

# **Clinical Performance Instrument (CPI) 3.0**

**Director of Clinical Education**  
**Academic Coordinator of Clinical  
Education**  
**Associate Director of Clinical  
Education**  
**Administrative Staff**

## **User Guide**

**3/11/2024**

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## Login

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

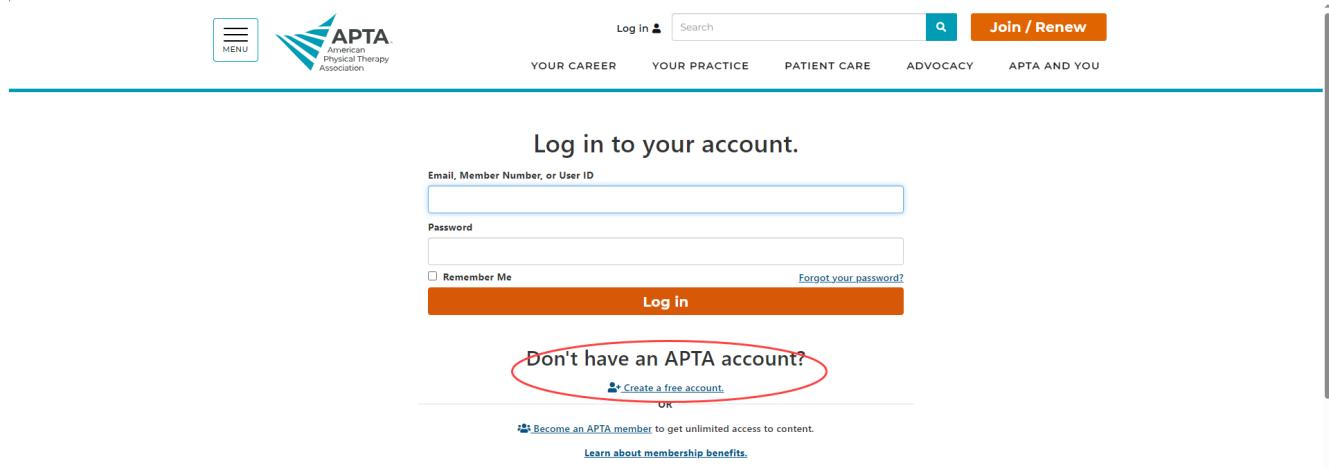
Click **Login**.



### 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.

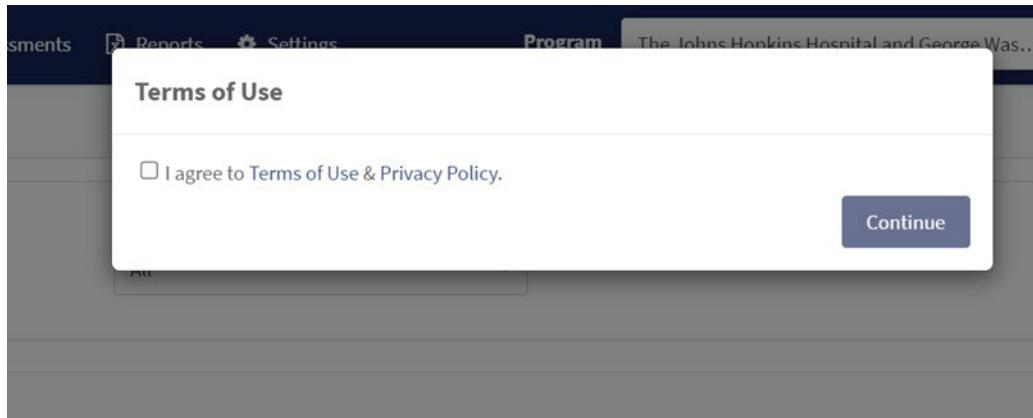
Log in to your account using your APTA login credentials.



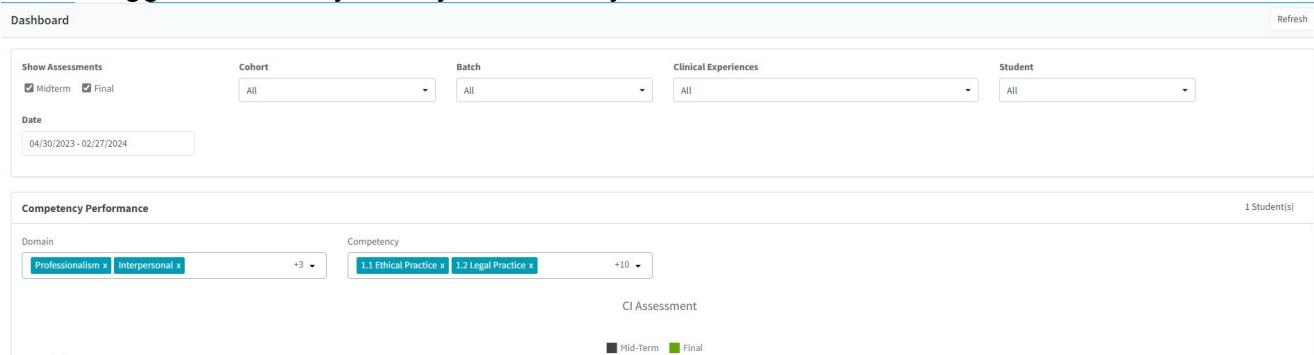
**For login questions/issues:** Email [membersuccess@apta.org](mailto:membersuccess@apta.org) or call 800-999-2782 (APTA). This includes situations of multiple APTA accounts, password reset, and updating email addresses.

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.

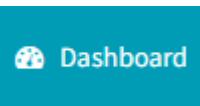
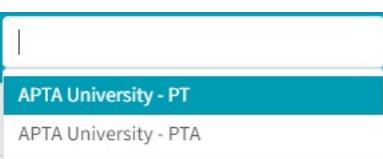


*Program Staff (DCE/ACCE, ADCE, Admin Staff) will be able to see the aggregate data for the program(s) they are associated with on the graphs on the dashboard.*

## System Overview

### Menu Icons



	The <b>Dashboard</b> 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 <b>Assessments</b> page is where Active Student and CI CPI evaluations can be viewed and the DCE sign-off occurs.
 	The <b>Reports</b> 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 <b>Clinical Site Profile</b> is where the CSIF lives. This page shows all completed CSIF profiles.
	The <b>Settings</b> tab is where your clinical experiences are set up, your program users are managed, and your list of sites are kept.
	The <b>My Notes</b> 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.
	Click to <b>enter/exit full screen</b> .
	This question mark allows you access to <b>User Guides</b> . <i>Note: As part of the program staff, you have access to all user guides.</i>
	Click your <b>User name dropdown</b> to: <ul style="list-style-type: none"> <li>• View your user profile</li> <li>• Log Out of the system</li> </ul>

## Program Users

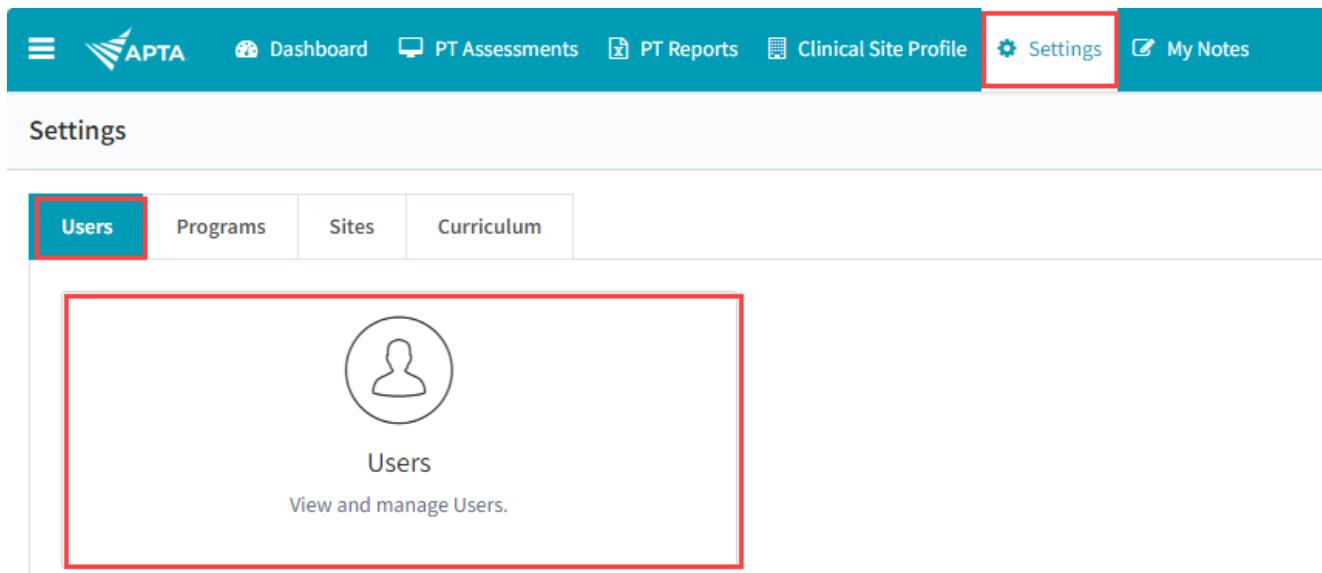
The Users page allows you to view and manage all individuals associated with your program. This includes DCEs, ADCEs, Adjunct Faculty, Administrative Staff, and Students.

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.

## 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 DEMS software interface. At the top, there is a navigation bar with the APTA logo and links for Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (which is highlighted with a red box), and My Notes. Below the navigation bar, the word "Settings" is displayed. Under "Settings", there is a sub-menu with four tabs: "Users" (which is highlighted with a red box), "Programs", "Sites", and "Curriculum". The "Users" tab is selected and leads to a page titled "Users" with a sub-instruction "View and manage Users." There is a large red box around the "Users" tab and the "View and manage Users." text.

Users						
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	<span>Active</span> <span>Inactive</span> <span>Retire</span>
CPI, AdminStaff1	AdminStaff1CPI@test.com		Administrative Staff	APTA University - PT		
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	<span>Active</span> <span>Inactive</span> <span>Retire</span>
CPI, Student2	student2CPI@test.com	Class of 2024	Student	APTA University - PT	Completed	<span>Active</span> <span>Inactive</span> <span>Retire</span>
CPI, Student3	student3CPI@test.com	Class of 2025	Student	APTA University - PT	Completed	<span>Active</span> <span>Inactive</span> <span>Retire</span>

View 150 entries

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## 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 ([Adding Students as Users](#))

Users						
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	<span>Active</span> <span>Inactive</span> <span>Retire</span>
CPI, AdminStaff1	AdminStaff1CPI@test.com		Administrative Staff	APTA University - PT		

- 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\*

derekstepp@apta.org

Search

3. 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\*  
derekstepp@apta.org

1 Result Found

Name	Email	Role*	Program	Action
Stepp, Derek	derekstepp@apta.org	Adjunct Faculty	Select Programs	Add

Adjunct Faculty  
Administrative Staff  
Associate DCE  
Director of Clinical Education (DCE)  
Student

CPI, Student1 student1CPI@test.com

4. 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\*  
derekstepp@apta.org

1 Result Found

Name	Email	Role*	Program*	Action
Stepp, Derek	derekstepp@apta.org	Adjunct Faculty	Select Programs	Add

Select Programs  
APTA University - PT

5. Click Add.

Add User

Search by Email\*  
derekstepp@apta.org

1 Result Found

Name	Email	Role*	Program*	Action
Stepp, Derek	derekstepp@apta.org	Adjunct Faculty	APTA University - PT	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.

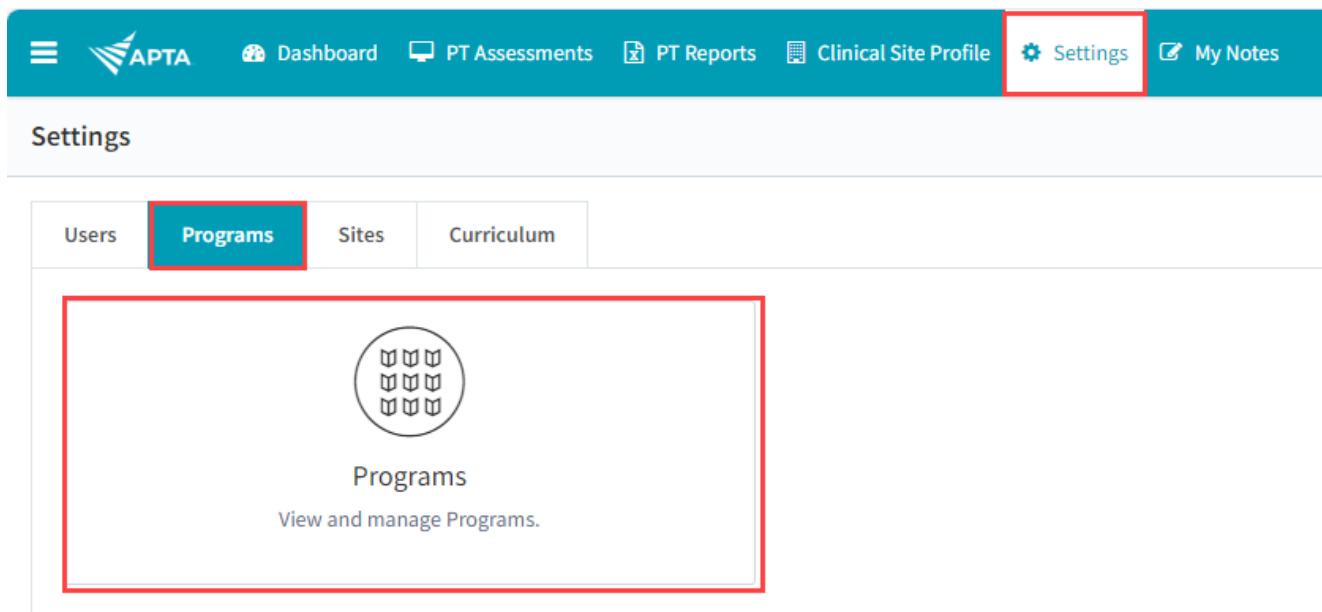
If the certificate says that they completed the correct training, please escalate to CPI Support. It is likely that the training did not push over to the APTA database correctly and that we will have to manually push it through.

## 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.



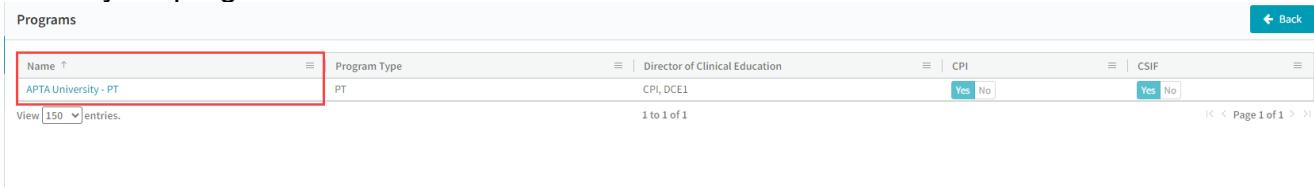
Settings

Users Programs Sites Curriculum

Programs

View and manage Programs.

3. Select your program name



Programs						Back
Name ↑	Program Type	Director of Clinical Education	CPI	DCE1	CPI	CSIF
APTA University - PT	PT		Yes	No	Yes	No
View 150 entries.			1 to 1 of 1			
Page 1 of 1						

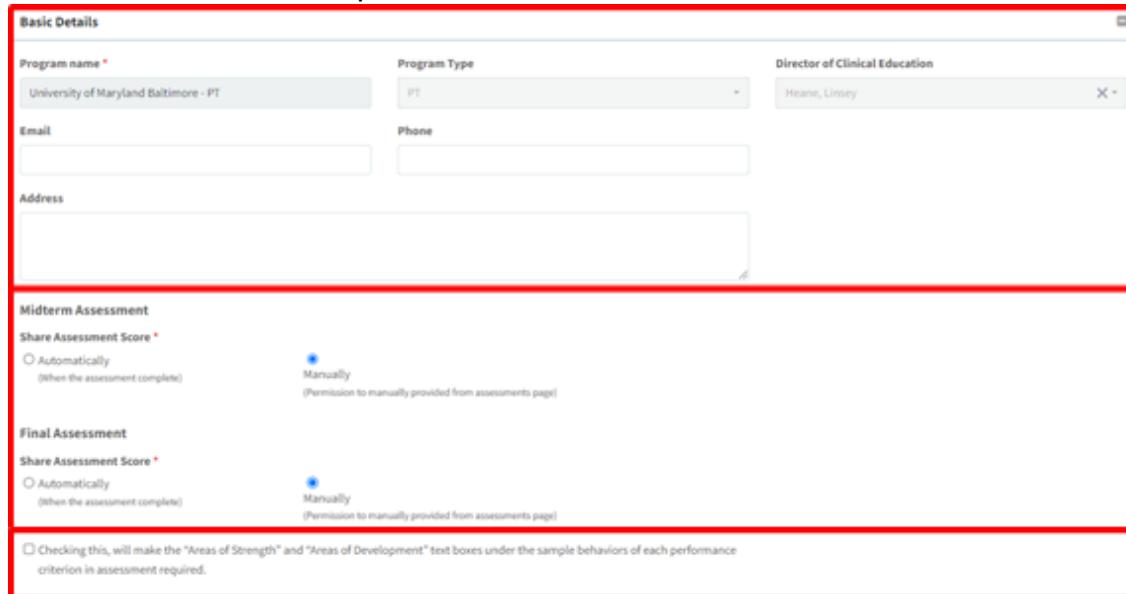
4. Review and update basic program details.
5. Set the CI CPI Evaluation sharing preferences automatically or manually. The difference is explained in the table below.

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.

- 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, Limley

Email:

Phone:

Address:

**Midterm Assessment**

Share Assessment Score \*

Automatically  
(When the assessment complete)

Manually  
(Permission to manually provide from assessments page)

**Final Assessment**

Share Assessment Score \*

Automatically  
(When the assessment complete)

Manually  
(Permission to manually provide 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.

- 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:

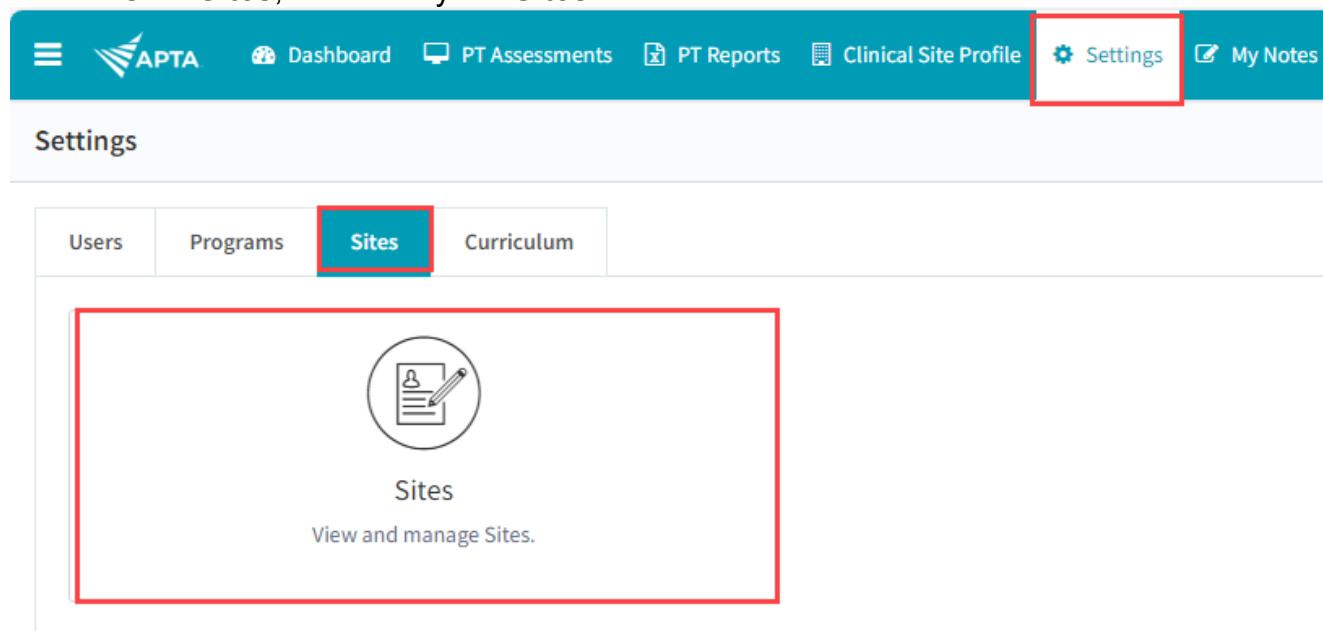
1. Creating/Adding Clinical Sites
  - The process for adding CIs to the clinical sites is discussed in [the Manual and Automatic/Spreadsheet process](#) for creating the clinical experiences.
2. [Creating the Cohorts](#)
3. [Creating Clinical Experiences and releasing to Students and CIs](#)
  - Manual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

**The next set of instructions will follow this workflow.**

### Step 1: Creating and Adding Clinical Sites

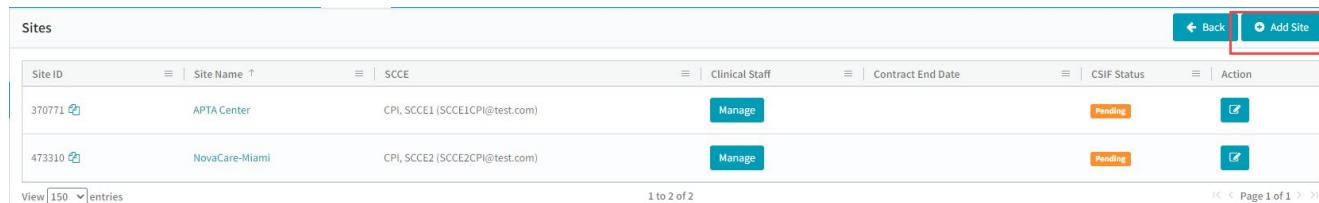
Clinical sites must be manually added to your program prior to setting up your clinical experiences. This is a manual process in order to reduce the potential for duplication and incorrect data.

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



The screenshot shows the top navigation bar with the APTA logo, Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (which is highlighted with a red box), and My Notes. Below the navigation bar is the 'Settings' page. At the top of the Settings page is a navigation bar with four tabs: Users, Programs, **Sites** (which is highlighted with a red box), and Curriculum. The 'Sites' tab is currently active, displaying a large red box around the 'Sites' icon (a circle with a person writing on a clipboard) and the text 'Sites' and 'View and manage Sites.'.

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



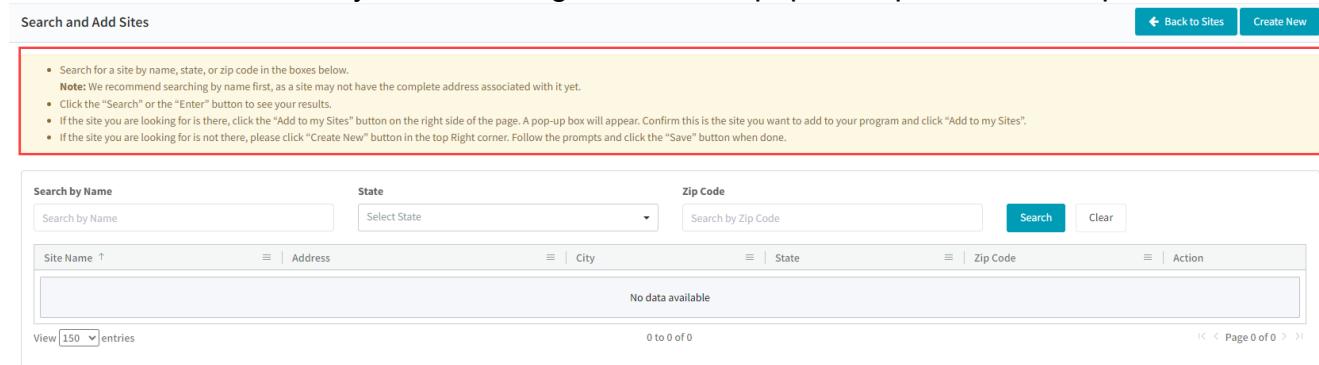
Sites

Site ID	Site Name	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	

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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

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.

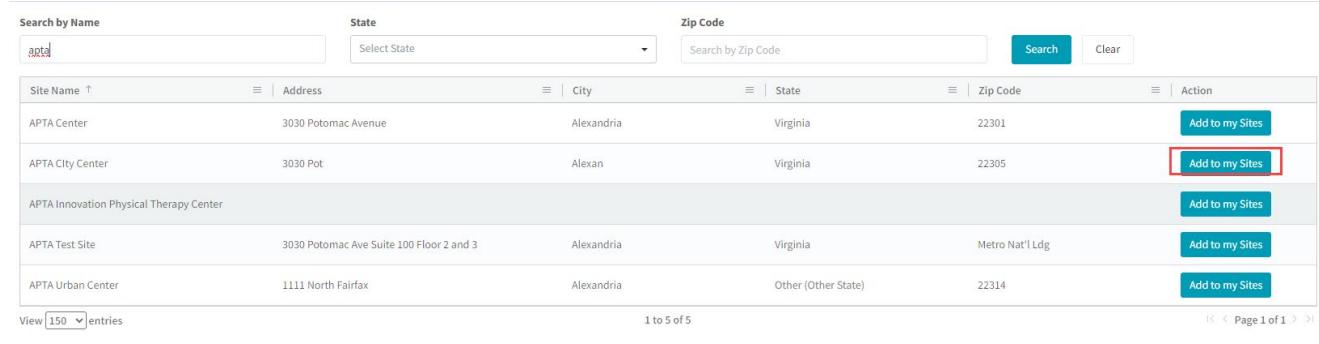
- Click the "Search" or the "Enter" button to see your results.
- If the site you are looking for is there, click the "Add to my Sites" button on the right side of the page. A pop-up box will appear. Confirm this is the site you want to add to your program and click "Add to my Sites".
- If the site you 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
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 by Name

Search by Name	State	Zip Code
apta	Select State	Search by Zip Code
Site Name ↑	Address	City
APTA Center	3030 Potomac Avenue	Alexandria
APTA City Center	3030 Pot	Alexan
APTA Innovation Physical Therapy Center		Virginia
APTA Test Site	3030 Potomac Ave Suite 100 Floor 2 and 3	Alexandria
APTA Urban Center	1111 North Fairfax	Alexandria

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

Add Site X

Name of Clinical Site\*

APTA City Center

Address Line 1\*

3030 Pot

Address Line 2

City \*

Alexan

State \*

Virginia

X -

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 and identify if they will also be an CI.

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

Select if the SCCE will also serve as a PT/PTA CI



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	Zip Code
<input type="text" value="apta"/>	<input type="button" value="Select State"/>	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>		

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

X

Name of Clinical Site\*

Address Line 1\*

Address Line 2

City \*

State \*

Zip Code \*

 Contract Auto Renew

Contract Start Date

Contract End Date

Add Site Coordinator Of Clinical Education

Search by Email

After entering the SCCE's email address, click **Search** to have their name populate and identify if they will also serve as a CI (now or in the future).

Add Site Coordinator Of Clinical Education

Search by Email

Enter Email Address

**Search**  

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

Select if the SCCE will also serve as a PT/PTA CI  

**Close** Save

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

**Notes:**

- If you check that the SCCE can serve as a CI for PT/PTA students the SCCE's name will appear as an option to pair with students. Do not attempt to also add the SCCE under the Manage Clinical Staff button discussed later.
- 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	<b>View</b>	<b>Complete</b>	
Select Physical Therapy - Manhattan Beach	<b>View</b>	<b>Pending</b>	

## 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.

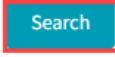
Sites						 Back	 Add Site
Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action	
370771 	APTA Center	CPI, SCCE1 (SCCE1CPI@test.com)	 Manage		Pending 		

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
  - Identify if they will also serve as a CI (now or in the future).

### Add Site Coordinator Of Clinical Education

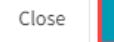
#### Search by Email

Enter Email Address

 Search

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

Select if the SCCE will also serve as a PT/PTA CI

 Close  Save

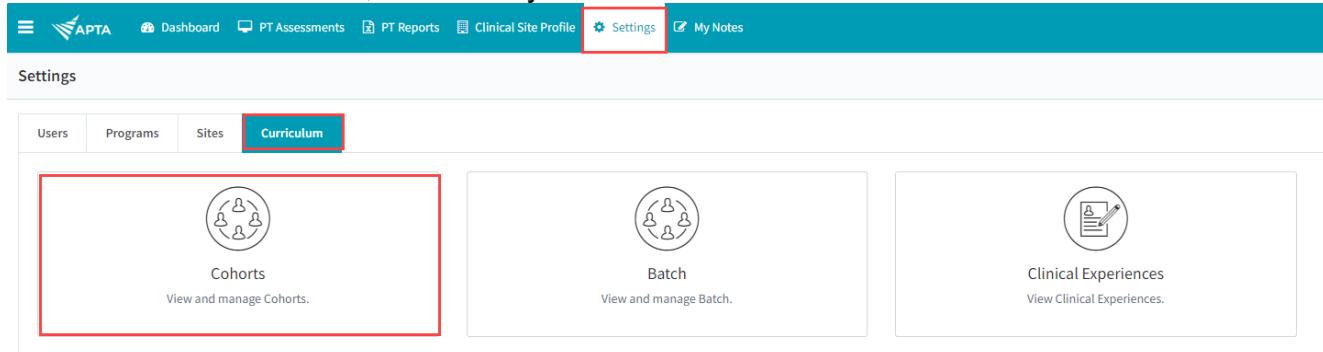
5. Click **Save** (shown in the image above). The SCCE name will appear in the 3<sup>rd</sup> column for the site.

NOTE: If you check that the SCCE can serve as a CI for PT/PTA students the SCCE's name will appear as an option to pair with students. Do not attempt to also add the SCCE under the Manage Clinical Staff button discussed later.

## 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.



The screenshot shows the 'Curriculum' tab selected in the top navigation bar. Below it, there are three main sections: 'Cohorts' (highlighted with a red box), 'Batch', and 'Clinical Experiences'. Each section has a circular icon and a brief description.

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



The screenshot shows a table of existing cohorts. In the top right corner of the table header, there is a 'Create' button highlighted with a red box.

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



The screenshot shows a 'Create Cohorts' dialog box. It has three input fields: 'Name\*' (filled with 'Class of 2026'), 'Title' (empty), and 'Description' (empty). At the bottom right are 'Cancel' and 'Save' buttons, with 'Save' highlighted with a red box.

### 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.

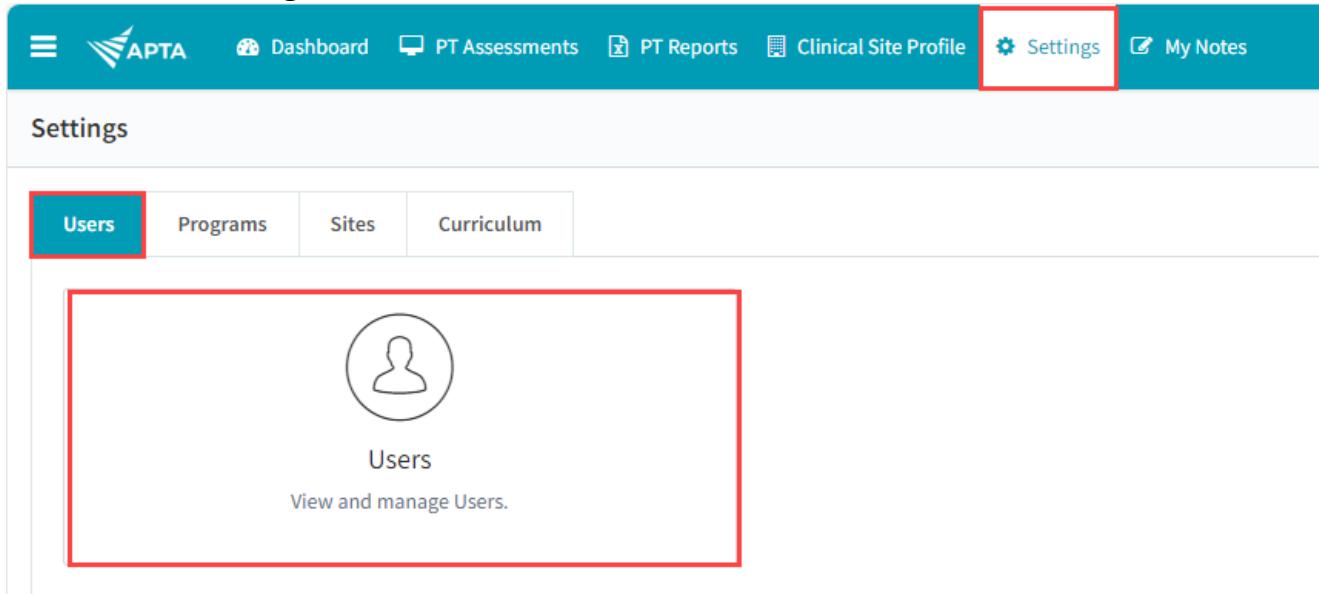
Steps 1 and 2 were discussed previously and this section will pick up at Step 3.

#### 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**.



The screenshot shows the APTA software interface with a teal header bar. The header includes the APTA logo, navigation links for Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (which is highlighted with a red box), and My Notes. Below the header is a 'Settings' page. At the top of this page is a navigation bar with tabs for Users, Programs, Sites, and Curriculum. The 'Users' tab is highlighted with a red box. The main content area is titled 'Users' and contains a user icon, the text 'View and manage Users.', and a large red box highlighting the entire section.

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

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

Users						<a href="#">Back</a>	<a href="#">Add User</a>
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	<a href="#">Active</a> <a href="#">Inactive</a> <a href="#">Retire</a>	
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 X

Search by Email\*  **Search**

1 Result Found

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

CPI, Student1 student1CPI@test.com

Education (DCE) Completed

Student APTA University - PT

Select your program from the drop-down list.

Add User

Search by Email\*

derekstepp@apta.org

Search

1 Result Found

Name	Email	Role*	Program*	Cohort	Action
Stepp, Derek	derekstepp@apta.org	Student	Select Programs APTA University - PT	Select Cohort	Add

## 6. Select the Cohort for your student.

Add User

Search by Email\*

derekstepp@apta.org

Search

1 Result Found

Name	Email	Role*	Program*	Cohort	Action
Stepp, Derek	derekstepp@apta.org	Student	APTA University - PT	Select Cohort Class of 2024 Class of 2025	Add

## 7. Click Add.

Add User

Search by Email\*

derekstepp@apta.org

Search

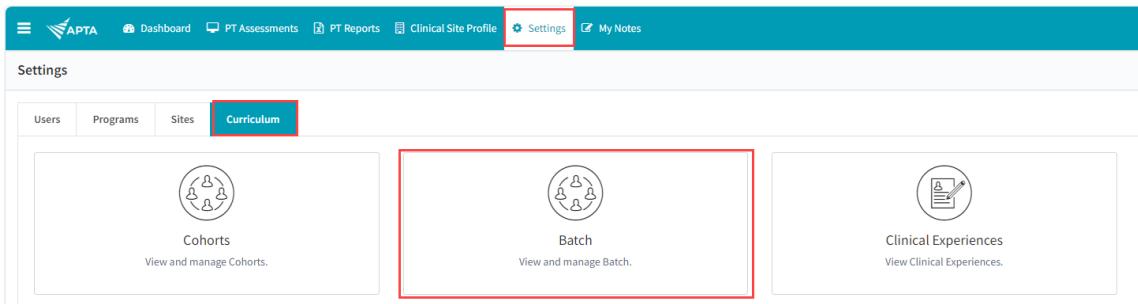
1 Result Found

Name	Email	Role*	Program*	Cohort	Action
Stepp, Derek	derekstepp@apta.org	Student	APTA University - PT	Class of 2024	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

Curriculum

Cohorts

Batch

Clinical Experiences

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



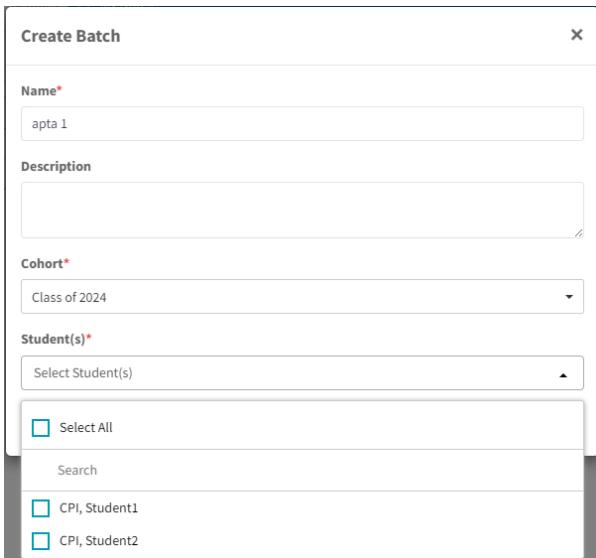
Batch

Create

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

View 100 entries. 1 to 2 of 2 (C < 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)

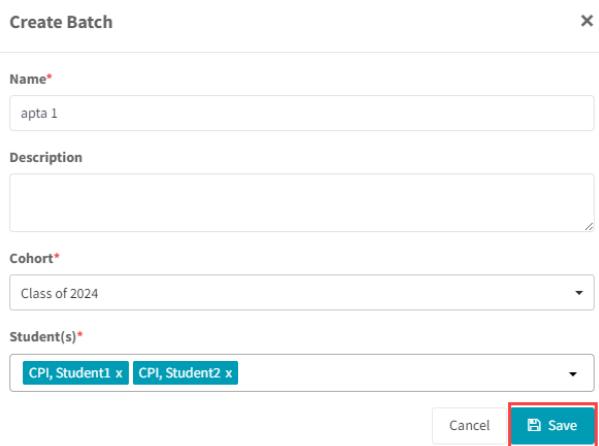
Select All

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

Save

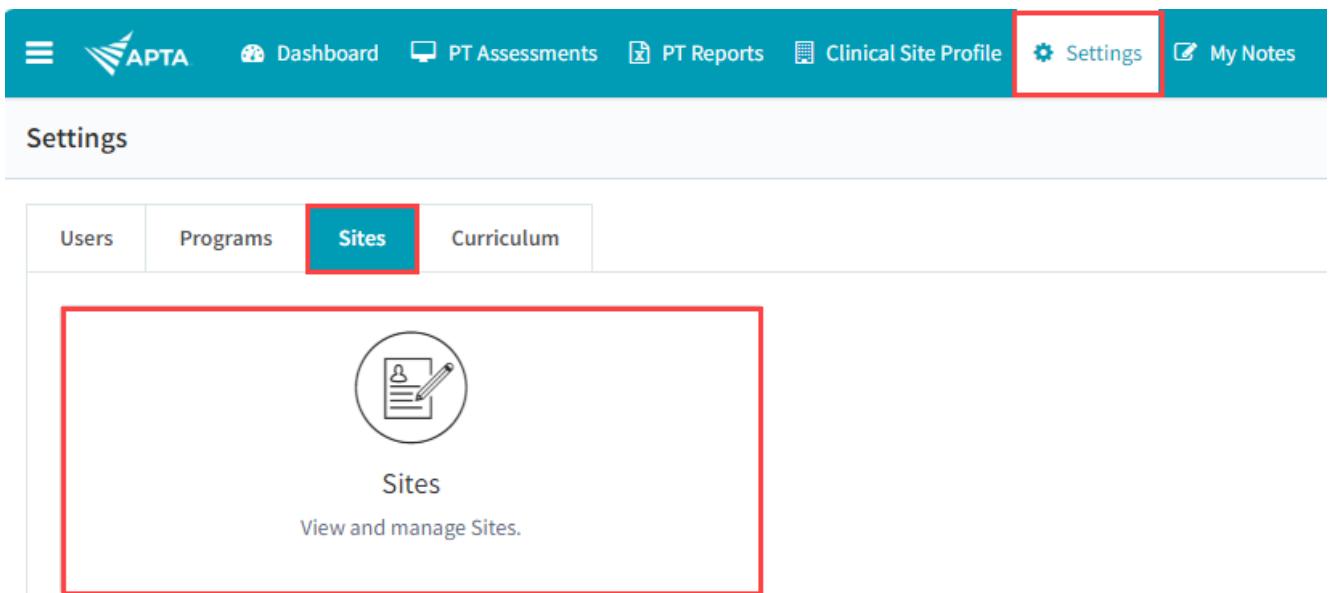
## Adding CIs to Sites

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. Do not add them as just a CI.**

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.

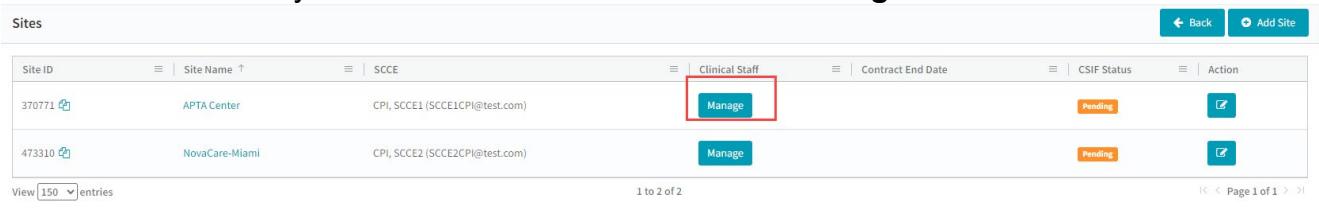
1. Click **Settings** from the top menu bar.



The screenshot shows the DEMS Settings page. At the top, there is a navigation bar with icons for APTA, Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (which is highlighted with a red box), and My Notes. Below the navigation bar, the word "Settings" is displayed. Under "Settings", there is a sub-navigation bar with four tabs: Users, Programs, Sites (which is highlighted with a red box), and Curriculum. The main content area is titled "Sites" and contains a circular icon with a person and a pen, followed by the text "View and manage Sites." A large red box surrounds this entire section.

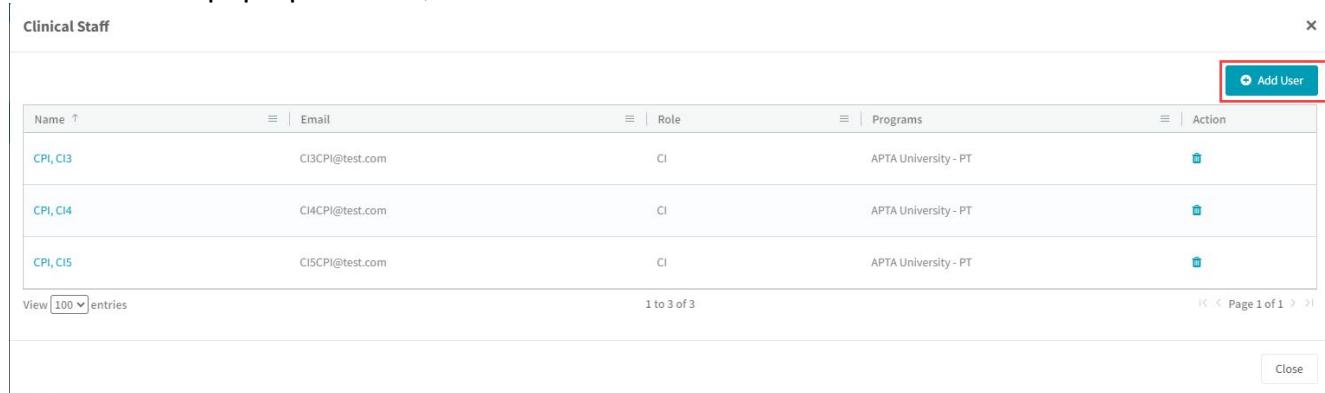
Click **Sites**, followed by the **Sites** icon.

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



The screenshot shows a table titled "Sites" with two rows of data. The columns are: Site ID, Site Name, SCCE, Clinical Staff, Contract End Date, CSIF Status, and Action. The first row has Site ID 370771, Site Name APTA Center, SCCE CPI, SCCE1 (SCCE1CPI@test.com), Clinical Staff (button highlighted with a red box), Contract End Date, CSIF Status Pending, and Action (button with a checkmark). The second row has Site ID 473310, Site Name NovaCare-Miami, SCCE CPI, SCCE2 (SCCE2CPI@test.com), Clinical Staff (button highlighted with a red box), Contract End Date, CSIF Status Pending, and Action (button with a checkmark). At the bottom of the table, there are buttons for "View 150 entries", "1 to 2 of 2", and "Page 1 of 1".

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



Clinical Staff

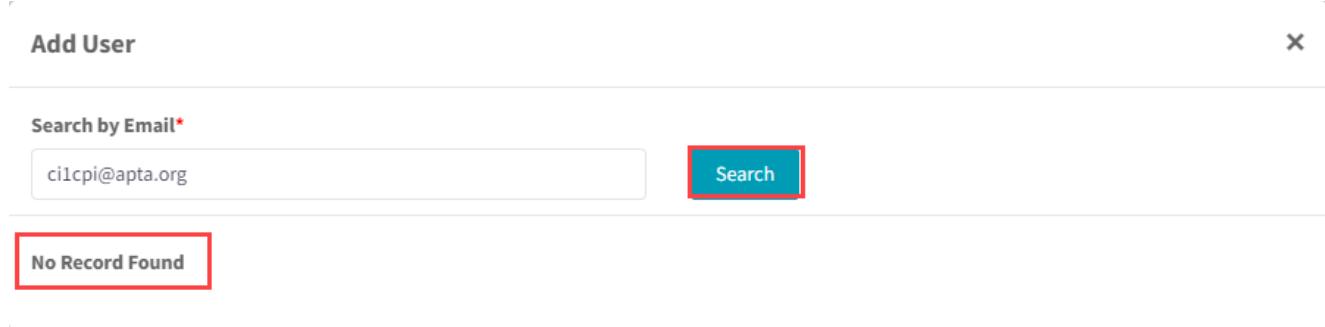
Name	Email	Role	Programs	Action
CPI, CI3	CI3CPI@test.com	CI	APTA University - PT	
CPI, CI4	CI4CPI@test.com	CI	APTA University - PT	
CPI, CI5	CI5CPI@test.com	CI	APTA University - PT	

View 100 entries 1 to 3 of 3 ( < < Page 1 of 1 > > )

**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.



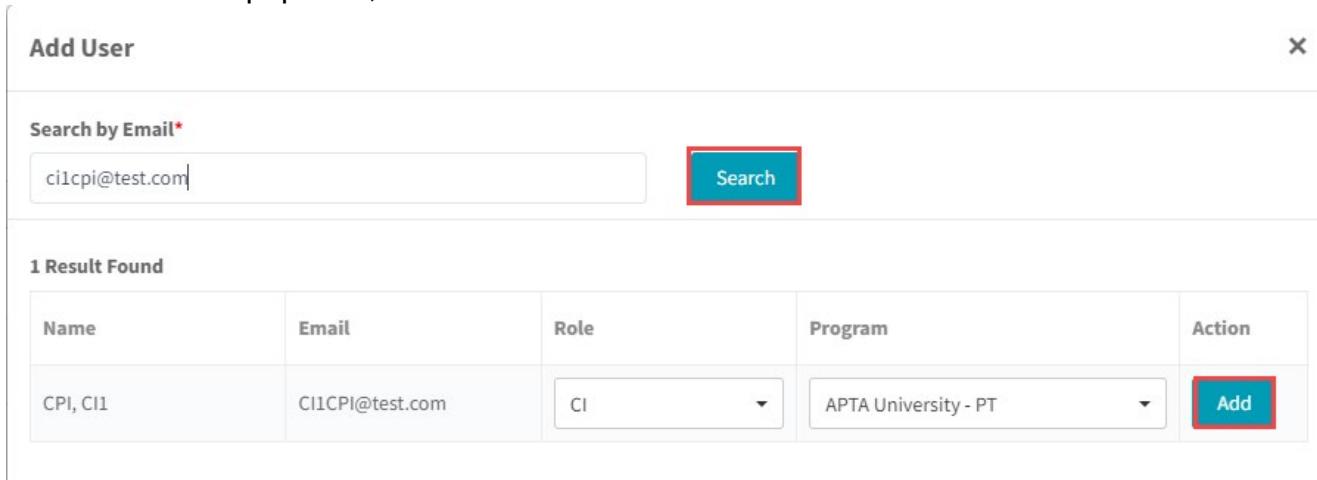
Add User

Search by Email\*

**Search**

**No Record Found**

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



Add User

Search by Email\*

**Search**

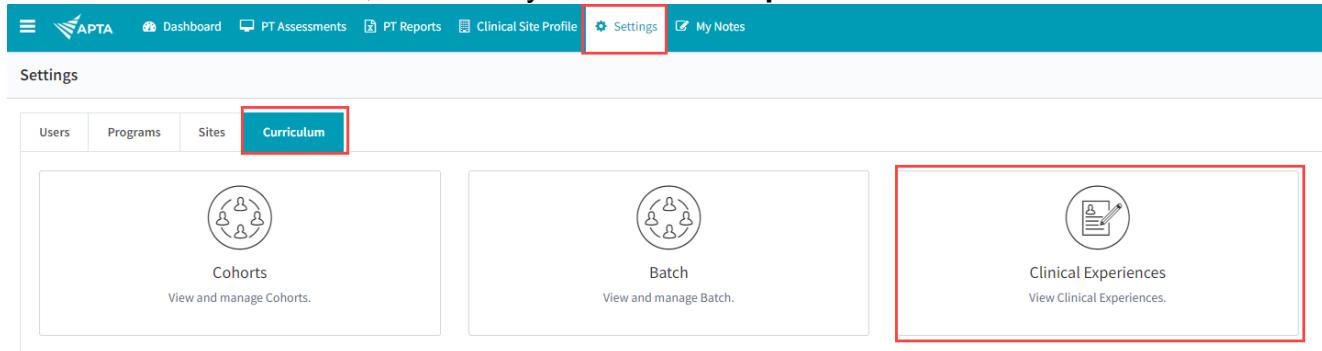
**1 Result Found**

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

## Pairing Students and CIs

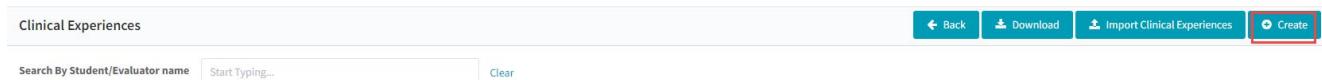
Now that the sites, students, and CIs are in the system, this next set of instructions covers linking all of them together.

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



The screenshot shows the 'Curriculum' section of the system. At the top, there are tabs for 'Users', 'Programs', 'Sites', and 'Curriculum'. The 'Curriculum' tab is selected and highlighted with a red box. Below the tabs are three cards: 'Cohorts' (View and manage Cohorts), 'Batch' (View and manage Batch), and 'Clinical Experiences' (View Clinical Experiences). The 'Clinical Experiences' card is also highlighted with a red box.

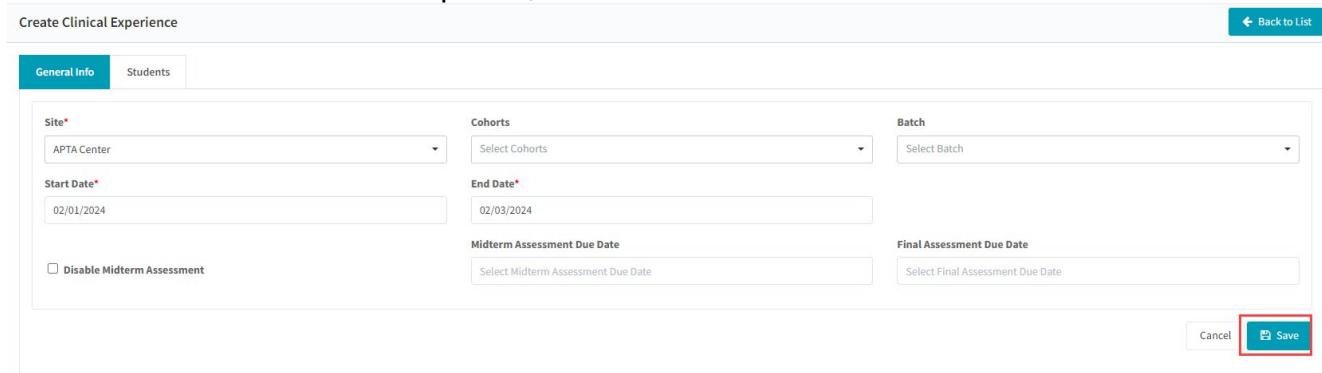
3. Click **+ Create** to create a single clinical experience.



The screenshot shows the 'Clinical Experiences' list page. At the top, there are buttons for 'Back', 'Download', 'Import Clinical Experiences', and a 'Create' button, which is highlighted with a red box. Below the buttons is a search bar with the placeholder 'Search By Student/Evaluator name' and a 'Clear' button.

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**.



The screenshot shows the 'Create Clinical Experience' form. At the top, there are tabs for 'General Info' and 'Students', with 'General Info' selected. The form fields include: 'Site\*' (APTA Center), 'Cohorts' (Select Cohorts), 'Batch' (Select Batch), 'Start Date\*' (02/01/2024), 'End Date\*' (02/03/2024), 'Midterm Assessment Due Date' (Select Midterm Assessment Due Date), 'Final Assessment Due Date' (Select Final Assessment Due Date), and a checkbox for 'Disable Midterm Assessment'. At the bottom right are 'Cancel' and 'Save' buttons, with 'Save' highlighted with a red box.

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

Create Clinical Experience

[← Back to List](#)

General Info	Students																		
	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between;"> <span>Select Cohorts</span> <span><a href="#">+ Add Students</a></span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Student Name</th> <th>Student Email</th> <th>CI/SCCE Name</th> <th>CI/SCCE Email</th> <th>Adjunct Faculty Name</th> <th>Adjunct Faculty Email</th> <th>Second CI/SCCE Name</th> <th>Second CI/SCCE Email</th> <th>Del.</th> </tr> </thead> <tbody> <tr> <td colspan="9" style="text-align: center;">No data available</td> </tr> </tbody> </table> <p style="text-align: center;">0 to 0 of 0</p> <p style="text-align: right;">( &lt; &lt; Page 0 of 0 &gt; &gt; )</p>	Student Name	Student Email	CI/SCCE Name	CI/SCCE Email	Adjunct Faculty Name	Adjunct Faculty Email	Second CI/SCCE Name	Second CI/SCCE Email	Del.	No data available								
Student Name	Student Email	CI/SCCE Name	CI/SCCE Email	Adjunct Faculty Name	Adjunct Faculty Email	Second CI/SCCE Name	Second CI/SCCE Email	Del.											
No data available																			

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*	<input type="text" value="Filter..."/> <input checked="" type="checkbox"/> CPI , Student1 <input type="checkbox"/> 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
<input type="checkbox"/> Disable Midterm Assessment		Final Assessment Due Date Select Final Assessment Due Date
Cancel <span style="background-color: #0070C0; color: white; padding: 2px 10px; border-radius: 5px;">Update</span>		

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!**

Clinical Experiences

Search By Student/Evaluator name

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	Pending	



## Confirmation

Are you sure you want to active clinical experience?

**Cancel**

**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.

APTA

Assessments

Midterm

Assessments Overall Status

**1** Assessment(s) Complete

**3** 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:

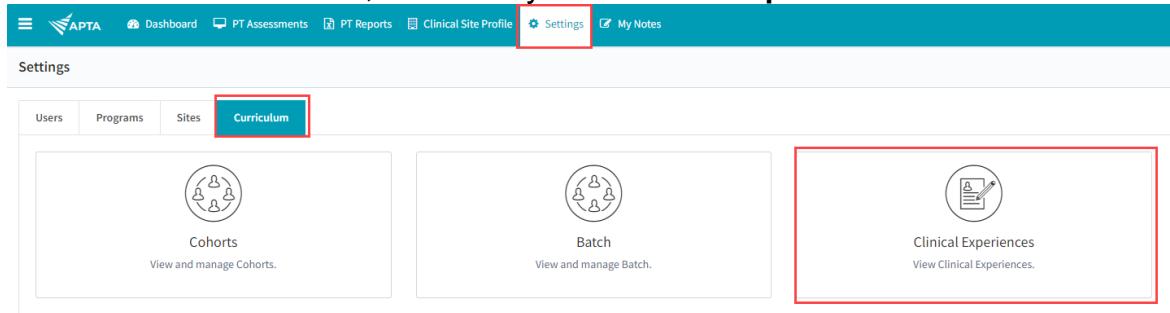
1. Add/Create clinical sites.
2. Create cohort.
3. Obtain and complete spreadsheet.
4. Import spreadsheet to create clinical experiences.
5. Release clinical experiences to students and CIs.

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

### Obtaining and Completing Import Spreadsheet

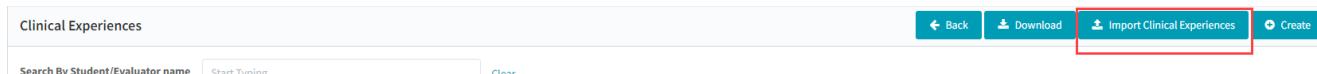
We have designed the import spreadsheet that must be used in order to properly import clinical experiences into the system.

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



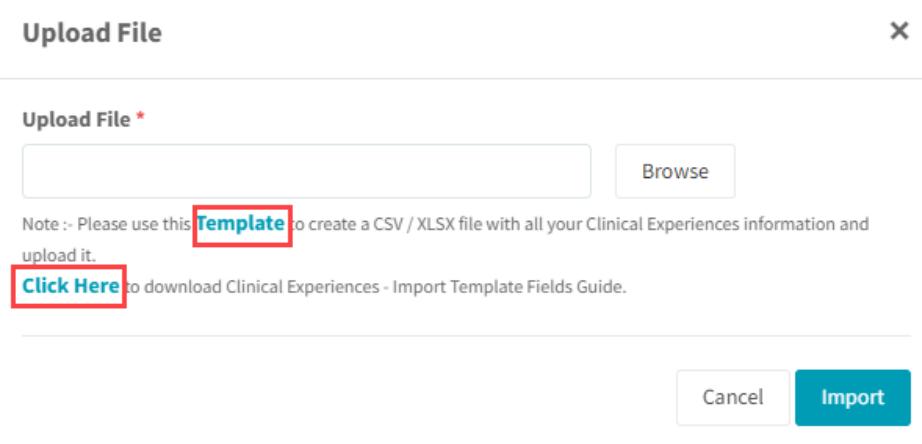
The screenshot shows the APTA software interface. At the top, there is a navigation bar with icons for APTA, Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (which is highlighted with a red box), and My Notes. Below this is a 'Settings' section with tabs for Users, Programs, Sites, and Curriculum (which is also highlighted with a red box). Under Curriculum, there are three options: Cohorts, Batch, and Clinical Experiences. The Clinical Experiences option is highlighted with a red box and has a sub-label 'View Clinical Experiences'.

3. Click Import Clinical Experiences



The screenshot shows the 'Clinical Experiences' page. At the top, there is a header with 'Clinical Experiences', 'Back', 'Download', 'Import Clinical Experiences' (which is highlighted with a red box), and 'Create'. Below the header is a search bar with 'Search By Student/Evaluator name' and 'Start Typing...'. There is also a 'Clear' button. The main area shows a table with columns for Student/Evaluator name, Clinical Experience, and Status.

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 screenshot shows a modal window titled 'Upload File'. It has a 'Upload File' button at the top left and a close 'X' button at the top right. Below the button is a 'Upload File \*' label and a file input field with a 'Browse' button to its right. A note below the input field says 'Note :- Please use this **Template** to create a CSV / XLSX file with all your Clinical Experiences information and upload it.' A 'Click Here' button is highlighted with a red box and is described as 'to download Clinical Experiences - Import Template Fields Guide.' At the bottom right of the modal are 'Cancel' and 'Import' buttons.

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

- 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).
- Click Import Clinical Experiences

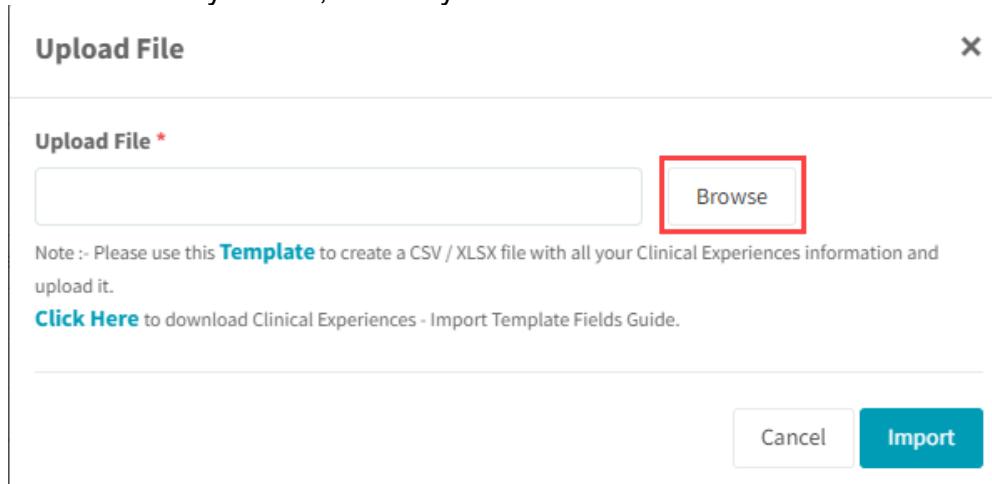


Clinical Experiences

Back Download Import Clinical Experiences Create

Search By Student/Evaluator name Start Typing... Clear

- 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

- 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

Apt... [REDACTED]	First... Stacey	Last... Schwartz	Email staceyschwa rtz@apta.org	C... Class of 2024	Batc... PTH 124 - Fall Clinical	Sess... 37077111/01/2023	Sess... 12/31/2023	Mid... Fina... Cl/S... Cl/S... Cl/S... Status	Cl/S... Steven	Chesbro	stevench esbro@ap ta.org	Valid
[REDACTED]	Chase	Kuhn	chasekuhn@ apta.org	Class of 2025	PTH 121 - Fall Clinical	15222511/01/2023	01/31/2024		Doreen	Stiskal	doreensti skal@apt a.org	Invalid (CI/SCCE Email does not exist in the system, )

1 to 2 of 2

Skip Invalid Records

[<] [Page 1 of 1] [>]

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

Apt...	First...	Last...	Email	C...	Batc...	Sess...	Sess...	Mid...	Fina...	CI/S...	CI/S...	CI/S...	CI/S...	Status
■■■	Stacey	Schwartz	staceyschwa rtz@apta.org	Class of 2024	PTH 124 - Fall Clinical	37077111/01/2023	12/31/2023	■■■	Steven	Chesbro	stevench esbro@a pta.org	Valid		
■■■	Chase	Kuhn	chasekuhn@ apta.org	Class of 2025	PTH 121 - Fall Clinical	15222511/01/2023	01/31/2024		Doreen	Stiskal	doreensti skal@apt a.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 <b>Pending</b> 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  [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	<a href="#">Pending</a> <a href="#">Active</a> <a href="#">Completed</a> <a href="#">Archived</a>	 



## Confirmation

Are you sure you want to active clinical experience?

[Cancel](#)

[Yes, change it!](#)

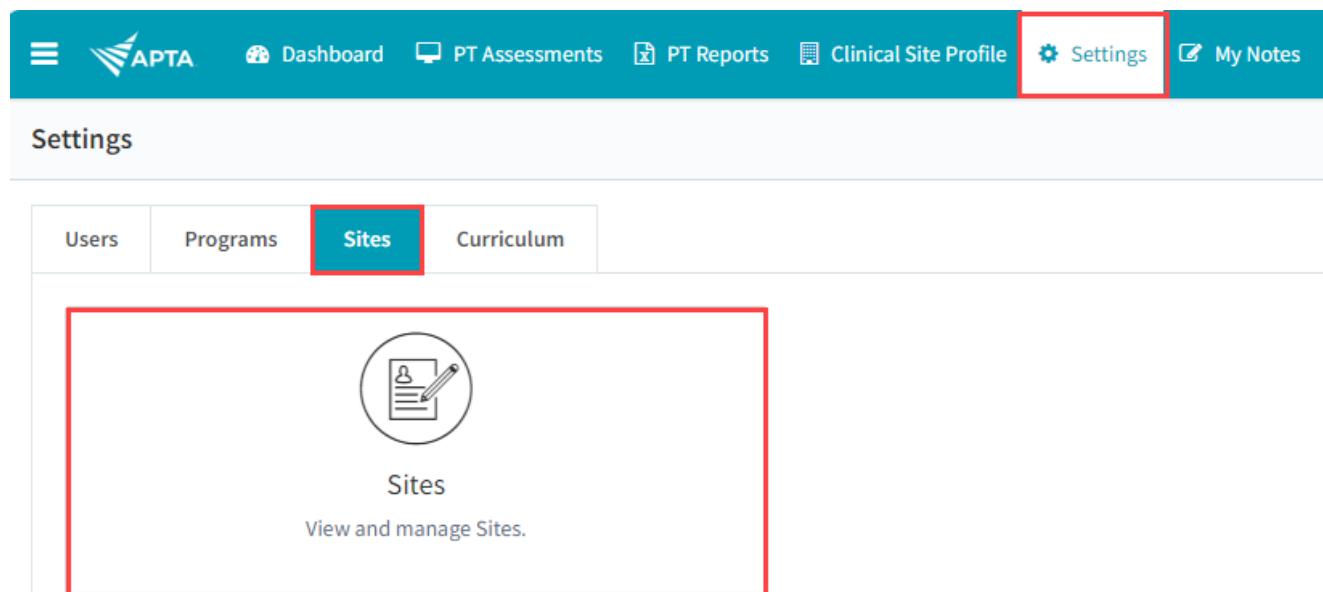
8. To confirm the release, click **PT/PTA Assessments** in the top ribbon, and you will see the active evaluation. Your student and their CI will see it the same way on their screen under the PT/PTA Assessment tab.

### 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.

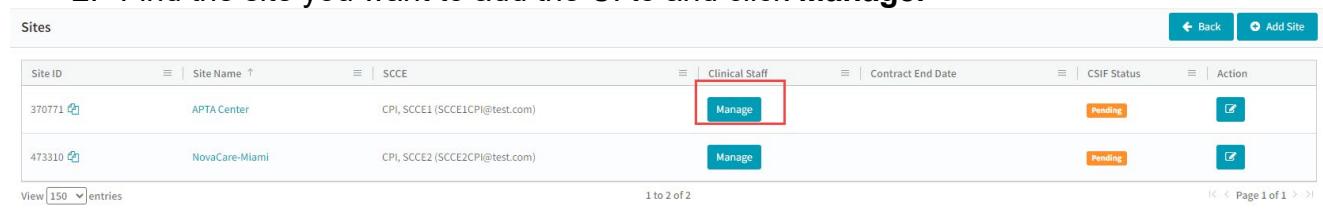
1. Click **Settings** from the top menu bar.



The screenshot shows the APTA portal's navigation bar with the following items: APTA logo, Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings (which is highlighted with a red box), and My Notes. Below the navigation bar, the 'Settings' page is displayed with a sub-menu for 'Sites'. The 'Sites' tab is also highlighted with a red box. The main content area shows a circular icon with a person writing on a clipboard, followed by the text 'Sites' and 'View and manage Sites.'.

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

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



The screenshot shows the 'Manage Site' page for 'APTA Center'. The table lists two sites: 'APTA Center' and 'NovaCare-Miami'. For the 'APTA Center' row, the 'Clinical Staff' column contains a 'Manage' button, which is highlighted with a red box. The page also includes navigation buttons for 'Back', 'Add Site', and a table footer with pagination information.

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

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

Clinical Staff					
Name	Email	Role	Programs	Action	Add User
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		

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\*

**Search**

No Record Found

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

**Add User**

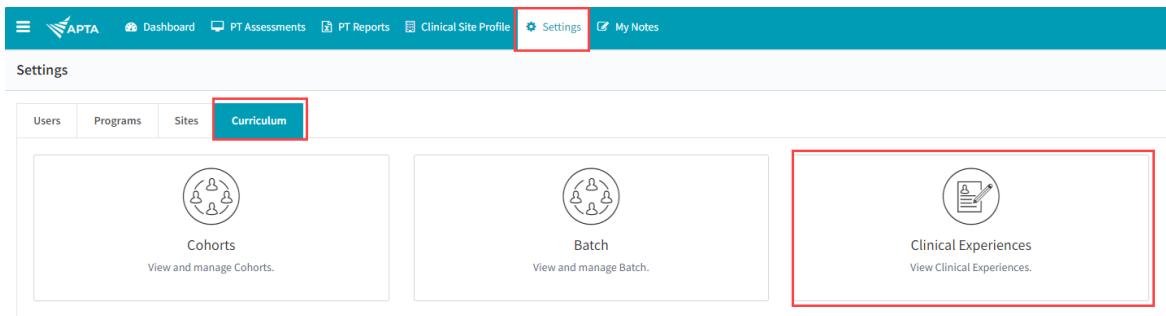
Search by Email\*

**Search**

1 Result Found

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

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



Settings

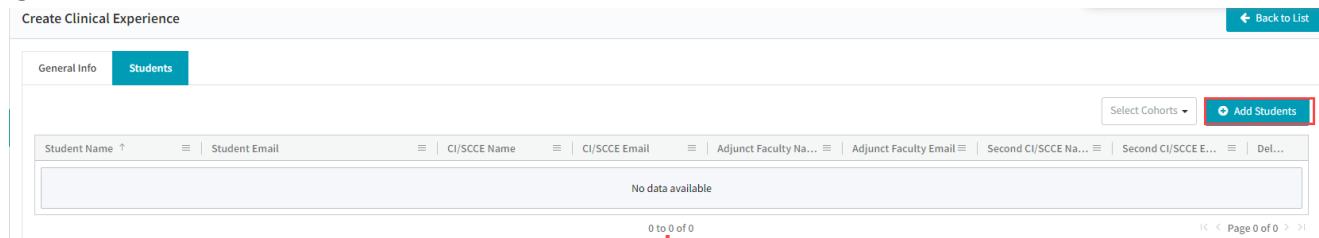
Curriculum

Cohorts

Batch

Clinical Experiences

7. Find and click the site name then switch to the student tab.  
Click the Student's name.



Create Clinical Experience

General Info Students

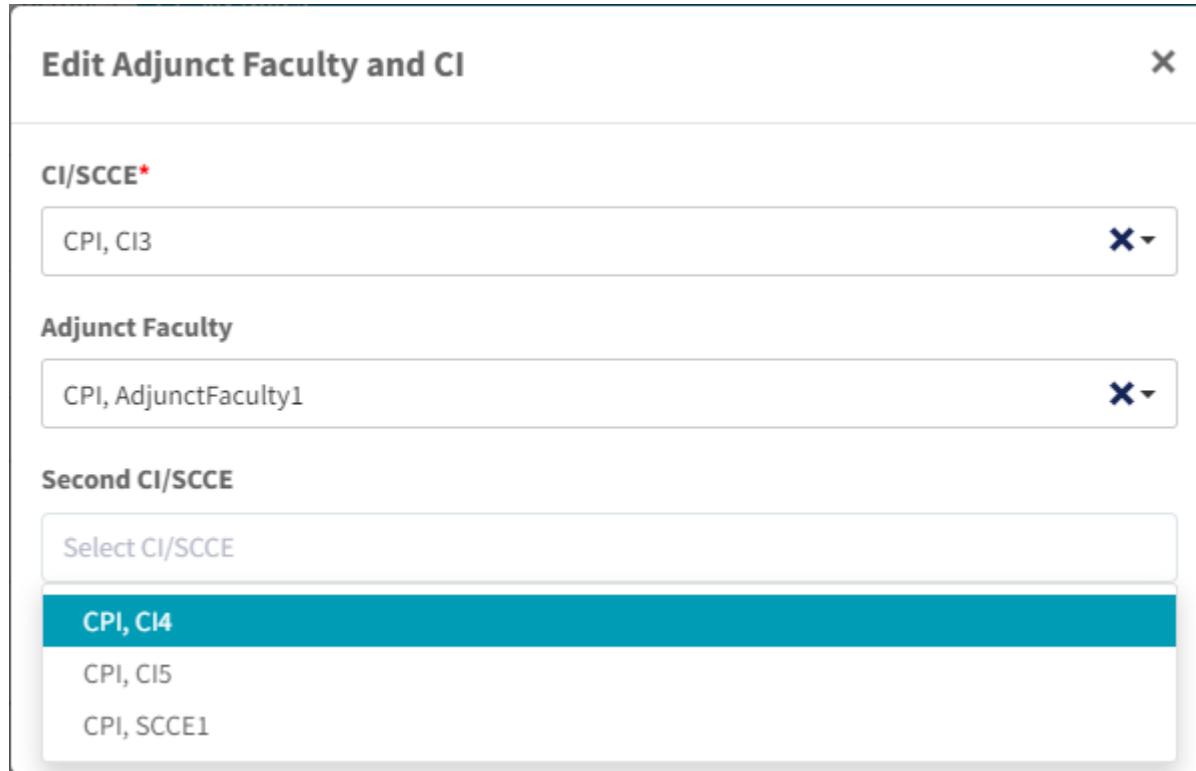
Select Cohorts Add Students

Student Name | Student Email | CI/SCCE Name | CI/SCCE Email | Adjunct Faculty Name | Adjunct Faculty Email | Second CI/SCCE Name | Second CI/SCCE Email | Del...

No data available

0 to 0 of 0 Page 0 of 0

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



Edit Adjunct Faculty and CI

CI/SCCE\*

CPI, CI3

Adjunct Faculty

CPI, AdjunctFaculty1

Second CI/SCCE

Select CI/SCCE

CPI, CI4

CPI, CI5

CPI, SCCE1

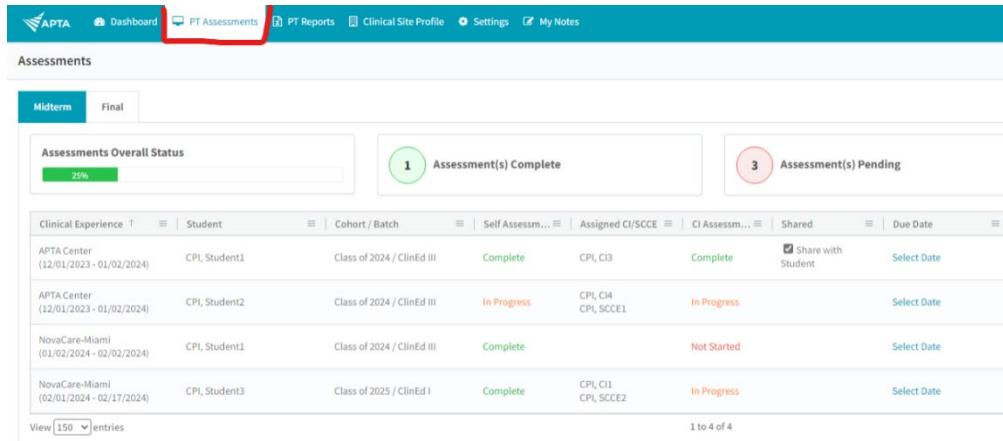
Note: If you need to make a new CI the first listed, select the new CI as CI/SCCE and hit Save. Then, you can go back in and the system will have updated so that you can add the original CI under Second CI/SCCE.

## 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.

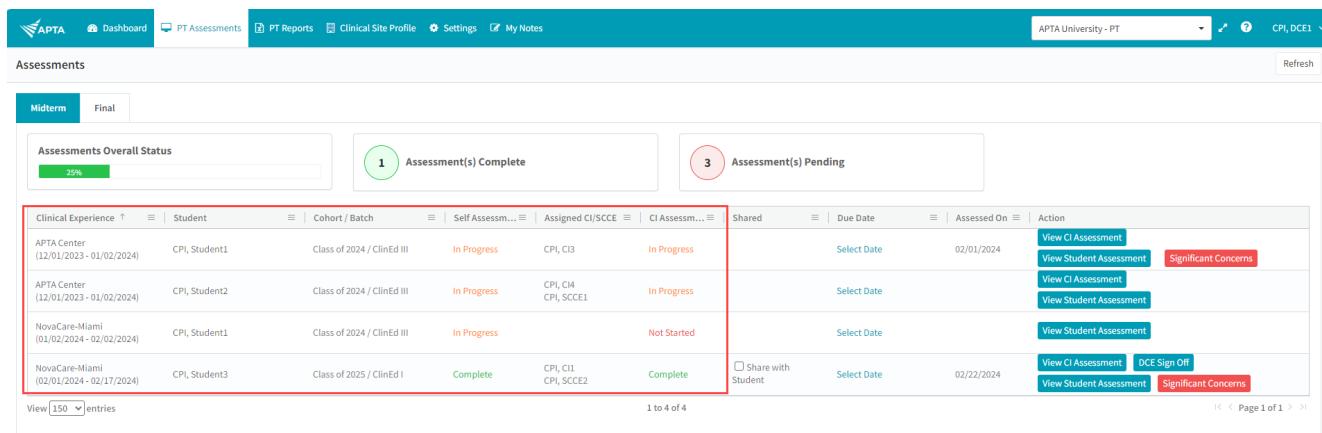


The screenshot shows the 'Assessments' page with a 'Midterm' tab selected. At the top, there are two summary boxes: 'Assessments Overall Status' (25% complete) and 'Assessment(s) Complete' (1) and 'Assessment(s) Pending' (3). Below is a table of clinical experiences:

Clinical Experience	Student	Cohort / Batch	Self Assessment	Assigned CI/SCCE	CI Assessment	Shared	Due Date
APTA Center (12/01/2023 - 01/02/2024)	CPI, Student1	Class of 2024 / ClinEd III	Complete	CPI, C13	Complete	<input checked="" type="checkbox"/> Share with Student	Select Date
APTA Center (12/01/2023 - 01/02/2024)	CPI, Student2	Class of 2024 / ClinEd III	In Progress	CPI, C14 CPI, SCCE1	In Progress	<input checked="" type="checkbox"/> Share with Student	Select Date
NovaCare-Miami (01/02/2024 - 02/02/2024)	CPI, Student1	Class of 2024 / ClinEd III	Complete		Not Started	<input checked="" type="checkbox"/> Share with Student	Select Date
NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, C11 CPI, SCCE2	In Progress	<input checked="" type="checkbox"/> Share with Student	Select Date

View 150 entries 1 to 4 of 4

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.



The screenshot shows the 'Assessments' page with a 'Midterm' tab selected. At the top, there are two summary boxes: 'Assessments Overall Status' (25% complete) and 'Assessment(s) Complete' (1) and 'Assessment(s) Pending' (3). Below is a table of clinical experiences with more detailed status and action buttons:

Clinical Experience	Student	Cohort / Batch	Self Assessment	Assigned CI/SCCE	CI Assessment	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	<input checked="" type="checkbox"/> Share with Student	Select Date	02/01/2024	<a href="#">View CI Assessment</a> <a href="#">View Student Assessment</a> <span style="background-color: red; color: white; border-radius: 5px; padding: 2px 5px;">Significant Concerns</span>
APTA Center (12/01/2023 - 01/02/2024)	CPI, Student2	Class of 2024 / ClinEd III	In Progress	CPI, C14 CPI, SCCE1	In Progress	<input checked="" type="checkbox"/> Share with Student	Select Date	02/01/2024	<a href="#">View CI Assessment</a> <a href="#">View Student Assessment</a>
NovaCare-Miami (01/02/2024 - 02/02/2024)	CPI, Student1	Class of 2024 / ClinEd III	In Progress		Not Started	<input checked="" type="checkbox"/> Share with Student	Select Date	02/22/2024	<a href="#">View Student Assessment</a> <span style="background-color: red; color: white; border-radius: 5px; padding: 2px 5px;">DCE Sign Off</span> <a href="#">View CI Assessment</a> <span style="background-color: red; color: white; border-radius: 5px; padding: 2px 5px;">Significant Concerns</span>
NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, C11 CPI, SCCE2	Complete	<input checked="" type="checkbox"/> Share with Student	Select Date	02/22/2024	<a href="#">View CI Assessment</a> <span style="background-color: red; color: white; border-radius: 5px; padding: 2px 5px;">Significant Concerns</span> <a href="#">View Student Assessment</a>

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

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



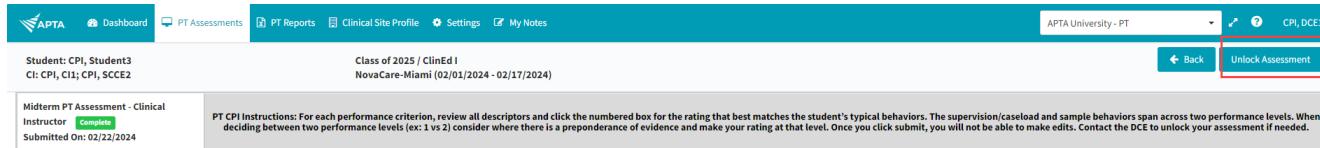
The screenshot shows the 'Assessments' page with a 'Midterm' tab selected. At the top, there are two summary boxes: 'Assessments Overall Status' (25% complete) and 'Assessment(s) Complete' (1) and 'Assessment(s) Pending' (3). Below is a table of clinical experiences with detailed status and action buttons. The 'Self Assessment' and 'CI Assessment' columns for the first two rows are highlighted with a red border.

Clinical Experience	Student	Cohort / Batch	Self Assessment	Assigned CI/SCCE	CI Assessment	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	<input checked="" type="checkbox"/> Share with Student	Select Date	02/01/2024	<a href="#">View CI Assessment</a> <a href="#">View Student Assessment</a>
APTA Center (12/01/2023 - 01/02/2024)	CPI, Student2	Class of 2024 / ClinEd III	In Progress	CPI, C14 CPI, SCCE1	In Progress	<input checked="" type="checkbox"/> Share with Student	Select Date	02/01/2024	<a href="#">View CI Assessment</a> <a href="#">View Student Assessment</a>

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.

NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, C11 CPI, SCCE2	Complete	<input type="checkbox"/> Share with Student	Select Date	02/22/2024	<a href="#">View CI Assessment</a> <a href="#">DCE Sign Off</a>
									<a href="#">View Student Assessment</a> <a href="#">Significant Concerns</a>



The screenshot shows the APTA University - PT software interface. At the top, there is a navigation bar with links for APTA, Dashboard, PT Assessments, PT Reports, Clinical Site Profile, Settings, and My Notes. Below the navigation bar, there is a search bar with the text 'APTA University - PT' and a dropdown arrow. To the right of the search bar are buttons for 'Back' and 'Unlock Assessment', with the 'Unlock Assessment' button highlighted by a red box. The main content area displays student information: 'Student: CPI, Student3' and 'Class of 2025 / ClinEd I'. Below this, there is a note: '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.' At the bottom left, there is a box containing 'Midterm PT Assessment - Clinical Instructor' and 'Submitted On: 02/22/2024'. The status 'Complete' is shown in a green box.

## 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 / ClinEd1	Complete	CPI, CI1 CPI, SCCC2	Complete	<input type="checkbox"/> Share with Student	Select Date	02/22/2024	<a href="#">View CI Assessment</a>	<a href="#">DCE Sign Off</a>	<a href="#">View Student Assessment</a>	<a href="#">Significant Concerns</a>
---------------------------------------------	---------------	-------------------------	----------	------------------------	----------	---------------------------------------------	-------------	------------	------------------------------------	------------------------------	-----------------------------------------	--------------------------------------

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** X

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**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	
<a href="#">View CI Assessment</a>	<a href="#">DCE Sign Off</a>
<a href="#">View Student Assessment</a>	<a href="#">Significant Concerns</a>

## 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.



Significant Concerns
Student : CPI, StudentA  
CI : CPI, CI1; CPI, SCCE1
Class of 2024 / Clin Ed I  
APTA Center (02/01/2024 - 02/17/2024)
X

CPI, SCCE1 (SCCE) 02/21/2024 4:52 PM  
test 2  
Sent to : CPI, DCEA (DCE)

CPI, SCCE1 (SCCE) 02/21/2024 4:49 PM  
Hi  
Sent to : CPI, DCEA (DCE)

CPI, DCEA (DCE) 02/21/2024 4:49 PM  
thanks!  
Sent to : CPI, CI1 (CI); CPI, SCCE1 (CI)

CPI, CI1 (CI) 02/05/2024 1:34 PM

Performance Concern(s), Unsafe Event(s), Incident(s) to be Recorded

Add Comments here

Send email to CI  Send email to Student

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.

Please note: The Significant Concerns box functions as a notification service, not a communication service.

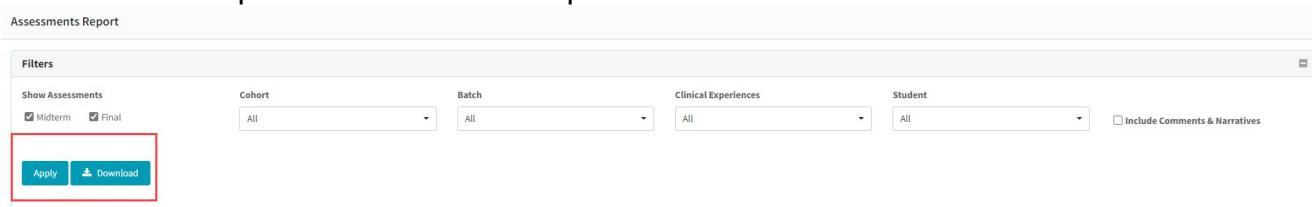
## PT/PTA Reports

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.

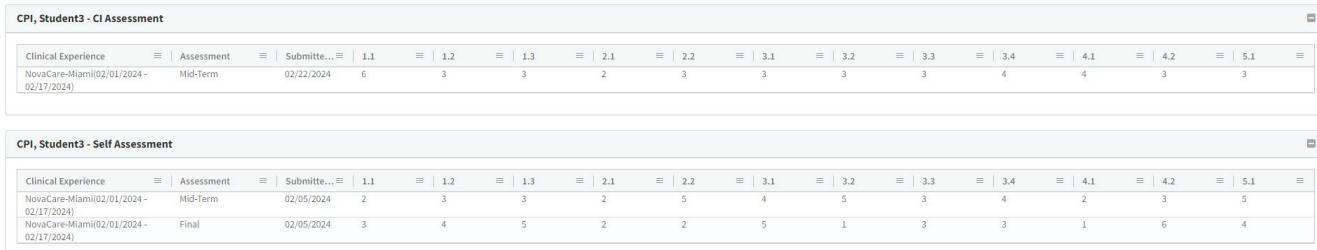
### 1. Click **PT/PTA Reports**.



### 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.



Clinical Experience	Assessment	Submitted	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

Clinical Experience	Assessment	Submitted	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



Clinical Site Profile

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/CSIE

1. Click Clinical Site Profile.



Clinical Site Profile

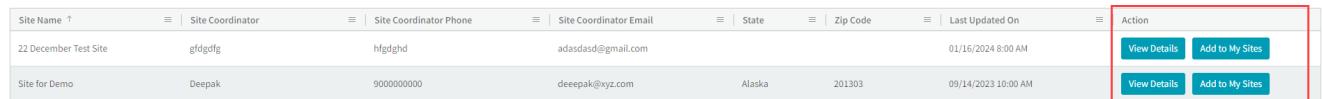
2. Use the search filters to search for a specific site name, zip code or state.

Click **Apply Filter**



Site Name	Site Zip Code	State
<input type="text" value="Enter site name"/>	<input type="text" value="Enter site Zip Code"/>	<input type="text" value="Select State"/>
<input type="button" value="Apply Filter"/> <input type="button" value="Clear"/>		

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**.



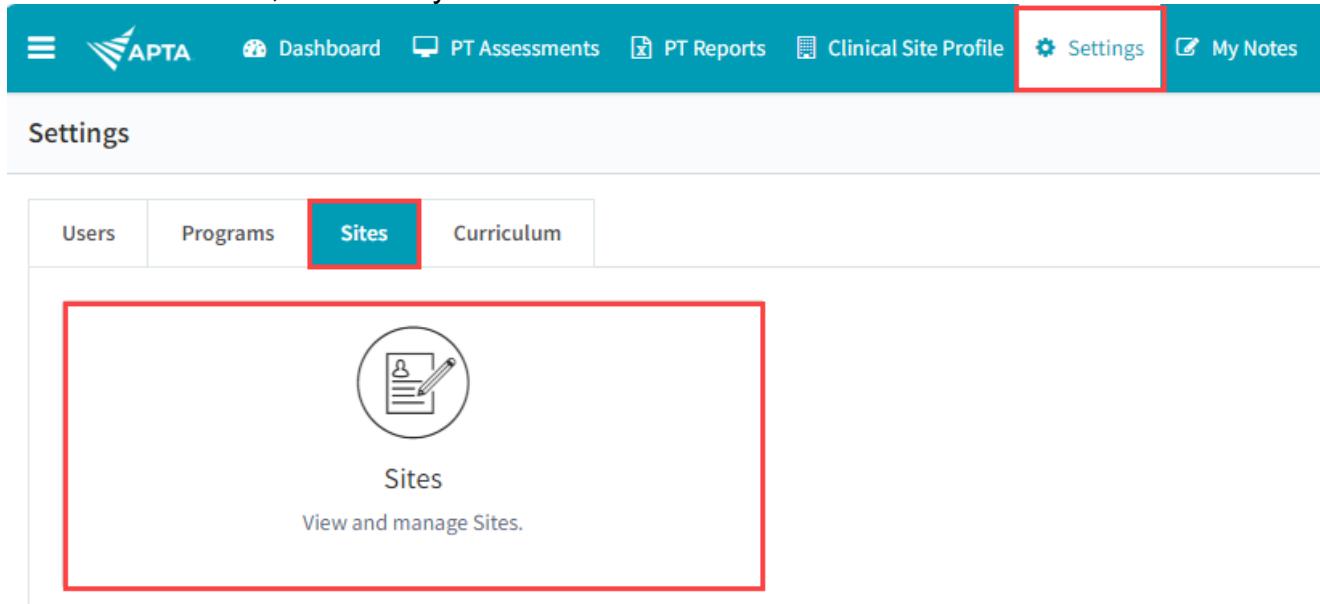
Site Name	Site Coordinator	Site Coordinator Phone	Site Coordinator Email	State	Zip Code	Last Updated On	Action
22 December Test Site	gldgdfg	hfgdfgh	adasdasd@gmail.com			01/16/2024 8:00 AM	<input type="button" value="View Details"/> <input type="button" value="Add to My Sites"/>
Site for Demo	Deepak	9000000000	deepak@xyz.com	Alaska	201303	09/14/2023 10:00 AM	<input type="button" value="View Details"/> <input type="button" value="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.



Settings

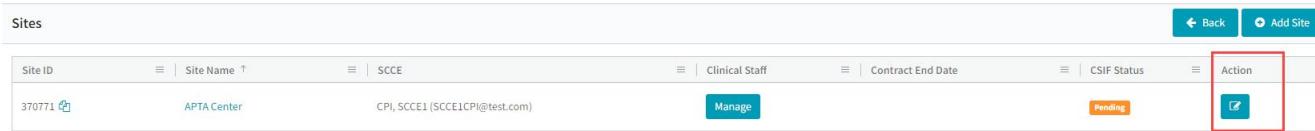
Users	Programs	<b>Sites</b>	Curriculum
-------	----------	--------------	------------



**Sites**

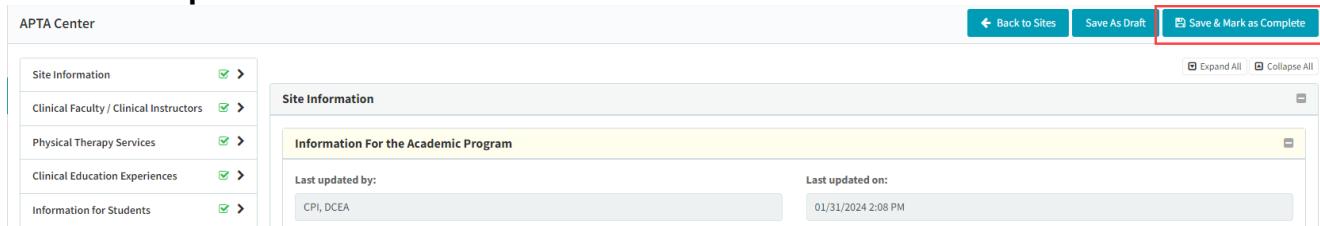
View and manage Sites.

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



Sites						<a href="#">Back</a>	<a href="#">Add Site</a>
Site ID	Site Name	SCCE	Clinical Staff	Contract End Date	CSIF Status	Action	
370771	APTA Center	SCCE1 (SCCE1CP1@test.com)	<a href="#">Manage</a>		Pending		

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**.



APTA Center

Site Information		<a href="#">Back to Sites</a>	<a href="#">Save As Draft</a>	<b>Save &amp; Mark as Complete</b>
<div style="border: 1px solid #ccc; padding: 5px;"> <b>Site Information</b> </div>		<a href="#">Expand All</a> <a href="#">Collapse All</a>		
<div style="border: 1px solid #ccc; padding: 5px;"> <b>Clinical Faculty / Clinical Instructors</b> </div>				
<div style="border: 1px solid #ccc; padding: 5px;"> <b>Physical Therapy Services</b> </div>				
<div style="border: 1px solid #ccc; padding: 5px;"> <b>Clinical Education Experiences</b> </div>				
<div style="border: 1px solid #ccc; padding: 5px;"> <b>Information for Students</b> </div>				
<div style="border: 1px solid #ccc; padding: 5px;"> <b>Site Information</b> </div>				
<div style="border: 1px solid #ccc; padding: 5px;"> <b>Information For the Academic Program</b> </div>				
Last updated by: CPI, DCEA		Last updated on: 01/31/2024 2:08 PM		

### 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](#) Expand All  Collapse All

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

Site Information

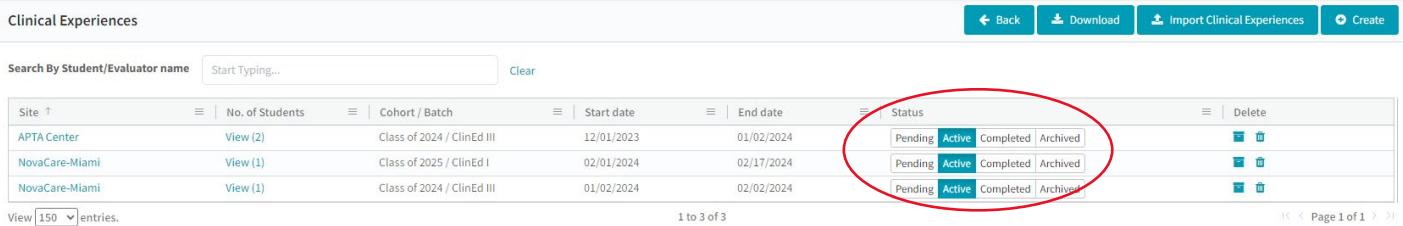
Information For the Academic Program

Last updated by:	Last updated on:
CPI, DCEA	01/31/2024 2:08 PM

## 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

Search By Student/Evaluator name

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	Pending Active Completed Archived	 
NovaCare-Miami	View (1)	Class of 2025 / ClinEd I	02/01/2024	02/17/2024	Pending Active Completed Archived	 
NovaCare-Miami	View (1)	Class of 2024 / ClinEd III	01/02/2024	02/02/2024	Pending Active Completed Archived	 

View 150 entries. 1 to 3 of 3 Page 1 of 1

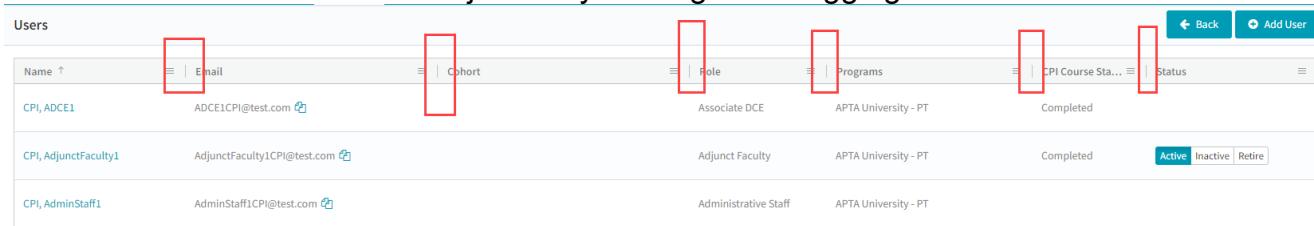
2. To search for a specific clinical experience by user, go to Settings → Curriculum → Clinical Experiences. Then, search by Student/Evaluator Name.
3. If the CI is not appearing on the Assessments tab, or if the student can see the CI but not the other way around, you must resave the pairing.
  - Go 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](#).



NovaCare-Miami (02/01/2024 - 02/17/2024) CPI, Student3 Class of 2025 / ClinEd I Complete CPI, C11 CPI, SCCE2 Complete  Share with Student Select Date 02/22/2024

[View CI Assessment](#) [DCE Sign Off](#) [View Student Assessment](#) [Significant Concerns](#)

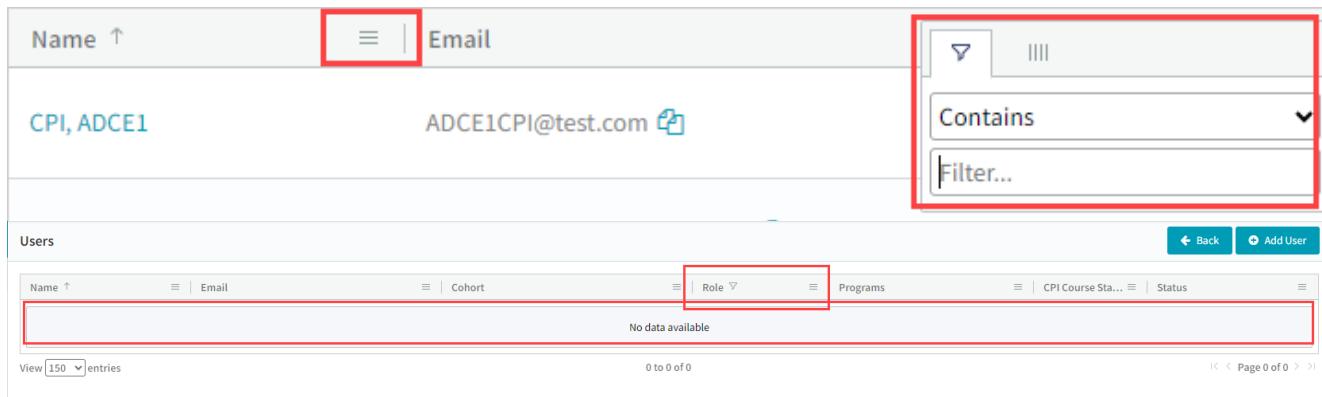
5. If a CI/SCCE is affiliated with a military program, they may experience errors when completing the assessment due to firewall restrictions. Please have them attempt to access the assessment from a different WiFi network prior to reaching out to support.
6. Column widths can be adjusted by clicking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



Users

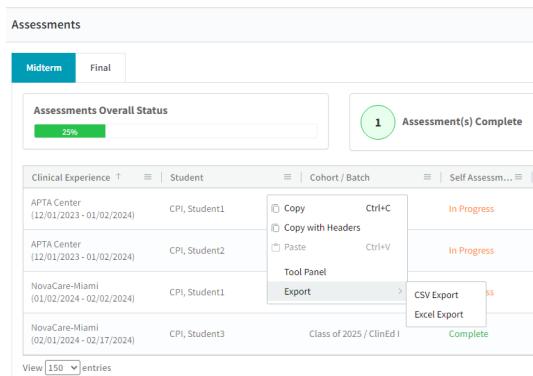
Name	Email	Cohort	Role	Programs	CPI Course Status	Status
CPI, ADCE1	ADCE1CPI@test.com		Associate DCE	APTA University - PT	Completed	  
CPI, AdjunctFaculty1	AdjunctFaculty1CPI@test.com		Adjunct Faculty	APTA University - PT	Completed	  
CPI, AdminStaff1	AdminStaff1CPI@test.com		Administrative Staff	APTA University - PT		

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.



The screenshot shows a search interface with a 'Name' field and an 'Email' field. A red box highlights the 'Email' field. To the right is a search panel with a dropdown menu set to 'Contains' and a 'Filter...' input field, also highlighted with a red box. Below the search is a table titled 'Users' with columns for Name, Email, Cohort, Role, Programs, CPI Course Sta..., and Status. A red box highlights the 'Role' column header. The table displays 'No data available'. At the bottom are pagination controls 'View 150 entries' and '0 to 0 of 0'.

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



The screenshot shows a list of clinical experiences. A context menu is open over the first item, showing options: 'Copy' (Ctrl+C), 'Copy with Headers' (Ctrl+Shift+C), 'Paste' (Ctrl+V), 'Tool Panel', 'Export' (highlighted), 'CSV Export' (In Progress), and 'Excel Export' (Complete). The table lists clinical experiences with columns for Site, Student, Cohort/Batch, and Self Assessm... The first item is 'APTA Center (12/01/2023 - 01/02/2024) CPI, Student1'.

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 also 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](#)