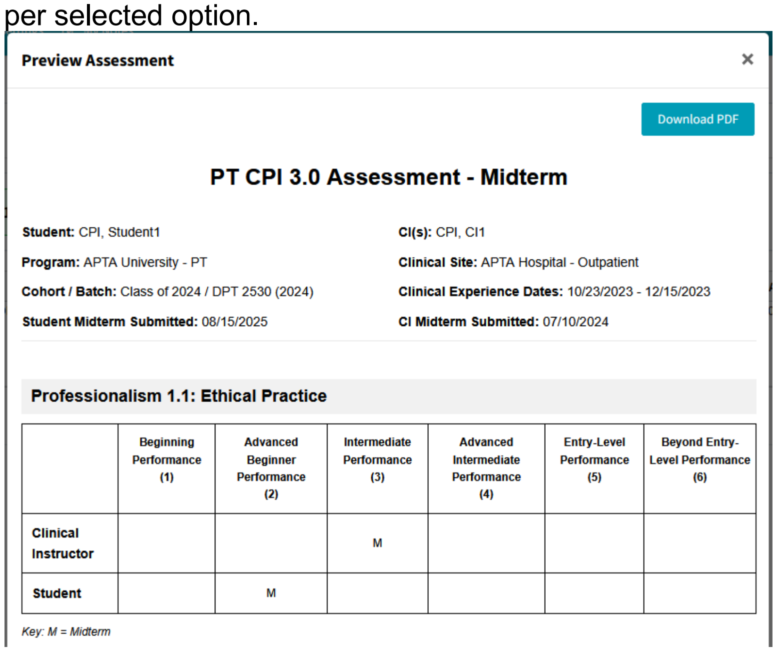
- ◯ All Comments
- ◯ Student Only Comments
- ◯ CI Only Comments
- ◯ No Comments

Include performance criteria descriptions in the PDF?

◯ Yes ◉ No

Close Continue

3. The "PDF" button in the midterm tab will include ratings and comments from JUST the midterm. The "PDF" button in the final tab will include ratings and comments from the midterm AND final.
4. Once the user selects the assessment type and comments they want to see, they will be able to view the appropriate fields on the provided PDF. The user should be able to view, download, save, and print the assessment they choose to view.
5. Clicking on Download button allows the user to produce the PDF document – PDF will be generated as per selected option.


Preview Assessment ×

Download PDF

PT CPI 3.0 Assessment - Midterm

Student: CPI, Student1
Program: APTA University - PT
Cohort / Batch: Class of 2024 / DPT 2530 (2024)
Student Midterm Submitted: 08/15/2025
CI(s): CPI, CI1
Clinical Site: APTA Hospital - Outpatient
Clinical Experience Dates: 10/23/2023 - 12/15/2023
CI Midterm Submitted: 07/10/2024

Professionalism 1.1: Ethical Practice

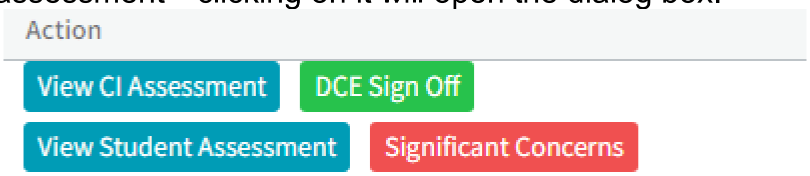
	Beginning Performance (1)	Advanced Beginner Performance (2)	Intermediate Performance (3)	Advanced Intermediate Performance (4)	Entry-Level Performance (5)	Beyond Entry-Level Performance (6)
Clinical Instructor			M			
Student		M				

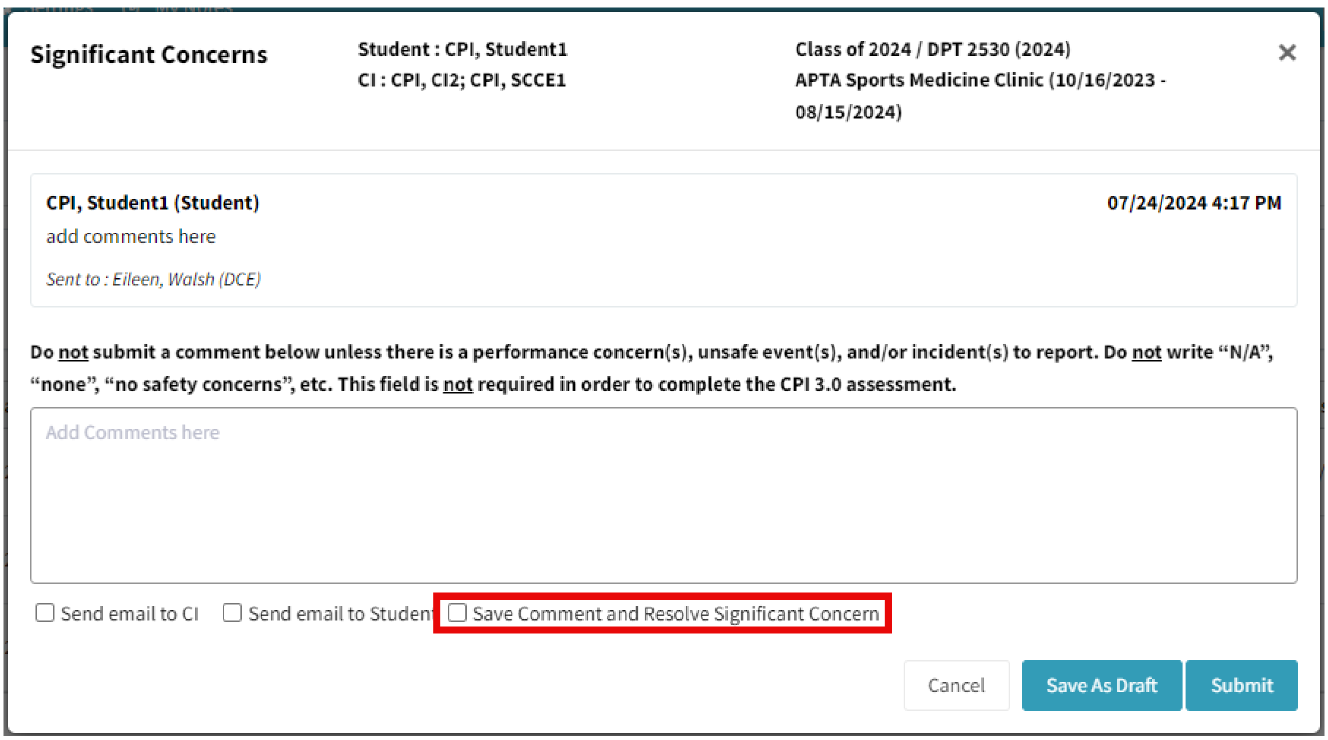
Key: M = Midterm

Significant Concerns

Throughout the clinical experience, students and CIs may submit "Significant Concerns" to the DCE/ADCE. These comments pertain to incidents that have occurred throughout the clinical experience or situations that are of concern to the student or clinical instructor(s). They can submit these concerns at any time.

When a Significant Concern is reported, the DCE and ADCE will receive an automated email notification. The Significant Concern button will populate as a red button next to the assessment—clicking on it will open the dialog box.





Here, you can review comments made by the student or CI. You can then write your comments and send a notification to the student and/or CI. Click "Save Comment and Resolve Significant Concern" checkbox, before submitting the assessment. Once the concern is resolved the Significant Concern button on the Assessment grid turns green.

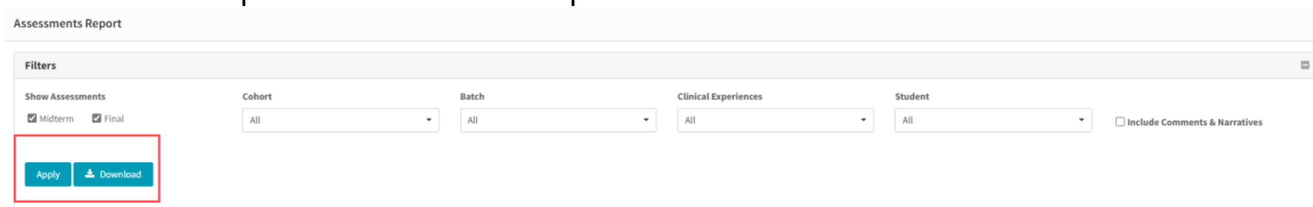
Please note: The Significant Concerns box functions as a notification service, not a communication service. Please remind your students and CIs that this is not a required field.

PT/PTA Reports

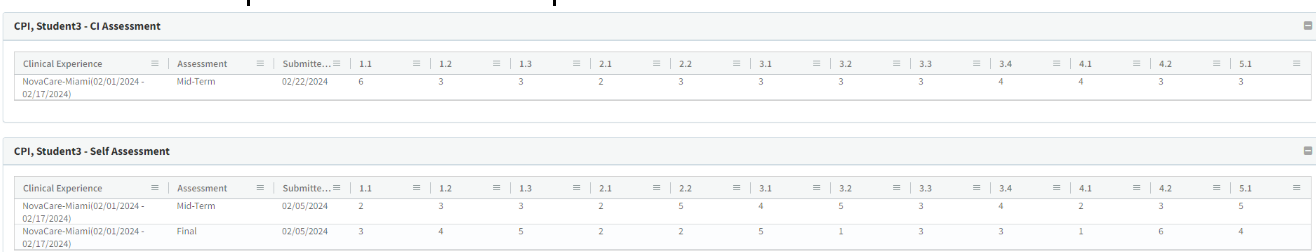
The PT/PTA Reports displays a quick view of the ratings submitted by students and CIs. It also allows for downloading the ratings and comments into an excel sheet.

1. Click **PT/PTA Reports.**

2. Adjust the filters to see any specific data. Click **Apply.** Click **Download** to have the data presented in an excel spreadsheet.



Here is an example of how the data is presented in the CPI.



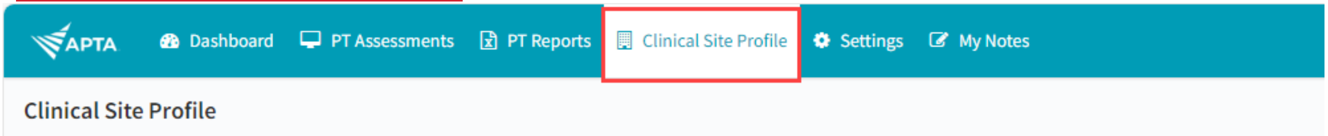
CPI, Student3 - CI Assessment

Clinical Experience	Assessment	Submitte...	1.1	1.2	1.3	2.1	2.2	3.1	3.2	3.3	3.4	4.1	4.2	5.1
NovaCare-Miami(02/01/2024 - 02/17/2024)	Mid-Term	02/22/2024	6	3	3	2	3	3	3	3	4	4	3	3

CPI, Student3 - Self Assessment

Clinical Experience	Assessment	Submitte...	1.1	1.2	1.3	2.1	2.2	3.1	3.2	3.3	3.4	4.1	4.2	5.1
NovaCare-Miami(02/01/2024 - 02/17/2024)	Mid-Term	02/05/2024	2	3	3	2	5	4	5	3	4	2	3	5
NovaCare-Miami(02/01/2024 - 02/17/2024)	Final	02/05/2024	3	4	5	2	2	5	1	3	3	1	6	4

Clinical Sites Profile/CSIF



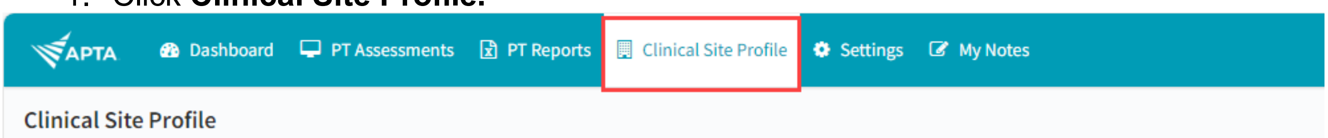
The Clinical Site Profile tab (or CSIF) is a listing of clinical sites with a completed profile. This list differs from the list on your Sites page (after you click Settings). Students and CIs should look under the PT(A) Assessments tab to determine their assigned sites.

The Site Profiles includes the following information:

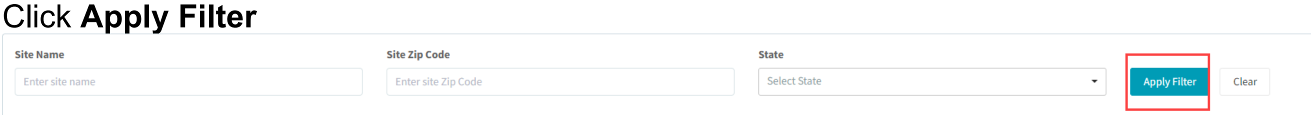
- Site Information
  - Address
  - Clinical Site Classifications
  - Clinical Site Location
  - Affiliated PT and PTA Educational Program
- Number of Clinical Faculty/Clinical Instructors
- Physical Therapy Services
  - Number of Patients
  - Patient/Client Lifespan and Continuum of Care
  - Patient/Client Diagnoses
  - Interprofessional Practice
- Clinical Education Experiences
- Information for Students

Viewing the completed Clinical Site Profiles/CSIF

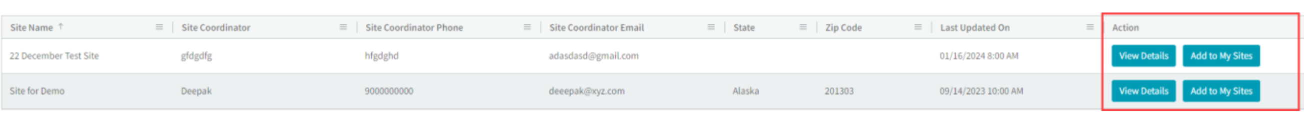
1. Click **Clinical Site Profile.**



2. Use the search filters to search for a specific site name, zip code or state. Click **Apply Filter**



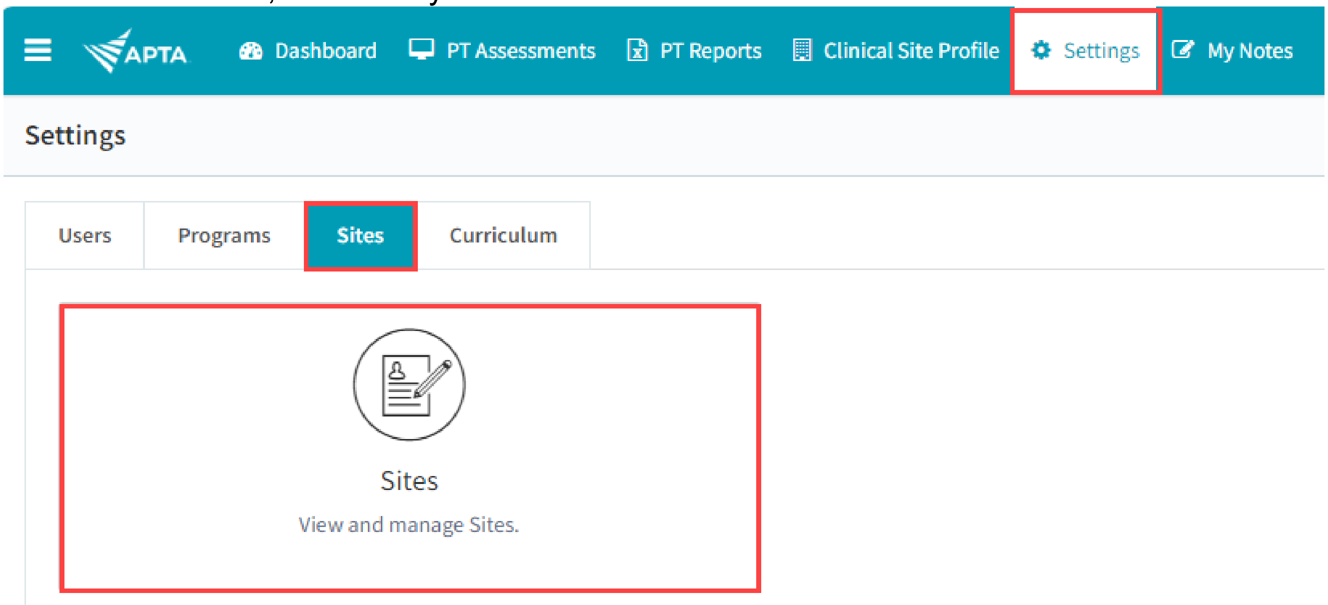
3. Once the site(s) you are looking for populates, click **View Details**. If the site is not already in your sites list and you want to include it in your list, click **Add to My Sites.**



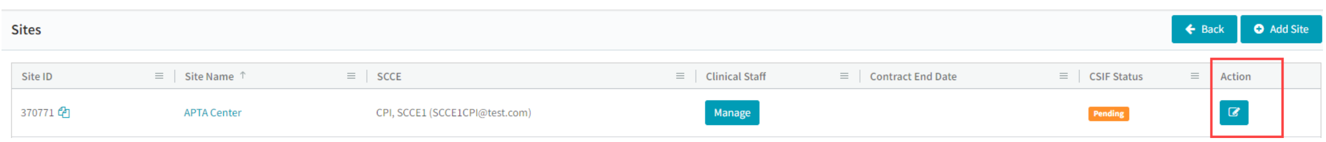
Editing the Clinical Site Profiles/CSIF

The CSIF only shows sites that have a completed profile. Use the following instructions to edit the CSIF for a site affiliated with your program. While you have the permission to edit a clinical site profile, this should be the priority of the site's SCCE.

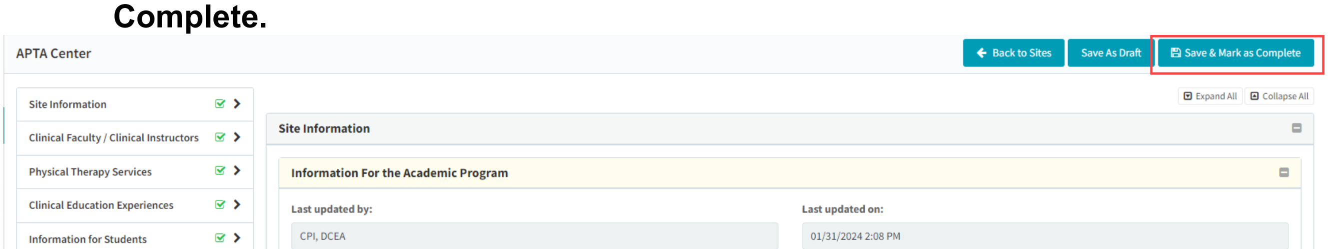
1. Click **Settings** from the top menu bar.
2. Click **Sites**, followed by the **Sites** icon.



3. Click the edit icon in the last column of the row.



4. Complete the elements of each category. The orange indicators next to the category names will change to a green checkmark once all required fields are completed. Once completed, click **Save & Mark as Complete.**



Note: Save Site Information

- Save As Draft allows you to save incomplete site information without publishing it to the CSIF. Sites saved as a draft will remain in **pending** status until edits are complete.
- Save & Mark as Complete means all required site information is **complete** where it can be shared to the CSIF.
- Back to Sites brings you back to the Sites page in Settings. **CHANGES WILL NOT BE SAVED.**

EMS Education Management Solutions

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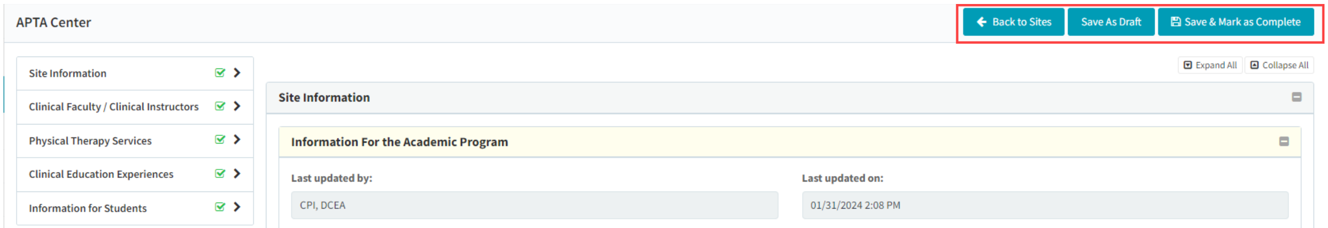

Guide to Multiple Roles

APTA CPI 3.0 Guide to Multiple Roles
The goal of multiple roles is to allow users, through a single APTA user account, to have multiple roles within and across programs, rather than only one role across every program.

Each user will have a primary role with a program and can have secondary roles with that same organization. A different program can choose a different role to be the primary role. As users switch between roles and programs the access and abilities of the different roles apply.

Assign multiple user roles to a user when editing a user profile. The option of additional secondary roles is dependent on the primary user role. When multiple user roles are assigned, users can switch or easily toggle between roles and have additional permissions for that role.

Primary Role	**Possible Secondary Roles**		
	Adjunct Faculty	Site Coordinator of Clinical Education (SCCE)	Clinical Instructor (CI)
Director of Clinical Education (DCE)	Y	Y	Y
Associate Director of Clinical Education (DCE)	Y	Y	Y
Administrative Staff	Y	Y	Y
Adjunct Faculty		Y	Y
Site Coordinator of Clinical Education (SCCE)	Y		Y
Clinical Instructor (CI)	Y	Y	
Student	Y		Y

The examples below feature CIs and SCCEs, but do apply for other roles as well.

1. Add new users to the role that you need them to have with your program.
2. For existing users, add change/keep their primary role and add secondary roles via the Users area or the Sites area.

EMS Education Management Solutions

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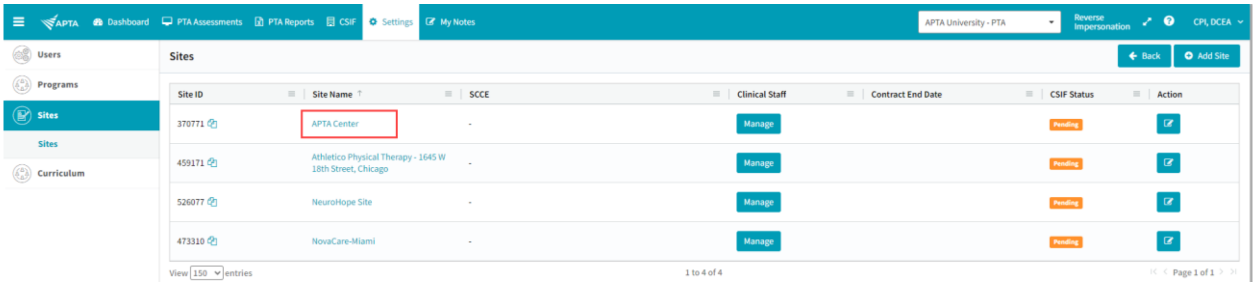
CIs and SCCEs now appear under the Users tab.

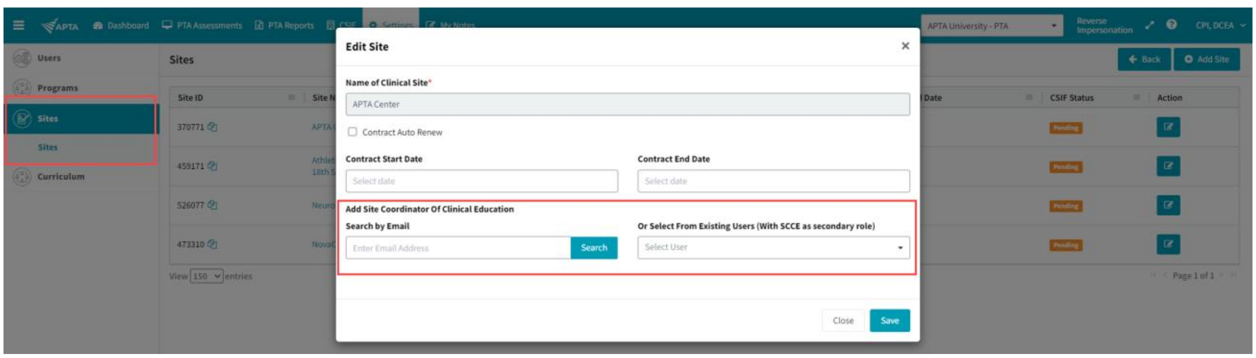
Adding new CIs and SCCEs

Add under Sites tab - SCCE

1. Click on site name.



2. Enter the user's APTA email address and click Search, OR select from drop-down menu to choose a user that has the secondary role of SCCE.
3. Click Save.



Add under Sites tab – CI

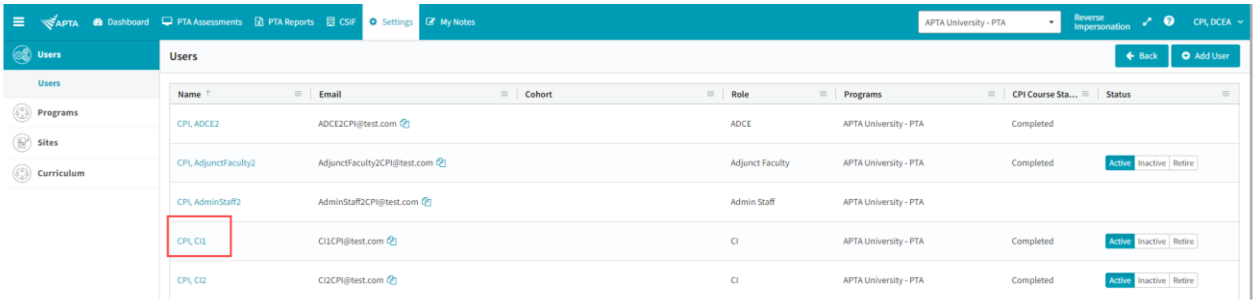
1. Click on Manage tab.
2. Click Add Clinical Staff.
3. Enter the user's APTA email address and click Search, OR select from drop-down menu to choose a user that has the secondary role of CI.

Giving users additional roles

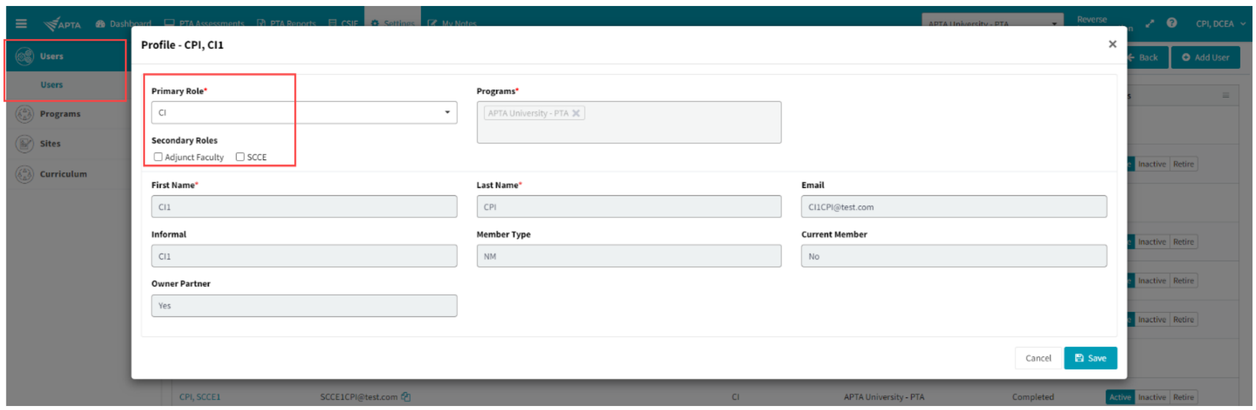
SCCEs

Option 1: Under Users tab

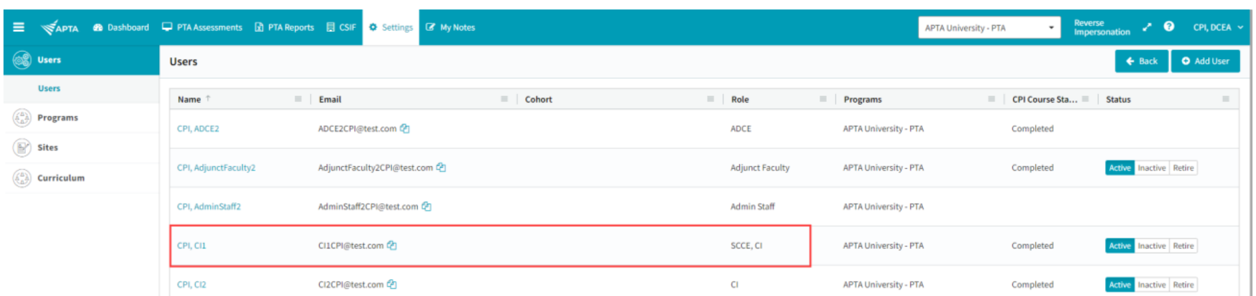
1. Click on user name.



2. Select either (or both) additional role options. You can also switch the primary role here. Hit Save when you are finished.

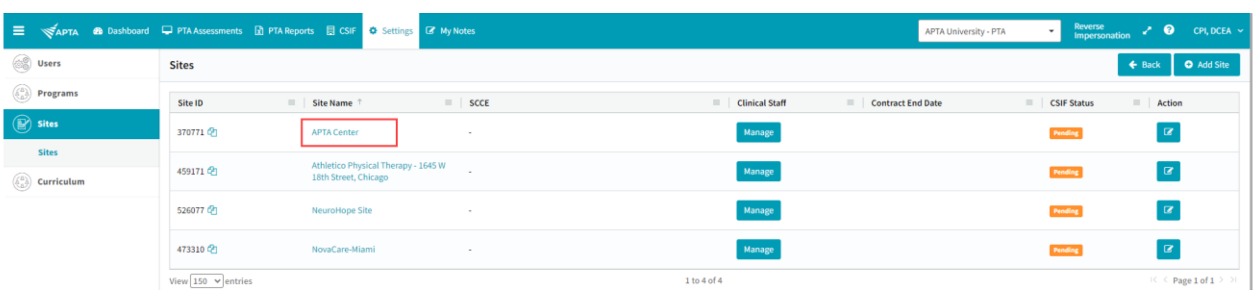


3. You will then see the user's roles in the Users tab.



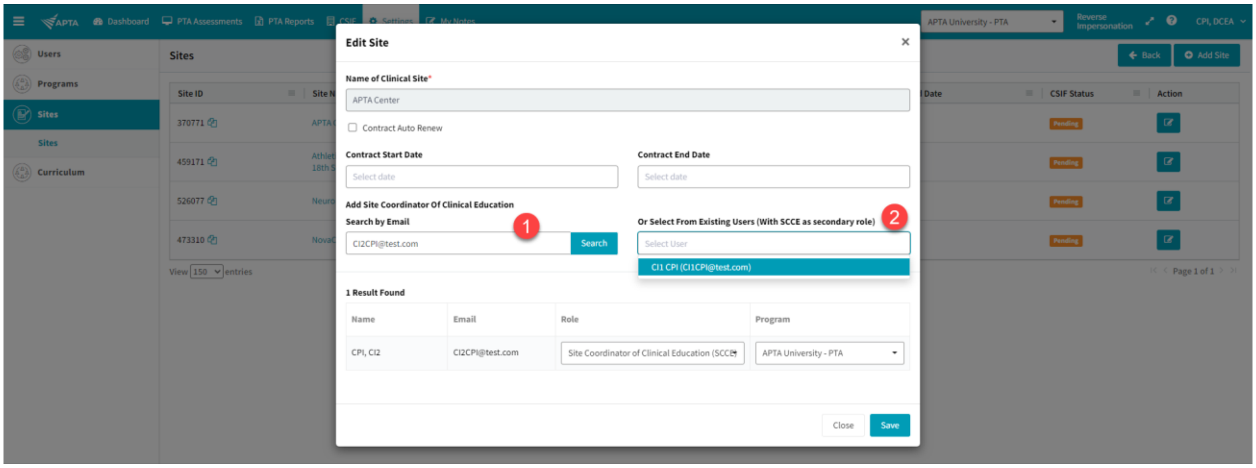
Option 2: Under Sites Tab - SCCEs

1. Click the site name.

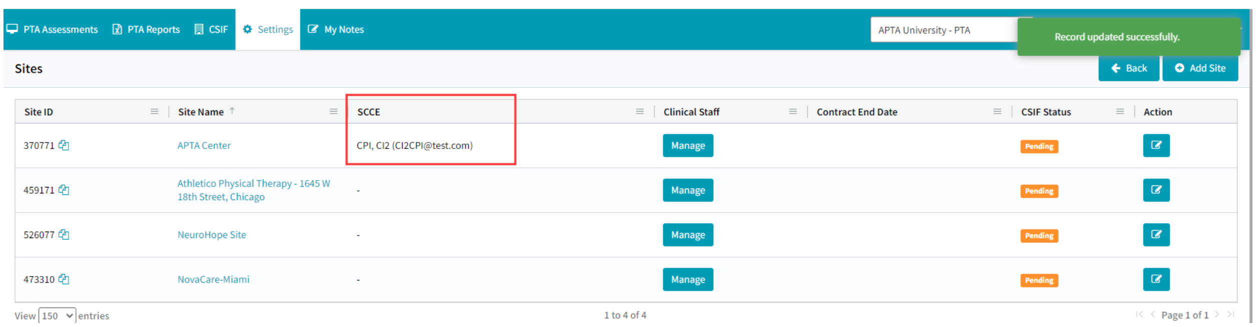


2. To assign a user another role as well as assigning them to the site, (1.) Search for them with their APTA email address.

3. If the user has already been given the additional SCCE role, (2.) select from drop-down menu to assign them to the site here.

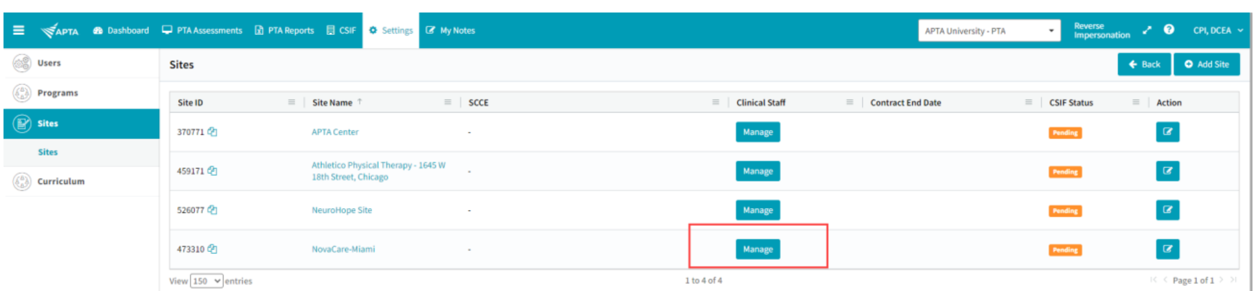


4. You will now see the user with the second role in the Sites tab as well as the Users tab.

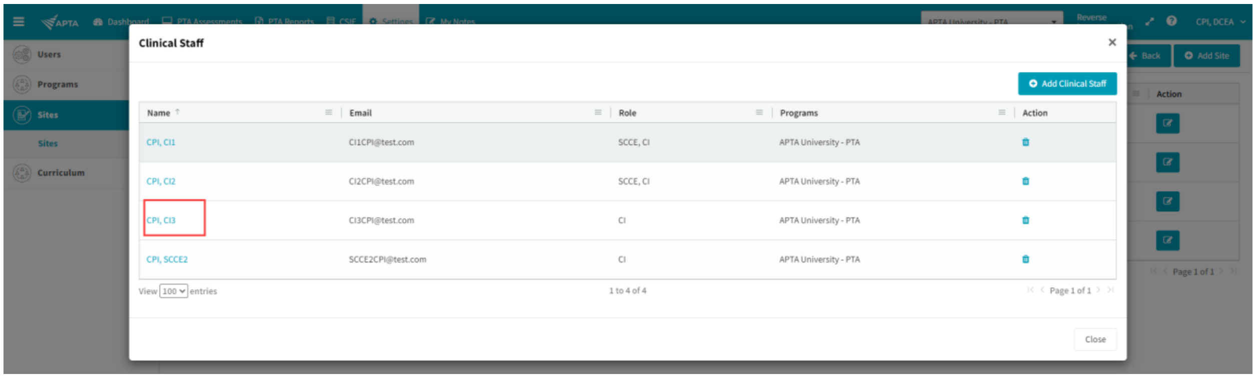


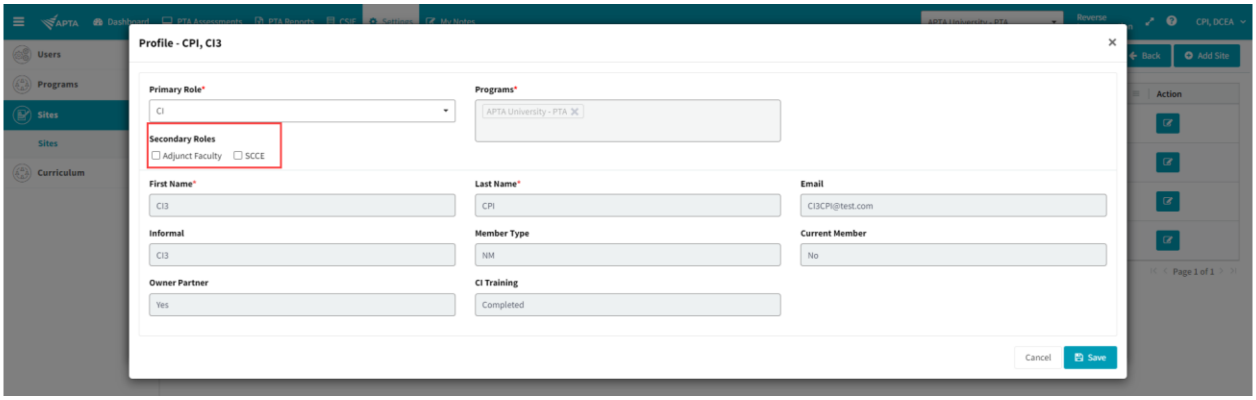
Option 3: Under Sites Tab – Cis

1. Click the Manage tab.

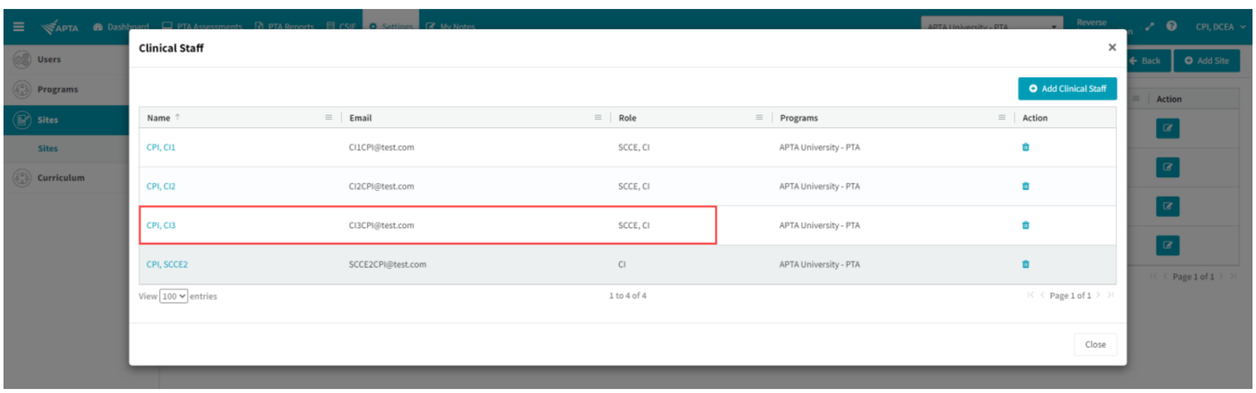


2. Click on the user's name and select the additional role.





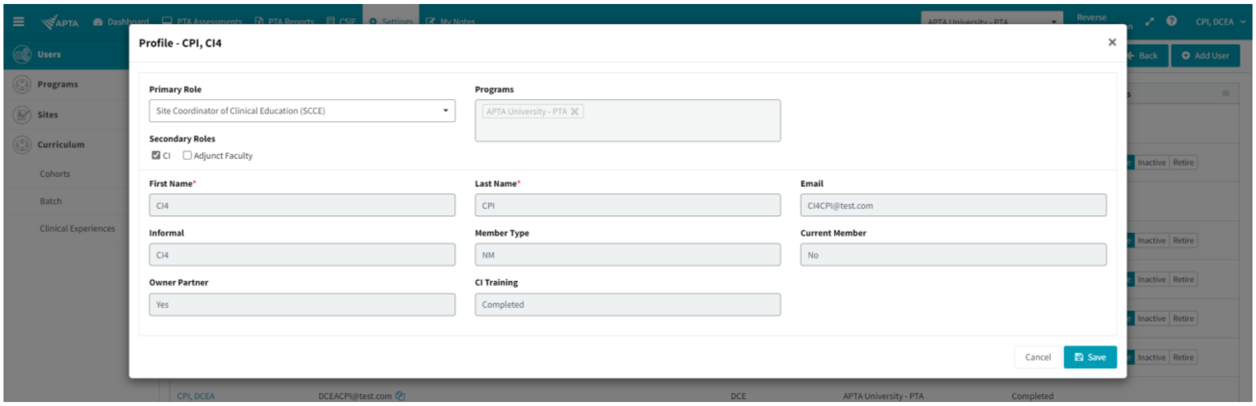
3. You will now see the user with the second role in the Sites tab as well as the Users tab.

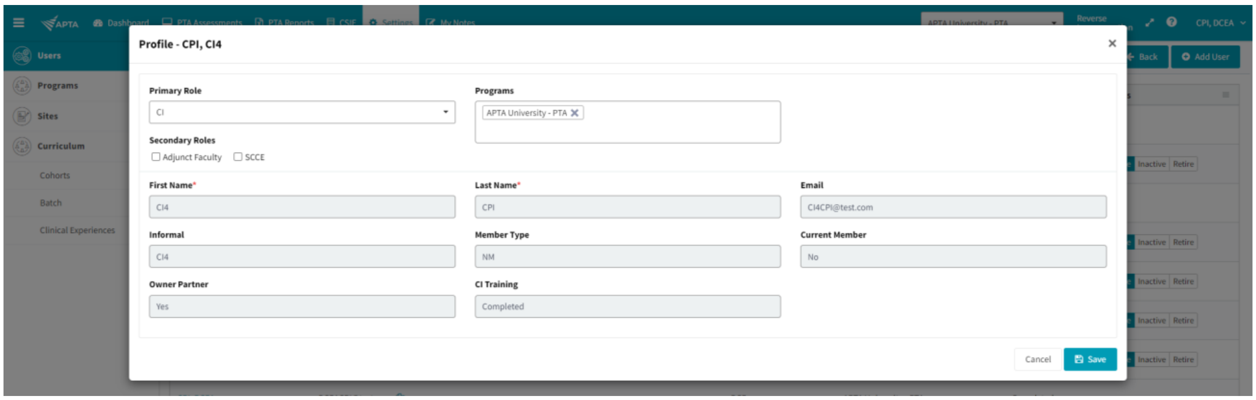


Removing a user from a role

Option 1 (Easiest Option): Under Users tab – SCCE example

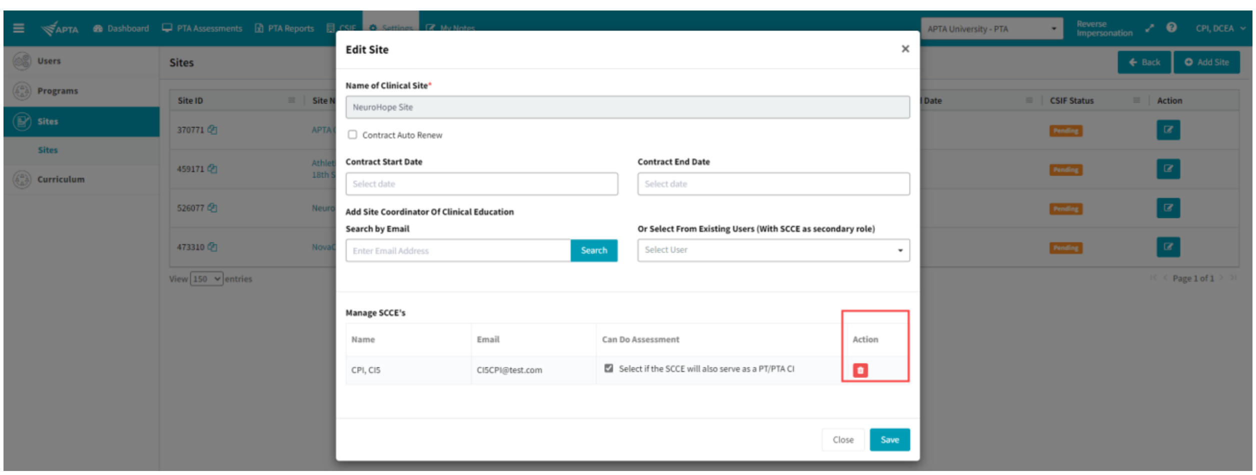
1. Select User name.
2. Switch primary role from SCCE to CI.
3. Hit save. The user will see this change upon their next log-in.





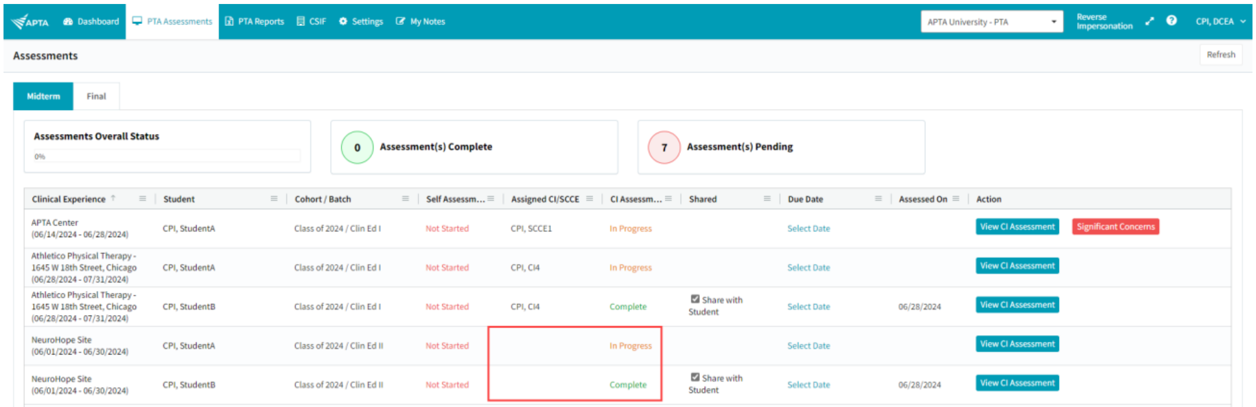
Option 2: Under Sites tab

1. Click on site that the SCCE is assigned to.
2. Delete the SCCE from the site.

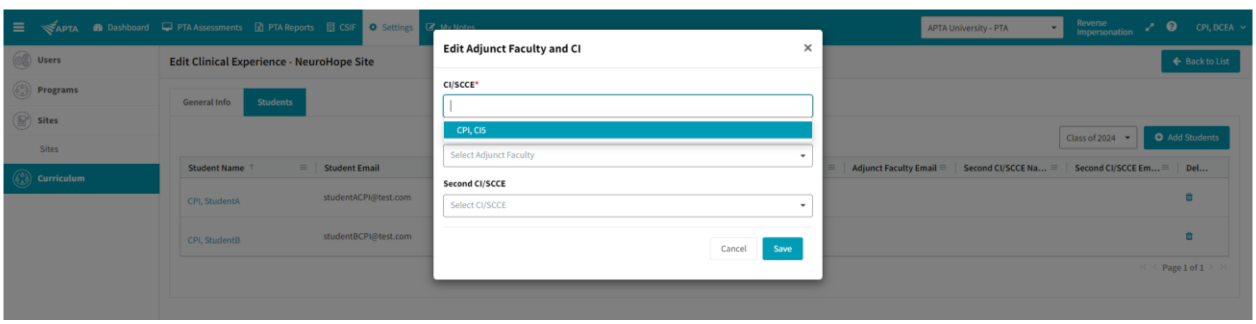


3. If the user is still visible under the Assessments tab, then you are all set. If the user is no longer visible under the Assessments tab, or if they still appear as having both SCCE and CI roles under the Users tab, follow the subsequent steps.

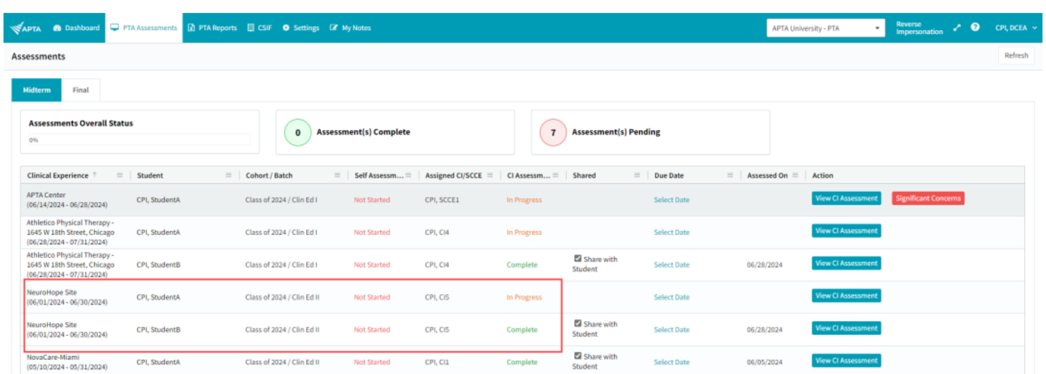
4. You may notice that the SCCE is no longer linked to the student under the Assessments tab. This is normal and should not result in the loss of assessment data.



5. Follow the instructions for removing a user from a role under the users tab to delete the SCCE role.
6. Re-assign the user under the Clinical Experiences tab. If the user does not appear in the drop-down menu, then you may need to re-add the user to the site under the Manage tab.

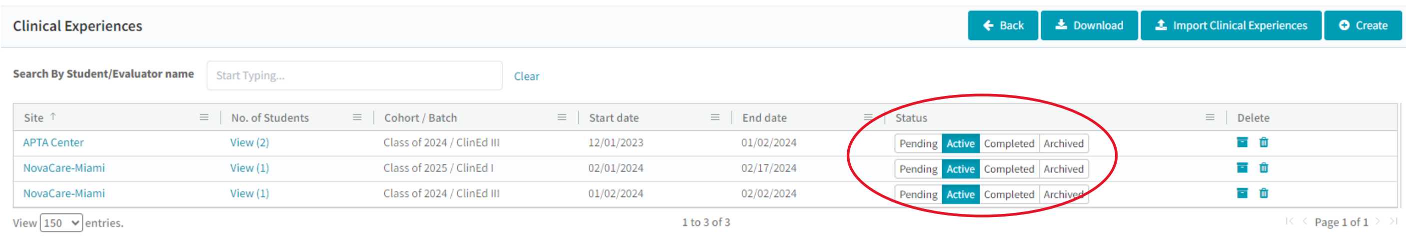


7. The user should now reappear under the Assessments tab.

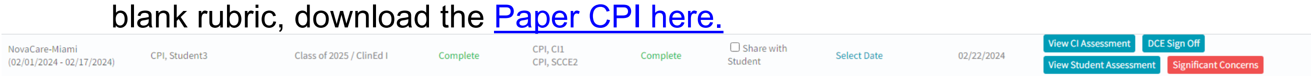


CPI Tips and Hints

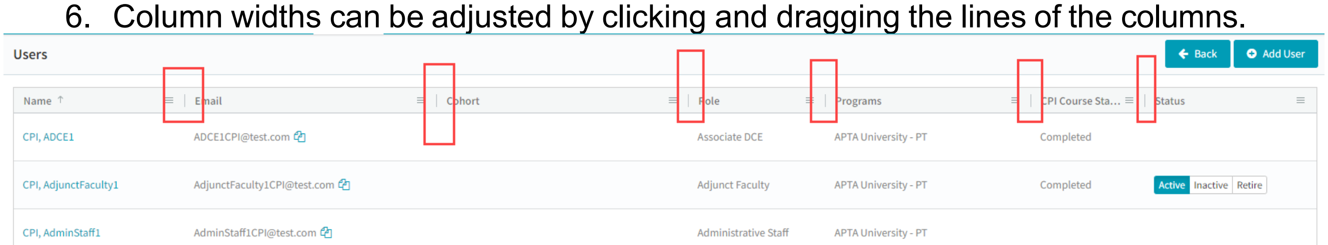
1. Statuses:
    - Pending: Make edits, hidden from users
    - Active: Visible in Assessments tab, able to open/submit assessments, available in Reports and Dashboard
    - Completed: Visible in Assessments, Reports, and Dashboard tabs
    - Archived: Hidden from Assessments tab, available in Reports and Dashboard tabs
    - Note: these statuses can be changed as necessary.



2. To search for a specific clinical experience by user, go to Settings→ Curriculum → Clinical Experiences. Then, search by Student/Evaluator Name.
3. If the CI is not appearing on the Assessments tab, or if the student can see the CI but not the other way around, you must resave the pairing.
    - Go to Settings/Curriculum/Clinical Experience.
    - Click on the Clinical Experience.
    - Click on the Student tab.
    - Click on the name of the Student.
    - Click Save again.
4. In Progress and Completed assessments are available to view. Click on "View CI/Student Assessment" to view the assessment prior to signing off. To view the blank rubric, download the [Paper CPI here.]

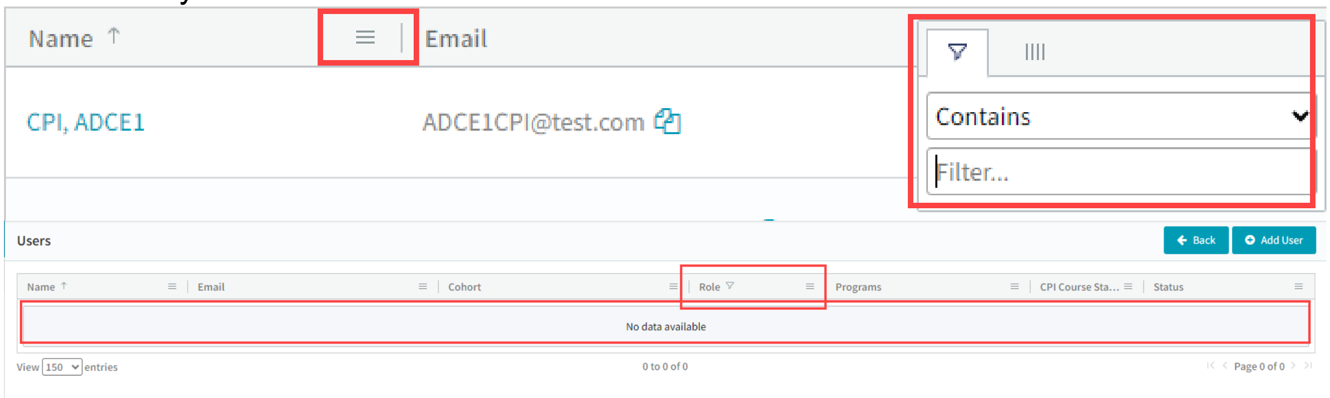


5. If a CI/SCCE is affiliated with a military program, they may experience errors when completing the assessment due to firewall restrictions. Please have them attempt to access the assessment from a different WiFi network prior to reaching out to support.
6. Column widths can be adjusted by clicking and dragging the lines of the columns.

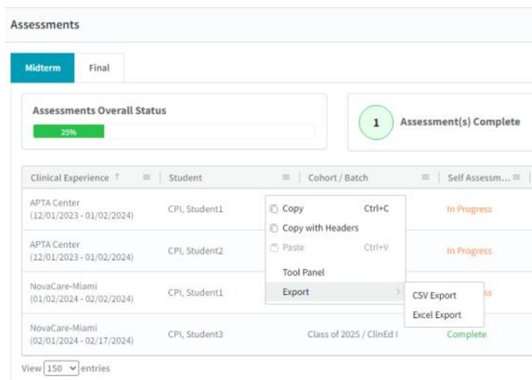


7. Clicking the three horizontal lines next to each column header will allow you to filter the column. If information is missing from a tab, please first

confirm that you do not have a filter on.



8. You can right click on any chart to copy or export data.



9. **Do NOT delete anything unless you are absolutely sure you do not need the information.**

   - Deleting clinical experiences will delete associated assessments, if there are any.
   - Removing a CI/SCCE from a site will remove them from any clinical experiences they have been associated with and the corresponding CI assessments will likely be lost.
   - Deleting a student from a clinical experience will delete the entire clinical experience, including any CI assessments.

Training Videos

PTA DCE Rubric Training Video
PTA Student Rubric Training Video
PT DCE Rubric Training Video
PT Student Rubric Training Video
CI/SCCE Rubric Training Video
Reporting Significant Concerns in CPI 3.0