

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

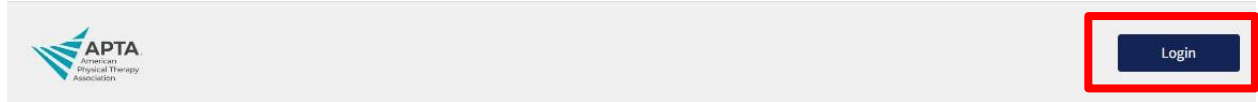
Table of Contents

Login	3
System Overview	5
Program Users	6
View Program Users.....	6
Adding New Program Users	7
Email Discrepancies and Log-In Issues.....	9
Program Details.....	10
Updating Program Details	10
Setting Up Clinical Experiences	12
Step 1: Creating and Adding Clinical Sites	12
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
Significant Concerns	42
PT/PTA Reports	43
Clinical Sites Profile/CSIF.....	44
Viewing the completed Clinical Site Profiles/CSIF	44
Editing the Clinical Site Profiles/CSIF.....	44
CPI Tips and Hints	47
Training Videos	48

Login

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

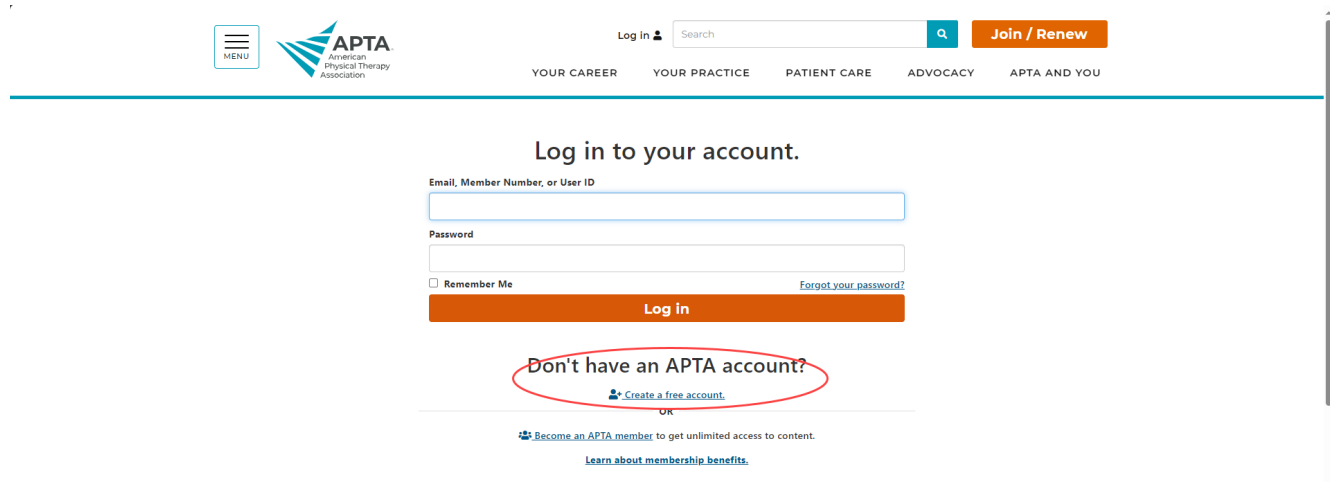
Click **Login**.



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.

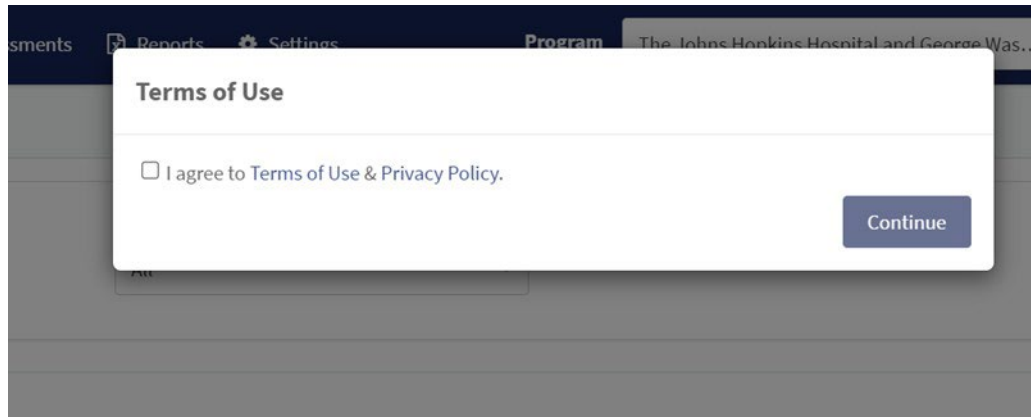
Log in to your account using your APTA login credentials.



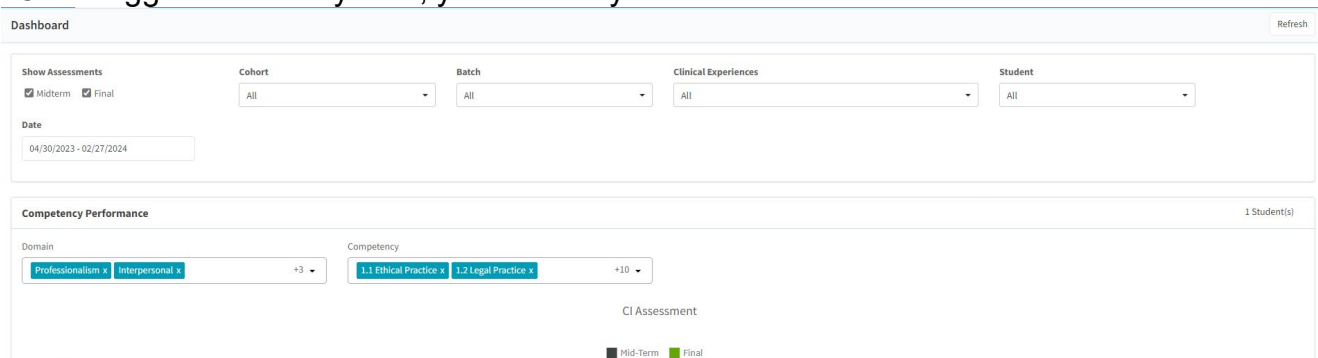
For login questions/issues: Email membersuccess@apta.org or call 800-999-2782 (APTA). This includes situations of multiple APTA accounts, password reset, and updating email addresses.

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**.




















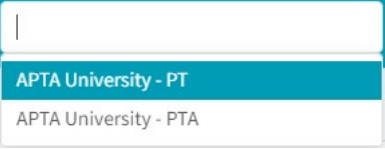



Once logged into the system, you will see your Dashboard.



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

  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>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>Click your User name dropdown to:</p> <ul style="list-style-type: none"> View your user profile Log Out of the system

Program Users

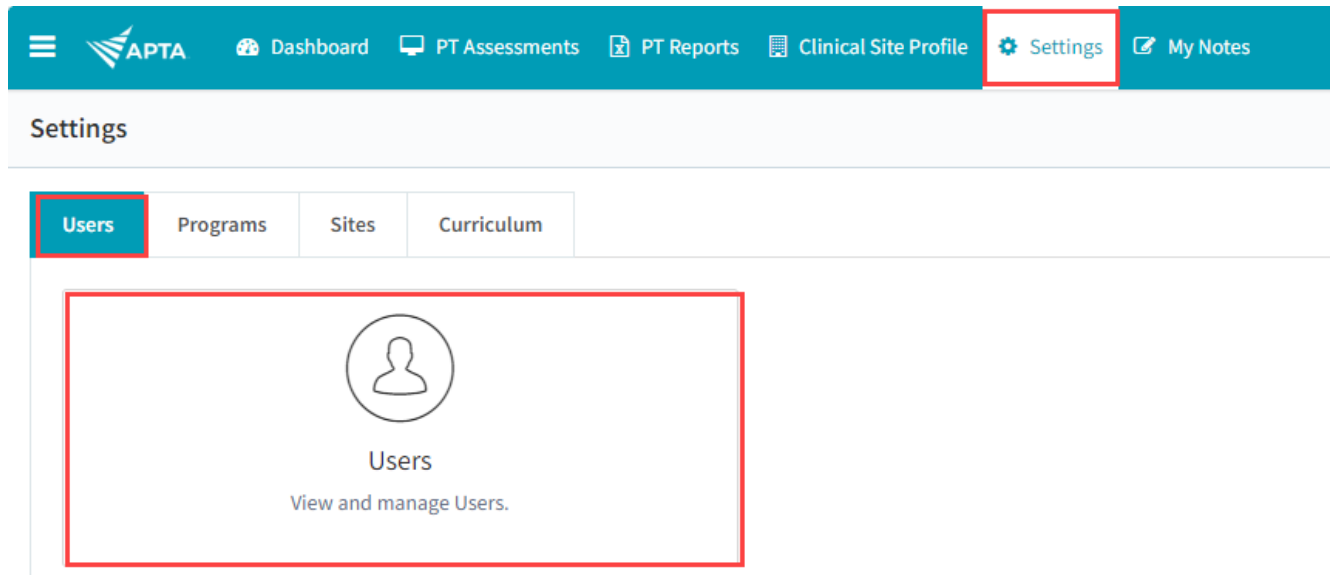
The Users page allows you to view and manage all individuals associated with your program. This includes DCEs, ADCEs, Adjunct Faculty, Administrative Staff, and Students.

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 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 with tabs for Users (highlighted with a red box), Programs, Sites, and Curriculum. The Users tab shows a large red-bordered box containing a user icon, the text "Users", and the instruction "View and manage 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	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 ([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	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*

derekstepp@apta.org

Search

- 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

Search

1 Result Found

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

derekstepp@apta.org

Search

1 Result Found

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

- Click **Add**.

Add User

Search by Email*

derekstepp@apta.org

Search

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.

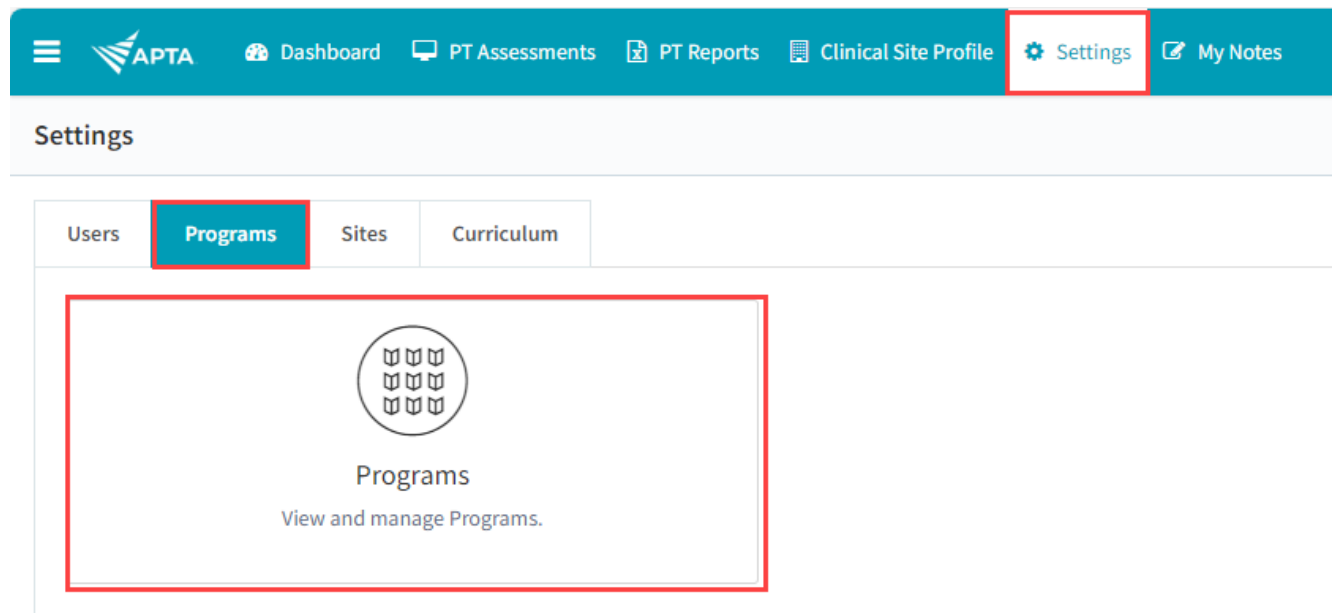
If the certificate says that they completed the correct training, please escalate to CPI Support. It is likely that the training did not push over to the APTA database correctly and that we will have to manually push it through.

Program Details

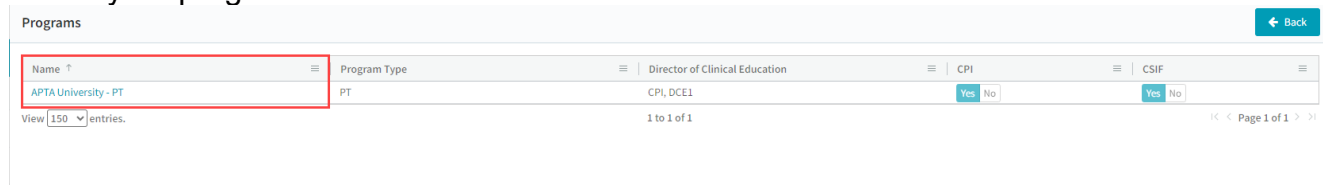
The Program page allows you to update your program information, including address, phone number and email address. Also on this page is the ability to control how you would like to share the CI CPI with your students and whether you want to require comments for each criterion on the CPI.

Updating Program Details

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



3. Select your program name



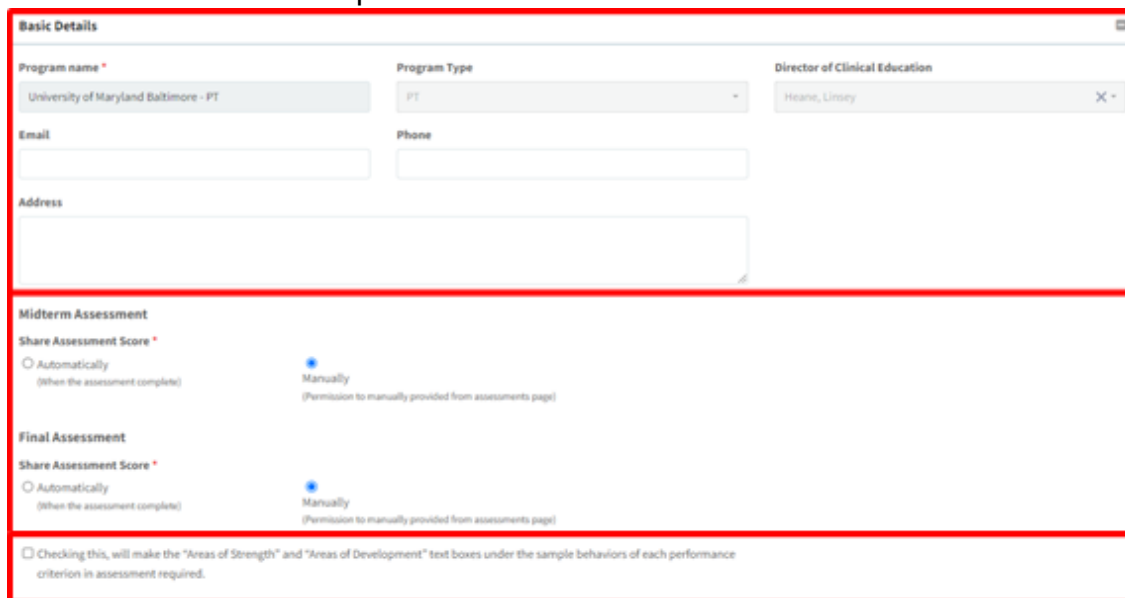
4. Review and update basic program details.
5. Set the CI CPI Evaluation sharing preferences automatically or manually. The difference is explained in the table below.

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

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

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

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



Basic Details

Program name * University of Maryland Baltimore - PT

Program Type PT

Director of Clinical Education Heane, Lintory

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:

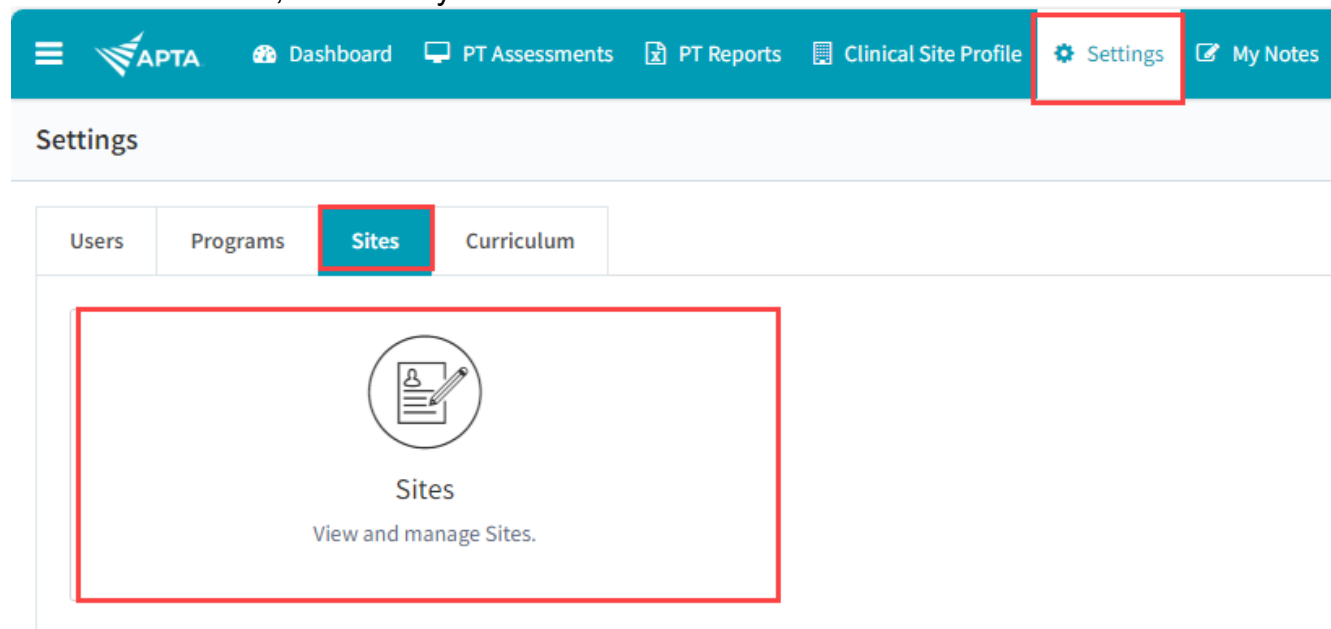
1. Creating/Adding Clinical Sites
 - The process for adding CIs to the clinical sites is discussed in [the Manual and Automatic/Spreadsheet process](#) for creating the clinical experiences.
2. [Creating the Cohorts](#)
3. [Creating Clinical Experiences and releasing to Students and CIs](#)
 - Manual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

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			
APTA	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 and 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

- 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

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*

Zip Code*

☐ Contract Auto Renew

Contract Start Date

Contract End Date

Add Site Coordinator Of Clinical Education

Search by Email

Search

Close

Save

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

Name	Email	Role	Program
CPI, SCCE1	SCCE1CPI@test.com	Site Coordinator of Clinical Education (SCCE)	APTA University - PT
<input checked="" type="checkbox"/> Select if the SCCE will also serve as a PT/PTA CI			

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

Add Site Coordinator Of Clinical Education

Search by Email

Name	Email	Role	Program
CPI, SCCE1	SCCE1CPI@test.com	Site Coordinator of Clinical Education (SCCE)	APTA University - PT
<input checked="" type="checkbox"/> Select if the SCCE will also serve as a PT/PTA CI			

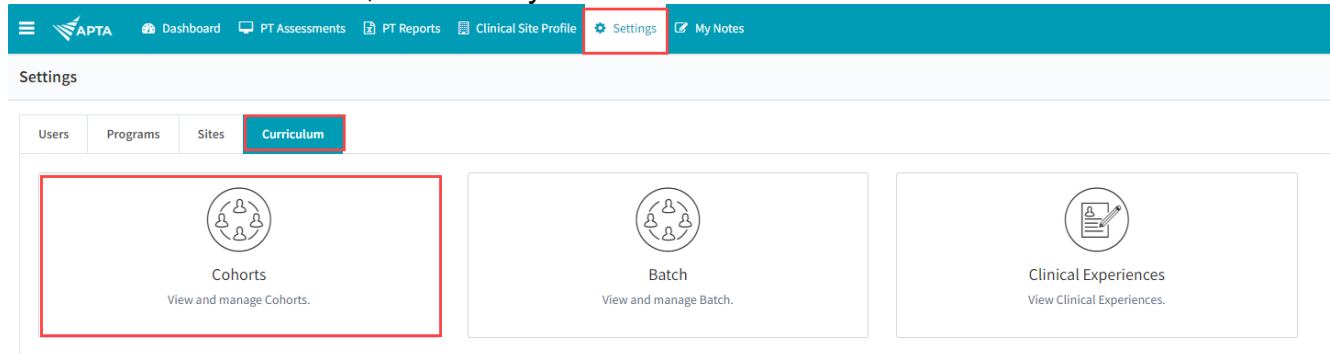
5. Click **Save** (shown in the image above). The SCCE name will appear in the 3rd column for the site.

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.



Settings

Users Programs Sites **Curriculum**

Cohorts
View and manage Cohorts.

Batch
View and manage Batch.

Clinical Experiences
View Clinical Experiences.

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



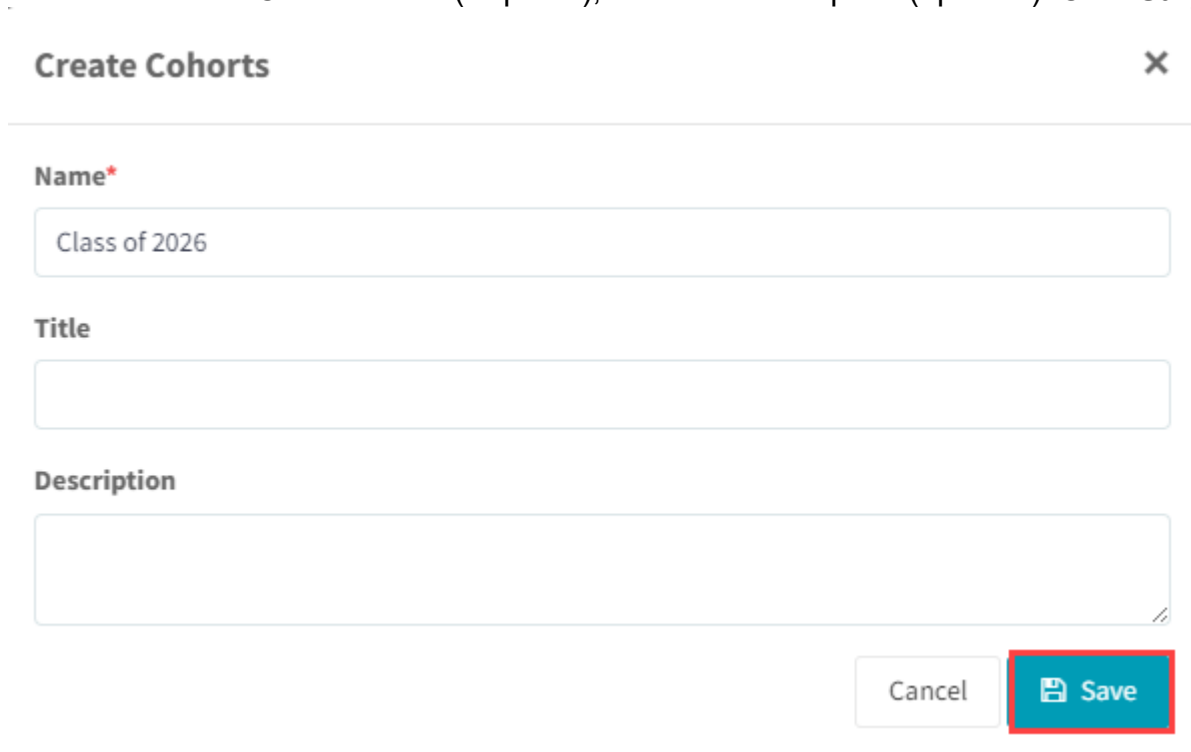
Cohorts

← Back Download + Create

Name ↑	Title	Description	Delete
Class of 2024			
Class of 2025			

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

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



Create Cohorts X

Name*

Class of 2026

Title

Description

Cancel 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.

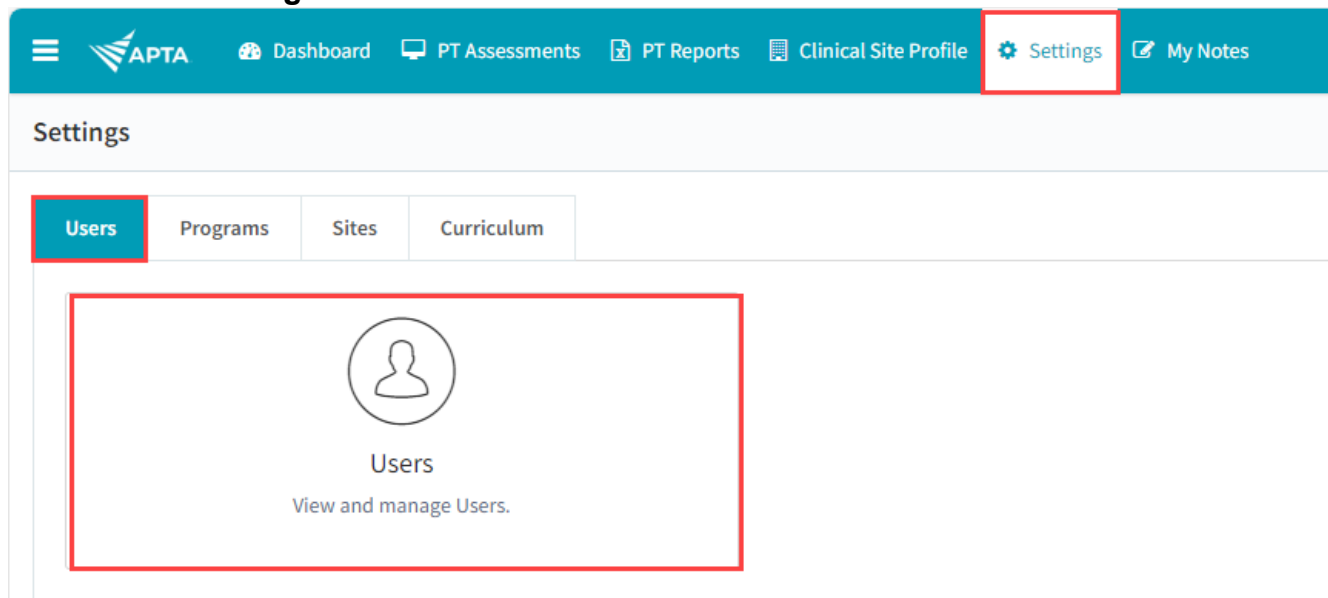
Steps 1 and 2 were discussed previously and this section will pick up at Step 3.

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**

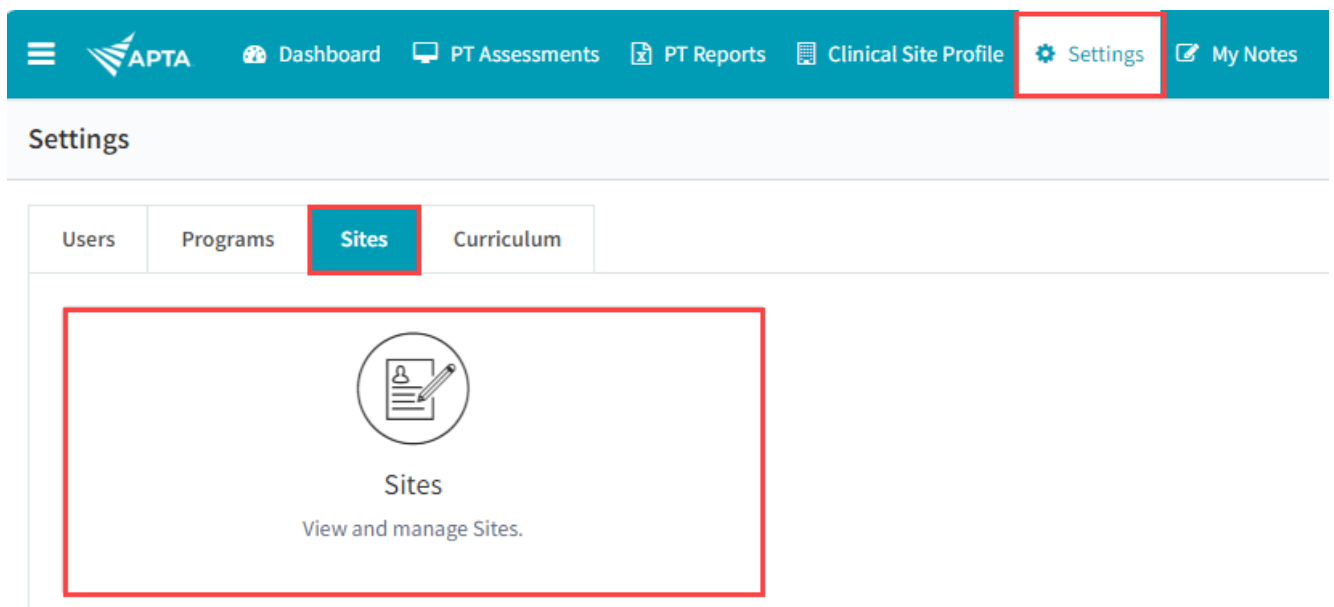
Adding CIs to Sites

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. 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.



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

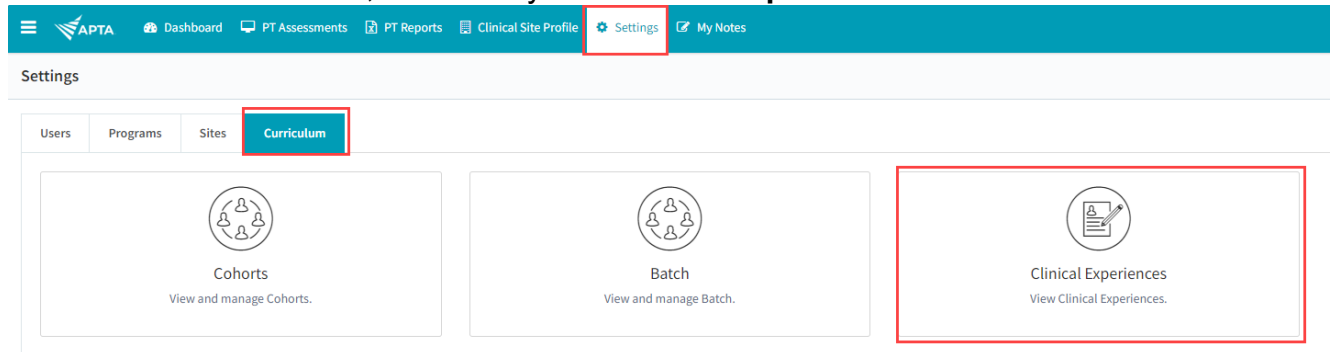
1 Result Found

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.



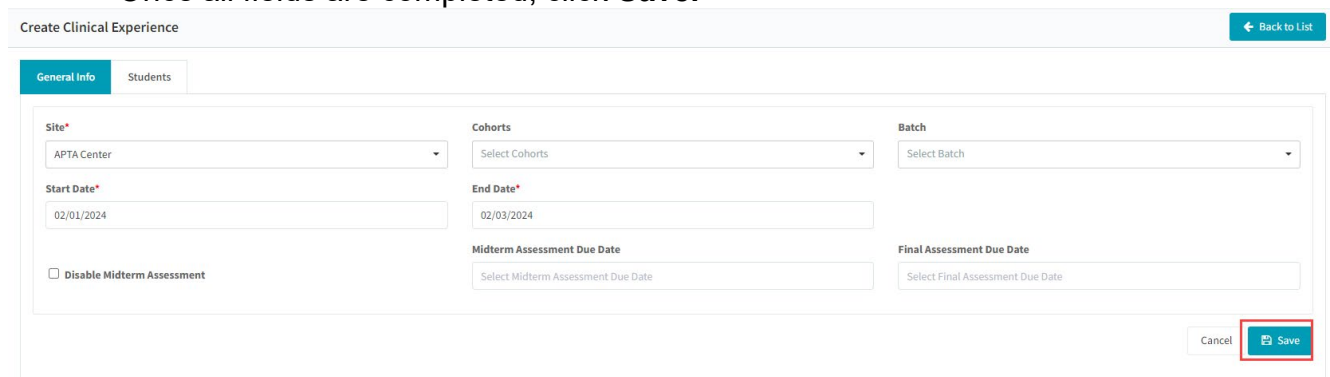
3. Click **+ Create** to create a single clinical experience.



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 <input type="text" value="Start Typing..."/> Clear										
Site ↑	No. of Students	Cohort / Batch	Start date	End date	Status					
APTA Center	View (2)	Class of 2024 / ClinEd III	12/01/2023	01/02/2024	Pending Active Completed Archived					




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										
<div> Midterm Final </div>		<div> Assessments Overall Status <div>25%</div> </div>			<div> 1 Assessment(s) Complete </div>			<div> 3 Assessment(s) Pending </div>		
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:

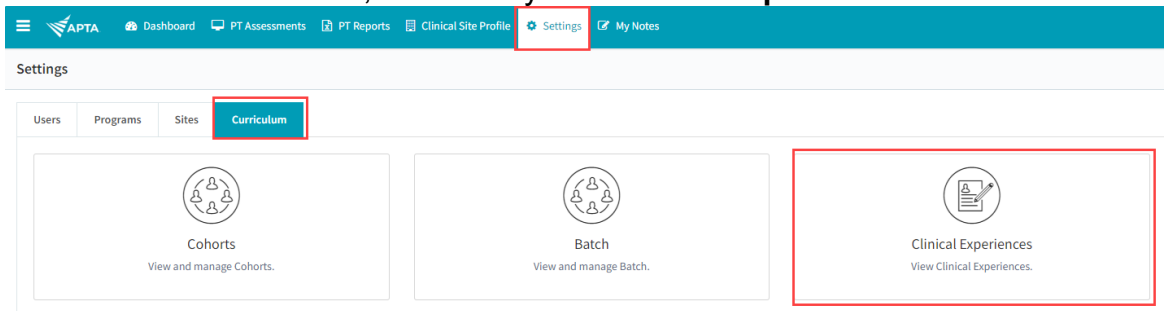
1. Add/Create clinical sites.
2. Create cohort.
3. Obtain and complete spreadsheet.
4. Import spreadsheet to create clinical experiences.
5. Release clinical experiences to students and CIs.

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

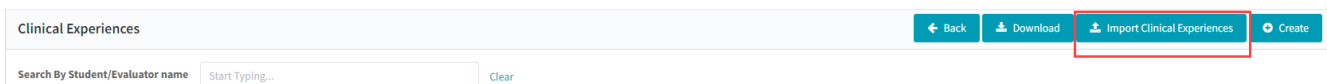
Obtaining and Completing Import Spreadsheet

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

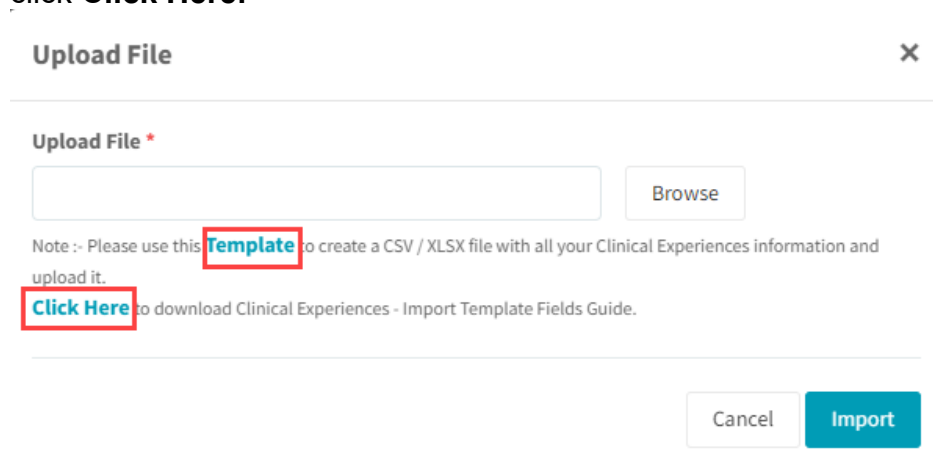
1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Clinical Experiences** icon.



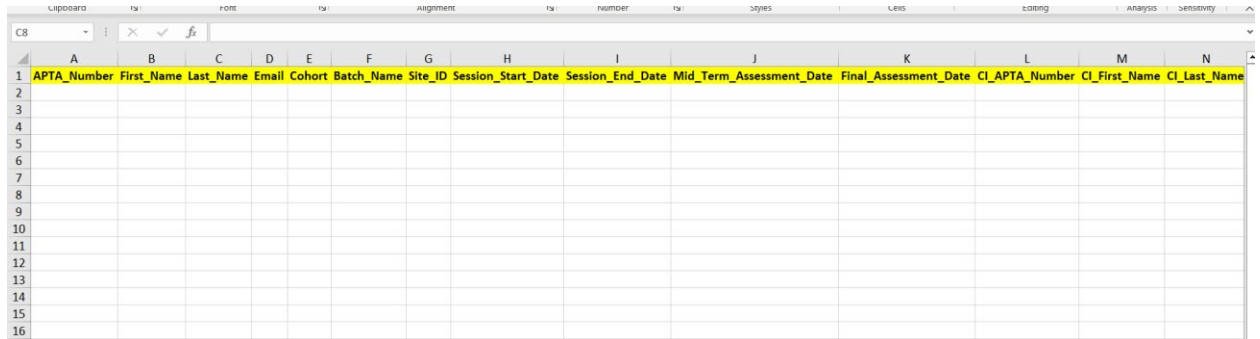
3. Click Import Clinical Experiences



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.



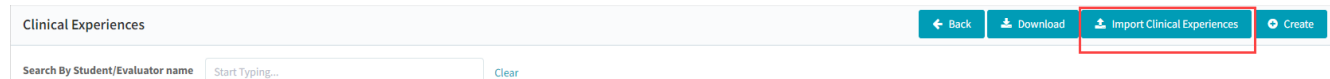
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	APTA_Number	First_Name	Last_Name	Email	Cohort	Batch_Name	Site_ID	Session_Start_Date	Session_End_Date	Mid_Term_Assessment_Date	Final_Assessment_Date	CI_APTA_Number	CI_First_Name	CI_Last_Name
2														
3														
4														
5														
6														
7														
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

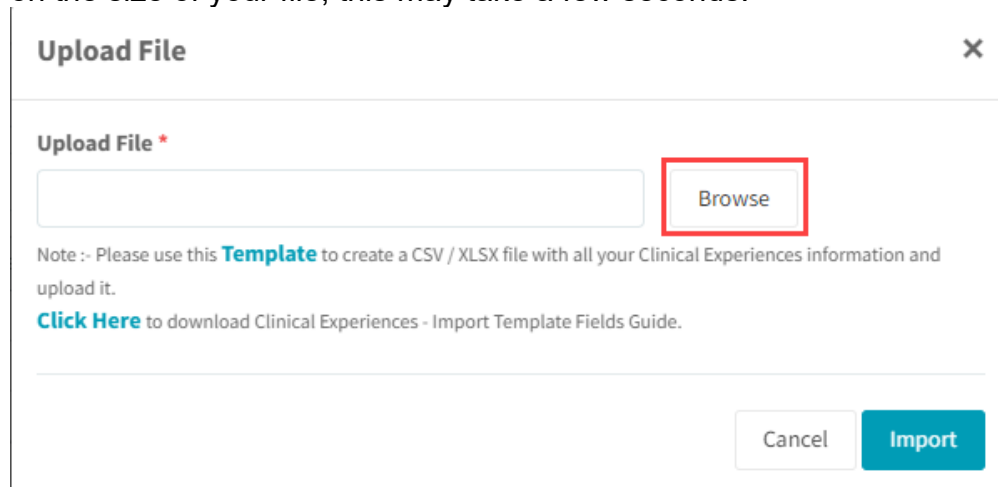


Clinical Experiences

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
██████	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

< > 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... 4	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!

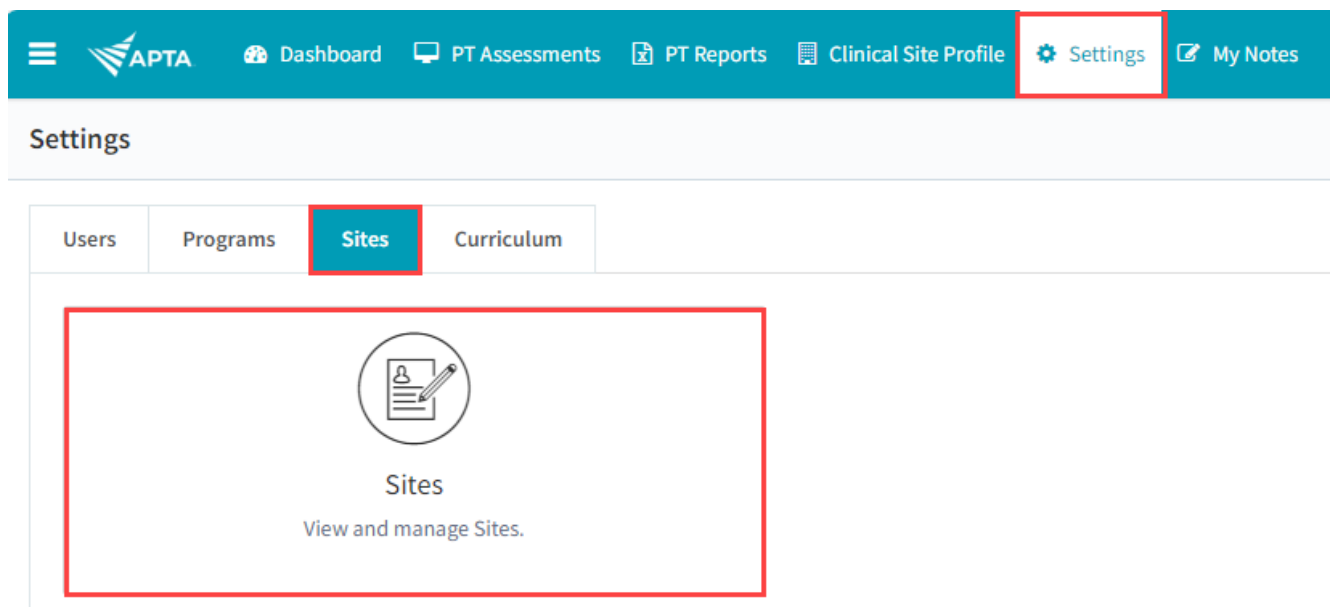
- To confirm the release, click **PT/PTA Assessments** in the top ribbon, and you will see the active evaluation. Your student and their CI will see it the same way on their screen under the PT/PTA Assessment tab.

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

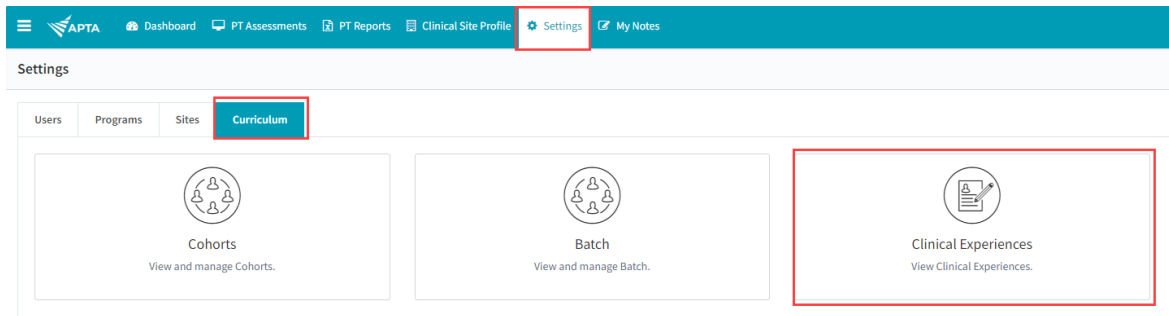
Search

1 Result Found

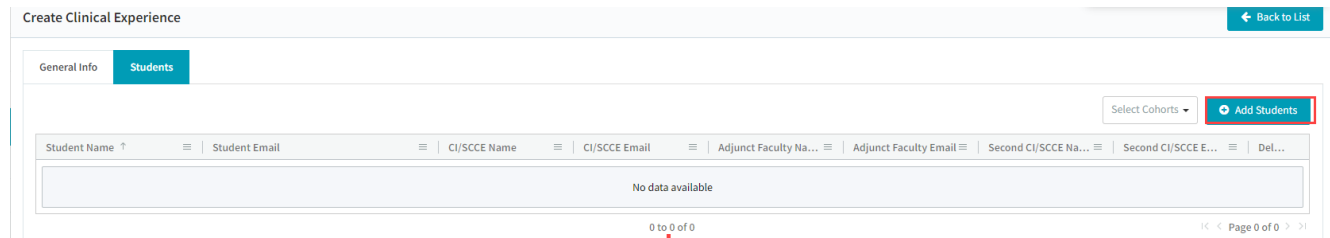
Name	Email	Role	Program	Action
CPI, CI1	CI1CPI@test.com	CI	APTA University - PT	Add

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

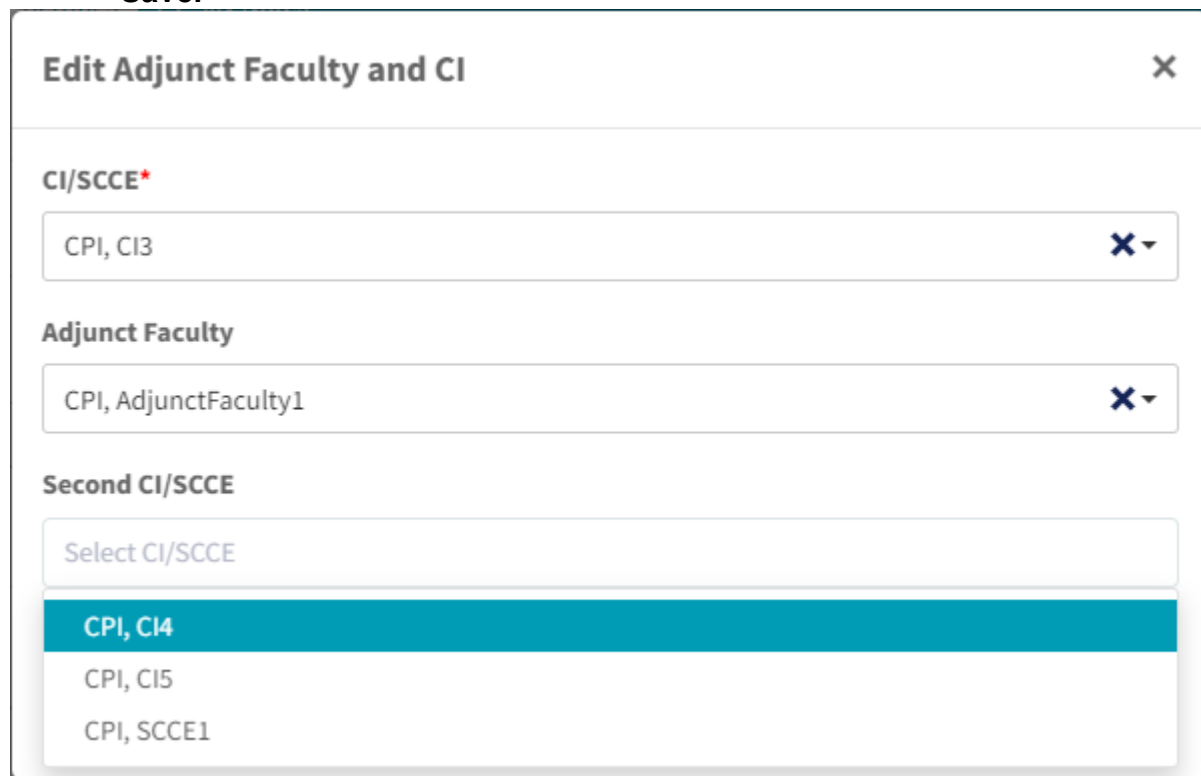
6. Click **Curriculum**, followed by the **Clinical Experiences** icon.



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**.



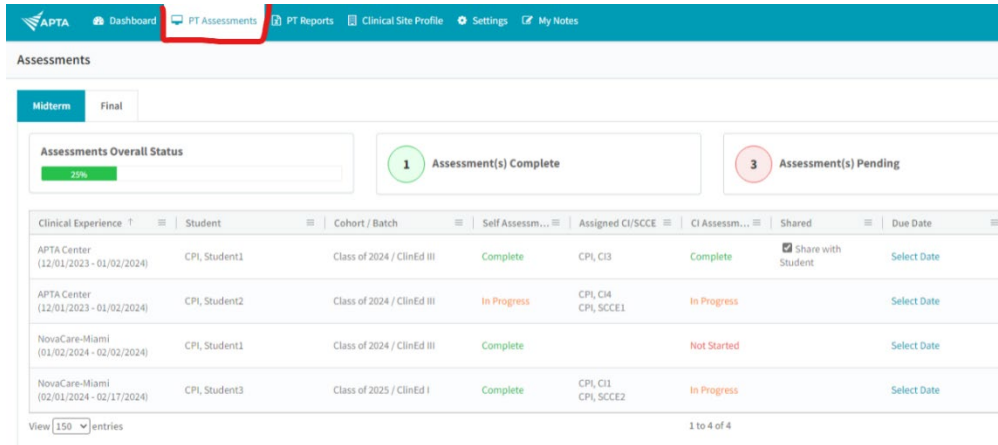
Note: If you need to make a new CI the first listed, select the new CI as CI/SCCE and hit Save. Then, you can go back in and the system will have updated so that you can add the original CI under Second CI/SCCE.

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

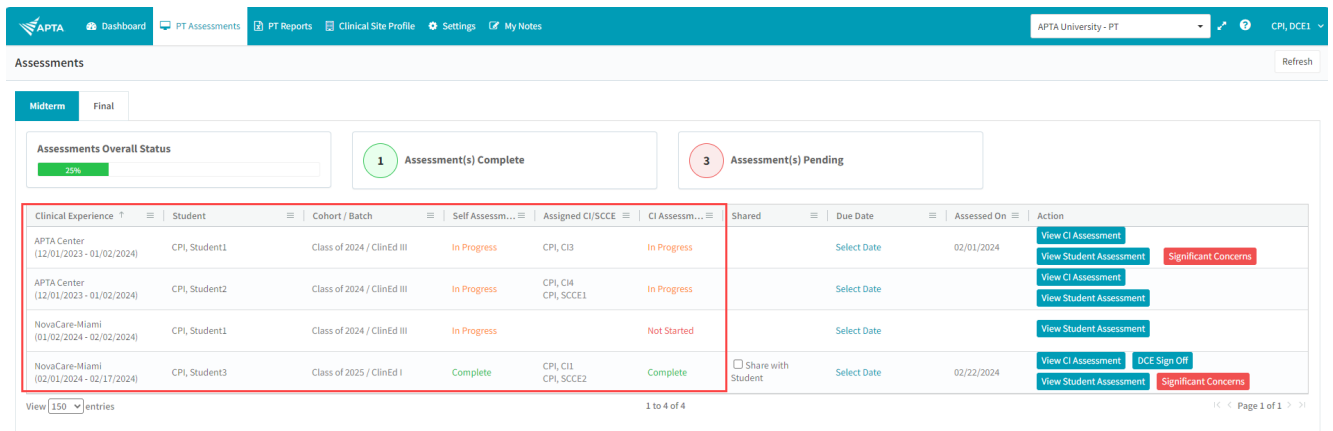
1. Click **PT/PTA Assessments** at the top of your screen.



The screenshot shows the PT/PTA Assessments page. The top navigation bar includes links for APTA, Dashboard, PT Assessments (highlighted), PT Reports, Clinical Site Profile, Settings, and My Notes. The main content area shows the Assessments section with tabs for Midterm and Final. A summary box indicates 25% overall status, 1 Assessment(s) Complete, and 3 Assessment(s) Pending. Below this is a table with columns: Clinical Experience, Student, Cohort / Batch, Self Assessm..., Assigned CI/SCCE, CI Assessm..., Shared, and Due Date. The table lists four rows of assessments for different students and clinical experiences.

Clinical Experience	Student	Cohort / Batch	Self Assessm...	Assigned CI/SCCE	CI Assessm...	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		Select Date
NovaCare-Miami (01/02/2024 - 02/02/2024)	CPI, Student1	Class of 2024 / ClinEd III	Complete		Not Started		Select Date
NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, C11 CPI, SCCE2	In Progress		Select Date

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 PT/PTA Assessments page with a more detailed view. The top navigation bar includes links for APTA, Dashboard, PT Assessments (highlighted), PT Reports, Clinical Site Profile, Settings, and My Notes. The main content area shows the Assessments section with tabs for Midterm and Final. A summary box indicates 25% overall status, 1 Assessment(s) Complete, and 3 Assessment(s) Pending. Below this is a table with columns: Clinical Experience, Student, Cohort / Batch, Self Assessm..., Assigned CI/SCCE, CI Assessm..., Shared, Due Date, Assessed On, and Action. The table lists four rows of assessments for different students and clinical experiences. The Action column contains buttons for View CI Assessment, View Student Assessment, and Significant Concerns.

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
APTA Center (12/01/2023 - 01/02/2024)	CPI, Student2	Class of 2024 / ClinEd III	In Progress	CPI, C14 CPI, SCCE1	In Progress		Select Date		View CI Assessment View Student Assessment
NovaCare-Miami (01/02/2024 - 02/02/2024)	CPI, Student1	Class of 2024 / ClinEd III	In Progress		Not Started		Select Date		View Student Assessment
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	View CI Assessment View Student Assessment DCE Sign Off 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

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 [View Profile](#)

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, C11 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 DCE Sign Off </div>
<div> View Student Assessment Significant Concerns </div>

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, StudentA
CI : CPI, CI1; CPI, SCCE1

Class of 2024 / Clin Ed I
APTA Center (02/01/2024 - 02/17/2024)

✕

CPI, SCCE1 (SCCE) test 2 <small>Sent to : CPI, DCEA (DCE)</small>	02/21/2024 4:52 PM
CPI, SCCE1 (SCCE) Hi <small>Sent to : CPI, DCEA (DCE)</small>	02/21/2024 4:49 PM
CPI, DCEA (DCE) thanks! <small>Sent to : CPI, CI1 (CI); CPI, SCCE1 (CI)</small>	02/21/2024 4:49 PM
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

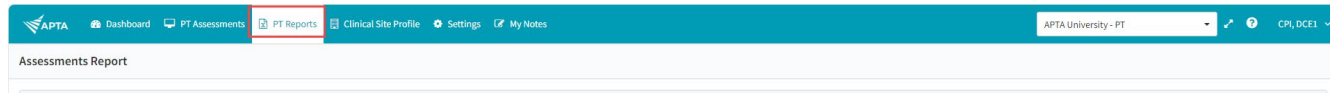
Here, you can review comments made by the student or CI. You can then write your comments and send a notification to the student and/or CI.

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.

Assessments Report

Filters

Show Assessments

☒ Midterm ☒ Final

Cohort

All

Batch

All

Clinical Experiences

All

Student

All

☐ Include Comments & Narratives

Apply

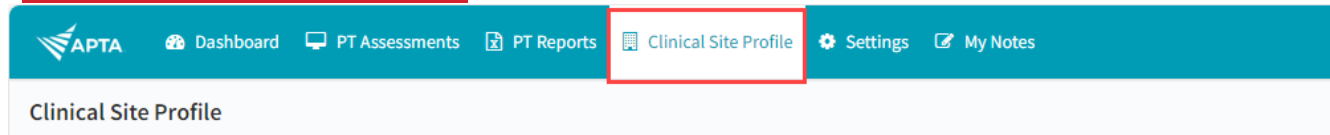
Download

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.

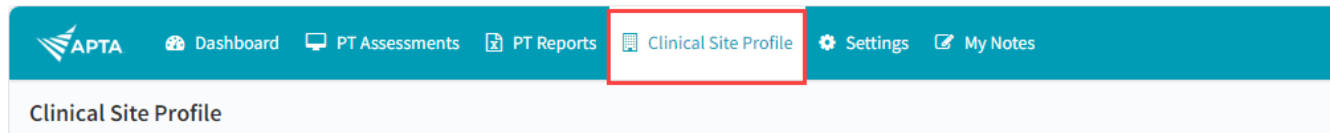
The Clinical Site Profile tab (or CSIF) is a listing of clinical sites with a completed profile. This list differs from the list on your Sites page (after you click Settings). Students and CIs should look under the PT(A) Assessments tab to determine their assigned sites.

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

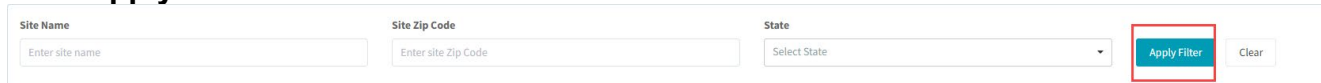
Viewing the completed Clinical Site Profiles/CSIF

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.

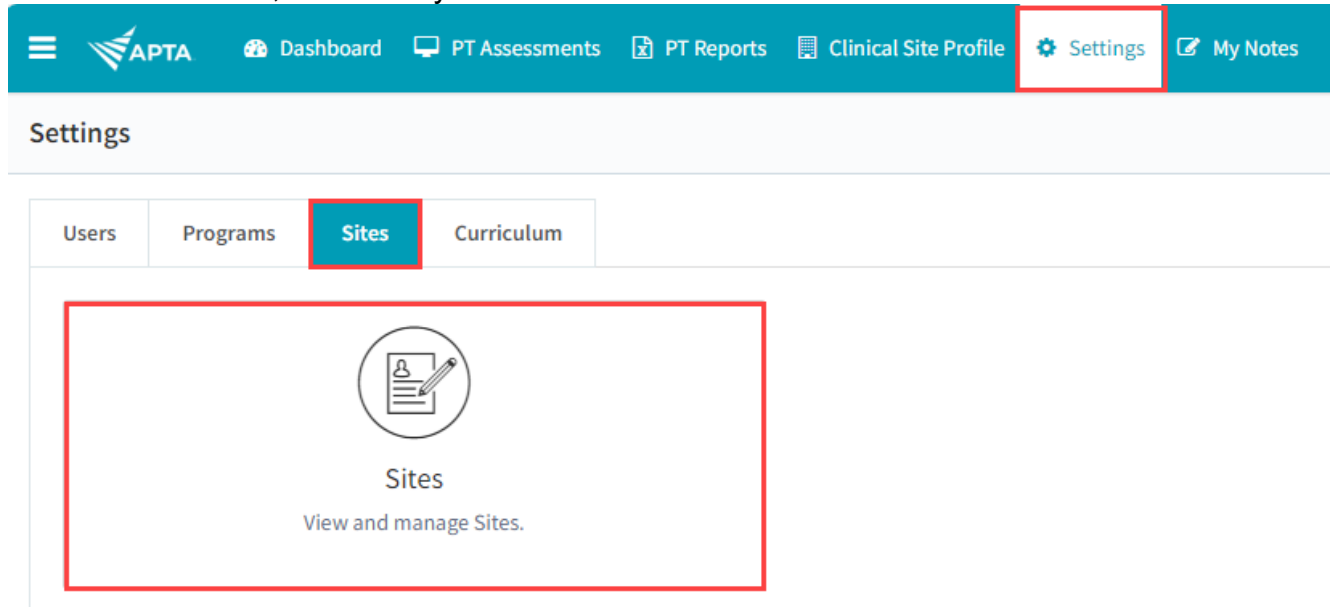
3. Once the site(s) you are looking for populates, click **View Details**. If the site is not already in your sites list and you want to include it in your list, click **Add to My Sites**.

Site Name ↑	Site Coordinator	Site Coordinator Phone	Site Coordinator Email	State	Zip Code	Last Updated On	Action
22 December Test Site	gfdgdfg	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

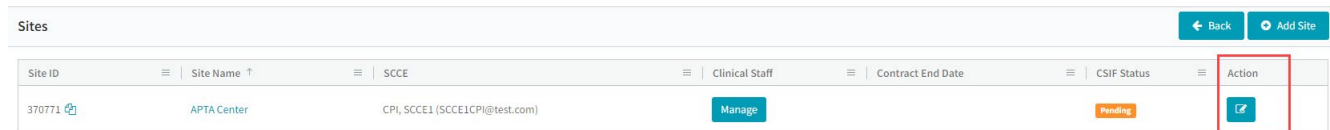
Editing the Clinical Site Profiles/CSIF

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.

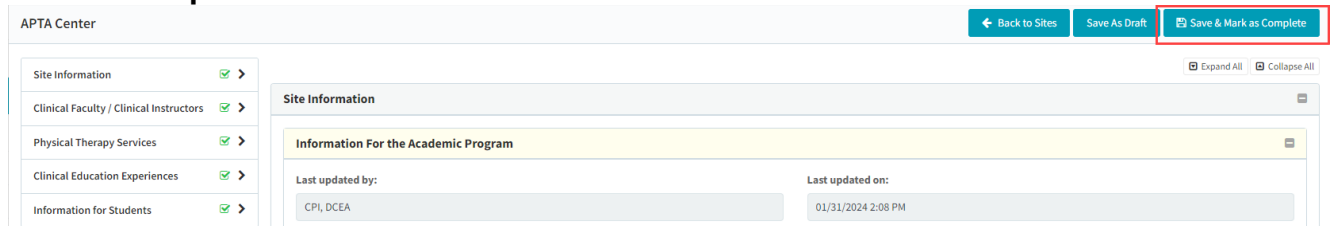
1. Click **Settings** from the top menu bar.
2. Click **Sites**, followed by the **Sites** icon.



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

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.

						Back	Download	Import Clinical Experiences	Create
Search By Student/Evaluator name <input type="text"/> Clear									
Site	No. of Students	Cohort / Batch	Start date	End date	Status				
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

- 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](#).

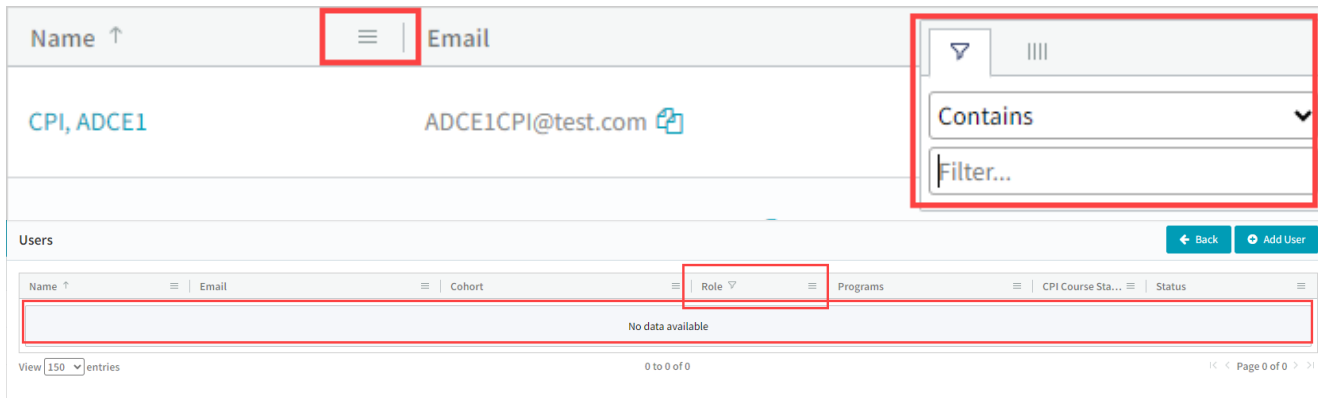
NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, CI CPI, SCCE2	Complete	<input type="checkbox"/> Share with Student	Select Date	02/22/2024	View CI Assessment DCE Sign Off	View Student Assessment Significant Concerns
---	---------------	--------------------------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

- 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.

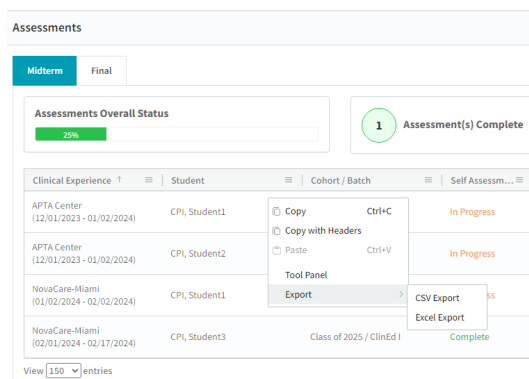
Users

</

- 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 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](#)