

Clinical Performance Instrument (CPI)

- Director of Clinical Education**
- Associate Director of
Clinical Education**
- Administrative Staff**

User Guide

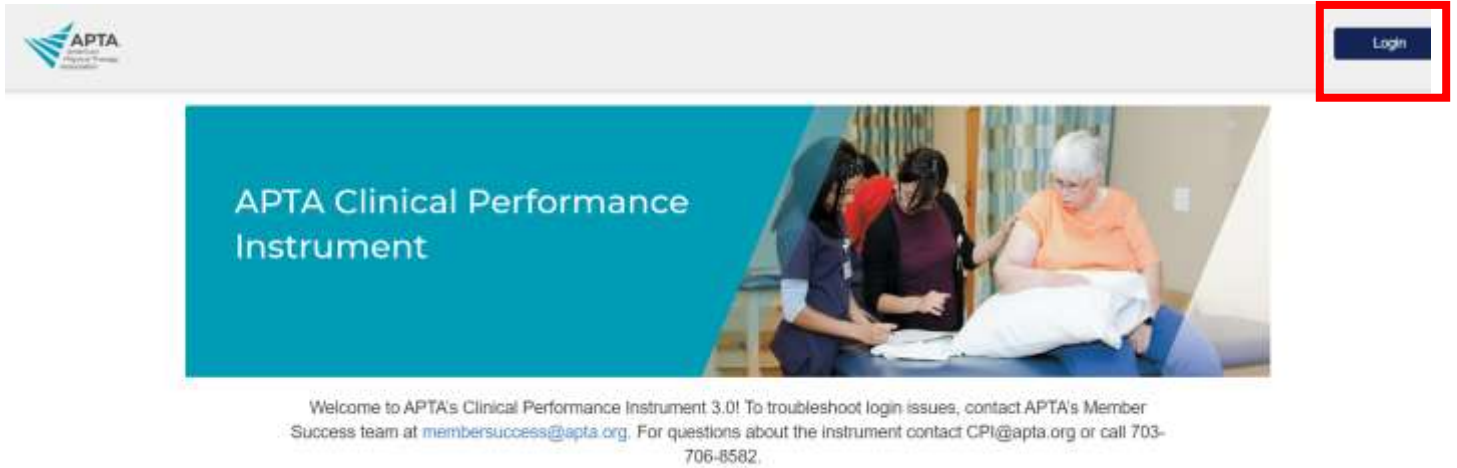
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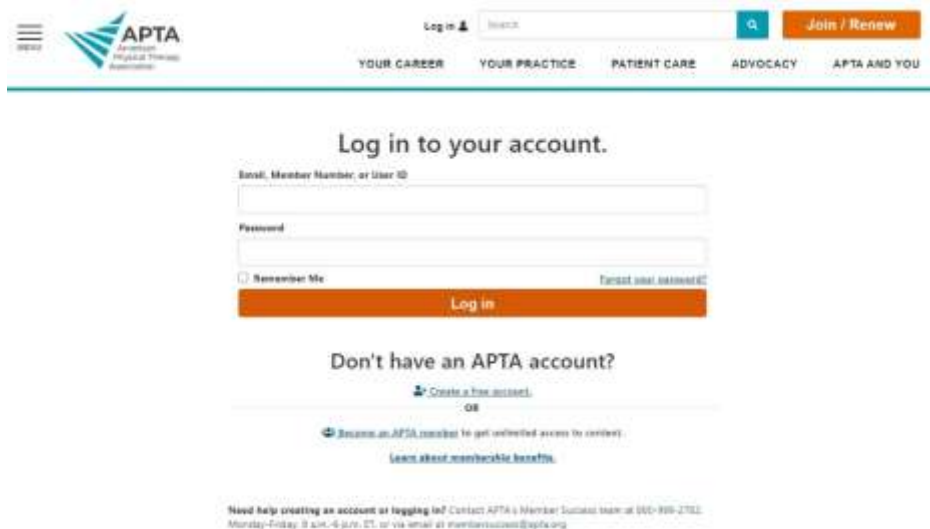
Login

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

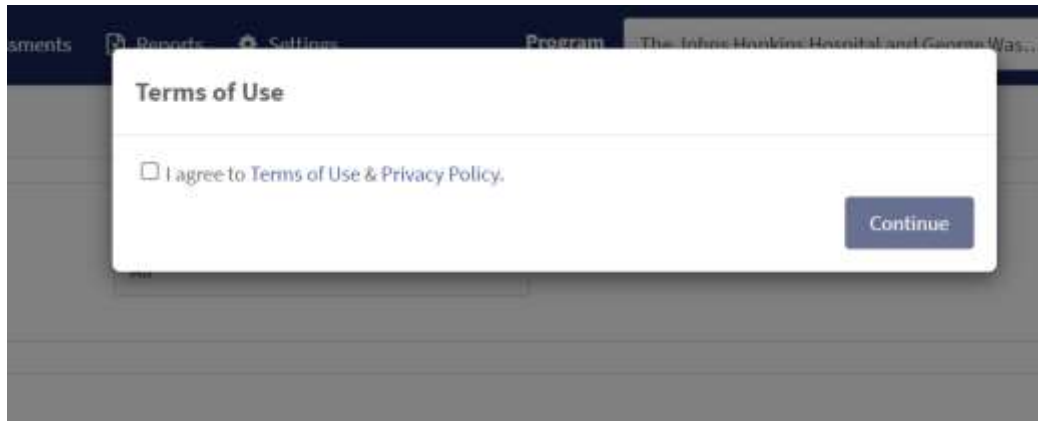
Click **Login**.



Log in to your account using your APTA login credentials.



Agree to the **Terms of Use**.



The **Dashboard** appears.



**The DCE/ADCE will be only able to see data for the program(s) he or she is associated with.*

For login issues: Email CPI@APTA.com or call 703-684-2782.

Menu Options

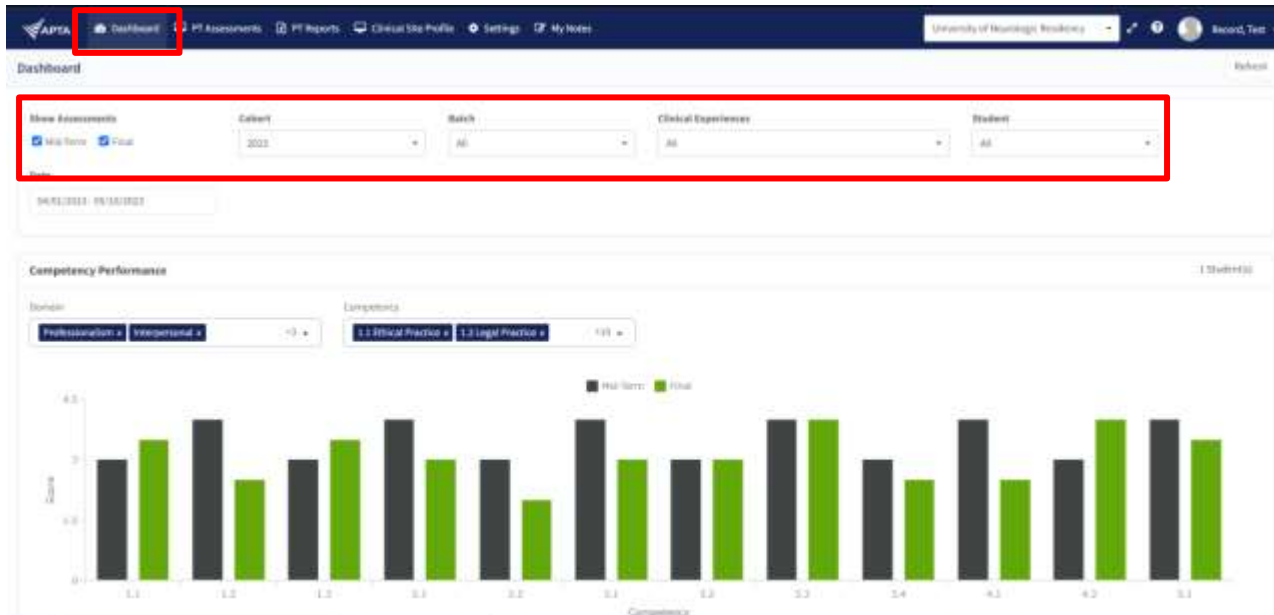


	Click to enter/exit full screen .
	Click to access User Guides .
	Click your User Profile photo to: <ul style="list-style-type: none"> • Update your user profile • Log Out of the system

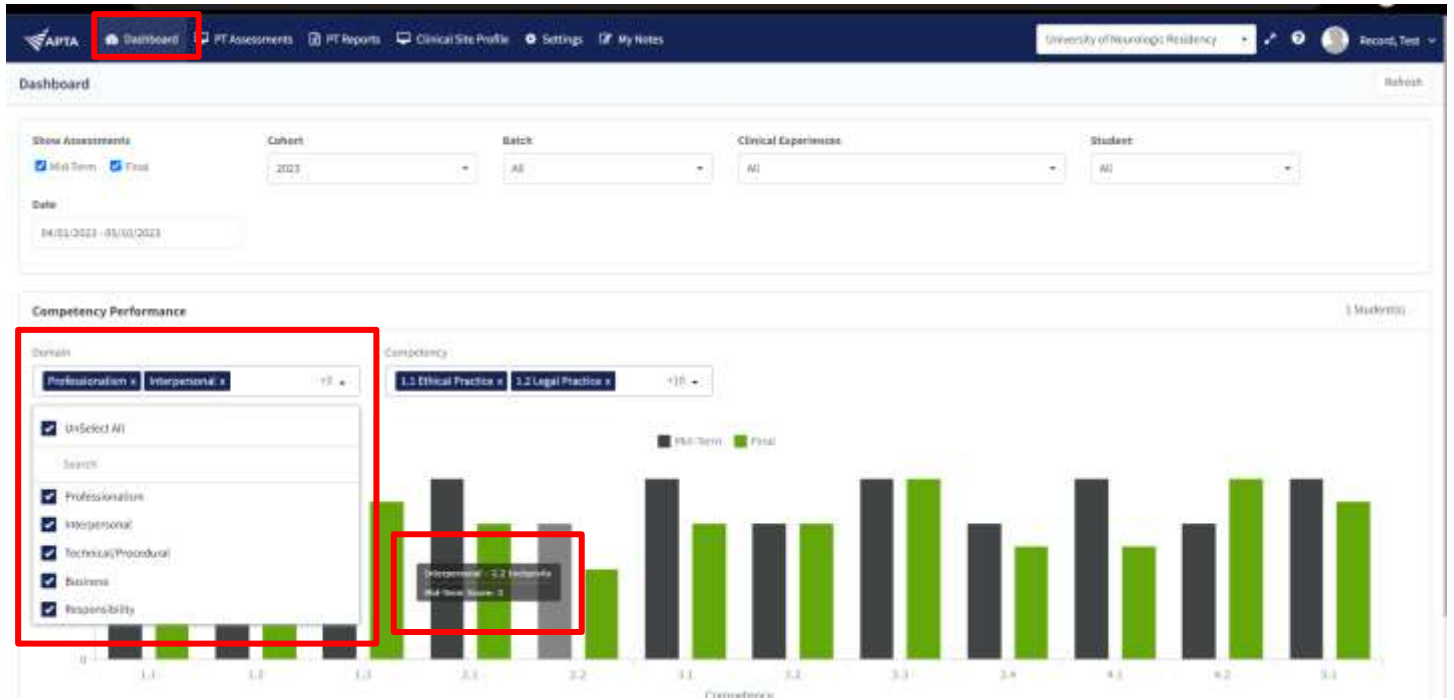
Dashboard

The Competency.AI 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.

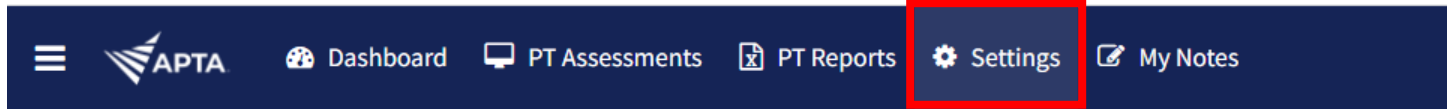


Select specific Domains and Competencies and mouse-over to see the score for each competency for additional information.

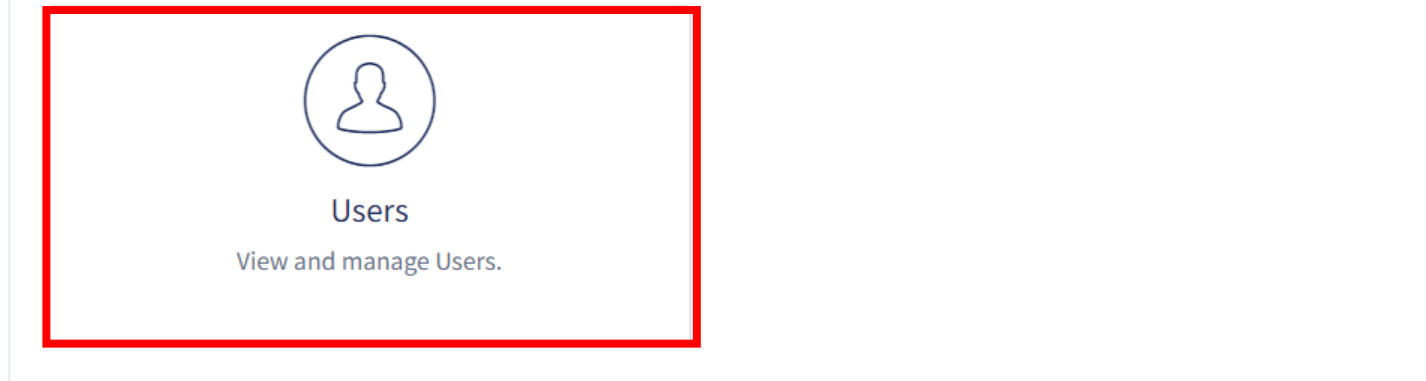


View Program Users

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



Settings

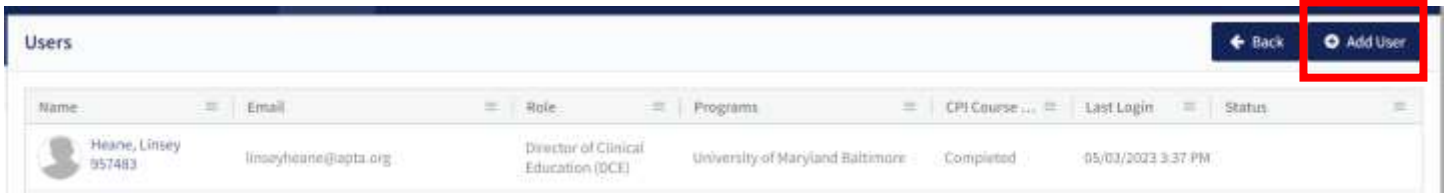




View current program users, user's role, CPI Training completion Status, and last login of users associated with your program.

Name	Email	Role	Programs	CPI Course ...	Last Login	Status
Heane, Linsay 957483	linseyheane@apta.org	Director of Clinical Education (DCE)	University of Maryland Baltimore	Completed	05/03/2023 3:17 PM	
Johnson, William 1050831	billjohnson@apta.org	Student	University of Maryland Baltimore	Completed	05/08/2023 4:25 PM	Active Inactive Retire
Record, Test 472067	membershiptest@apta.org.null	Adjunct Faculty	University of Maryland Baltimore			Active Inactive Retire
record, test 628201	jojo_super77@yahoo.com	Associate DCE	University of Maryland Baltimore			

Add New Program Users

Click **Add User** located on top right of the screen to add users (ADCE, Adjunct Faculty, Administrative Staff and Students) to the program.



Name	Email	Role	Programs	CPI Course ...	Last Login	Status
 Heane, Linsey 957483	linseyheane@apta.org	Director of Clinical Education (DCE)	University of Maryland Baltimore	Completed	05/03/2023 3:37 PM	

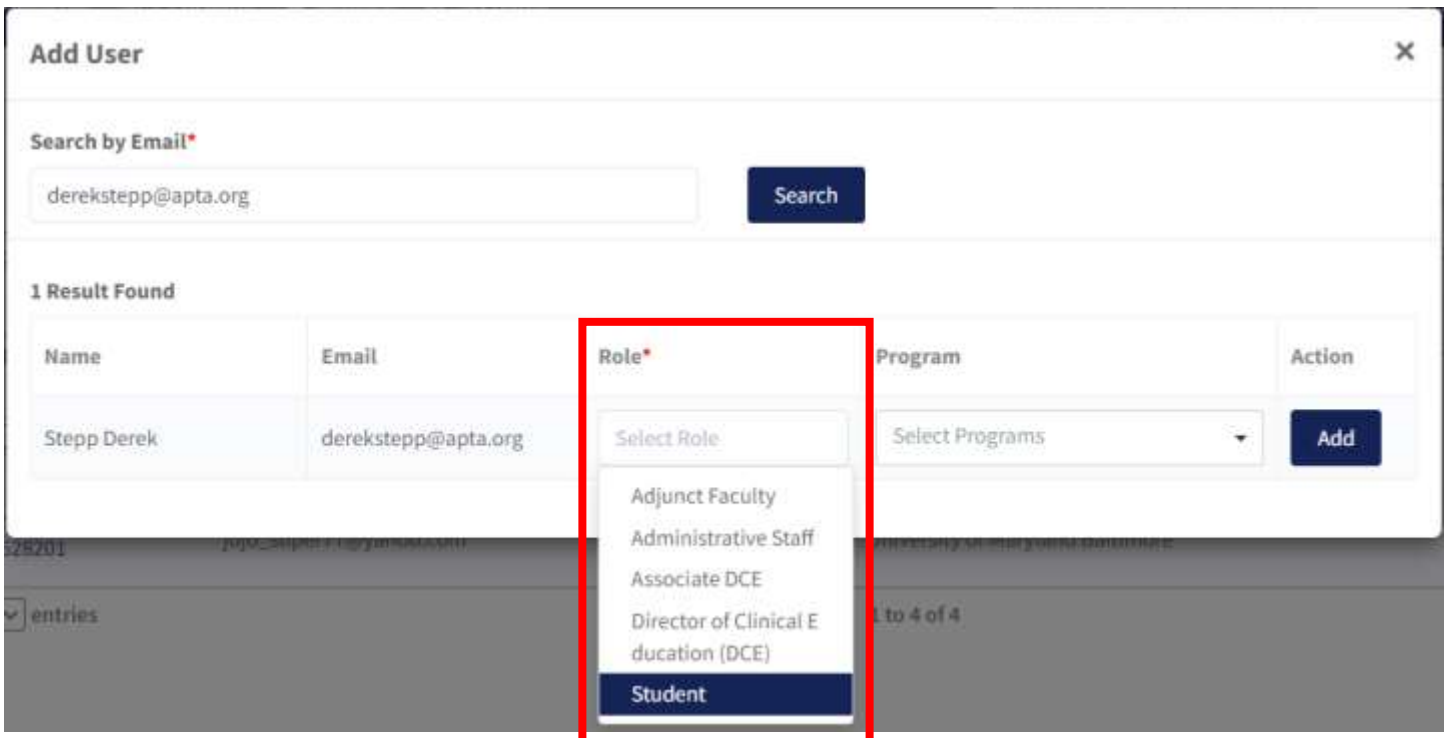
Enter **Email** associated with user's APTA (member or non-member) account and click **Search**.

Add User

Search by Email*

Search

Select **Role** from drop down list to indicate the user's role in the program.



Add User [Close]

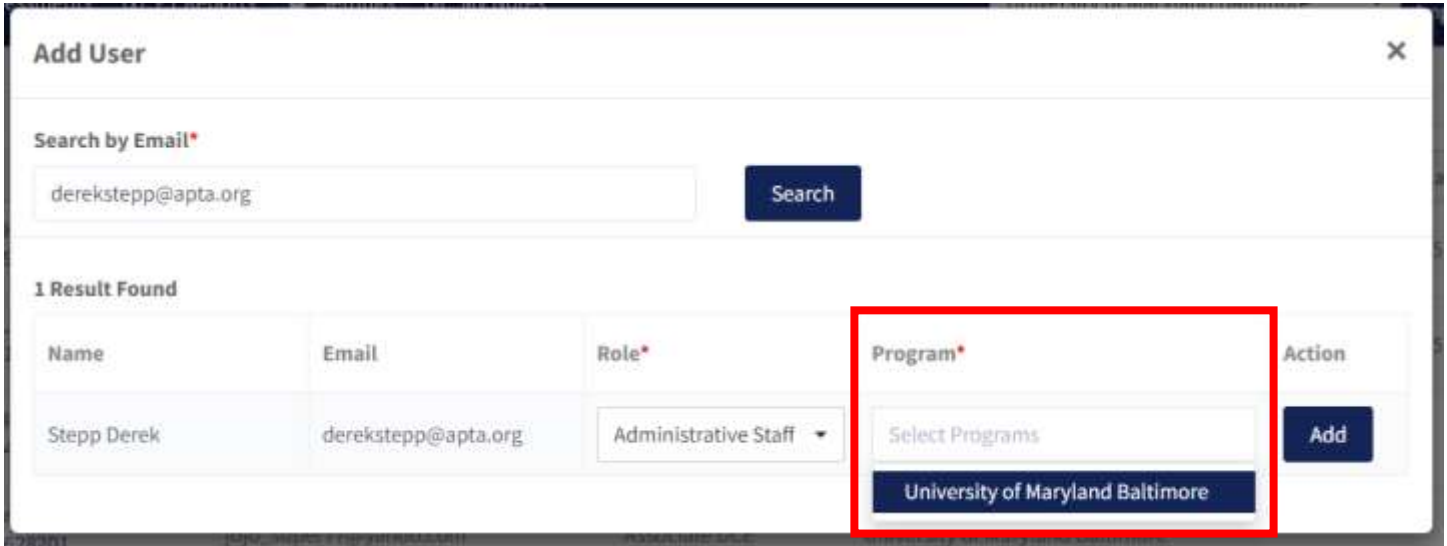
Search by Email*

Search

1 Result Found

Name	Email	Role*	Program	Action
Stepp Derek	derekstepp@apta.org	<ul style="list-style-type: none">Select RoleAdjunct FacultyAdministrative StaffAssociate DCEDirector of Clinical Education (DCE)Student	Select Programs	Add

Select the **Program** from the drop-down list to indicate the program this user is associated with.



Add User [X]

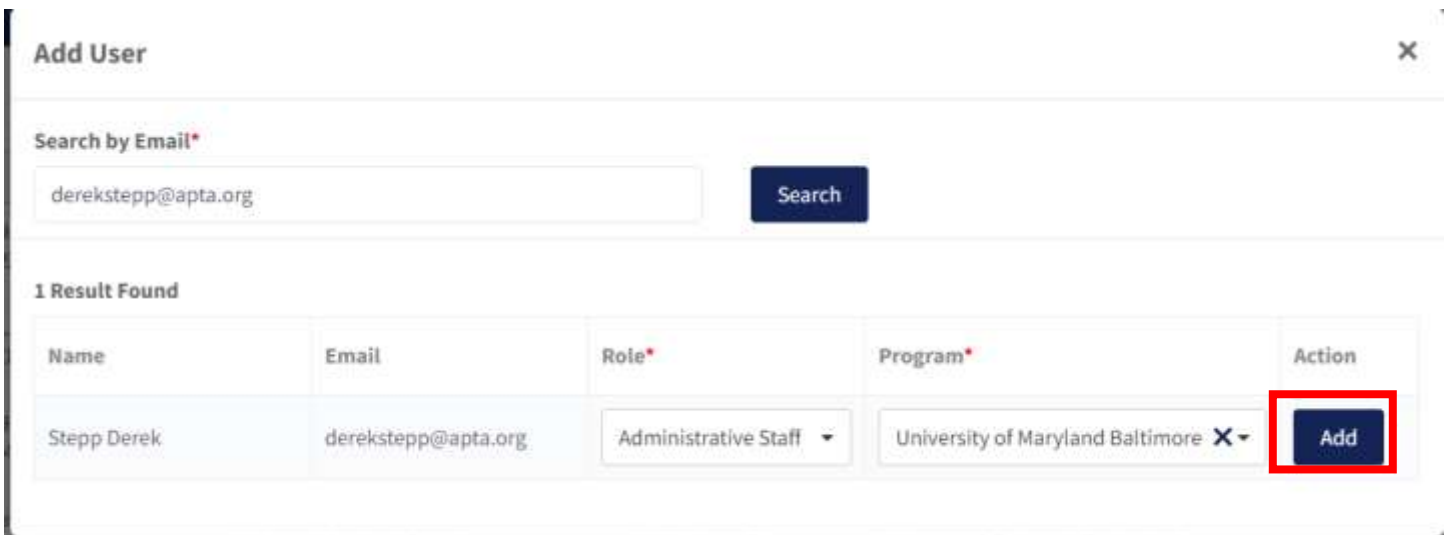
Search by Email*

derekstepp@apta.org [Search]

1 Result Found

Name	Email	Role*	Program*	Action
Stepp Derek	derekstepp@apta.org	Administrative Staff ▾	Select Programs University of Maryland Baltimore	Add

Click **Add**.



Add User [X]

Search by Email*

derekstepp@apta.org [Search]

1 Result Found

Name	Email	Role*	Program*	Action
Stepp Derek	derekstepp@apta.org	Administrative Staff ▾	University of Maryland Baltimore X ▾	Add

Please Note: The Administrative Staff will have similar permissions in Competency AI as the DCE/ADCE. These users will be able to create schedules, assessments, etc. just as the DCE/ADCE can.

IMPORTANT! For students, once you click Add, please click their names to add them to a specific cohort.

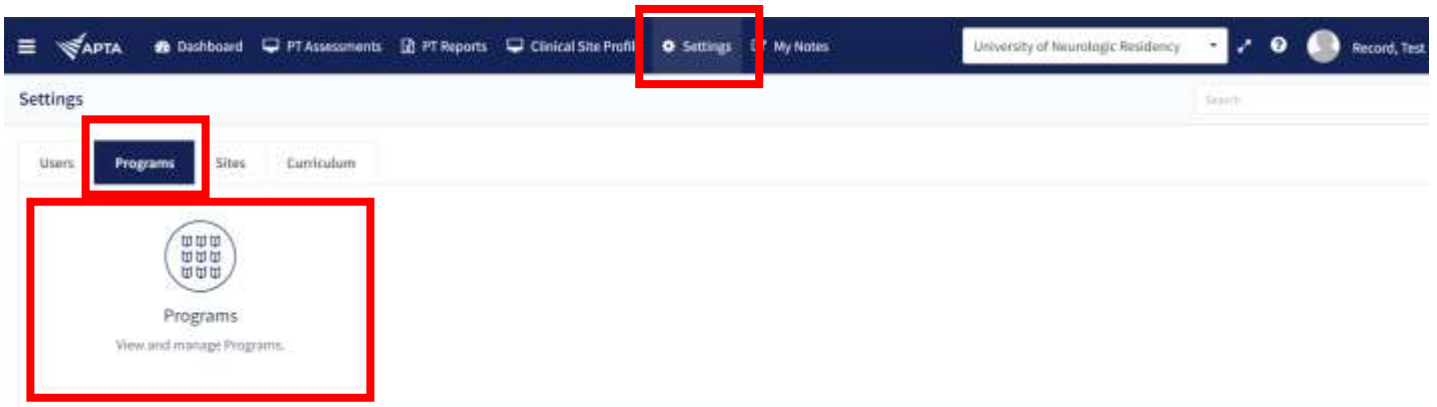
View and Manage Program Details.

Note: Programs have been created by an APTA Administrator.

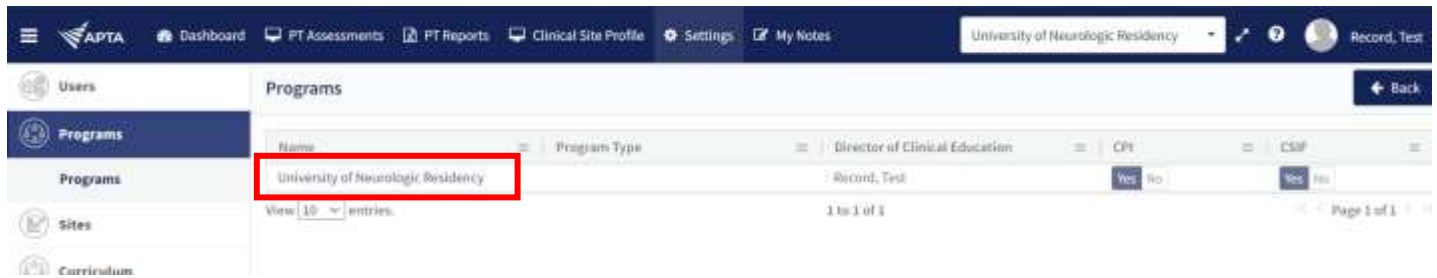
Click **Settings**.

Click **Programs** from menu tab.

Click the **Programs** box.



Select the program.



Review basic program details.
Set assessment sharing permissions.

Basic Details

Program name * University of Maryland Baltimore	Program Type PT	Director of Clinical Education Heene, Lindsay
Email	Phone	
Address		

Mid-Term 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)

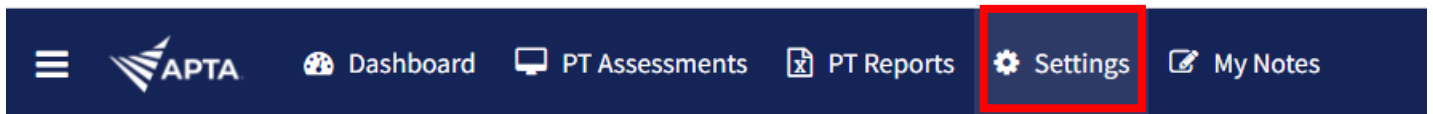
Manually
(Permission to manually provided from assessments page)

Clinical Sites

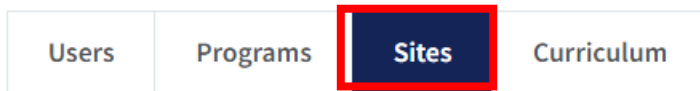
IMPORTANT! Clinical Sites must be manually entered into the system to avoid duplications and incorrect data. Sites must be created adding creating/uploading clinical rotations.

Add Clinical Sites

Click **Settings** from the top menu bar.
Click **Sites**, followed by the **Sites** box



Settings



Click **+Create**

Sit...	Site Name	SCCE	Clinical Staff	Last Updated By	Last Updated On	Contract End Date	CSIF St...	
553610	Johns Hopkins University	-		Heane, Linsey	05/10/2023 10:57 AM	08/31/2023	Pending	
251223	APTA ABC Clinic	-		Heane, Linsey	05/10/2023 10:58 AM	05/31/2024	Pending	

Enter the name of the Clinical Site. If your site is already in the system, the information will automatically populate, and you can select it from the drop down.

Enter the contract dates with the clinic and the email address of the SCCE (must be the email address associated with their APTA account).

Click **Save**.

Add Site
✕

Name of Clinical Center

Contract Auto Renew

Contract Start Date *

Contract End Date *

Add Site Coordinator Of Clinical Education

Search by Email

Save site information

Save As Draft allows you to save incomplete site information without publishing it to other areas in Competency.AI. Sites saved as a draft will remain in **pending** status until edits are complete.

Save & Mark as Complete means site information is **complete** enough to share with other areas of Competency.AI

Back to Sites brings you back to the Sites page in Settings. **CHANGES WILL NOT BE SAVED**

University of Neurologic Residency

↗
?

Record, Test ▾

← Back to Sites

Save As Draft

📄 Save & Mark as Complete

Click **Manage** to manage site clinical staff information. This will open a new window

APTA
Dashboard
PT Assessments
PT Reports
Clinical Site Profile
Settings
My Notes

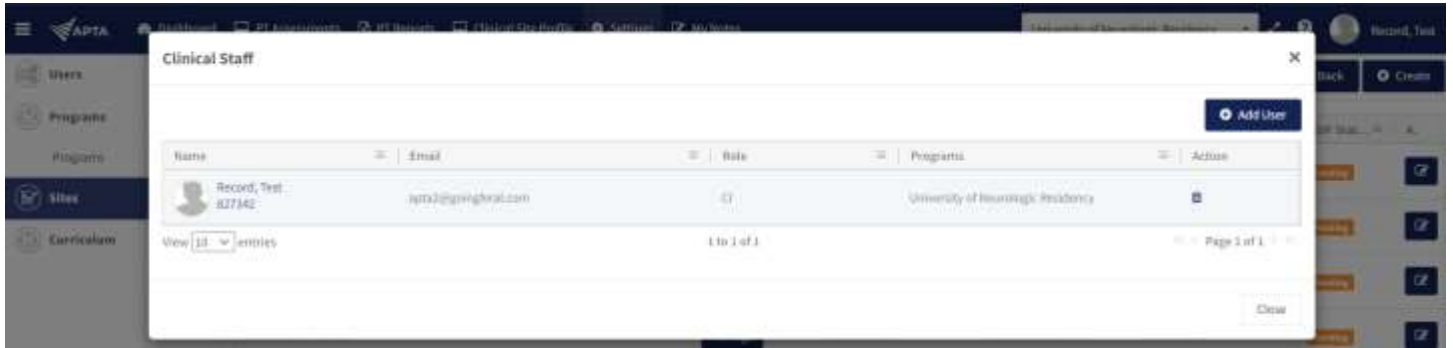
University of Neurologic Residency
Record, Test

- Users
- Programs
- Programs
- Sites
- Curriculum

Sites
← Back
➕ Create

Site ID	Site Name	SCCE	Clinical Staff	Last Updated By	Last Updated On	Contract End Date	CSOP Stat...	A
BRUN441V	Sidney Kimmel Medical College	Record.Test.brst2@gmail.com	Manage	Record, Test	05/09/2023 3:38 PM	04/27/2023	Pending	
HRAPO60Y	Ab Medical College	Record.Test.brst2@gmail.com	Manage	Record, Test	04/27/2023 2:22 PM	05/30/2025	Pending	

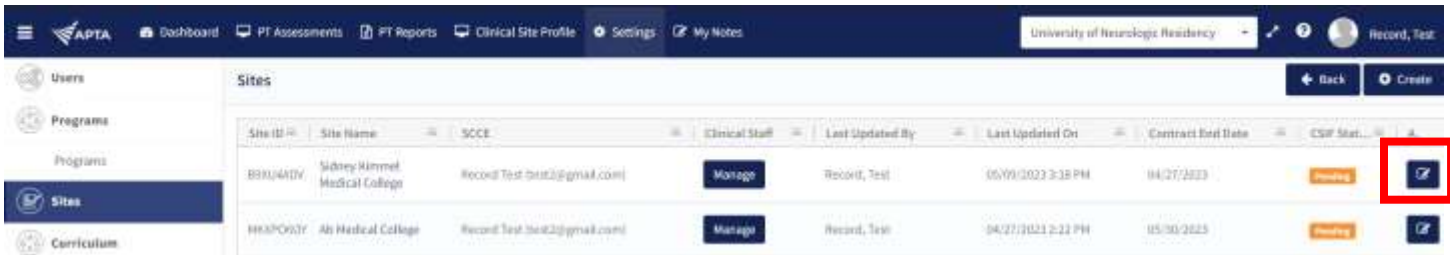
Click **+Add User** to add a CI associated with this site by their email address or the trash can to delete clinical staff associated with this site then close the window



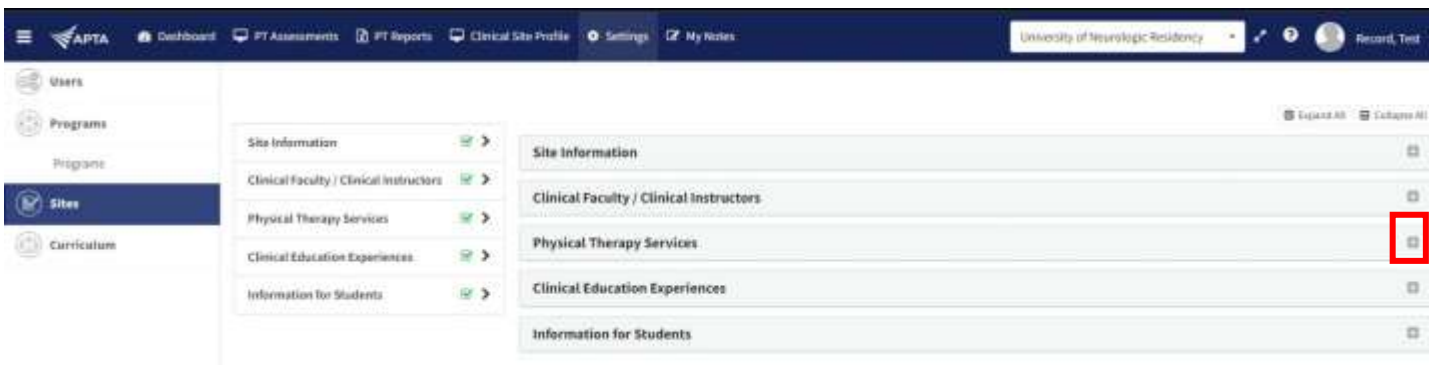
Edit Clinical Site Information

As the DCE/ADCE, you have the permission to edit clinical site information along with the SCCE. Though, this is the responsibility of the SCCE

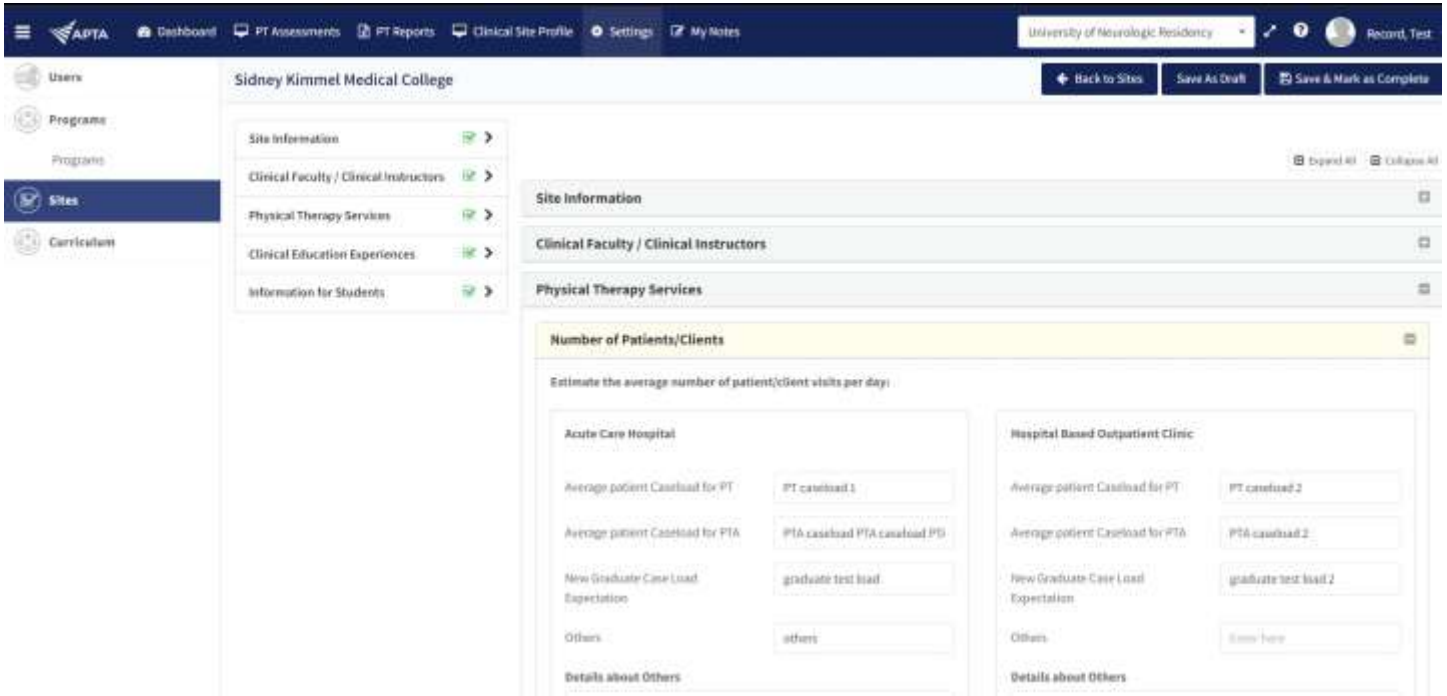
Click the edit icon to add and edit FULL site information



This edit screen is divided into sections which can be expanded and collapsed. Use the commands or + and – icons to expand and collapse these fields.



Complete each section and **SAVE**.




The screenshot shows the 'Physical Therapy Services' section of the 'Number of Patients/Clients' form. It is divided into two columns: 'Acute Care Hospital' and 'Hospital Based Outpatient Clinic'. Each column contains input fields for 'Average patient Caseload for PT', 'Average patient Caseload for PTA', 'New Graduate Case Load Expectation', and 'Others'. The 'Acute Care Hospital' section has a 'PT caseload 1' field, while the 'Hospital Based Outpatient Clinic' section has a 'PT caseload 2' field. There are also 'Expand All' and 'Collapse All' buttons on the right side of the form.

Save site information

Save As Draft allows you to save incomplete site information without publishing it to other areas in Competency.AI. Sites saved as a draft will remain in **pending** status until edits are complete.

Save & Mark as Complete means site information is **complete** enough to share with other areas of Competency.AI

Back to Sites brings you back to the Sites page in Settings. **CHANGES WILL NOT BE SAVED**



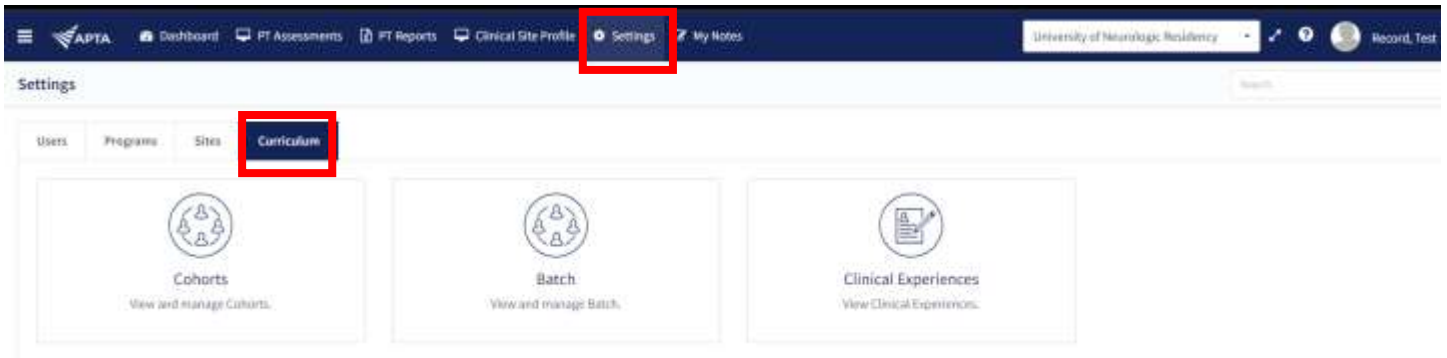
This screenshot is similar to the one above but focuses on the top right of the form. A red box highlights three buttons: 'Back to Sites', 'Save As Draft', and 'Save & Mark as Complete'. The 'Back to Sites' button has a left-pointing arrow, and the 'Save & Mark as Complete' button has a checkmark icon.

Curriculum

This section allows you to create student cohorts, student batches, and clinical education experience schedules.

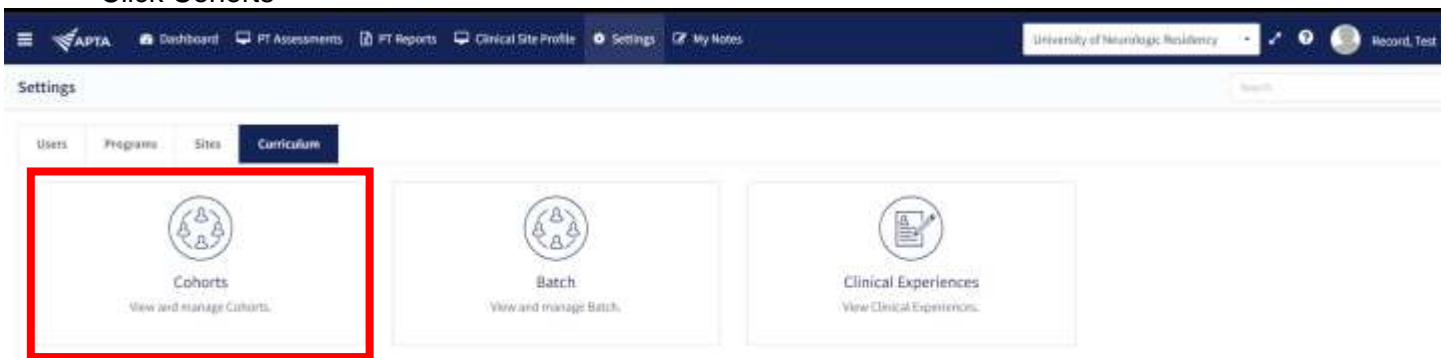
Note: A batch is a learner group within a cohort. A batch may include the entire cohort or selected learners. For example, the cohort is the Class of 2025 and the batch is 2023 Summer Session I.

Click Settings > Curriculum



Cohorts

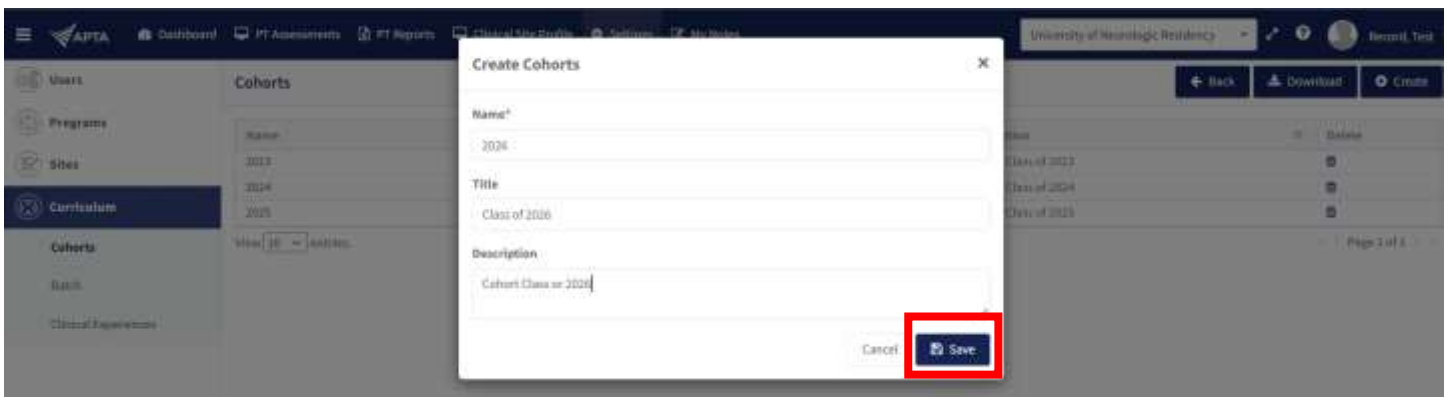
Click Cohorts



Select +Create to add a new cohort

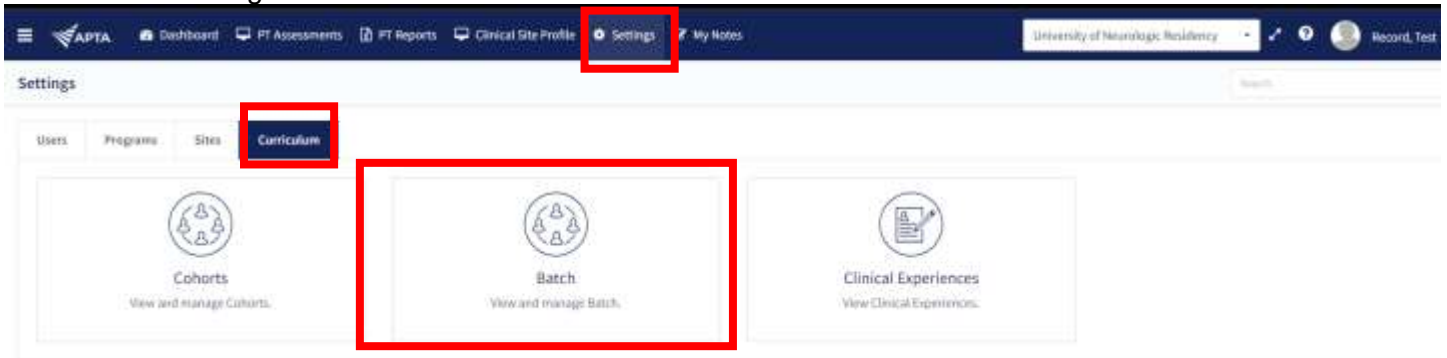


Enter the Cohort Name (required) Title and Description (optional). Click **Save**.



Batch

1. Click Settings > Curriculum > Batch



Click **+Create** to create and edit batch information.



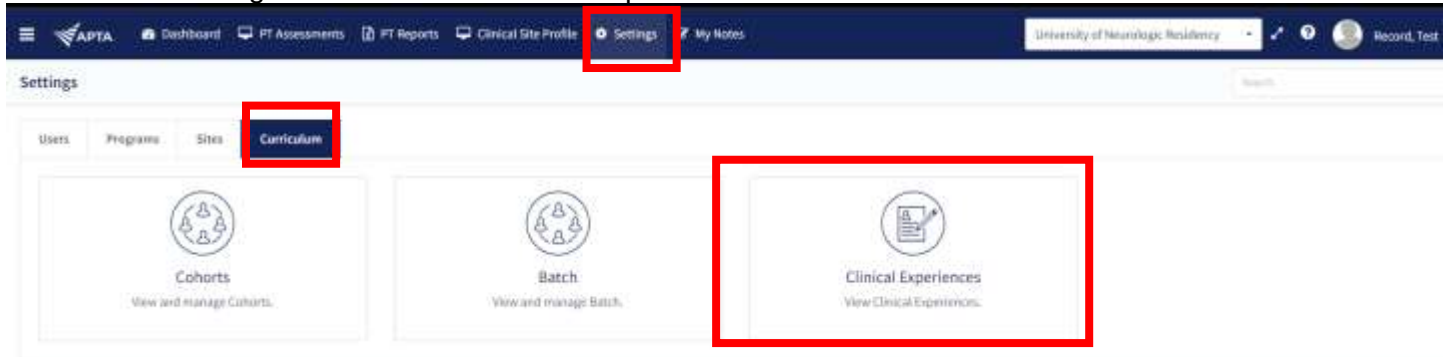
Enter batch details and click **Save**.

Click Batch name to edit Batch Information

Name	Description	Cohort	Delete
Batch 2 2023	test description	2023	[Delete Icon]
Batch 1 2023		2023	[Delete Icon]

Clinical Experiences

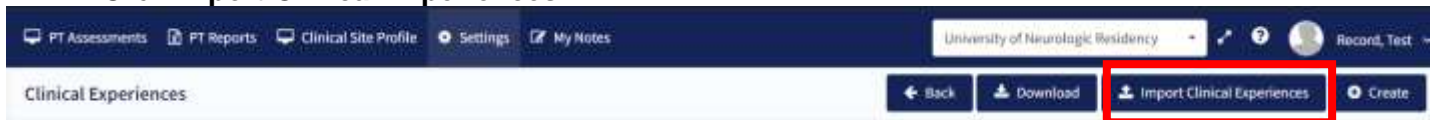
Click Settings > Curriculum > Clinical Experience



Clinical experiences can be entered into the system manually or by importing the data.

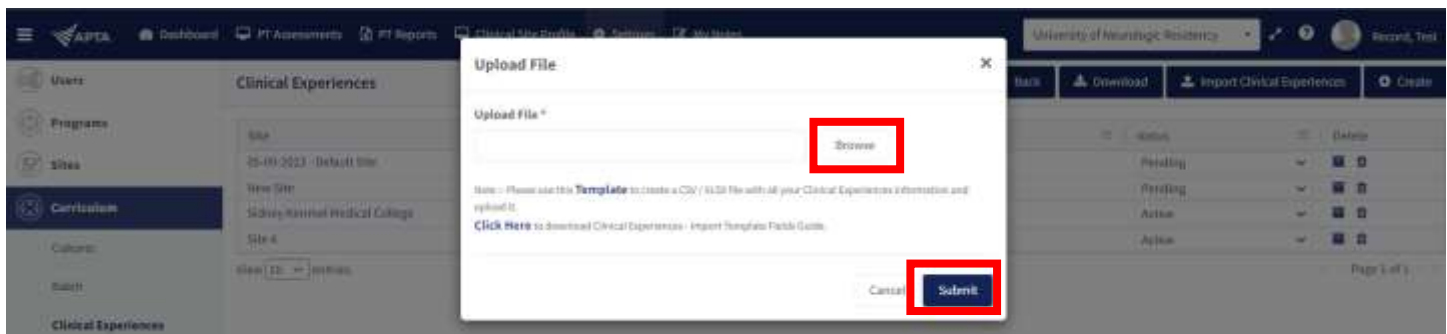
Import Process – allows for multiple experiences to be added to the system at once.

Click **Import Clinical Experiences**



The template will be provided here for you to download if you do not already have it. Also linked here is the list of required fields for the spreadsheet as guidance. **Note* 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.*

Click **Browse** to locate your spreadsheet from your computer upload it to system and click **Submit**.



The Status of newly created and imported Clinical Experiences will remain **Pending** until updated to **Active**. Only Active Clinical experiences will allow rubric assignments and evaluations.

Status may also be used to mark Clinical Experiences as **Completed** or **Archived**



Manual Process

Click **+Create** function to create a single Clinical Experience.



Use the dropdown menus and calendars to complete these fields. Click **SAVE**

Note: If you do not see expected **Site**, **Cohorts**, or **Batch** information in Clinical Experiences dropdowns, return to Settings > Curriculum and use the previous guides to make needed changes.

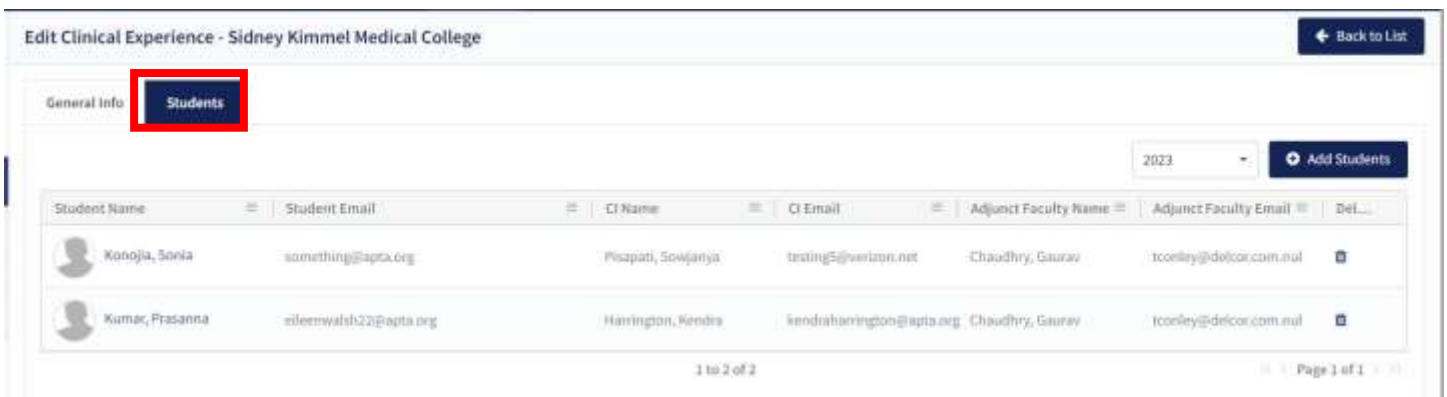
Note: If your program does not conduct a mid-term assessment as part of the Clinical Experience, click Disable Mid-Term Assessment



Click Students to add students to this clinical experience.

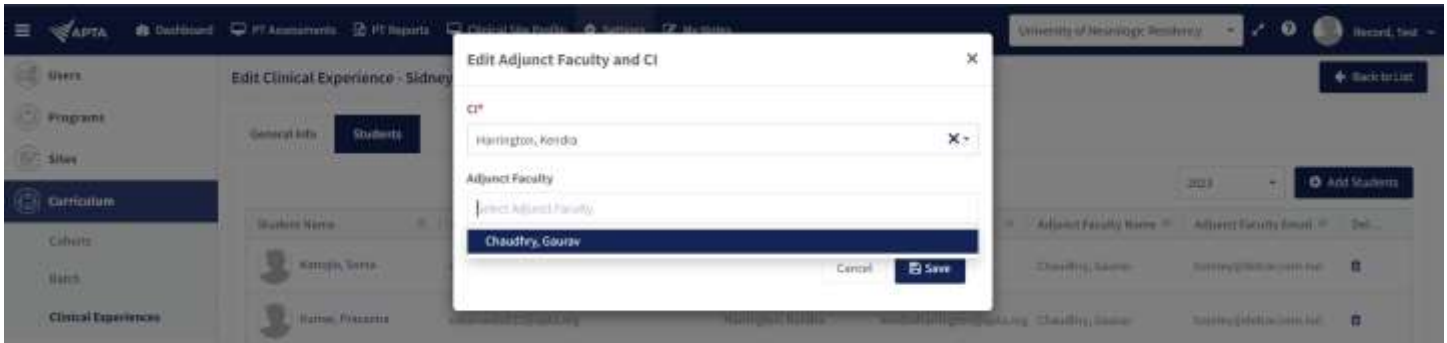
**Note* If you do not see expected Student information in Clinical Experiences dropdowns, return to Settings>Users and use the previous guides to make needed changes.*

Students for this Clinical Experience have been pre-populated according to the Cohort and Batch information on the General Information tab



Student Name	Student Email	CI Name	CI Email	Adjunct Faculty Name	Adjunct Faculty Email	De...
Konoja, Sonia	something@apta.org	Pisapati, Sowjanya	testing5@verizon.net	Chaudhry, Gaurav	tconley@delcor.com.nul	
Kumar, Prasanna	siiteenwalsh22@apta.org	Harrington, Kendis	kendiaharrington@apta.org	Chaudhry, Gaurav	tconley@delcor.com.nul	

Click the student's name to assign a Clinical Instructor and/or Adjunct Faculty Member to complete evaluations for this student. (this will open in a pop up window). Click **Save**.

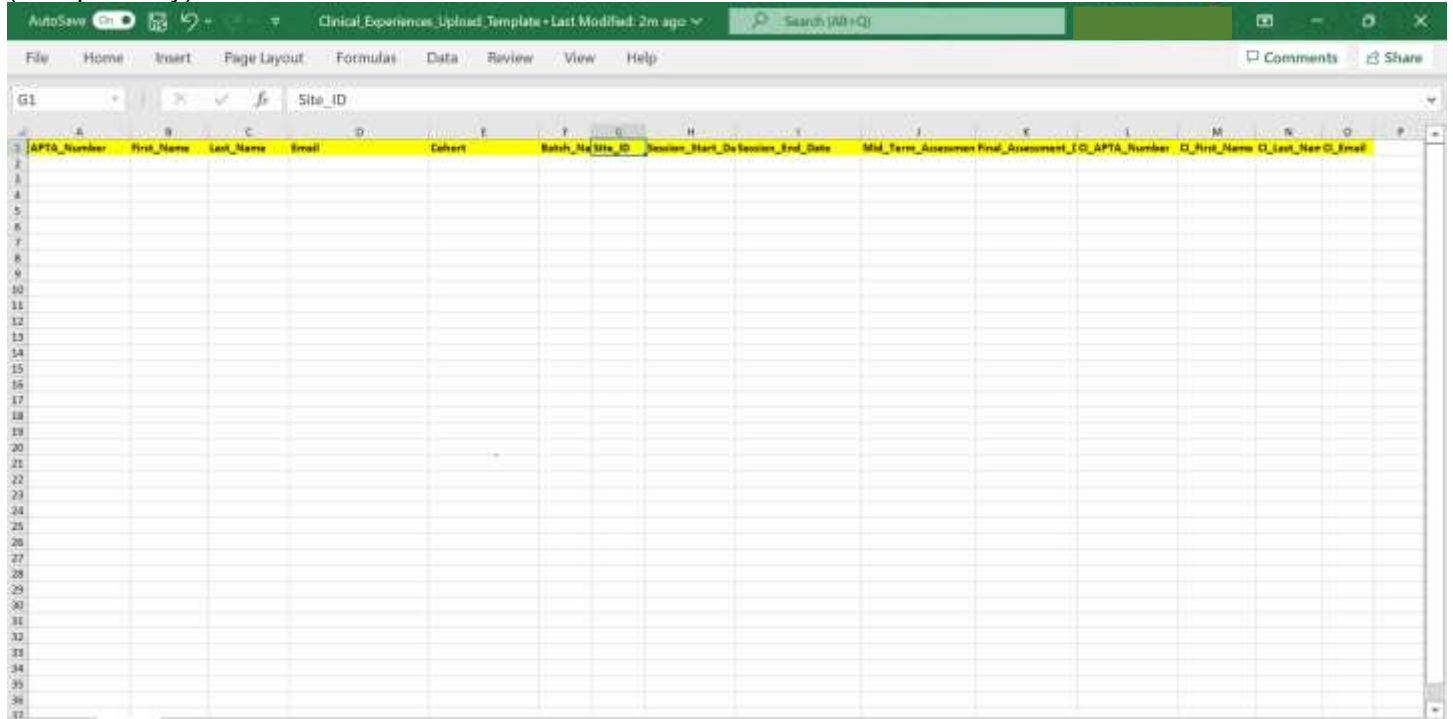


For additional guidance:

Email CPI@APTA.com or call 703-684-2782.

Appendix A: Clinical Experiences Import Template

(Sample Only)



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	APTA_Number	First_Name	Last_Name	Email	Cohort	Batch_No	Site_ID	Session_Start_Date	Session_End_Date	Mid_Term_Assessment	Final_Assessment	APTA_Number	First_Name	Last_Name	Email	
1																
2																
3																
4																
5																
6																
7																
8																
9																
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11																
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Appendix B: Clinical Experiences - Import Template Fields Guide

Clinical Experiences - Import Template Fields Guide

Column Name	Mandatory	Description
APTA_Number	No	Student APTA number. <ul style="list-style-type: none"> APTA Number and Email Address must be affiliated with the same APTA account.
First_Name	Yes	Student First Name.
Last_Name	Yes	Student Last Name.
Email	Yes	Student Email. <ul style="list-style-type: none"> APTA Number and Email Address must be affiliated with the same APTA account.
Cohort	Yes	Student Cohort. <ul style="list-style-type: none"> Must be entered into the system prior to import. Example: Cohort: Class of 2025, Batch: 2023 Summer Session 1
Batch_Name	Yes	Student Batch – learner group within a cohort. <ul style="list-style-type: none"> Will automatically populate with the import. Example: Cohort: Class of 2'025, Batch: 2023 Summer Session 1
Site_ID	Yes	Site ID – Copy from Manage Sites Page. <ul style="list-style-type: none"> All Sites must be populated in the CPI 3.0 system prior to import. Cell format must be Text.
Session_Start_Date	Yes	Clinical Experience Start Date. <ul style="list-style-type: none"> Date Format – MM/DD/YYYY
Session_End_Date	Yes	Clinical Experience End Date. <ul style="list-style-type: none"> Date Format – MM/DD/YYYY
Mid_Term_Assessment_Date	No	Clinical Experience Mid Term Assessment Due Date. <ul style="list-style-type: none"> Date Format – MM/DD/YYYY
Final_Assessment_Date	No	Clinical Experience Final Assessment Due Date. <ul style="list-style-type: none"> Date Format – MM/DD/YYYY
CI_APTA_Number	No	CI APTA number. <ul style="list-style-type: none"> APTA Number and Email Address must be affiliated with the same APTA account.
CI_First_Name	No	CI First Name.
CI_Last_Name	No	CI Last Name.
CI_Email	No	CI Email. <ul style="list-style-type: none"> APTA Number and Email Address must be affiliated with the same APTA account.

IMPORTANT: Do not make any changes in the template – E.g. (Adding / Removing / Renaming Columns)