

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

Table of Contents

Login	3
System Overview	5
Program Users	7
View Program Users.....	7
Adding New Program Users	8
Email Discrepancies and Log-In Issues.....	10
Program Details.....	11
Updating Program Details	11
Setting Up Clinical Experiences	13
Step 1: Creating and Adding Clinical Sites	13
Manually add SCCE to a Site	18
Step 2: Creating Cohorts	19
Step 3: Creating Clinical Experiences.....	20
Manual Process for Creating Clinical Experiences.....	20
Creating Batches	22
Adding CIs to Sites	24
Pairing Students and CIs.....	26
Automatic/Spreadsheet Process for Creating Clinical Experiences	30
Obtaining and Completing Import Spreadsheet	30
Import Spreadsheet	32
Possible error messages that can be received include:.....	34
Adding a Second CI	36
PT/PTA Assessments	39
Viewing Assessments.....	39
DCE Sign Off	41
Viewing Combined Assessments	42
Significant Concerns	44
PT/PTA Reports	45
Clinical Sites Profile/CSIF.....	46
Viewing the completed Clinical Site Profiles/CSIF	46
Editing the Clinical Site Profiles/CSIF	46
Guide to Multiple Roles	49

CPI Tips and Hints	56
Training Videos	57

Login

Go to <https://cpi.apta.org>

Click **Login**.

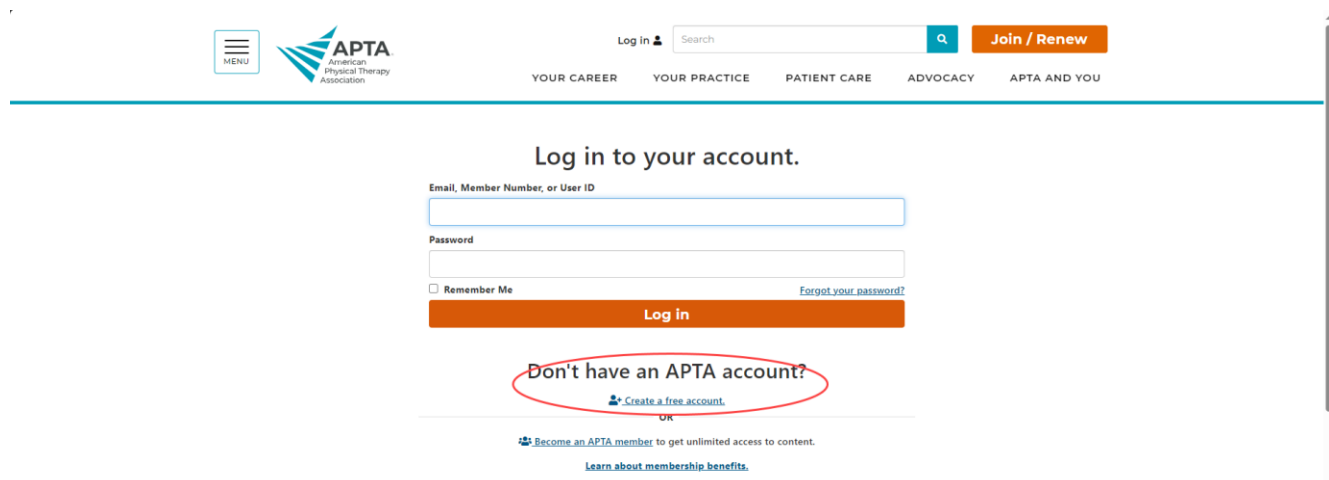


APTAClinical Performance Instrument

Welcome to APTA's Clinical Performance Instrument 3.0!

For questions about the instrument contact CPI@apta.org or call 703-706-8582.
For APTA username and password issues, contact APTA's Member Success team at membersuccess@apta.org.

Log in to your account using your APTA login credentials.



Log in to your account.

Email, Member Number, or User ID

Password

☐ Remember Me [Forgot your password?](#)

Log in

Don't have an APTA account?

[Create a free account.](#)

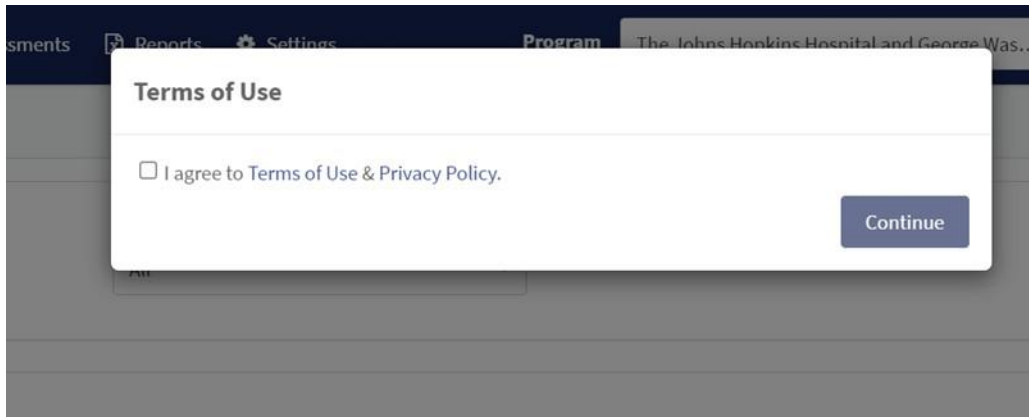
OR

[Become an APTA member](#) to get unlimited access to content.
[Learn about membership benefits.](#)

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.

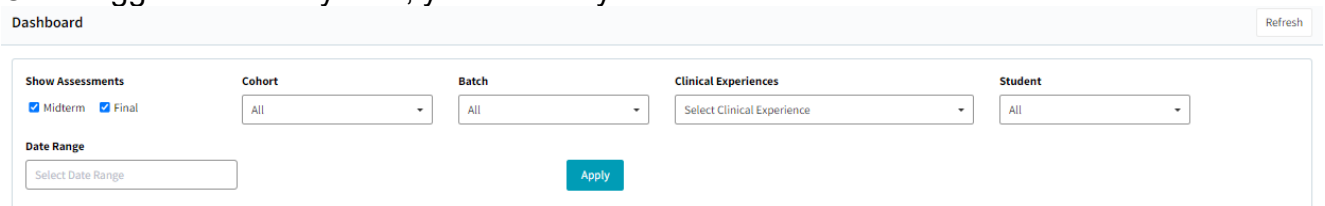
Users can also update their email address themselves by going to [Contact Information](#). Please do not create a new account if one currently exists in the system.

Agree to the **Terms of Use**.



A screenshot of a web application interface showing a 'Terms of Use' modal dialog. The dialog is white with a dark border and contains a checkbox labeled 'I agree to Terms of Use & Privacy Policy.' and a blue 'Continue' button. The background shows a dark navigation bar with links like 'sments', 'Reports', 'Settings', and 'Program'. Below the navigation bar, there's a header for 'The Johns Hopkins Hospital and George Was...'.

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


















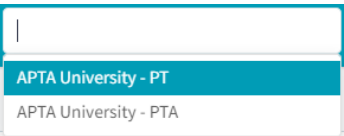
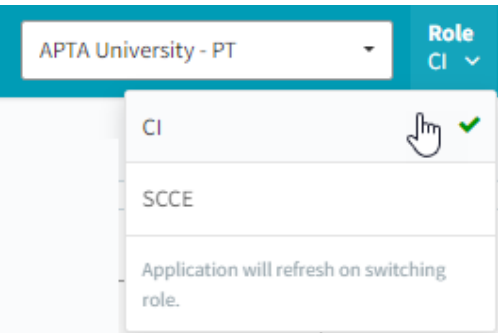




A screenshot of a dashboard interface. At the top, there's a 'Dashboard' header with a 'Refresh' button. Below the header, there are several filter sections: 'Show Assessments' with checkboxes for 'Midterm' and 'Final'; 'Cohort' with a dropdown menu set to 'All'; 'Batch' with a dropdown menu set to 'All'; 'Clinical Experiences' with a dropdown menu set to 'Select Clinical Experience'; and 'Student' with a dropdown menu set to 'All'. At the bottom left, there's a 'Date Range' section with a 'Select Date Range' button. A blue 'Apply' button is located at the bottom center.

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

  Dashboard  PT Assessments  PT Reports  Clinical Site Profile  Settings  My Notes  	
 Dashboard	<p>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.</p>
 PT Assessments  PTA Assessments	<p>The Assessments page is where Active Student and CI CPI evaluations can be viewed and the DCE sign-off occurs.</p>
 PT Reports  PTA Reports	<p>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.</p>
 Clinical Site Profile	<p>The Clinical Site Profile is where the CSIF lives. This page shows all completed CSIF profiles.</p>
 Settings	<p>The Settings tab is where your clinical experiences are set up, your program users are managed, and your list of sites are kept.</p>
 My Notes	<p>The My Notes area is available for all users to keep private notes while in the CPI 3.0.</p>
	<p>This dropdown is used to switch between multiple programs to which you are associated.</p>
	<p>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.</p>
	<p>Click to enter/exit full screen.</p>

	<p>This question mark allows you access to User Guides. <i>Note: As part of the program staff, you have access to all user guides.</i></p>
<p>CPI, DCE1 ▾</p>	<p>Click your User name dropdown to:</p> <ul style="list-style-type: none"> • View your user profile • Log Out of the system

Program Users

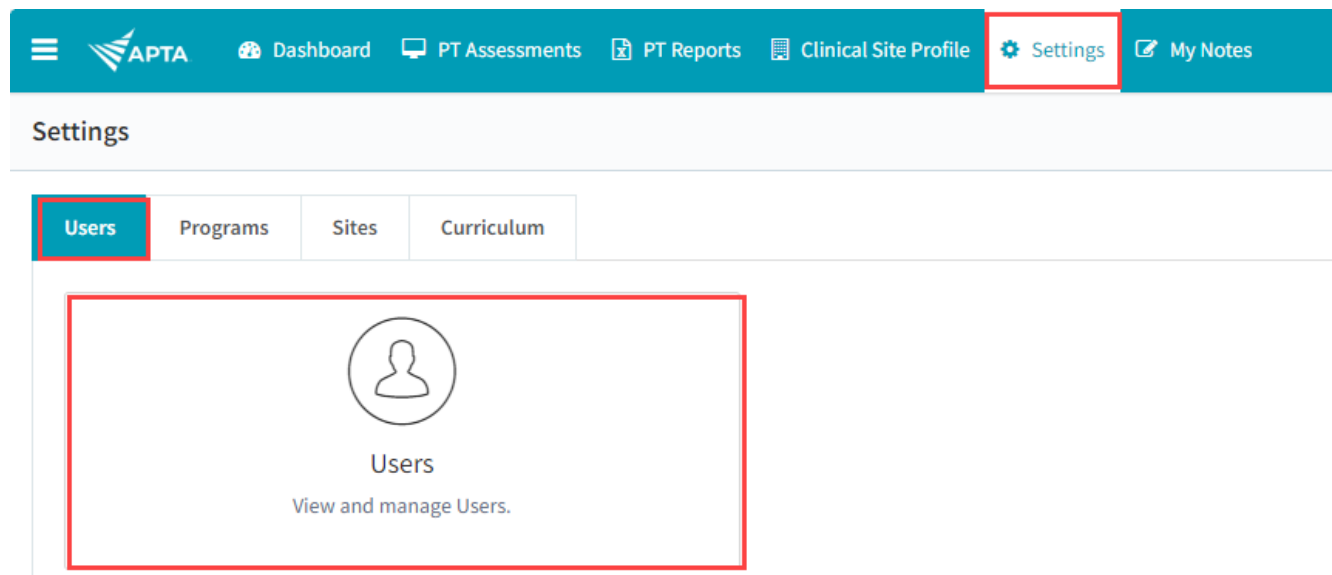
The Users page allows you to add, view and manage all individuals associated with your program. This includes DCEs, ADCEs, Adjunct Faculty, Administrative Staff, and Students. With the multiple roles release (June '24) you can view and manage CIs and SCCEs as well. These 2 roles can only be added in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



The screenshot shows the APTA system interface. The top navigation bar includes a menu icon, the APTA logo, and links to Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (highlighted with a red box), and My Notes. Below the navigation bar, the 'Settings' page is displayed. On the left, there are four tabs: Users (highlighted with a red box), Programs, Sites, and Curriculum. The main content area shows a large red-bordered box containing a user icon, the text 'Users', and the instruction 'View and manage Users.'

Users							Back	Add User
Name ↑	Email	Cohort	Role	Programs	CPI Course Sta...	Status		
CPI, ADCE1	ADCE1CPI@test.com		Associate DCE	APTA University - PT	Completed			
CPI, AdjunctFaculty1	AdjunctFaculty1CPI@test.com		Adjunct Faculty	APTA University - PT	Completed	Active Inactive Retire		
CPI, AdminStaff1	AdminStaff1CPI@test.com		Administrative Staff	APTA University - PT	Completed			
CPI, DCE1	DCE1CPI@test.com		Director of Clinical Education (DCE)	APTA University - PT	Completed			
CPI, Student1	student1CPI@test.com	Class of 2024	Student	APTA University - PT	Completed	Active Inactive Retire		
CPI, Student2	student2CPI@test.com	Class of 2024	Student	APTA University - PT	Completed	Active Inactive Retire		
CPI, Student3	student3CPI@test.com	Class of 2025	Student	APTA University - PT	Completed	Active Inactive Retire		

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](#).

Users							Back	Add User
Name ↑	Email	Cohort	Role	Programs	CPI Course Sta...	Status		
CPI, ADCE1	ADCE1CPI@test.com		Associate DCE	APTA University - PT	Completed			
CPI, AdjunctFaculty1	AdjunctFaculty1CPI@test.com		Adjunct Faculty	APTA University - PT	Completed	Active Inactive Retire		
CPI, AdminStaff1	AdminStaff1CPI@test.com		Administrative Staff	APTA University - PT	Completed			

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

Add User

Search by Email*

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

Add User
×

Search by Email*

1 Result Found

Name	Email	Role*	Program	Action
Stepp, Derek	derekstepp@apta.org	<div> Select Role <ul style="list-style-type: none"> Adjunct Faculty Administrative Staff Associate DCE Director of Clinical Education (DCE) Student </div>	<div> Select Programs </div>	<input type="button" value="Add"/>

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

Add User
×

Search by Email*

1 Result Found

Name	Email	Role*	Program*	Action
Stepp, Derek	derekstepp@apta.org	Adjunct Faculty	<div> Select Programs <ul style="list-style-type: none"> APTA University - PT </div>	<input type="button" value="Add"/>

- Click **Add**.

Add User
×

Search by Email*

1 Result Found

Name	Email	Role*	Program*	Action
Stepp, Derek	derekstepp@apta.org	Adjunct Faculty	APTA University - PT	<input type="button" value="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	<i>If CI has not started assessment:</i> Delete from site and re-add with correct email. OR <i>If CI has started assessment:</i> 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.

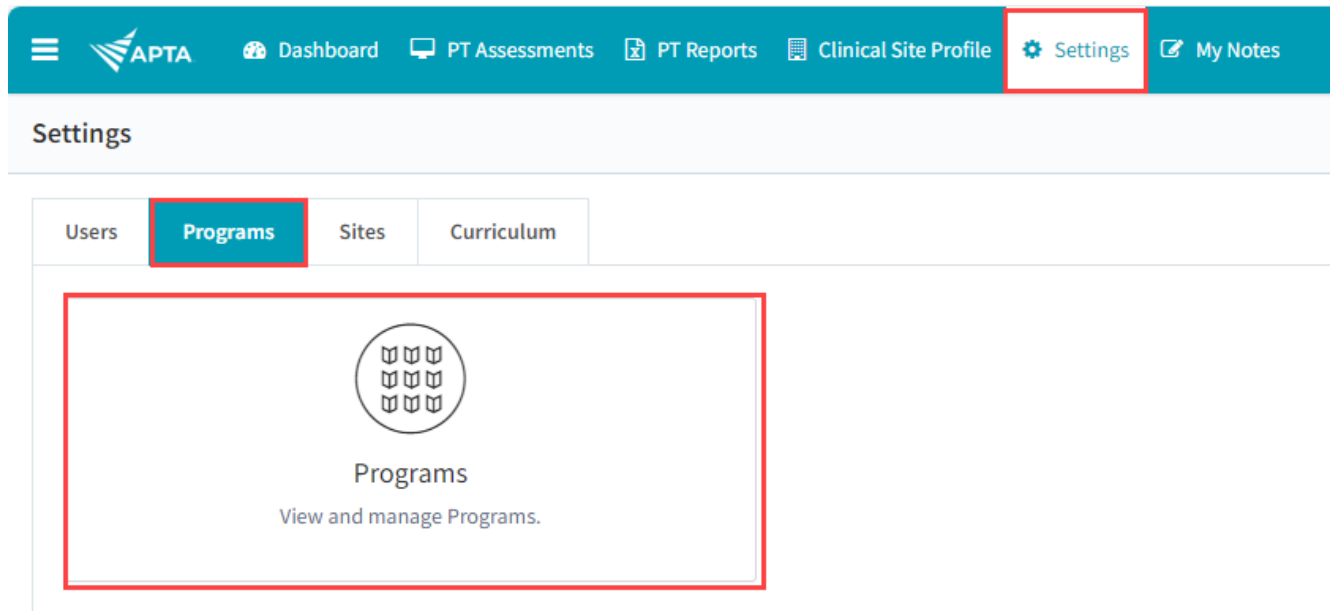
If the certificate says that they completed the correct training, please escalate to CPI Support. It is likely that the training did not push over to the APTA database correctly and that we will have to manually push it through.

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.

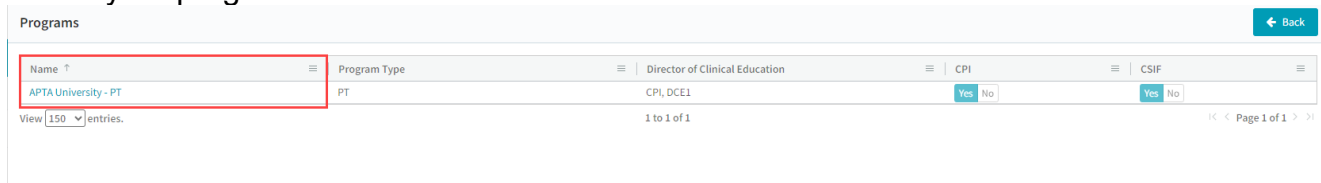
Updating Program Details

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



The screenshot shows the APTA web application interface. The top navigation bar includes links for Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (highlighted with a red box), and My Notes. Below the navigation bar, the 'Settings' section is active, and the 'Programs' tab is selected (also highlighted with a red box). The main content area displays a 'Programs' icon and the text 'View and manage Programs.'.

3. Select your program name



The screenshot shows the 'Programs' table in the APTA application. The table has columns for Name, Program Type, Director of Clinical Education, CPI, and CSIF. The 'Name' column is highlighted with a red box, and the first row shows 'APTA University - PT'. The table also includes a 'View' dropdown set to '150' entries and a 'Back' button in the top right corner.

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.

Basic Details

Program name *

University of Maryland Baltimore - PT

Program Type

PT

Director of Clinical Education

Heane, Lindsay

Email

Phone

Address

Midterm Assessment

Share Assessment Score *

☐ Automatically
(When the assessment complete)
 ☒ Manually
(Permission to manually provided from assessments page)

Final Assessment

Share Assessment Score *

☐ Automatically
(When the assessment complete)
 ☒ Manually
(Permission to manually provided from assessments page)

☐ 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

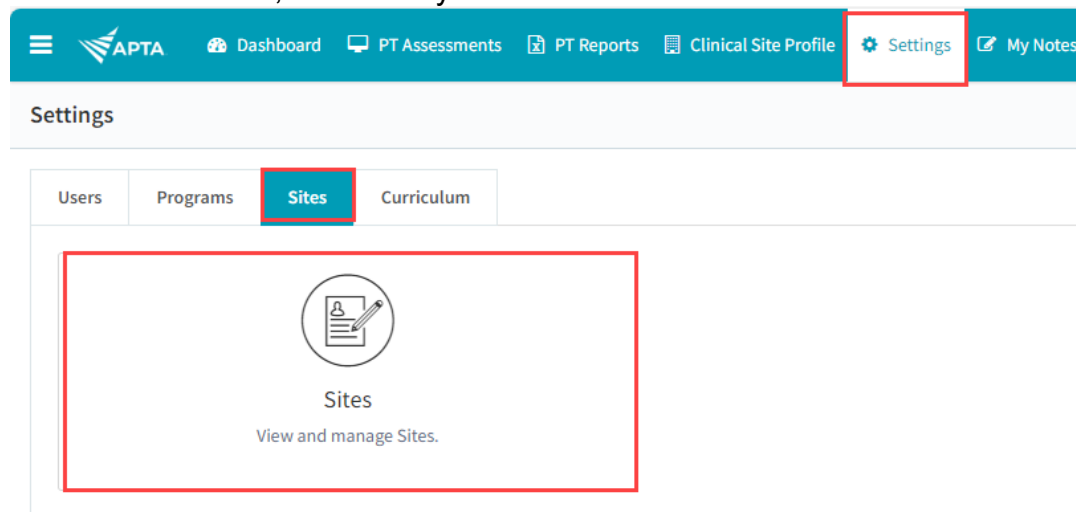
The next set of instructions will follow this workflow.

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.

Sites							
Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action	
370771	APTA Center	CPI, SCCE1 (SCCE1CPI@test.com)	Manage		Pending		
473310	NovaCare-Miami	CPI, SCCE2 (SCCE2CPI@test.com)	Manage		Pending		

View 150 entries 1 to 2 of 2 Page 1 of 1

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.

Search and Add Sites
Back to Sites
Create New

- Search for a site by name, state, or zip code in the boxes below.
- Note:** We recommend searching by name first, as a site may not have the complete address associated with it yet.
- Click the "Search" or the "Enter" button to see your results.
- If the site you are looking for is there, click the "Add to my Sites" button on the right side of the page. A pop-up box will appear. Confirm this is the site you want to add to your program and click "Add to my Sites".
- If the site you are looking for is not there, please click "Create New" button in the top Right corner. Follow the prompts and click the "Save" button when done.

Search by Name
State
Zip Code

Search by Name
Select State
Search by Zip Code
Search
Clear

Site Name	Address	City	State	Zip Code	Action
No data available					

View 150 entries 0 to 0 of 0 Page 0 of 0

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

Search and Add Sites					
Search by Name	State	Zip Code			
Search by Name	Select State	Search by Zip Code	Search	Clear	
Site Name	Address	City	State	Zip Code	Action
APTA Center	3030 Potomac Avenue	Alexandria	Virginia	22301	Add to my Sites
APTA City Center	3030 Pot	Alexan	Virginia	22305	Add to my Sites
APTA Innovation Physical Therapy Center					Add to my Sites
APTA Test Site	3030 Potomac Ave Suite 100 Floor 2 and 3	Alexandria	Virginia	Metro Nat'l Ldg	Add to my Sites
APTA Urban Center	1111 North Fairfax	Alexandria	Other (Other State)	22314	Add to my Sites

View 150 entries 1 to 5 of 5 Page 1 of 1

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

Add Site

Name of Clinical Site*

APTA City Center

Address Line 1*

3030 Pot

Address Line 2

City *

Alexan

State *

Virginia

Zip Code *

22305

☐ Contract Auto Renew

Contract Start Date

Select date

Contract End Date

Select date

Add Site Coordinator Of Clinical Education

Search by Email

Enter Email Address

Search

Close

Add to my Sites

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](#).

Add Site Coordinator Of Clinical Education

Search by Email

1 Result Found

Name	Email	Role	Program
CPI, SCCE1	SCCE1CPI@test.com	Site Coordinator of Clinical Education (SCCE)	APTA University - PT

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**.

Search and Add Sites

- Search for a site by name, state, or zip code in the boxes below.
- Note:** We recommend searching by name first, as a site may not have the complete address associated with it yet.
- Click the "Search" or the "Enter" button to see your results.
- If the site you are looking for is there, click the "Add to my Sites" button on the right side of the page. A pop-up box will appear. Confirm this is the site you want to add to your program and click "Add to my Sites".
- If the site you are looking for is not there, please click "Create New" button in the top Right corner. Follow the prompts and click the "Save" button when done.

Search by Name

State

Select State

Zip Code

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

Create Site

×

Name of Clinical Site*

Address Line 1*

Address Line 2

City*

State*

Select State

Zip Code*

☐ Contract Auto Renew

Contract Start Date

Select date

Contract End Date

Select date

Add Site Coordinator Of Clinical Education

Search by Email

Enter Email Address

Search

Close

Save

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.

Select Physical Therapy - Lemoyne	-	View	Complete	✎
Select Physical Therapy - Manhattan Beach	-	View	Pending	✎

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.

Sites							Back	Add Site
Site ID	Site Name ↑	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action		
370771	APTA Center	CPI, SCCE1 (SCCE1CPI@test.com)	Manage		Pending			

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](#)

Add Site Coordinator Of Clinical Education

Search by Email

1 Result Found

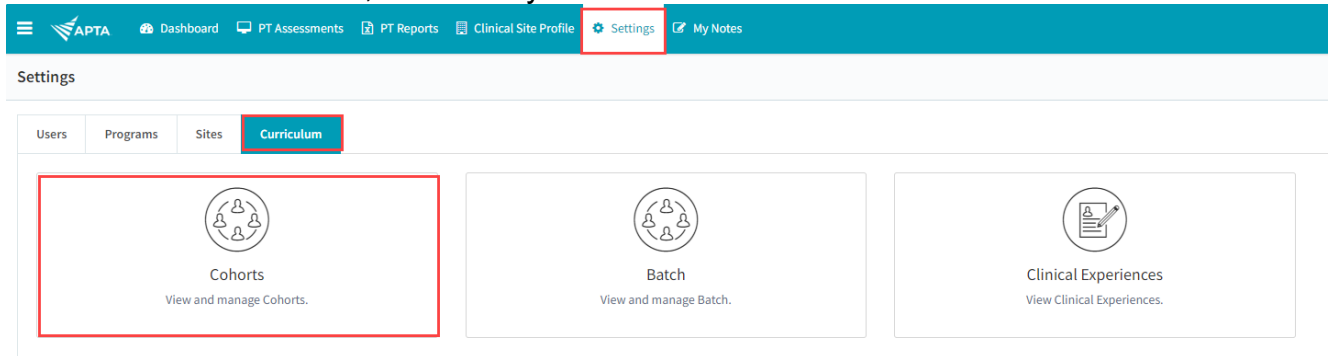
Name	Email	Role	Program
CPI, SCCE1	SCCE1CPI@test.com	Site Coordinator of Clinical Education (SCCE)	APTA University - PT

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.

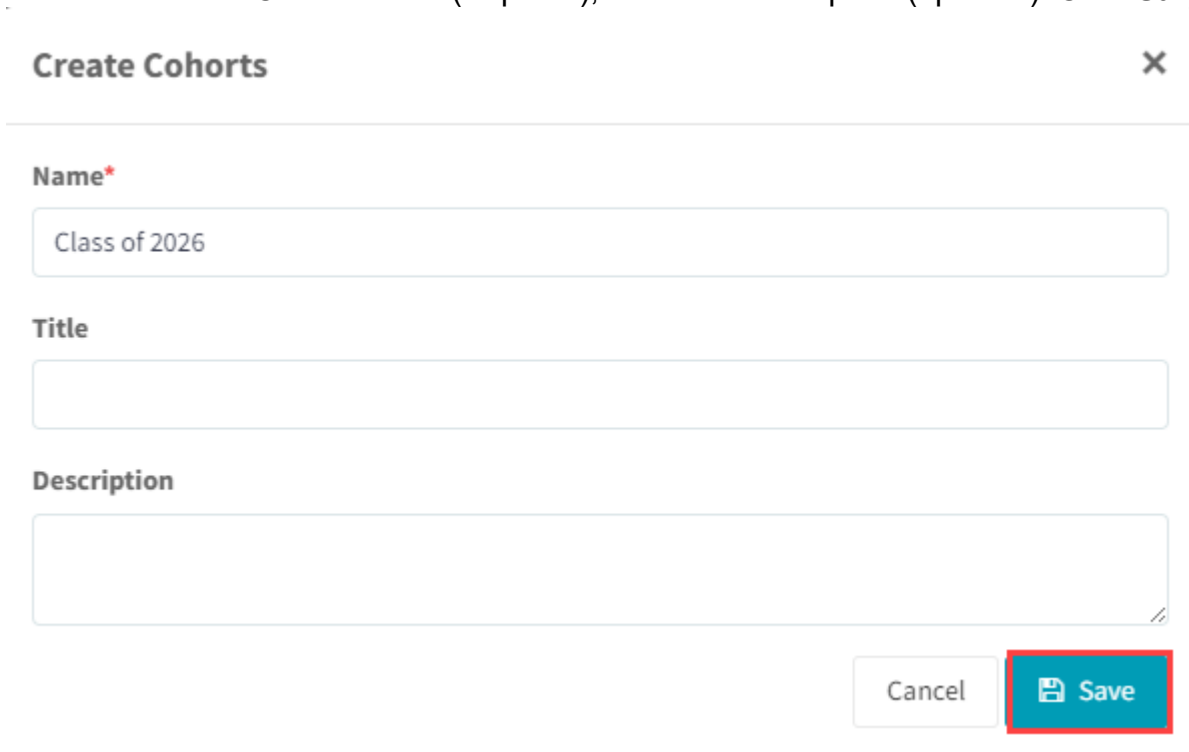
1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Cohorts** icon.



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.

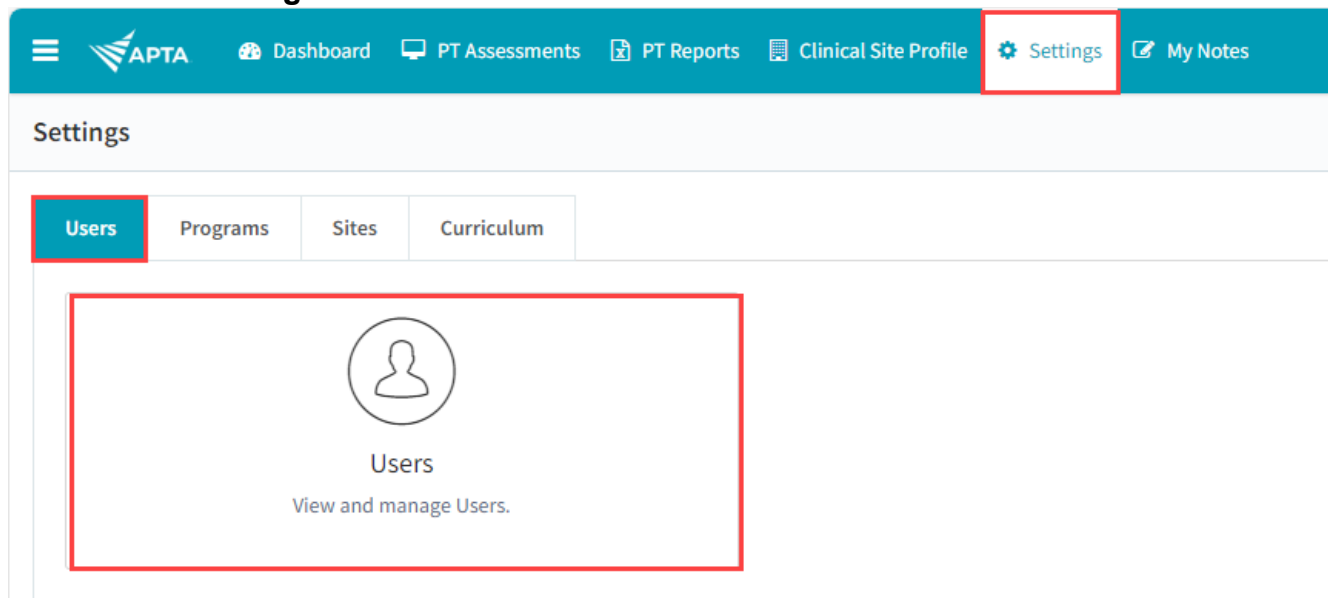
Steps 1 and 2 were discussed previously and this section will pick up at Step 3.

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.

Users							Back	Add User
Name	Email	Cohort	Role	Programs	CPI Course Sta...	Status		
CPI, ADCE1	ADCE1CPI@test.com		Associate DCE	APTA University - PT	Completed			
CPI, AdjunctFaculty1	AdjunctFaculty1CPI@test.com		Adjunct Faculty	APTA University - PT	Completed	Active	Inactive	Retire
CPI, AdminStaff1	AdminStaff1CPI@test.com		Administrative Staff	APTA University - PT				

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

Add User

Search by Email*

derekstepp@apta.org

Search

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

Add User

Search by Email*

derekstepp@apta.org

Search

1 Result Found

Name	Email	Role*	Program*	Cohort	Action
Stepp, Derek	derekstepp@apta.org	<div> <div></div> <div> Adjunct Faculty Administrative Staff Associate DCE Director of Clinical Education (DCE) Student </div> </div>	Select Programs	Select Cohort	Add

Select your program from the drop-down list.

Add User
×

Search by Email*

1 Result Found

Name	Email	Role*	Program*	Cohort	Action
Stepp, Derek	derekstepp@apta.org	Student	<div> Select Programs <div> APTA University - PT </div> </div>	<div> Select Cohort </div>	<input type="button" value="Add"/>

6. Select the Cohort for your student.

Add User
×

Search by Email*

1 Result Found

Name	Email	Role*	Program*	Cohort	Action
Stepp, Derek	derekstepp@apta.org	Student	<div> APTA University - PT </div>	<div> Select Cohort <div> Class of 2024 Class of 2025 </div> </div>	<input type="button" value="Add"/>

7. Click **Add**.

Add User
×

Search by Email*

1 Result Found

Name	Email	Role*	Program*	Cohort	Action
Stepp, Derek	derekstepp@apta.org	Student	<div> APTA University - PT </div>	<div> Class of 2024 </div>	<input type="button" value="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.


Settings

Users Programs Sites **Curriculum**




Cohorts

View and manage Cohorts.



Batch

View and manage Batch.





Clinical Experiences

View Clinical Experiences.

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

Batch

← Back **+ Create**

Name ↑	Description	Cohort	Delete
ClinEd I		Class of 2025	
ClinEd III		Class of 2024	

View 100 entries. 1 to 2 of 2 Page 1 of 1

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

Create Batch

Name*

apta 1

Description

Cohort*

Class of 2024

Student(s)*

Select Student(s)

☐ Select All

Search

☐ CPI, Student1

☐ CPI, Student2

5. Click **Save**.

Create Batch

Name*

apta 1

Description

Cohort*

Class of 2024

Student(s)*

CPI, Student1 x CPI, Student2 x

Cancel **Save**

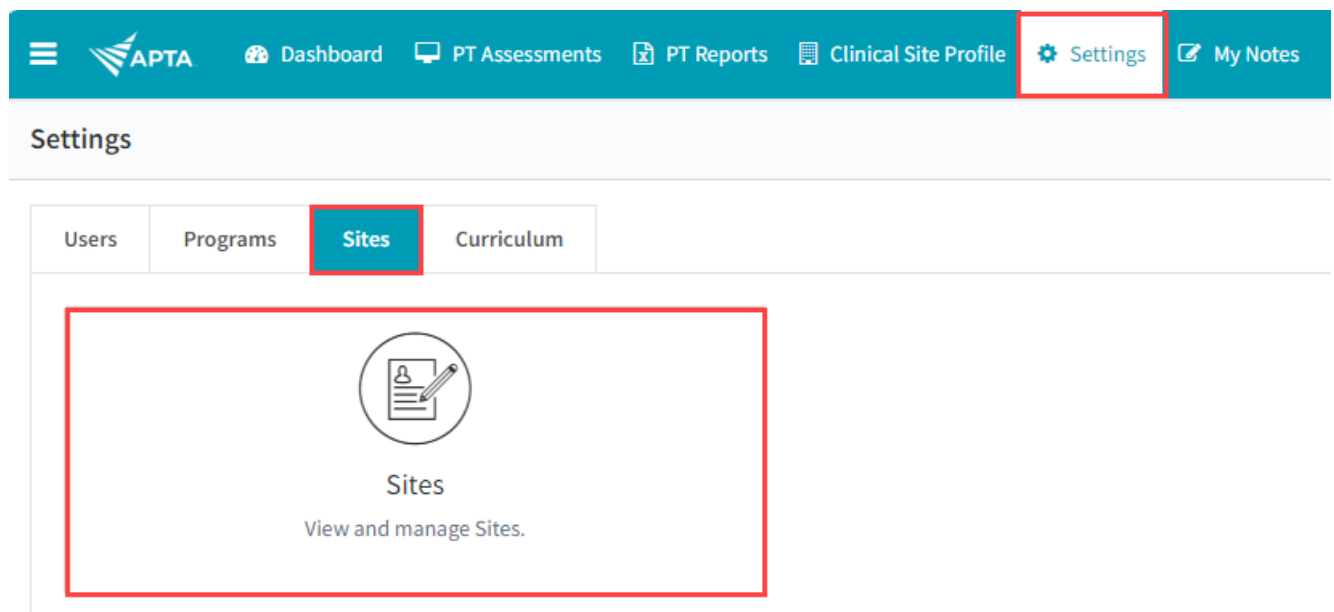
Adding CIs to Sites

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**.

Sites								Back	Add Site
Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action			
370771	APTA Center	CPI, SCCE1 (SCCE1CPI@test.com)	Manage		Pending				
473310	NovaCare-Miami	CPI, SCCE2 (SCCE2CPI@test.com)	Manage		Pending				

View 150 entries 1 to 2 of 2 Page 1 of 1

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

Clinical Staff

+ Add User

Name ↑	Email	Role	Programs	Action
CPI, CI3	CI3CPI@test.com	CI	APTA University - PT	
CPI, CI4	CI4CPI@test.com	CI	APTA University - PT	
CPI, CI5	CI5CPI@test.com	CI	APTA University - PT	

View 100 entries
1 to 3 of 3
Page 1 of 1

Close

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.

Add User

Search by Email*

ci1cpi@apta.org

Search

No Record Found

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

Add User

Search by Email*

ci1cpi@test.com

Search

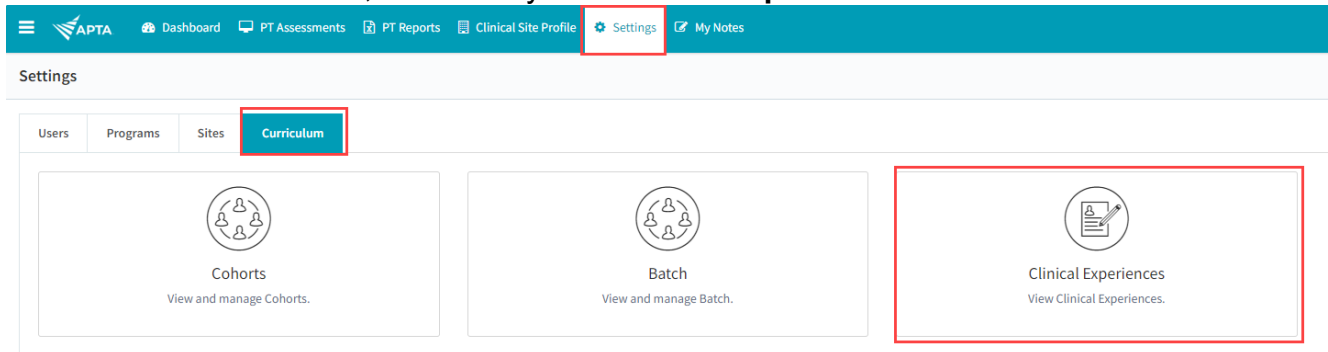
1 Result Found

Name	Email	Role	Program	Action
CPI, CI1	CI1CPI@test.com	CI	APTA University - PT	Add

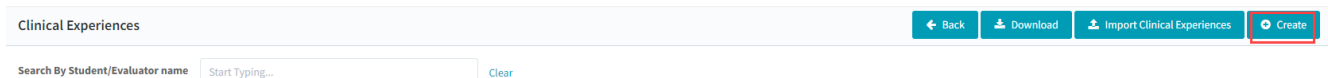
Pairing Students and CIs

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.



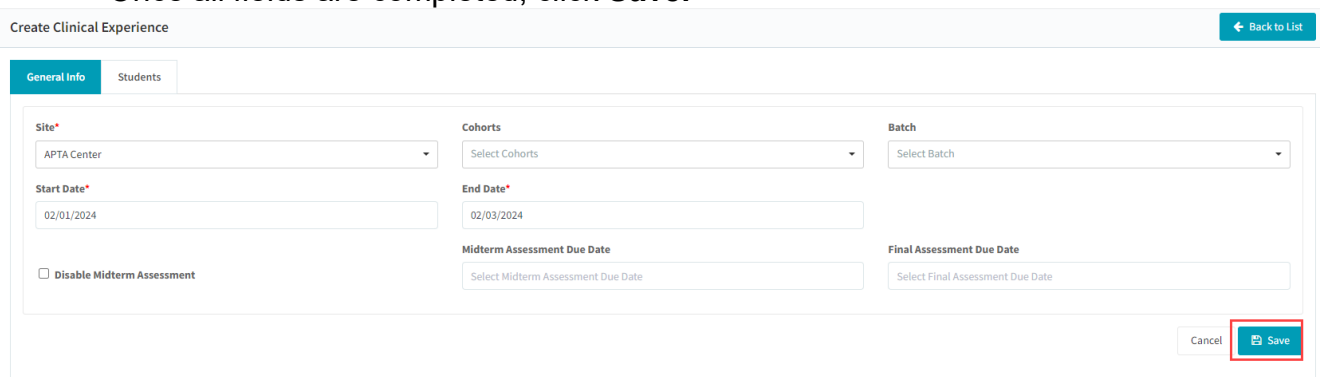
3. Click **+ Create** to create a single clinical experience.



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**.

Create Clinical Experience ← Back to List

General Info
Students

Select Cohorts ▾ + Add Students

Student Name ↑	Student Email	CI/SCCE Name	CI/SCCE Email	Adjunct Faculty Na...	Adjunct Faculty Email	Second CI/SCCE Na...	Second CI/SCCE E...	Del...
No data available								

0 to 0 of 0

Page 0 of 0

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.

Add Students
×

CI/SCCE
CPI, CI3

Adjunct Faculty
CPI, AdjunctFaculty1

Second CI/SCCE
CPI, SCCE1

Students*
Filter...
☐ CPI , Student1
☐ CPI , Student2

Add Students
×

CI/SCCE
CPI, CI3

Adjunct Faculty
CPI, AdjunctFaculty1

Second CI/SCCE
CPI, SCCE1

Students*

Filter...

☒ CPI , Student1
☐ CPI , Student2

Cancel
Save

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**

Edit Clinical Experience - APTA Center
← Back to List

General Info
Students

Site*
APTA Center

Cohorts
Class of 2024

Batch
ClinEd III

Start Date*
12/01/2023

End Date*
01/02/2024

Midterm Assessment Due Date
Select Midterm Assessment Due Date

Final Assessment Due Date
Select Final Assessment Due Date

☐ Disable Midterm Assessment

Cancel
Update

- 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!**

Clinical Experiences

← Back

Download

Import Clinical Experiences

Create

Search By Student/Evaluator name

Start Typing...

Clear

Site ↑	No. of Students	Cohort / Batch	Start date	End date	Status	Delete
APTA Center	View (2)	Class of 2024 / ClinEd III	12/01/2023	01/02/2024	<div><div>Pending</div><div>Active</div><div>Completed</div><div>Archived</div></div>	<div><div></div><div></div></div>




Confirmation

Are you sure you want to active clinical experience?

Cancel

Yes, change it!

- 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.

<div>  Dashboard PT Assessments PT Reports Clinical Site Profile Settings My Notes </div>										
Assessments										
Midterm		Final								
Assessments Overall Status <div>25%</div>			<div>1</div> Assessment(s) Complete			<div>3</div> Assessment(s) Pending				
Clinical Experience ↑	Student	Cohort / Batch	Self Assessm...	Assigned CI/SCCE	CI Assessm...	Shared	Due Date	Assessed On		
APTA Center (12/01/2023 - 01/02/2024)	CPI, Student1	Class of 2024 / ClinEd III	In Progress	CPI, CI3	In Progress		Select Date	02/01/2024		

Automatic/Spreadsheet Process for Creating Clinical Experiences

The general workflow with the automatic process is as follows:

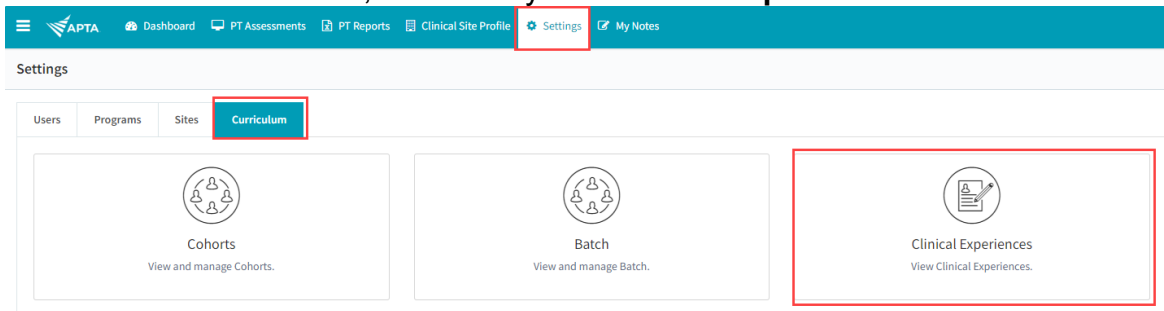
1. Add/Create clinical sites.
2. Create cohort.
3. Obtain and complete spreadsheet.
4. Import spreadsheet to create clinical experiences.
5. Release clinical experiences to students and CIs.

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

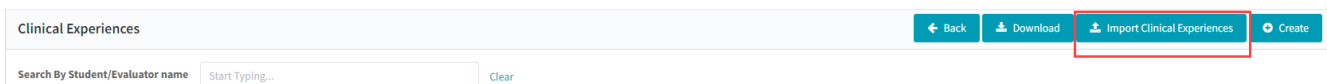
Obtaining and Completing Import Spreadsheet

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

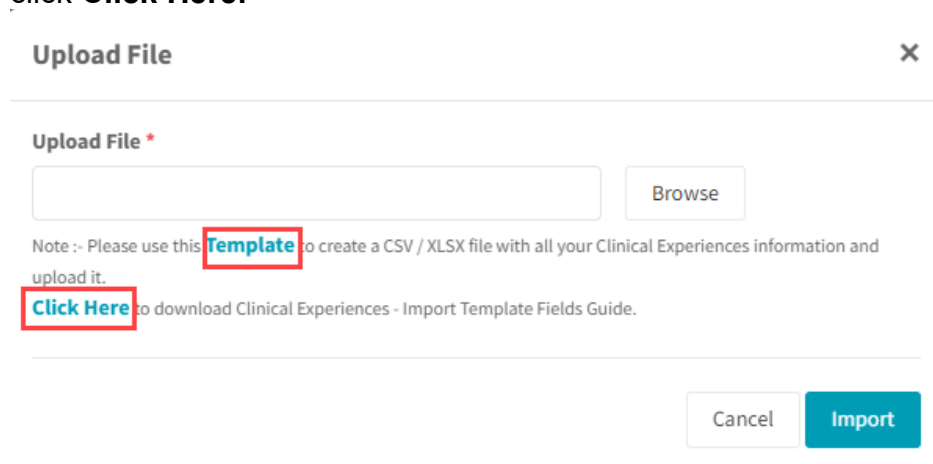
1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Clinical Experiences** icon.



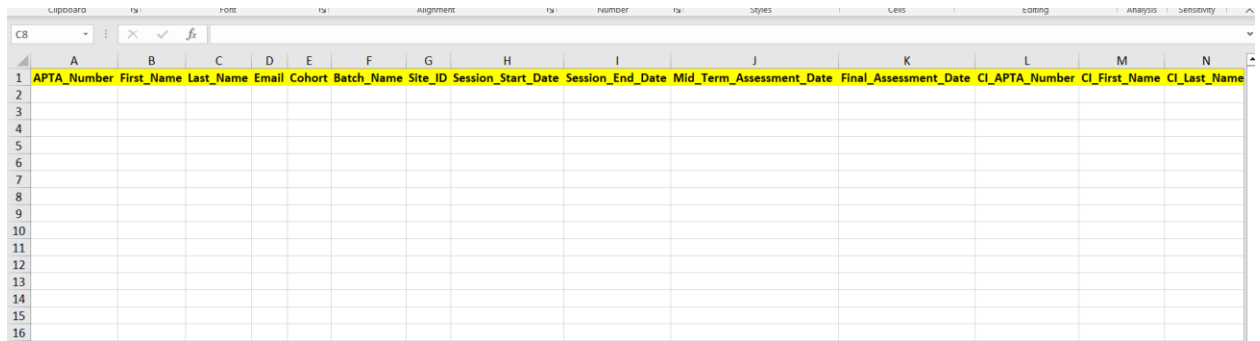
3. Click Import Clinical Experiences



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.



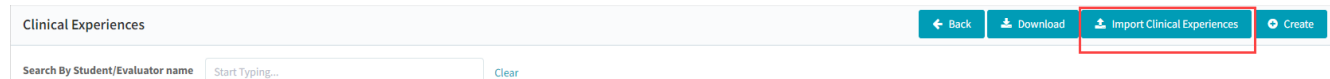
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	APTA_Number	First_Name	Last_Name	Email	Cohort	Batch_Name	Site_ID	Session_Start_Date	Session_End_Date	Mid_Term_Assessment_Date	Final_Assessment_Date	CI_APTA_Number	CI_First_Name	CI_Last_Name
2														
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														

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

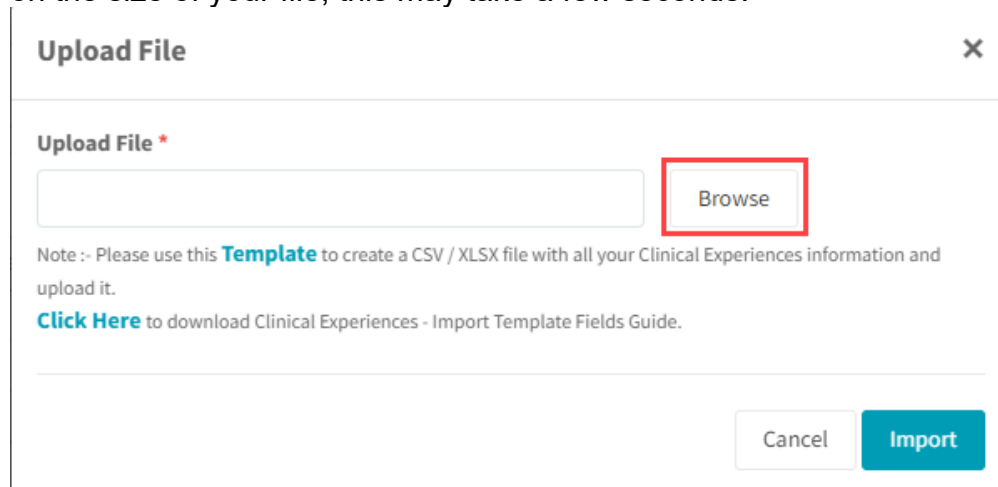


Clinical Experiences

Search By Student/Evaluator name Start Typing... [Clear](#)

[Back](#) [Download](#) [Import Clinical Experiences](#) [Create](#)

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



Upload File ×

Upload File *

[Browse](#)

Note :- Please use this [Template](#) to create a CSV / XLSX file with all your Clinical Experiences information and upload it.

[Click Here](#) to download Clinical Experiences - Import Template Fields Guide.

[Cancel](#) [Import](#)

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

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.

Clinical Experience Import Data

Apta ...	First...	Last...	Email	C...	Batc...	Sess...	Sess...	Mid...	Fin...	CI/S... ↓	CI/S...	CI/S...	CI/S...	Status
	Stacey	Schwartz	staceyschwartz@apta.org	Class of 2024	PTH 124 - Fall Clinical	37077111/01/2023	12/31/2023				Steven	Chesbro	stevenchesbro@apta.org	Valid
	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

☐ Skip Invalid Records

Cancel Submit

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.

Site ▾ ↑	No. of Students ↑	Cohort / Batch	Start date	End date	Status ▾	Delete
APTA Center	1	Class of 2024 / PTH 123 Summer Clinical 2 - Class of 2024	10/01/2023	12/01/2023	Active Pending Archived Completed	

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**

Clinical Experiences

← Back

Download

Import Clinical Experiences

Create

Search By Student/Evaluator name

Start Typing...

Clear

Site ↑	No. of Students	Cohort / Batch	Start date	End date	Status	Delete
APTA Center	View (2)	Class of 2024 / ClinEd III	12/01/2023	01/02/2024	<div><div>Pending</div><div>Active</div><div>Completed</div><div>Archived</div></div>	<div><div>✕</div><div>🗑</div></div>



Confirmation

Are you sure you want to active clinical experience?

Cancel

Yes, change it!

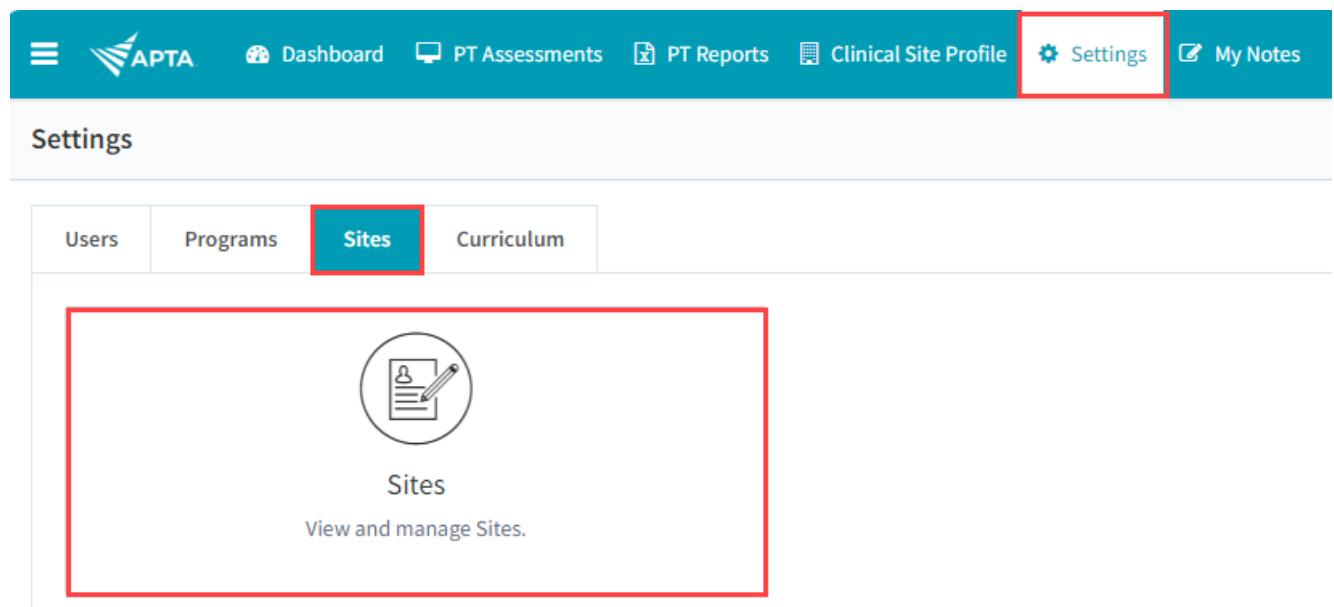
- To confirm the release, click **PT/PTA Assessments** in the top ribbon, and you will see the active evaluation. Your student and their CI will see it the same way on their screen under the PT/PTA Assessment tab.

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**.

Sites							Back	Add Site
Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action		
370771	APTA Center	CPI, SCCE1 (SCCE1CPI@test.com)	Manage		Pending			
473310	NovaCare-Miami	CPI, SCCE2 (SCCE2CPI@test.com)	Manage		Pending			

View 150 entries 1 to 2 of 2 Page 1 of 1

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

Clinical Staff

Add User

Name ↑	Email	Role	Programs	Action
CPI, CI3	CI3CPI@test.com	CI	APTA University - PT	
CPI, CI4	CI4CPI@test.com	CI	APTA University - PT	
CPI, CI5	CI5CPI@test.com	CI	APTA University - PT	

View 100 entries
1 to 3 of 3
Page 1 of 1

Close

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.

Add User

Search by Email*

ci1cpi@apta.org

Search

No Record Found

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

Add User

Search by Email*

ci1cpi@test.com

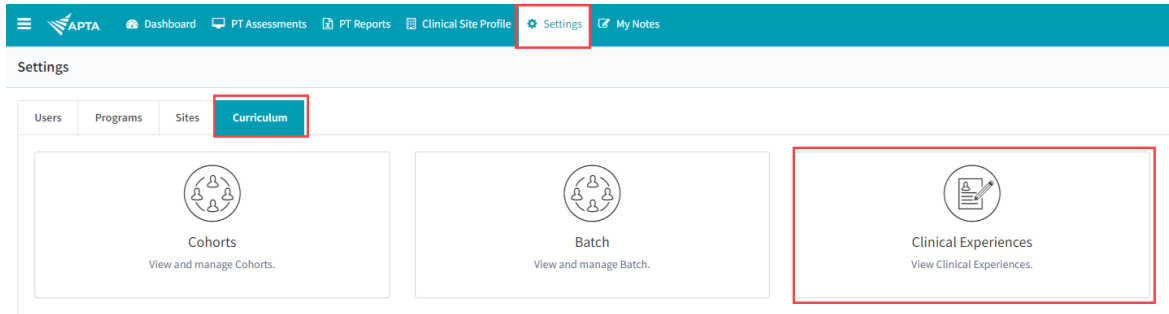
Search

1 Result Found

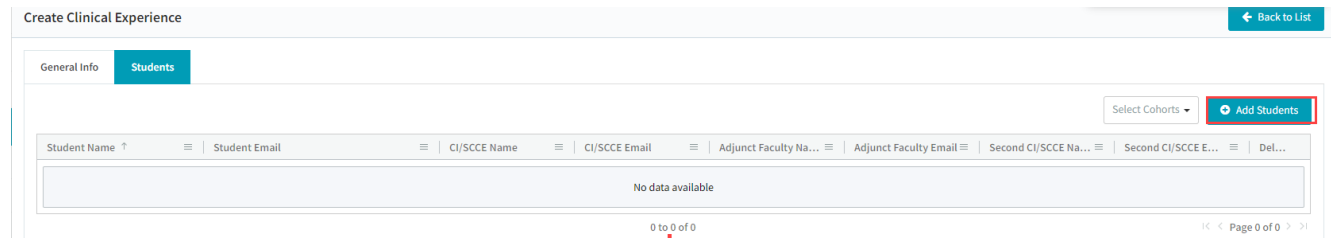
Name	Email	Role	Program	Action
CPI, CI1	CI1CPI@test.com	CI	APTA University - PT	Add

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

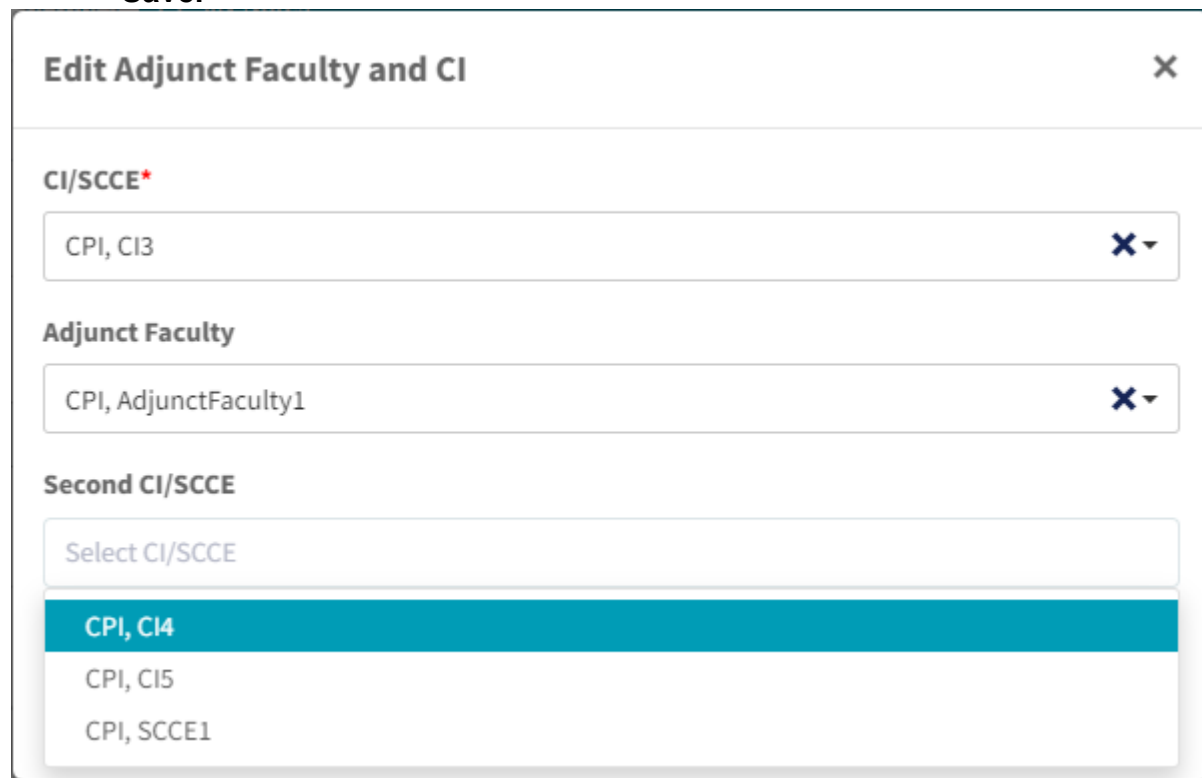
6. Click **Curriculum**, followed by the **Clinical Experiences** icon.



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**.



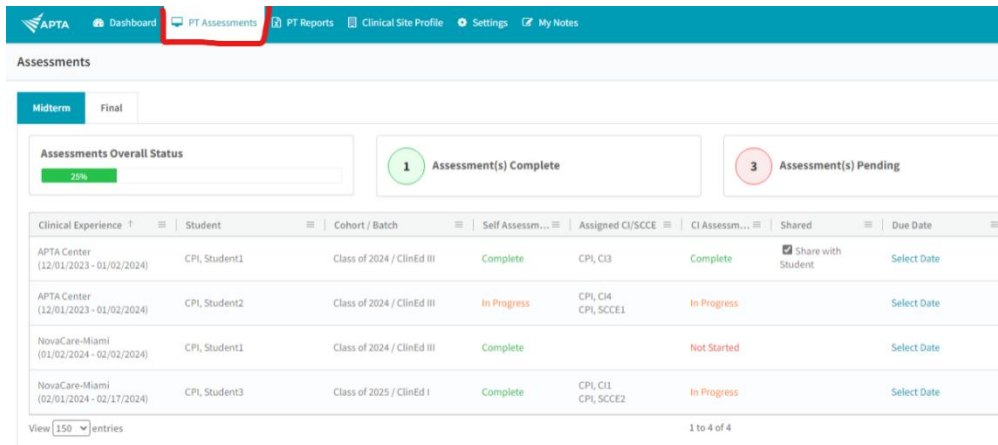
Note: If you need to make a new CI the first listed, select the new CI as CI/SCCE and hit Save. Then, you can go back in and the system will have updated so that you can add the original CI under Second CI/SCCE.

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.

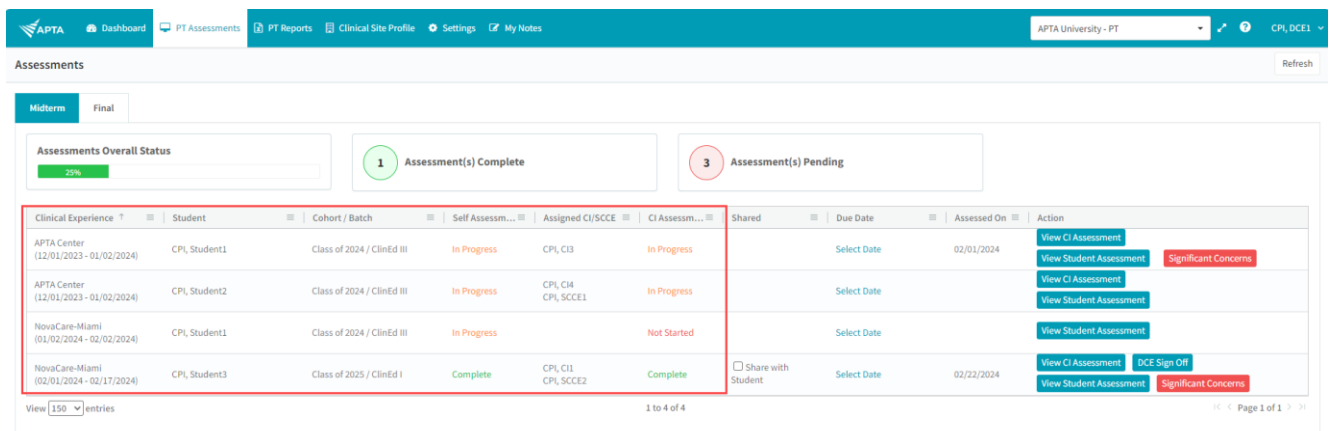
Viewing Assessments

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



The screenshot shows the 'PT Assessments' tab selected in the top navigation bar. Below the navigation bar, there's a section for 'Assessments' with tabs for 'Midterm' and 'Final'. A summary box shows 'Assessments Overall Status' at 25%, with '1 Assessment(s) Complete' and '3 Assessment(s) Pending'. A table lists four clinical experiences with columns for Clinical Experience, Student, Cohort / Batch, Self Assessm..., Assigned CI/SCCE, CI Assessm..., Shared, and Due Date. The table shows various statuses like 'Complete', 'In Progress', and 'Not Started'.

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.



This screenshot shows the same 'PT Assessments' page, but with a red box highlighting the first four rows of the table. The table columns include 'Clinical Experience', 'Student', 'Cohort / Batch', 'Self Assessm...', 'Assigned CI/SCCE', 'CI Assessm...', 'Shared', 'Due Date', 'Assessed On', and 'Action'. The 'Action' column contains buttons like 'View CI Assessment', 'View Student Assessment', and 'Significant Concerns'.

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

Clinical Experience	Student	Cohort / Batch	Self Assessm...	Assigned CI/SCCE	CI Assessm...	Shared	Due Date	Assessed On	Action
APTA Center (12/01/2023 - 01/02/2024)	CPI, Student1	Class of 2024 / ClinEd III	In Progress	CPI, C13	In Progress		Select Date	02/01/2024	View CI Assessment View Student Assessment Significant Concerns

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

- 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.

NovaCare-Miami
(02/01/2024 - 02/17/2024)

CPI, Student3

Class of 2025 / ClinEd I

Complete

CPI, CI1
CPI, SCCE2

Complete

☐ Share with Student

Select Date

02/22/2024

[View CI Assessment](#)
[DCE Sign Off](#)

[View Student Assessment](#)
[Significant Concerns](#)

APTA

Dashboard

PT Assessments

PT Reports

Clinical Site Profile

Settings

My Notes

APTA University - PT

CPI, DCE1

Student: CPI, Student3
CI: CPI, CI1; CPI, SCCE2

Class of 2025 / ClinEd I
NovaCare-Miami (02/01/2024 - 02/17/2024)

[Back](#)
[Unlock Assessment](#)

Midterm PT Assessment - Clinical

Instructor

Submitted On: 02/22/2024

PT CPI Instructions: For each performance criterion, review all descriptors and click the numbered box for the rating that best matches the student's typical behaviors. The supervision/caseload and sample behaviors span across two performance levels. When deciding between two performance levels (ex: 1 vs 2) consider where there is a preponderance of evidence and make your rating at that level. Once you click submit, you will not be able to make edits. Contact the DCE to unlock your assessment if needed.

40

DCE Sign Off

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

NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd 1	Complete	CPI, CI1 CPI, SCCE2	Complete	<input type="checkbox"/> Share with Student	Select Date	02/22/2024	View CI Assessment	DCE Sign Off	View Student Assessment	Significant Concerns
---	---------------	--------------------------	----------	------------------------	----------	---	-------------	------------	--------------------	---------------------	-------------------------	----------------------

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

DCE Sign Off

×

Comments

Enter the Comments

Please enter the comments

☐ **Share with CI**
☐ **Share with Student**

Cancel

Submit

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

Action
<div>View CI Assessment</div> <div>DCE Sign Off</div> <div>View Student Assessment</div> <div>Significant Concerns</div>

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

- 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.
- 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.
- 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

CI(s): CPI, CI1

Program: APTA University - PT

Clinical Site: APTA Hospital - Outpatient

Cohort / Batch: Class of 2024 / DPT 2530 (2024)

Clinical Experience Dates: 10/23/2023 - 12/15/2023

Student Midterm Submitted: 08/15/2025

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.

Action

View CI Assessment

DCE Sign Off

View Student Assessment

Significant Concerns

Significant Concerns

Student : CPI, Student1
CI : CPI, CI2; CPI, SCCE1

Class of 2024 / DPT 2530 (2024)
APTA Sports Medicine Clinic (10/16/2023 - 08/15/2024)
✕

CPI, Student1 (Student)
 add comments here
Sent to : Eileen, Walsh (DCE)

07/24/2024 4:17 PM

Do not submit a comment below unless there is a performance concern(s), unsafe event(s), and/or incident(s) to report. Do not write “N/A”, “none”, “no safety concerns”, etc. This field is not required in order to complete the CPI 3.0 assessment.

Add Comments here

☐ Send email to CI
 ☐ Send email to Student

☐ Save Comment and Resolve Significant Concern

Cancel

Save As Draft

Submit

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.

Assessments Report

Filters

Show Assessments

☒ Midterm ☒ Final

Cohort

All

Batch

All

Clinical Experiences

All

Student

All

☐ Include Comments & Narratives

Apply

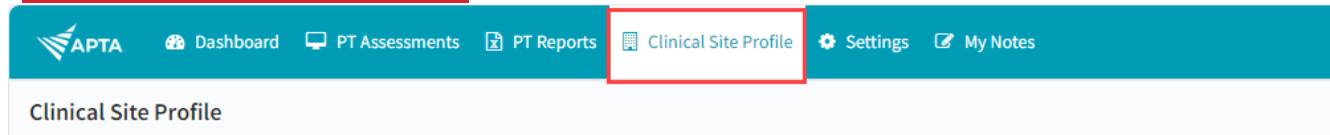
Download

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 screenshot shows the APTA dashboard with the following navigation items: APTA, Dashboard, PT Assessments, PT Reports, Clinical Site Profile (highlighted), Settings, and My Notes. Below the navigation bar, the 'Clinical Site Profile' section is visible.

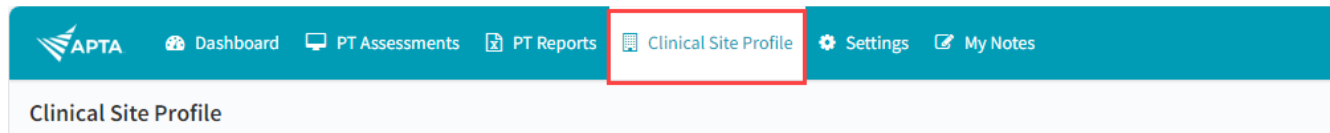
The Clinical Site Profile tab (or CSIF) is a listing of clinical sites with a completed profile. This list differs from the list on your Sites page (after you click Settings). Students and CIs should look under the PT(A) Assessments tab to determine their assigned sites.

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

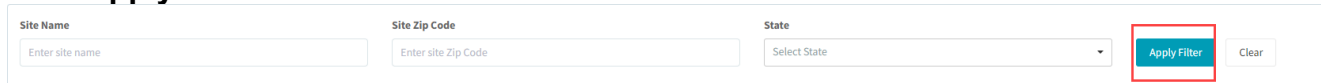
Viewing the completed Clinical Site Profiles/CSIF

1. Click **Clinical Site Profile**.



The screenshot shows the APTA dashboard with the following navigation items: APTA, Dashboard, PT Assessments, PT Reports, Clinical Site Profile (highlighted), Settings, and My Notes. Below the navigation bar, the 'Clinical Site Profile' section is visible.

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



The screenshot shows the search filters for Clinical Site Profiles. It includes three input fields: 'Site Name' (with placeholder 'Enter site name'), 'Site Zip Code' (with placeholder 'Enter site Zip Code'), and 'State' (with a dropdown menu labeled 'Select State'). To the right of these fields is a red-bordered button labeled 'Apply Filter' and a 'Clear' button.

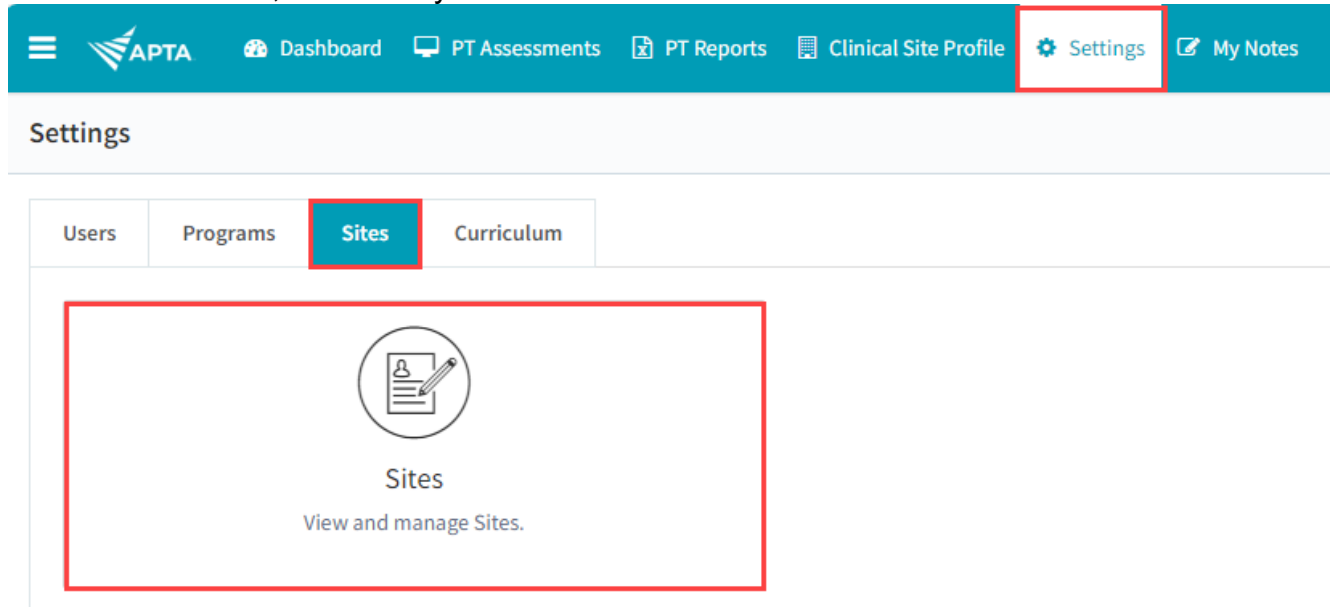
3. Once the site(s) you are looking for populates, click **View Details**. If the site is not already in your sites list and you want to include it in your list, click **Add to My Sites**.

Site Name	Site Coordinator	Site Coordinator Phone	Site Coordinator Email	State	Zip Code	Last Updated On	Action
22 December Test Site	gfdgfdg	hfgdghd	adasdasd@gmail.com			01/16/2024 8:00 AM	View Details Add to My Sites
Site for Demo	Deepak	9000000000	deepak@xyz.com	Alaska	201303	09/14/2023 10:00 AM	View Details Add to My Sites

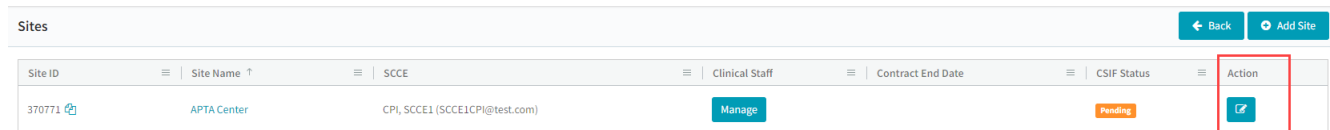
Editing the Clinical Site Profiles/CSIF

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.

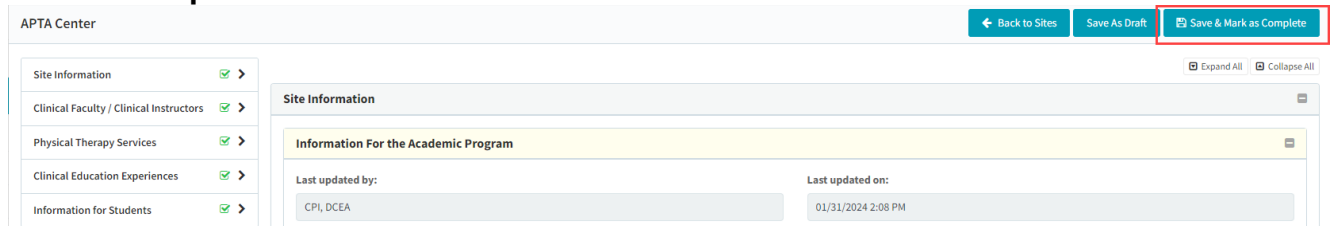
1. Click **Settings** from the top menu bar.
2. Click **Sites**, followed by the **Sites** icon.



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.**

APTA Center

← Back to Sites

Save As Draft

Save & Mark as Complete

Site Information	✓ >
Clinical Faculty / Clinical Instructors	✓ >
Physical Therapy Services	✓ >
Clinical Education Experiences	✓ >
Information for Students	✓ >

Expand All Collapse All

Site Information

Information For the Academic Program

Last updated by:

CPI, DCEA

Last updated on:

01/31/2024 2:08 PM

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.

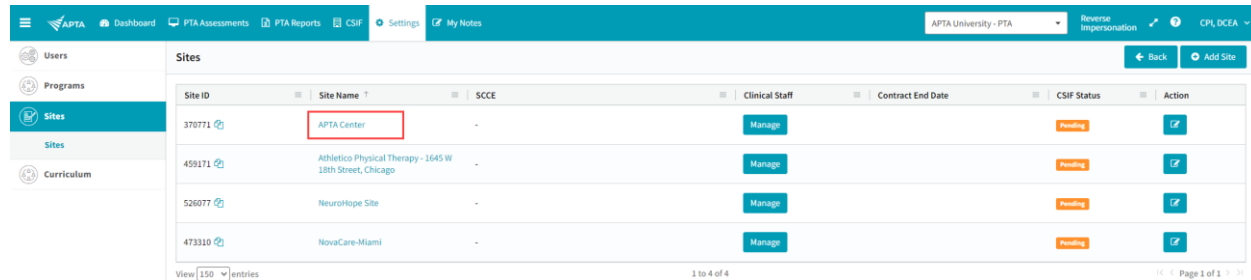
1. Add new users to the role that you need them to have with your program.
2. For existing users, add change/keep their primary role and add secondary roles via the Users area or the Sites area.

CIs and SCCEs now appear under the Users tab.

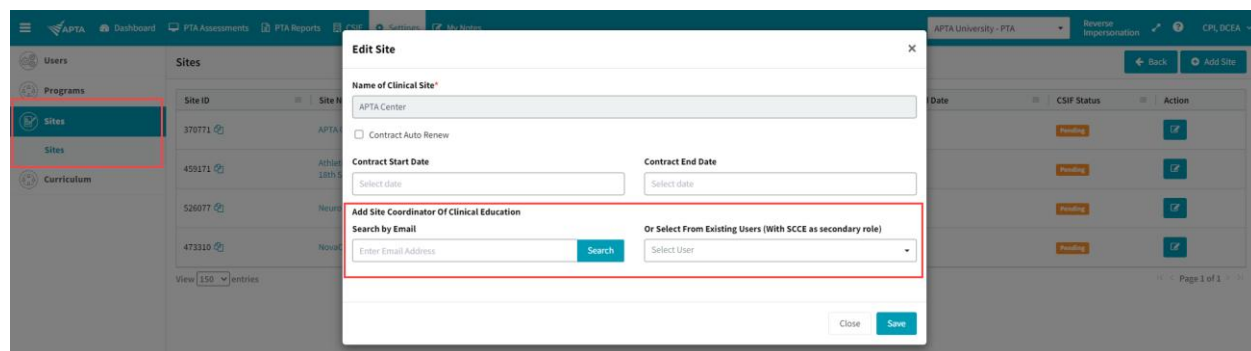
Adding new CIs and SCCEs

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

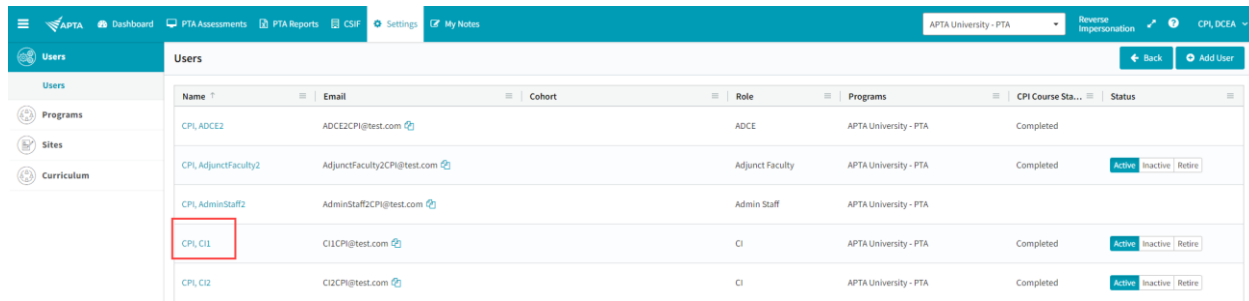
1. Click on Manage tab.
2. Click Add Clinical Staff.
3. Enter the user's APTA email address and click Search, OR select from drop-down menu to choose a user that has the secondary role of CI.

Giving users additional roles

SCCEs

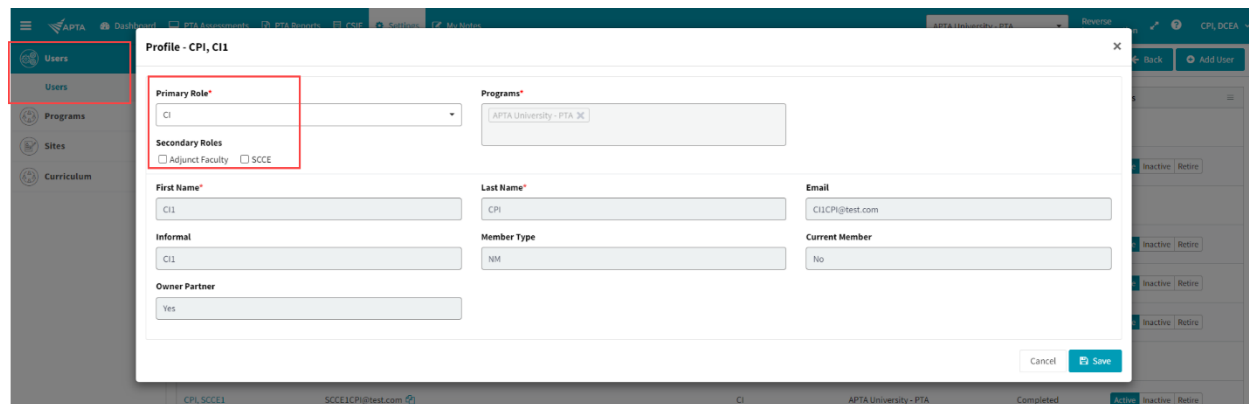
Option 1: Under Users tab

1. Click on user name.



Name	Email	Cohort	Role	Programs	CPI Course Sta...	Status
CPI, ADCE2	ADCE2CPI@test.com		ADCE	APTA University - PTA	Completed	
CPI, AdjunctFaculty2	AdjunctFaculty2CPI@test.com		Adjunct Faculty	APTA University - PTA	Completed	Active Inactive Retire
CPI, AdminStaff2	AdminStaff2CPI@test.com		Admin Staff	APTA University - PTA	Completed	
CPI, C1	C1CPI@test.com		CI	APTA University - PTA	Completed	Active Inactive Retire
CPI, C12	C12CPI@test.com		CI	APTA University - PTA	Completed	Active Inactive Retire

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



Profile - CPI, C1

Primary Role: CI

Secondary Roles: ☐ Adjunct Faculty ☒ SCCE

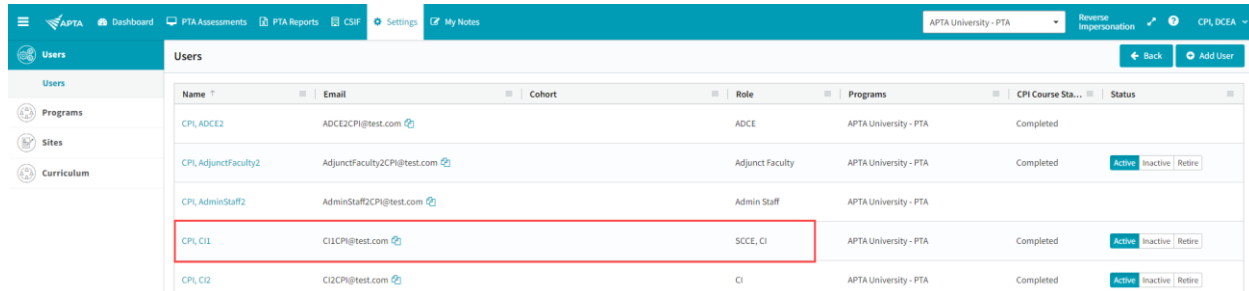
First Name: C1 Last Name: CPI Email: C1CPI@test.com

Informal: C1 Member Type: NM Current Member: No

Owner Partner: Yes

Buttons: Cancel, Save

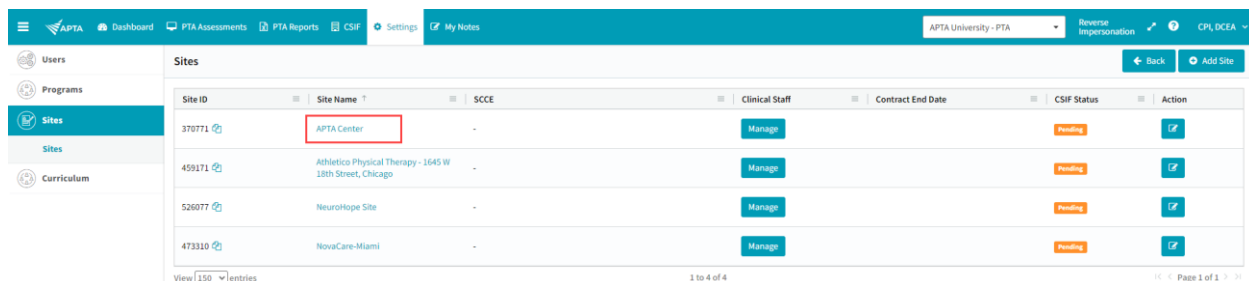
3. You will then see the user's roles in the Users tab.



Name	Email	Cohort	Role	Programs	CPI Course Sta...	Status
CPI, ADCE2	ADCE2CPI@test.com		ADCE	APTA University - PTA	Completed	
CPI, AdjunctFaculty2	AdjunctFaculty2CPI@test.com		Adjunct Faculty	APTA University - PTA	Completed	Active Inactive Retire
CPI, AdminStaff2	AdminStaff2CPI@test.com		Admin Staff	APTA University - PTA	Completed	
CPI, C1	C1CPI@test.com		SCCE, CI	APTA University - PTA	Completed	Active Inactive Retire
CPI, C12	C12CPI@test.com		CI	APTA University - PTA	Completed	Active Inactive Retire

Option 2: Under Sites Tab - SCCEs

1. Click the site name.

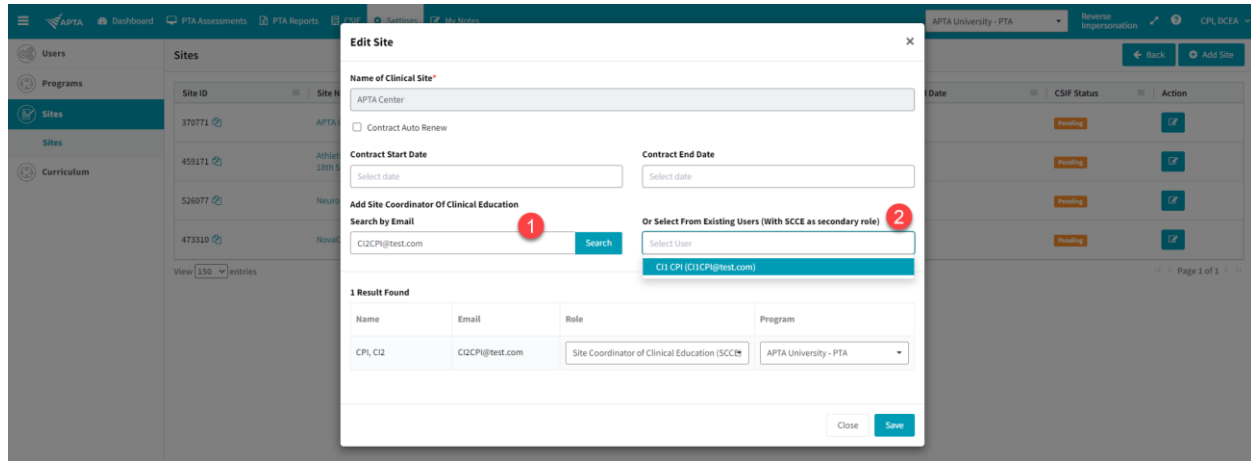


Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action
370771	APTA Center	-	Manage		Pending	🔗
459371	Athletica Physical Therapy - 1645 W 18th Street, Chicago	-	Manage		Pending	🔗
526077	NeuroHope Site	-	Manage		Pending	🔗
473310	NovaCare-Miami	-	Manage		Pending	🔗

View 150 entries 1 to 4 of 4 Page 1 of 1

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

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



Edit Site

Name of Clinical Site*
APTA Center

☐ Contract Auto Renew

Contract Start Date
Select date

Contract End Date
Select date

Add Site Coordinator Of Clinical Education

Search by Email 1
C12CPI@test.com Search

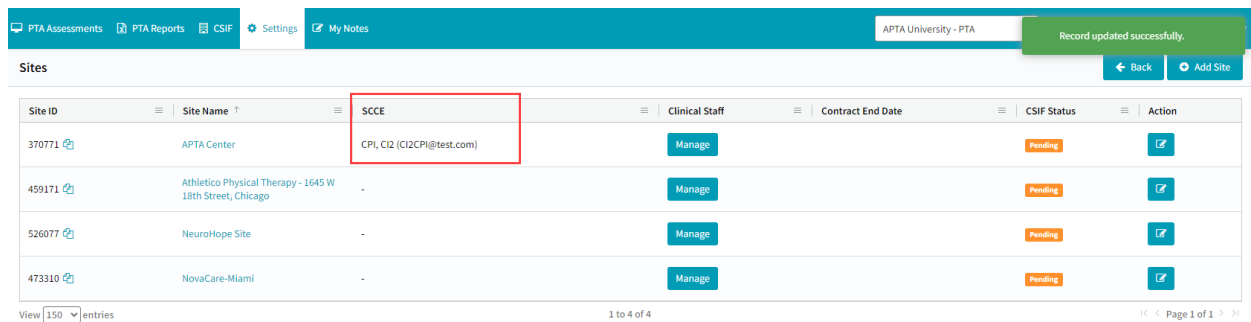
Or Select From Existing Users (With SCCE as secondary role) 2
Select User
C12CPI (C12CPI@test.com)

1 Result Found

Name	Email	Role	Program
CPI, C12	C12CPI@test.com	Site Coordinator of Clinical Education (SCCE)	APTA University - PTA

Close Save

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



PTA Assessments PTA Reports CSIF Settings My Notes APTA University - PTA Record updated successfully.

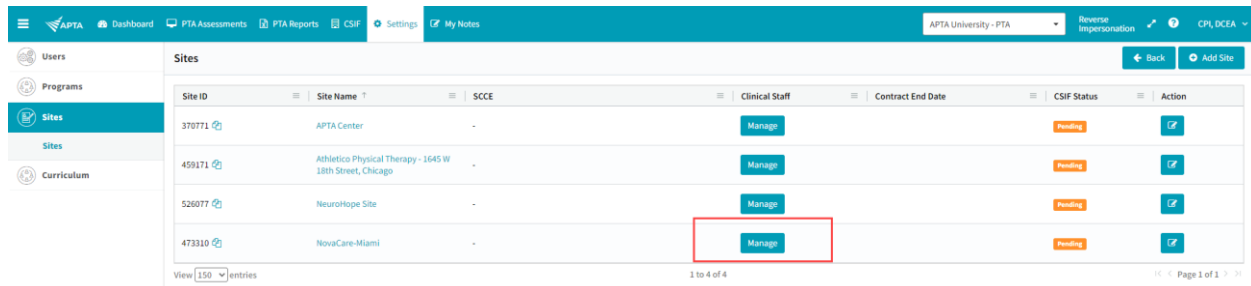
Sites Back Add Site

Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action
370771	APTA Center	CPI, C12 (C12CPI@test.com)	Manage		Pending	
459171	Athletico Physical Therapy - 1645 W 18th Street, Chicago	-	Manage		Pending	
526077	NeuroHope Site	-	Manage		Pending	
473310	NovaCare-Miami	-	Manage		Pending	

View 150 entries 1 to 4 of 4 Page 1 of 1

Option 3: Under Sites Tab – Cis

- Click the Manage tab.



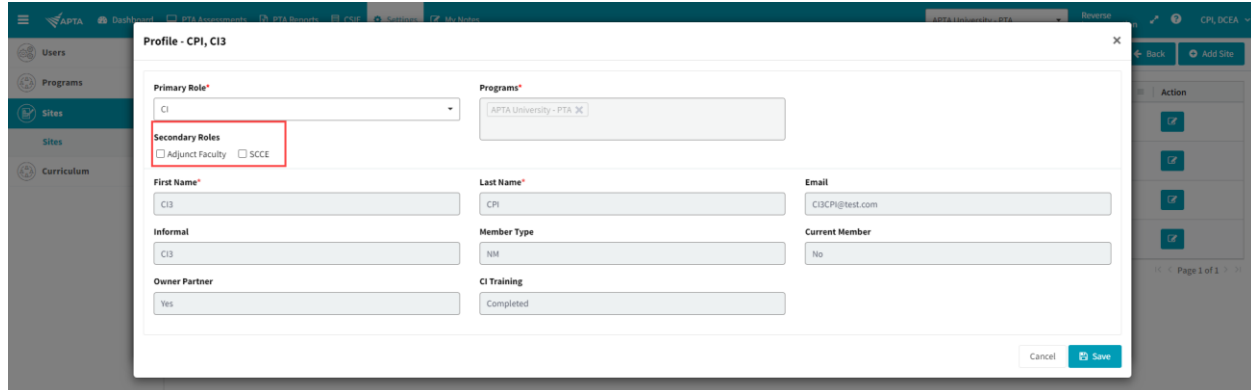
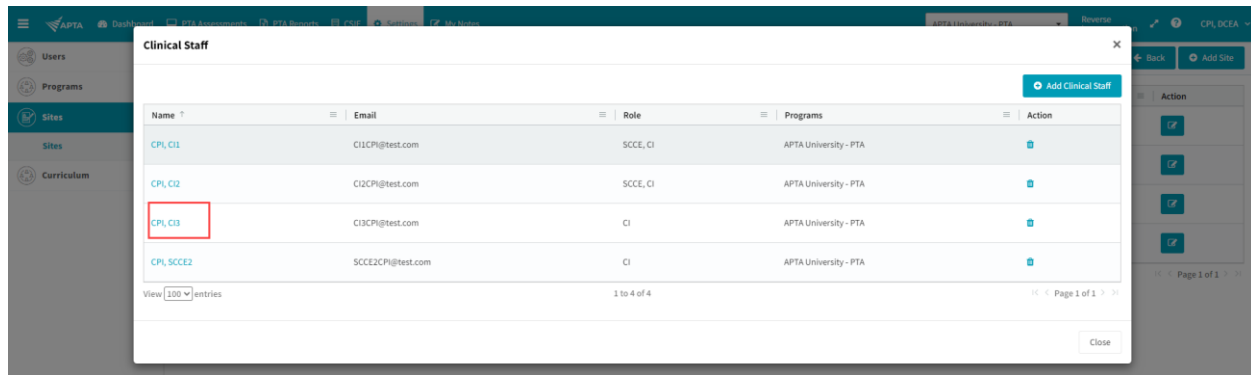
APTA Dashboard PTA Assessments PTA Reports CSIF Settings My Notes APTA University - PTA Reverse Impersonation CPL DCEA

Sites Back Add Site

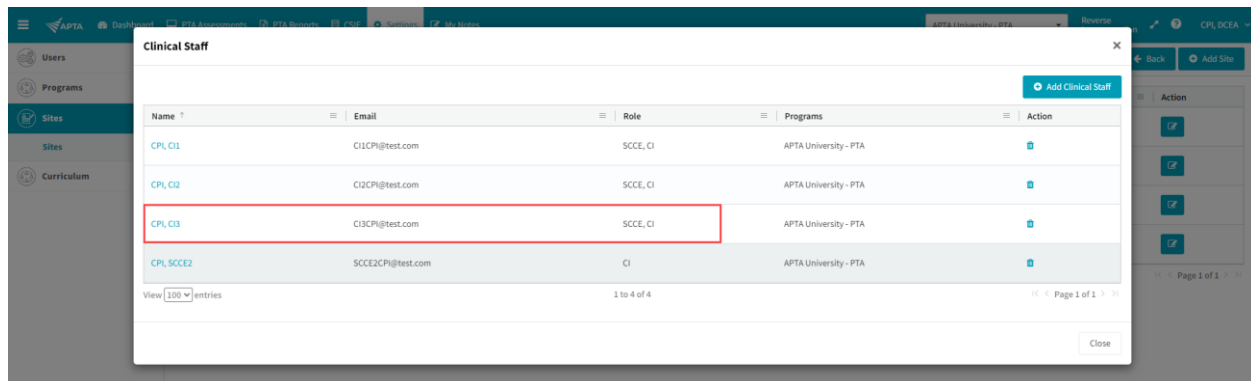
Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action
370771	APTA Center	-	Manage		Pending	
459171	Athletico Physical Therapy - 1645 W 18th Street, Chicago	-	Manage		Pending	
526077	NeuroHope Site	-	Manage		Pending	
473310	NovaCare-Miami	-	Manage		Pending	

View 150 entries 1 to 4 of 4 Page 1 of 1

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



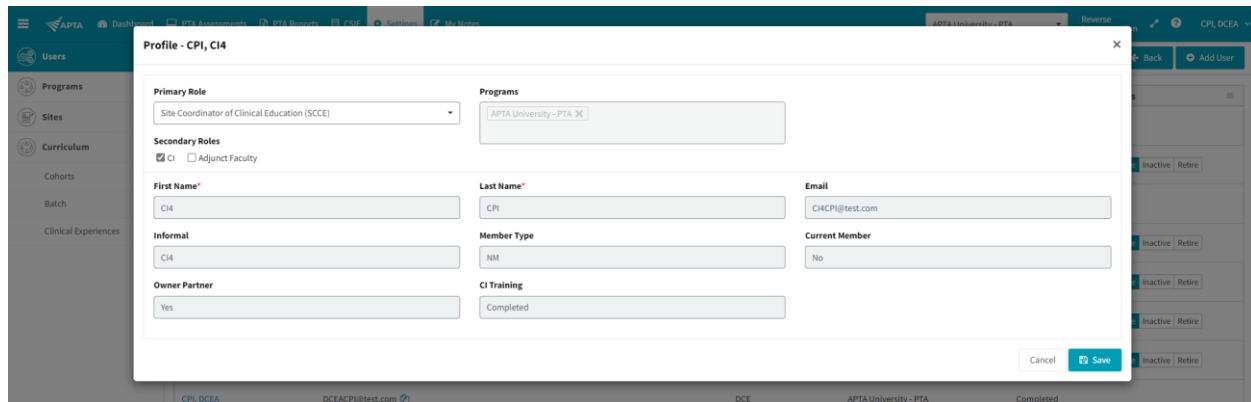
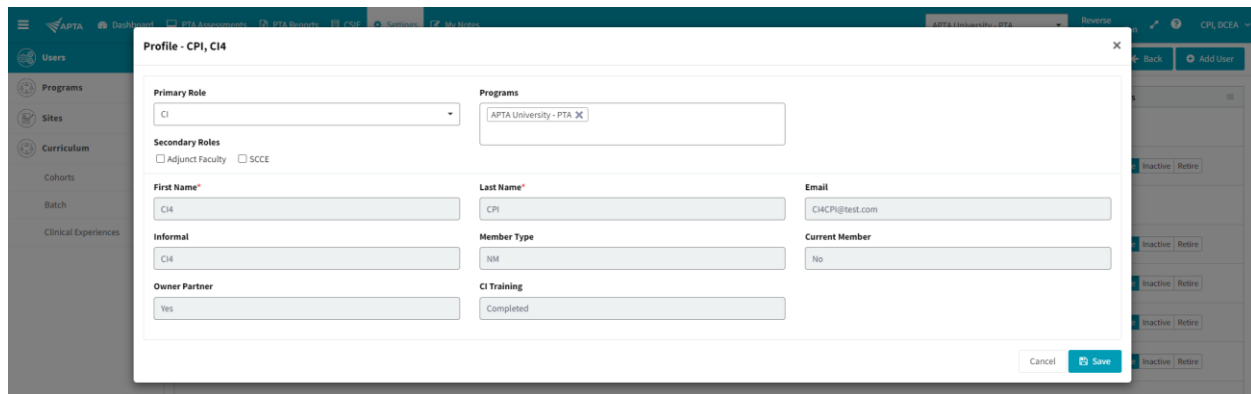
3. You will now see the user with the second role in the Sites tab as well as the Users tab.



Removing a user from a role

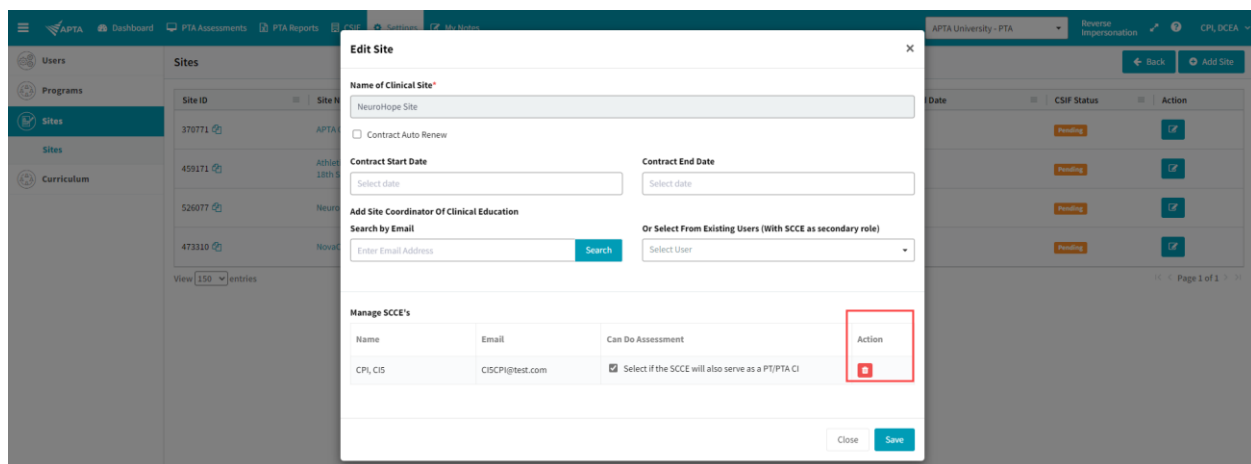
Option 1 (Easiest Option): Under Users tab – SCCE example

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.

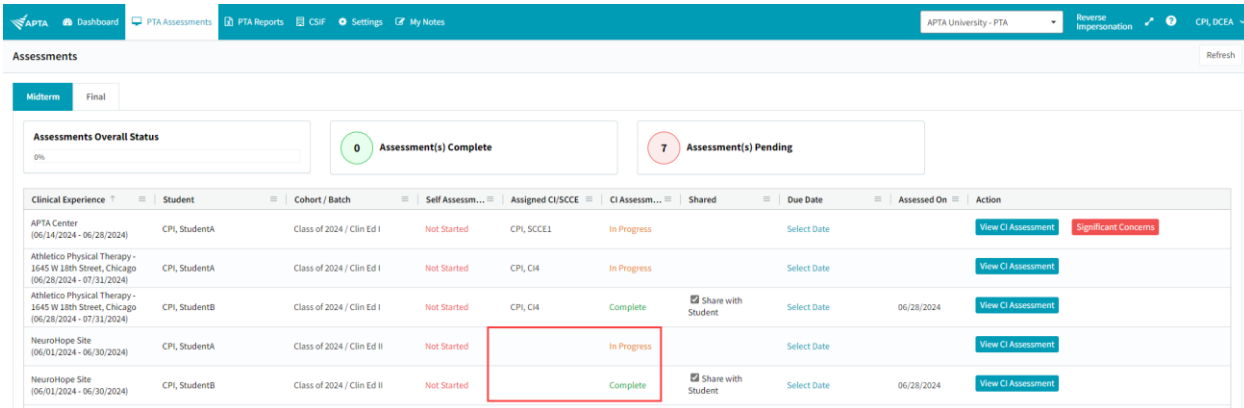
Option 2: Under Sites tab

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



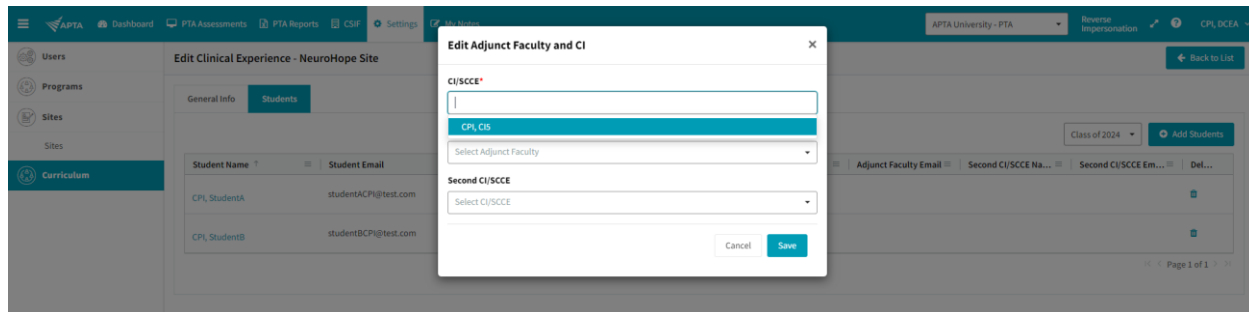
3. If the user is still visible under the Assessments tab, then you are all set. If the user is no longer visible under the Assessments tab, or if they still appear as having both SCCE and CI roles under the Users tab, follow the subsequent steps.

- 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.

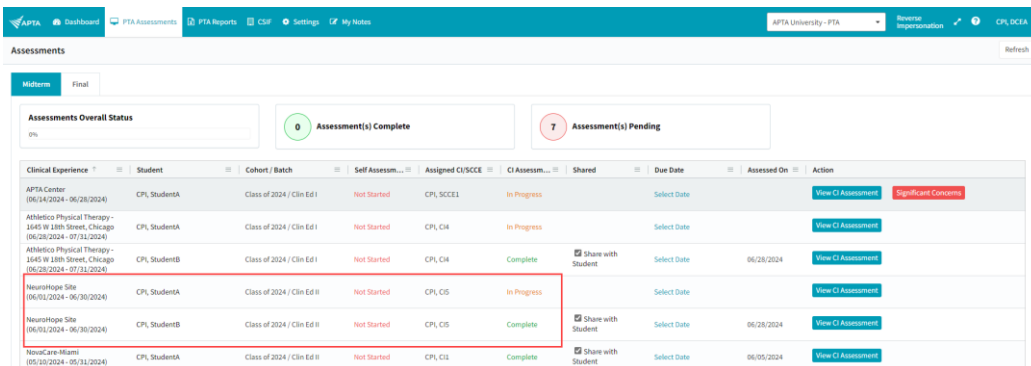


Clinical Experience	Student	Cohort / Batch	Self Assess...	Assigned CI/SCCE	CI Assess...	Shared	Due Date	Assessed On	Action
APTA Center (06/14/2024 - 06/28/2024)	CPI, StudentA	Class of 2024 / Clin Ed I	Not Started	CPI, SCCE1	In Progress		Select Date		View CI Assessment Significant Concerns
Athletico Physical Therapy - 1645 W 18th Street, Chicago (06/28/2024 - 07/11/2024)	CPI, StudentA	Class of 2024 / Clin Ed I	Not Started	CPI, C14	In Progress		Select Date		View CI Assessment
Athletico Physical Therapy - 1645 W 18th Street, Chicago (06/28/2024 - 07/11/2024)	CPI, StudentB	Class of 2024 / Clin Ed I	Not Started	CPI, C14	Complete	Share with Student	Select Date	06/28/2024	View CI Assessment
NeuroHope Site (06/01/2024 - 06/30/2024)	CPI, StudentA	Class of 2024 / Clin Ed II	Not Started		In Progress		Select Date		View CI Assessment
NeuroHope Site (06/01/2024 - 06/30/2024)	CPI, StudentB	Class of 2024 / Clin Ed II	Not Started		Complete	Share with Student	Select Date	06/28/2024	View CI Assessment

- Follow the instructions for removing a user from a role under the users tab to delete the SCCE role.
- 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.



- The user should now reappear under the Assessments tab.



Clinical Experience	Student	Cohort / Batch	Self Assess...	Assigned CI/SCCE	CI Assess...	Shared	Due Date	Assessed On	Action
APTA Center (06/14/2024 - 06/28/2024)	CPI, StudentA	Class of 2024 / Clin Ed I	Not Started	CPI, SCCE1	In Progress		Select Date		View CI Assessment Significant Concerns
Athletico Physical Therapy - 1645 W 18th Street, Chicago (06/28/2024 - 07/11/2024)	CPI, StudentA	Class of 2024 / Clin Ed I	Not Started	CPI, C14	In Progress		Select Date		View CI Assessment
Athletico Physical Therapy - 1645 W 18th Street, Chicago (06/28/2024 - 07/11/2024)	CPI, StudentB	Class of 2024 / Clin Ed I	Not Started	CPI, C14	Complete	Share with Student	Select Date	06/28/2024	View CI Assessment
NeuroHope Site (06/01/2024 - 06/30/2024)	CPI, StudentA	Class of 2024 / Clin Ed II	Not Started	CPI, C15	In Progress		Select Date		View CI Assessment
NeuroHope Site (06/01/2024 - 06/30/2024)	CPI, StudentB	Class of 2024 / Clin Ed II	Not Started	CPI, C15	Complete	Share with Student	Select Date	06/28/2024	View CI Assessment
NovaCare Miami (06/10/2024 - 06/14/2024)	CPI, StudentA	Class of 2024 / Clin Ed II	Not Started	CPI, C15	Complete	Share with Student	Select Date	06/05/2024	View CI Assessment

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.

Clinical Experiences

Back

Download

Import Clinical Experiences

Create

Search By Student/Evaluator name

Start Typing...

Clear

Site ↑	No. of Students	Cohort / Batch	Start date	End date	Status	Delete
APTA Center	View (2)	Class of 2024 / ClinEd III	12/01/2023	01/02/2024	<div><div>Pending</div><div>Active</div><div>Completed</div><div>Archived</div></div>	<div><div>✕</div><div>📄</div></div>
NovaCare-Miami	View (1)	Class of 2025 / ClinEd I	02/01/2024	02/17/2024	<div><div>Pending</div><div>Active</div><div>Completed</div><div>Archived</div></div>	<div><div>✕</div><div>📄</div></div>
NovaCare-Miami	View (1)	Class of 2024 / ClinEd III	01/02/2024	02/02/2024	<div><div>Pending</div><div>Active</div><div>Completed</div><div>Archived</div></div>	<div><div>✕</div><div>📄</div></div>

View 150 entries.

1 to 3 of 3

Page 1 of 1

- To search for a specific clinical experience by user, go to Settings → Curriculum → Clinical Experiences. Then, search by Student/Evaluator Name.
- 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.
- 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.](#)

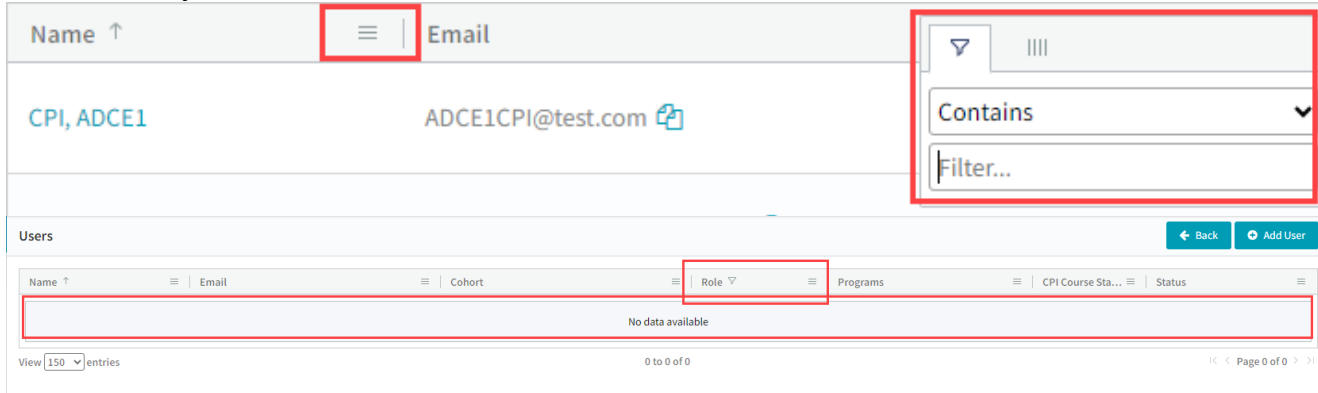
NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, C1 CPI, SCCE2	Complete	<input type="checkbox"/> Share with Student	Select Date	02/22/2024	View CI Assessment	DCE Sign Off	View Student Assessment	Significant Concerns
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- 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.
- Column widths can be adjusted by clicking and dragging the lines of the columns.

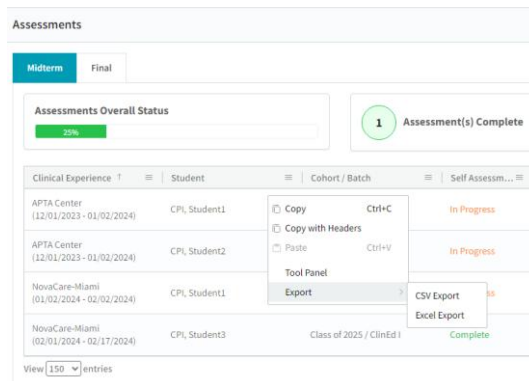
Users

- 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](#)