

Clinical Performance Instrument (CPI) 3.0

**Director of Clinical Education
Academic Coordinator of Clinical
Education**

**Associate Director of Clinical
Education**

Administrative Staff

User Guide

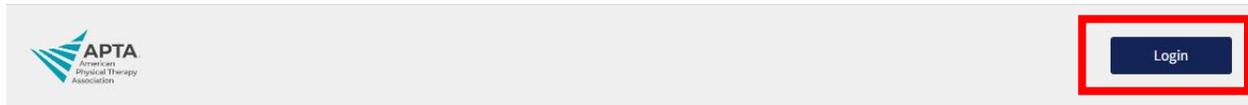
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Login

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

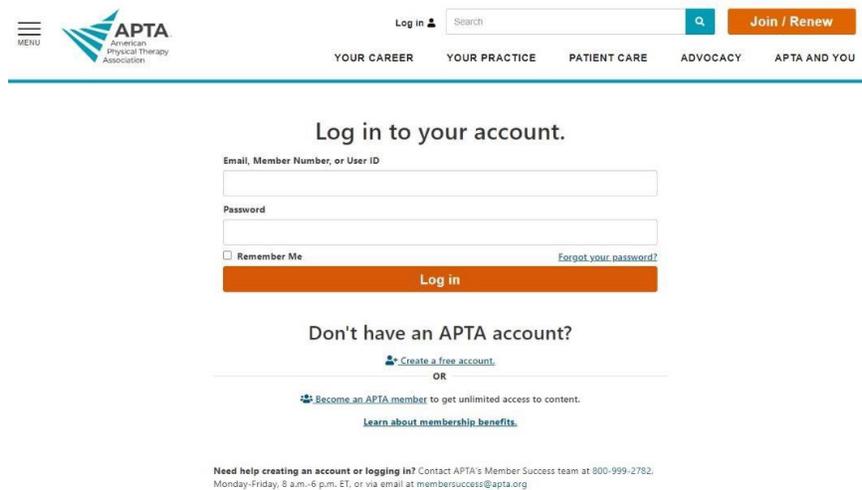
Click **Login**.



Welcome to APTA's Clinical Performance Instrument 3.0!

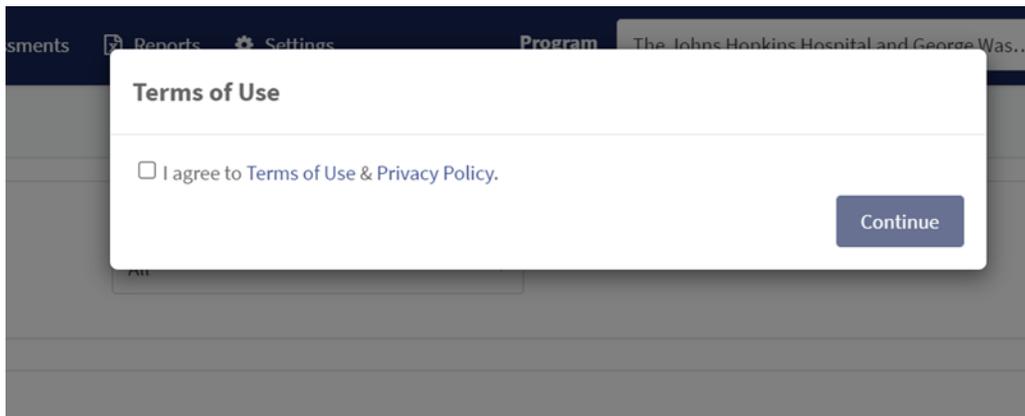
For questions about the instrument contact CPI@apta.org or call 703-706-8582.
For APTA username and password issues, contact APTA's Member Success team at membersuccess@apta.org.

Log in to your account using your APTA login credentials.

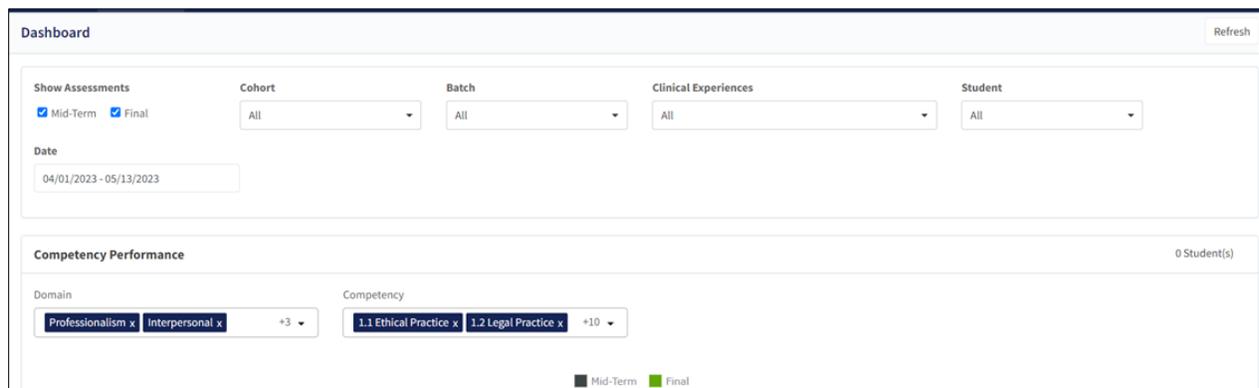


For login issues: Email membersuccess@apta.org or call 800-999-2782. This includes situations of multiple APTA accounts, password reset, and updating email addresses.

Agree to the **Terms of Use**.



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



Programs Staff (DCE/ACCE, ADCE, Admin Staff) will be able to see the aggregate data for the program(s) he or she is associated with on the graphs on the dashboard.

System Overview

Menu Icons



 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>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>

Program Users

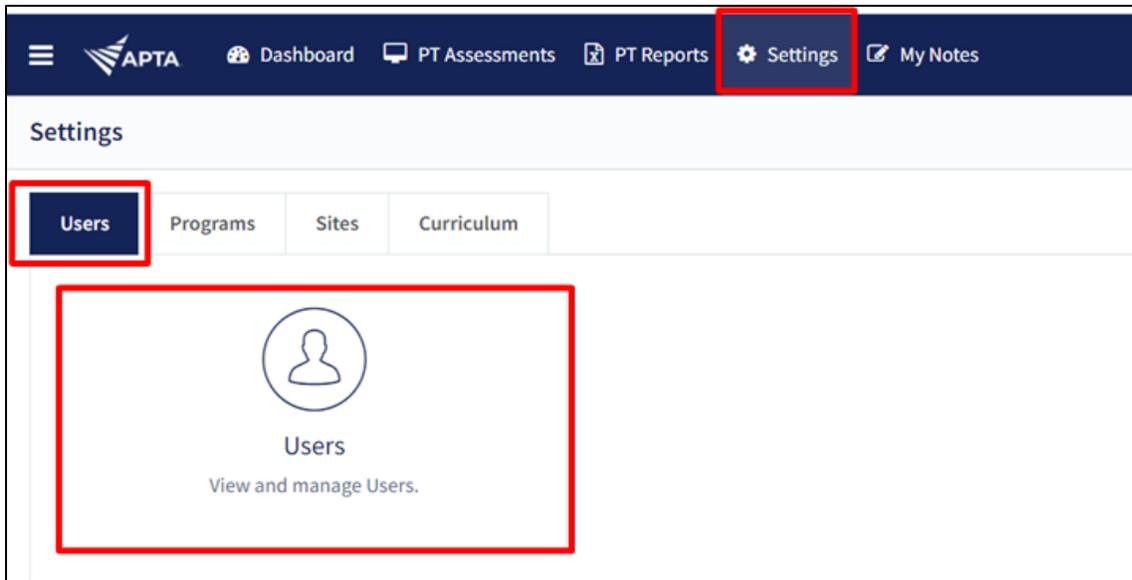
The Users page allows you to view and manage all individuals associated with your program. This includes DCEs, ADCEs, Adjunct Faculty, Administrative Staff, and Students.

DCE/ACCE, ADCE, Administrative Staff	Permissions to create and review clinical experiences.
Adjunct Faculty	View only permissions for 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.



Name ↑	Email	Cohort	Role	Programs	CPI Course S...	Status
Amesbury, Sarah	sarahamesbury@apta.org	Class of 2024	Student	University of Maryland Baltimore		Active Inactive Retire
Cabal, Armand	armandcabal@apta.org	Class of 2024	Student	University of Maryland Baltimore		Active Inactive Retire
Heane, Linsey	linseyheane@apta.org		Director of Clinical Education (DCE)	University of Maryland Baltimore	Completed	
Lambert, Candace	candacelambert@apta.org	Class of 2025	Student	University of Maryland Baltimore		Active Inactive Retire
Record, Test	membershiptest@apta.org.nul		Administrative Staff	University of Maryland Baltimore		

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

Note:

- The CPI Course Status column will populate during the 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 sections. 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.

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

Name ↑	Email	Cohort	Role	Programs	CPI Co...
Amesbury, Sarah	sarahamesbury@apta.org	Class of 2024	Student	University of Maryland Baltimore	
Cabal, Armand	armandcabal@apta.org	Class of 2024	Student	University of Maryland Baltimore	

2. In the pop-up, enter the email associated with user’s APTA (member or non-member) account and click **Search**.

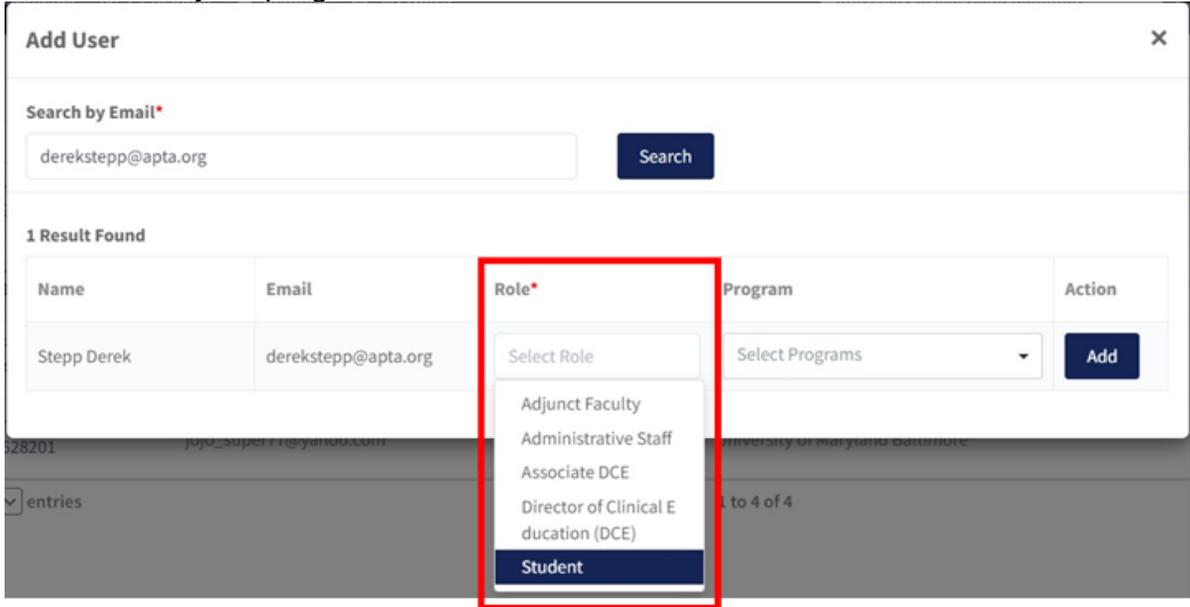
Add User

Search by Email*

derekstepp@apta.org

Search

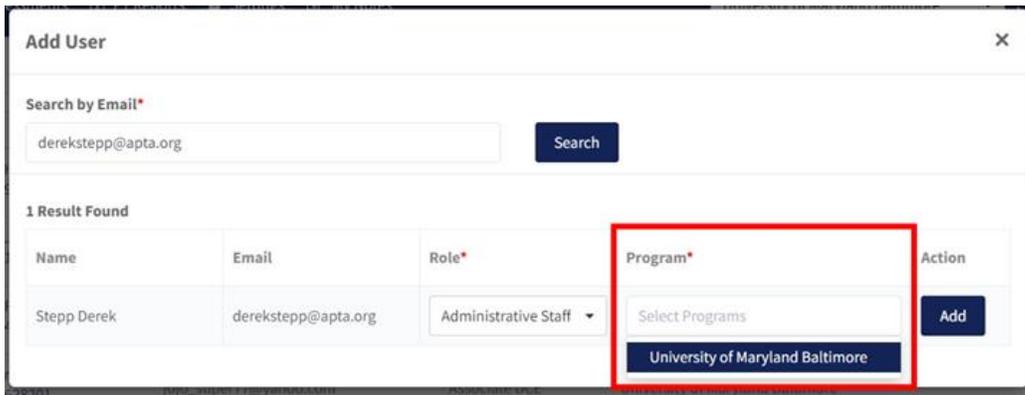
- When the results populate, select the role from drop-down list to indicate the user's role in your program.



The screenshot shows the 'Add User' form with the search results table. The 'Role' dropdown menu is open, showing options: Select Role, Adjunct Faculty, Administrative Staff, Associate DCE, Director of Clinical Education (DCE), and Student. The 'Student' option is highlighted.

Name	Email	Role*	Program	Action
Stapp Derek	derekstapp@apta.org	Select Role	Select Programs	Add

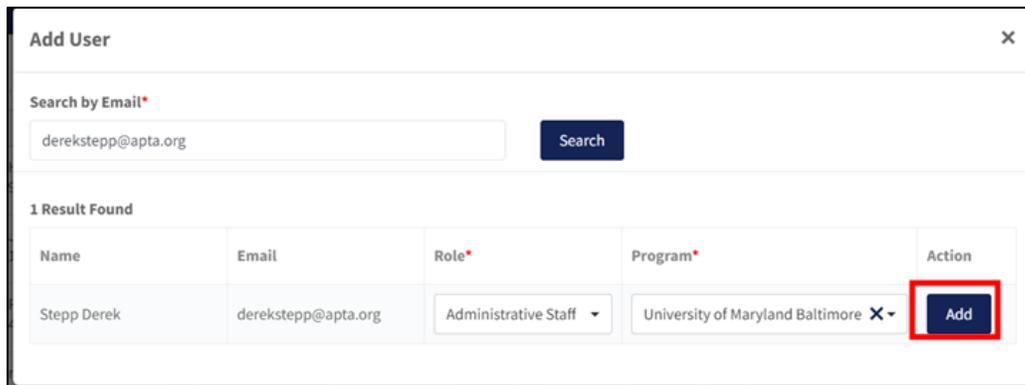
- Select your program from the drop-down list.



The screenshot shows the 'Add User' form with the search results table. The 'Program' dropdown menu is open, showing the option: University of Maryland Baltimore.

Name	Email	Role*	Program*	Action
Stapp Derek	derekstapp@apta.org	Administrative Staff	Select Programs	Add

- Click **Add**.



The screenshot shows the 'Add User' form with the search results table. The 'Add' button is highlighted.

Name	Email	Role*	Program*	Action
Stapp Derek	derekstapp@apta.org	Administrative Staff	University of Maryland Baltimore	Add

Program Details

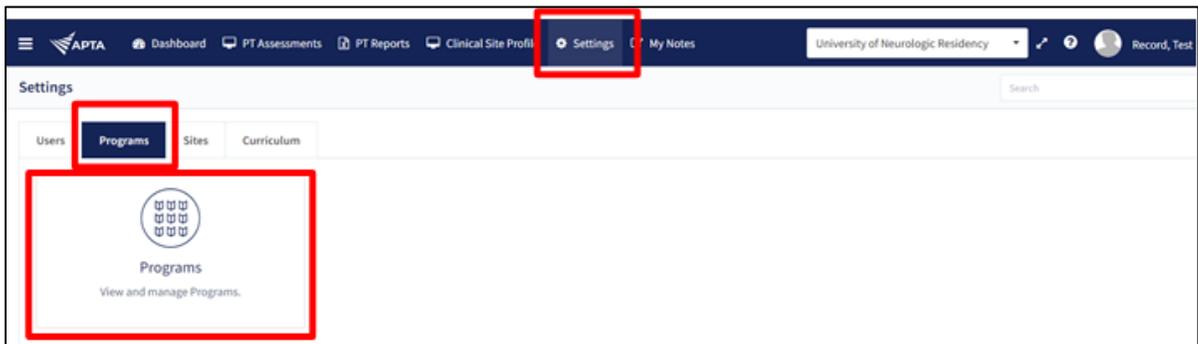
The Program page allows you to update your program information, including address, phone number and email address. Also on this page is the ability to control how you would like to share the CI CPI with your student, automatically or manually. The difference is explained in the table below.

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.

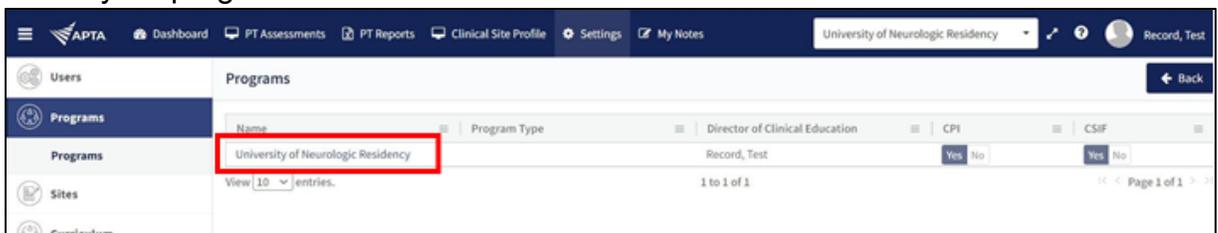
Please note: The Student CPI evaluation will be shared with the CI upon submission independently of the choice selected here.

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.

Basic Details

Program name * University of Maryland Baltimore	Program Type PT	Director of Clinical Education Heane, Linsey
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)

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:

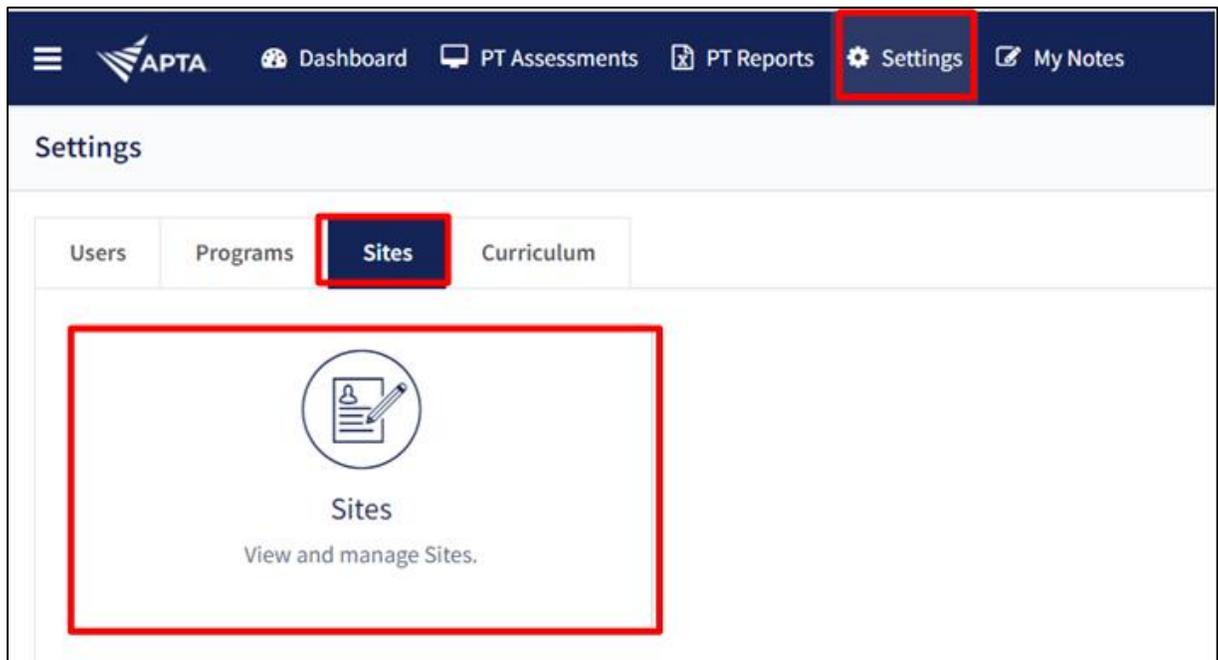
1. Creating/Adding Clinical Sites
2. Creating the Cohorts
3. Creating Clinical Experiences
 - a. Manual Process
 - b. Automatic/Spreadsheet Process
4. Releasing Clinical Experiences to Students and CIs

The next set of instructions will follow this workflow.

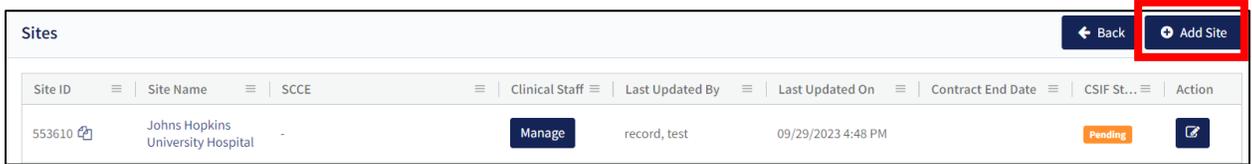
Creating and Adding Clinical Sites

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.

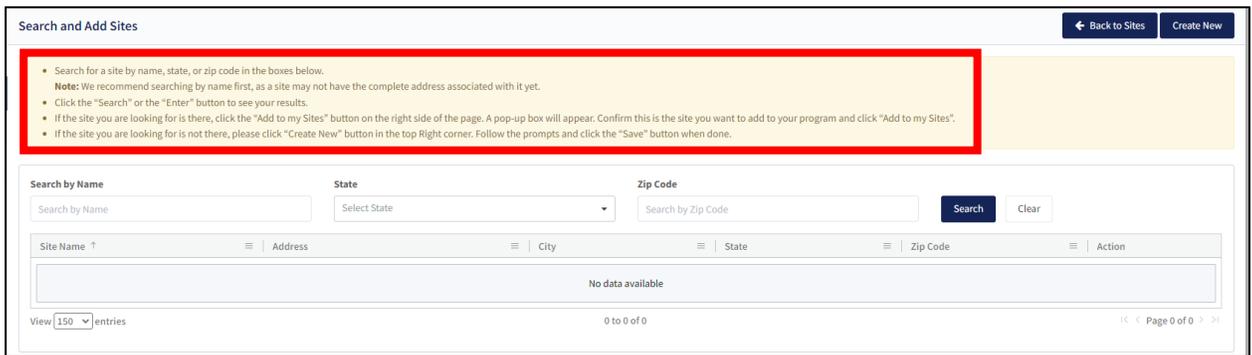


3. Click **+ Add Site** in the top right corner of your screen.

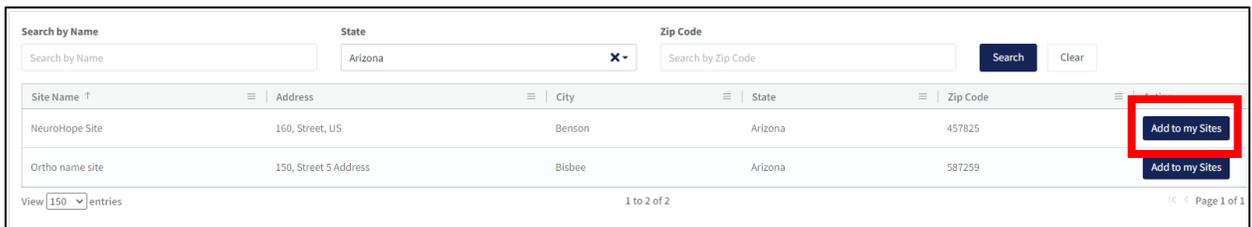


4. Follow the instructions on the next screen to search for your site.

- If the site you are looking for populates, proceed to Step 5.
- If the site you are looking for does not populate, proceed to Step 9.



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



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

Add Site ✕

Name of Clinical Site*

NeuroHope Site

Address*

160, Street, US

City* **State***

Benson Arizona ✕

Zip Code*

457825

Contract Auto Renew

Contract Start Date **Contract End Date**

Select 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

sarahamesbury@apta.org **Search**

1 Result Found

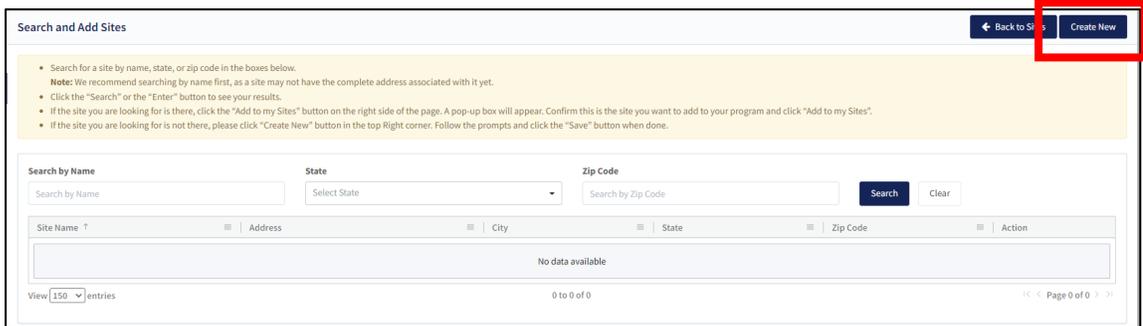
Name	Email	Role	Program
Amesbury, Sarah	sarahamesbury@apta.org	Site Coordinator of Clinical Education (SCCE)	University of Maryland Baltimore ▾

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

Close **Add to my Sites**

- Then click **Add to my Sites** (shown in the image above). The clinical site will not appear in your list of sites.

9. 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

← Back to Sites **Create New**

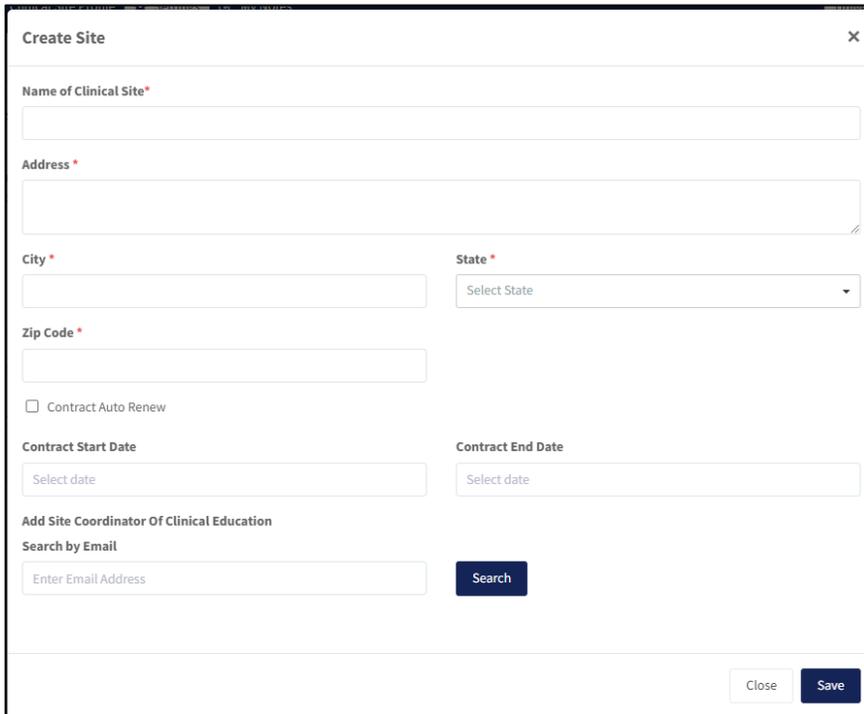
- Search for a site by name, state, or zip code in the boxes below.
- Note: We recommend searching by name first, as a site may not have the complete address associated with it yet.
- Click the "Search" or the "Enter" button to see your results.
- If the site you are looking for is there, click the "Add 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**

Site Name ↑	Address	City	State	Zip Code	Action
No data available					

View entries 0 to 0 of 0 Page 0 of 0

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



Create Site [Close]

Name of Clinical Site*

Address*

City* State*

Zip Code*

Contract Auto Renew

Contract Start Date Contract End Date

Add Site Coordinator Of Clinical Education

Search by Email **Search**

Save

11. 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

Search

1 Result Found

Name	Email	Role	Program
Amesbury, Sarah	sarahamesbury@apta.org	Site Coordinator of Clinical Education (SCCE)	University of Maryland Baltimore ▾

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

Close

Save

12. Click **Save** (shown in the image above). The clinical site will not appear in your list of sites.

Notes:

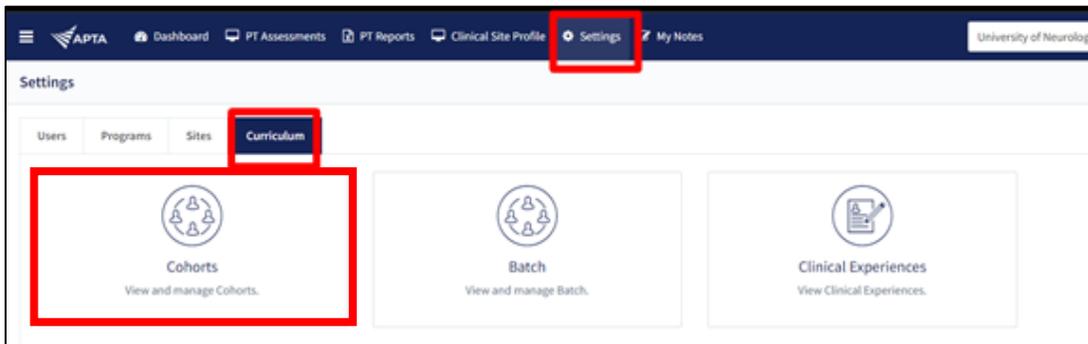
- The process for CIs to the clinical sites is discussed in the Manual and Automatic/Spreadsheet process for creating the clinical experiences.
- On the Sites page, there are status buttons that will either say Pending or Complete. This refers to the status of the CSIF, which will be discussed later in this guide. These statuses do not affect your clinical experiences.

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

Creating Cohorts

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

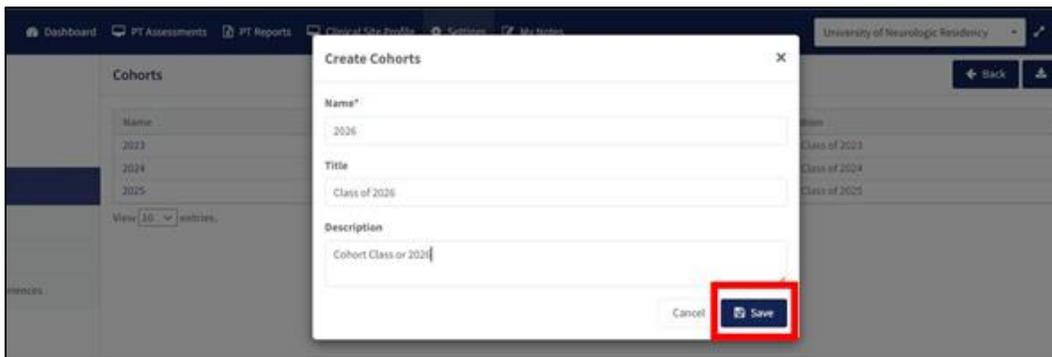
1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Cohorts** icon.



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



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



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.

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 sites and pair with CIs.

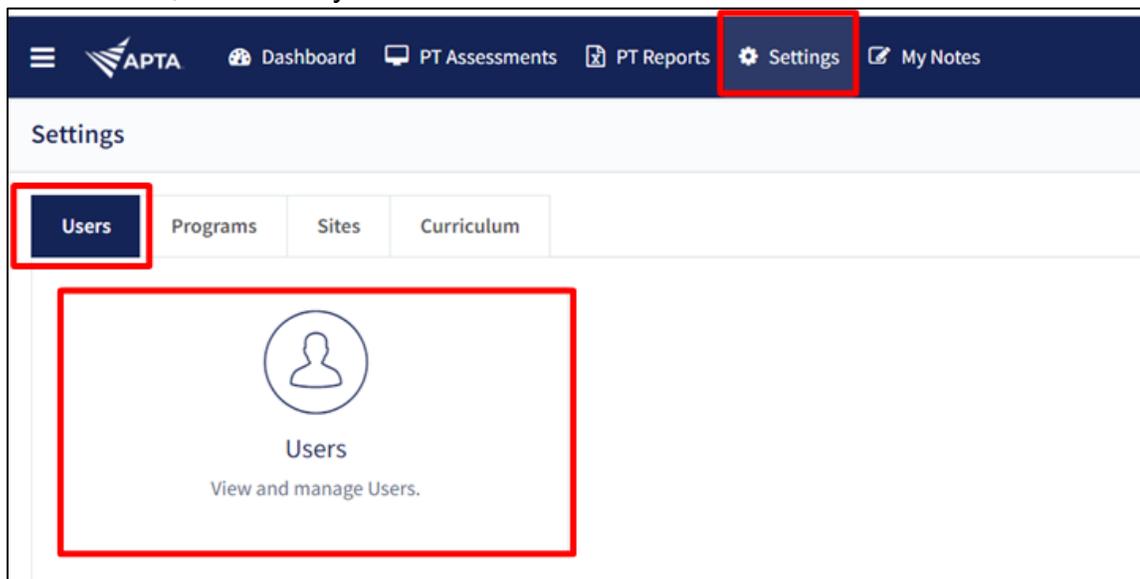
Steps 1 and 2 were discussed previously and this section will pick up at Step 3.

Adding Students as Users

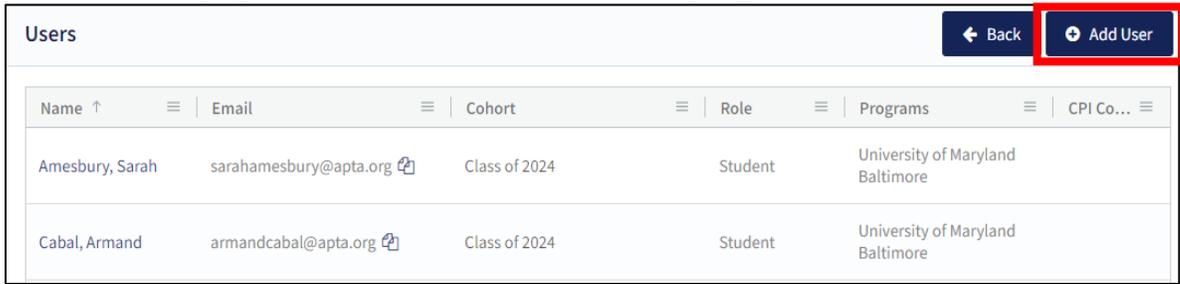
Upon completion of this process, all your students will be listed on the Users page with and assigned to their Cohort.

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

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



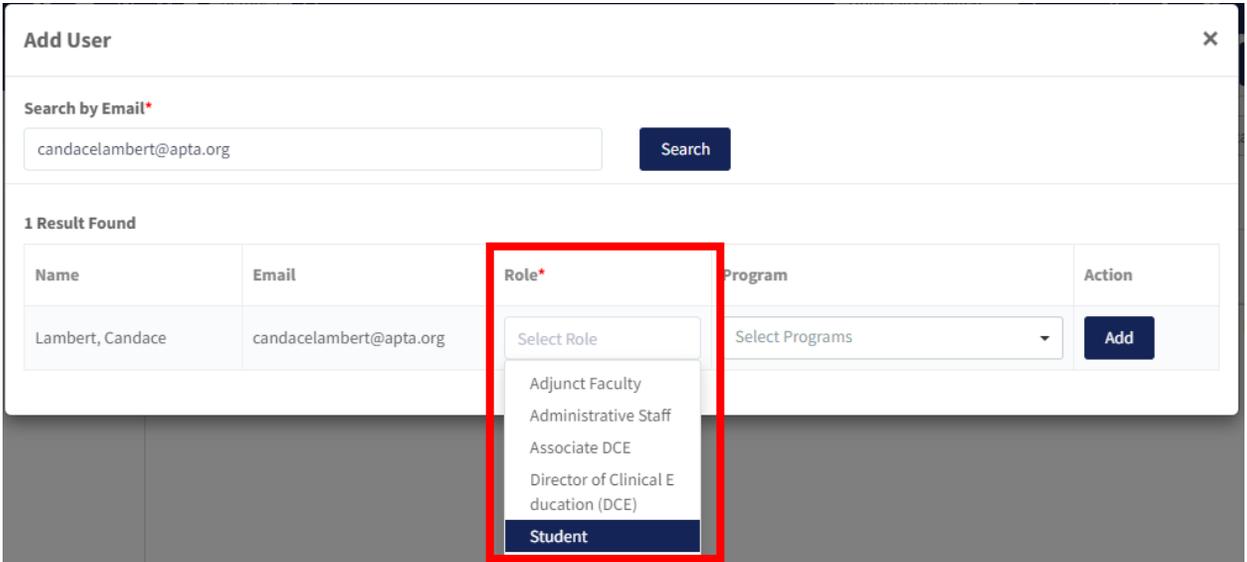
3. On the Users page, click **Add User** located on top right of the screen.



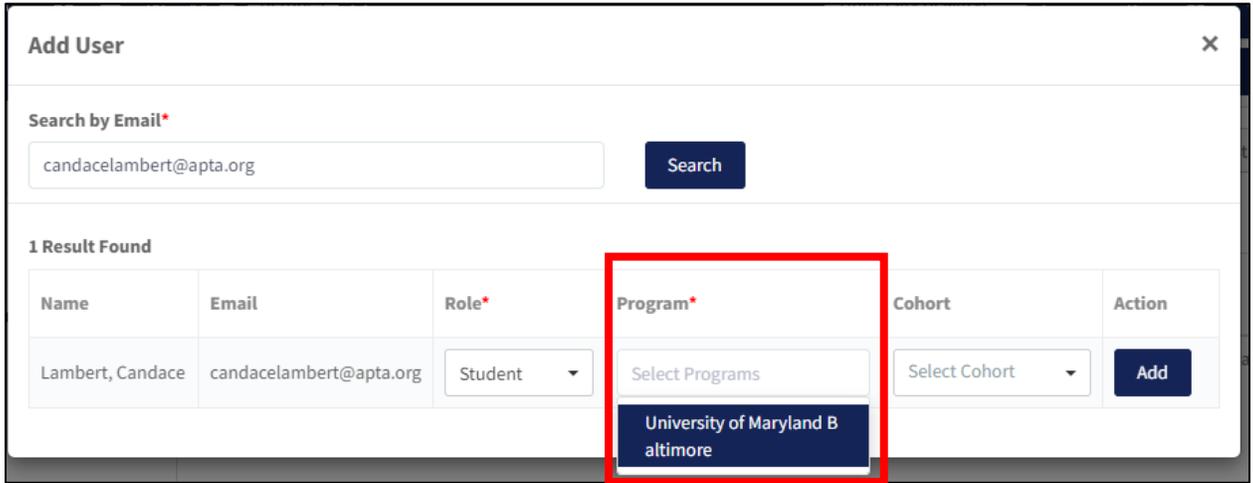
4. In the pop-up, enter the email associated with student's APTA (member or non-member) account and click **Search**.



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



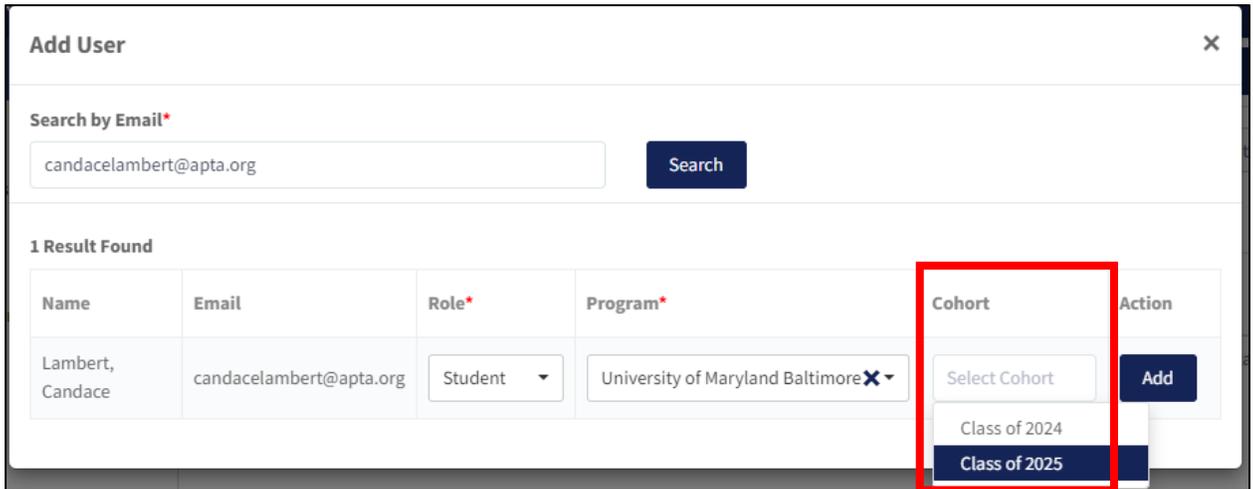
6. Select your program from the drop-down list.



The screenshot shows the 'Add User' form with a search bar containing 'candacelambert@apta.org'. Below the search bar, a table lists one result for 'Lambert, Candace'. The 'Program' dropdown menu is open, showing 'University of Maryland Baltimore' as the selected option.

Name	Email	Role*	Program*	Cohort	Action
Lambert, Candace	candacelambert@apta.org	Student	University of Maryland Baltimore	Select Cohort	Add

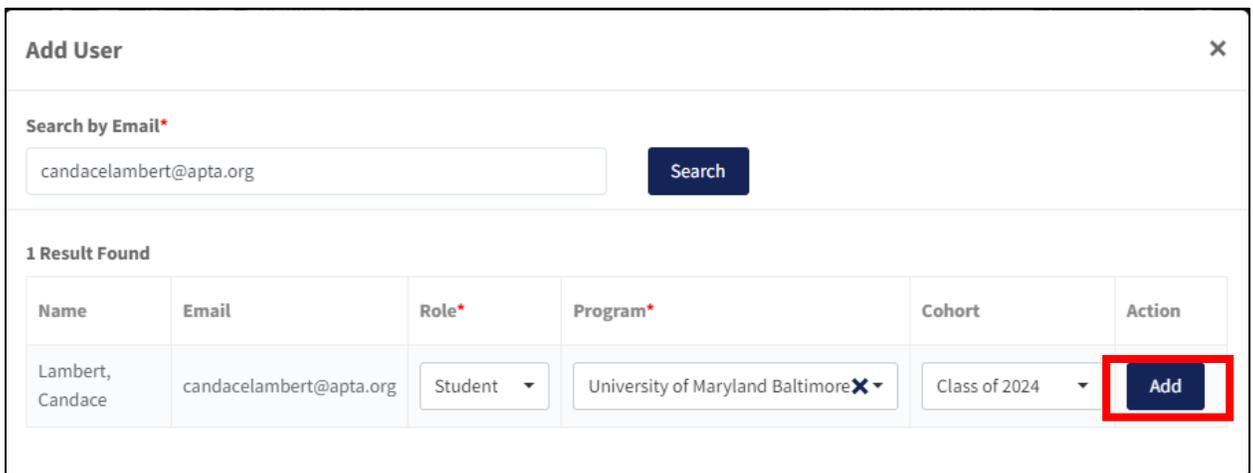
7. Select the Cohort for your student.



The screenshot shows the 'Add User' form with the 'Program' dropdown menu closed and the 'Cohort' dropdown menu open. 'Class of 2025' is selected in the cohort dropdown.

Name	Email	Role*	Program*	Cohort	Action
Lambert, Candace	candacelambert@apta.org	Student	University of Maryland Baltimore	Class of 2025	Add

8. Click **Add**.



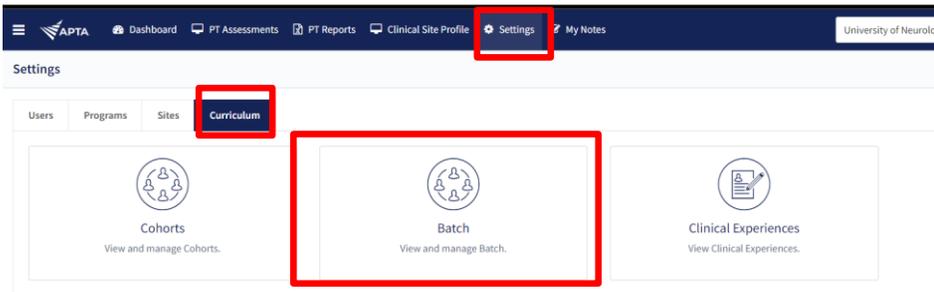
The screenshot shows the 'Add User' form with the 'Add' button highlighted in a red box.

Name	Email	Role*	Program*	Cohort	Action
Lambert, Candace	candacelambert@apta.org	Student	University of Maryland Baltimore	Class of 2024	Add

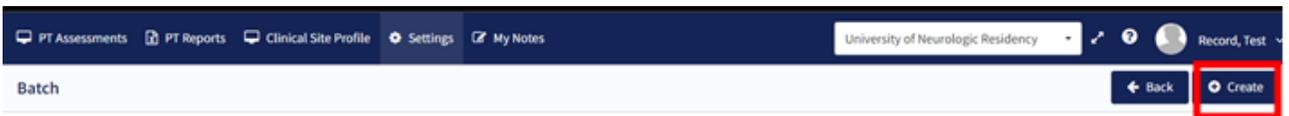
Creating Batches

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.



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



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

Create Batch ✕

Name*

Description

Cohort*

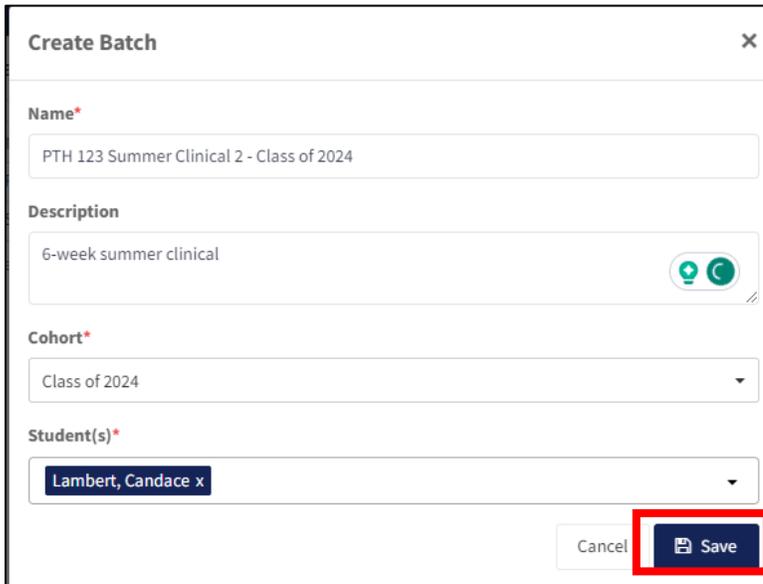
Student(s)*

Select All

Search

Lambert, Candace

5. Click **Save**.



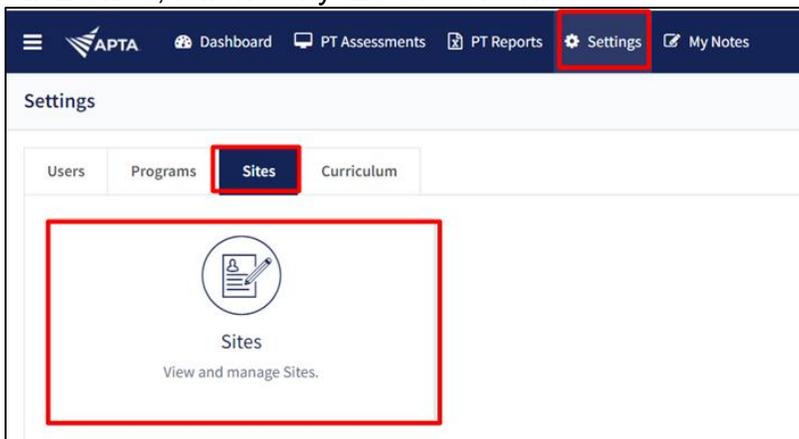
Adding CIs to Sites

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

STOP: If your CI is also the SCCE for this clinical site, please refer to the above instructions for adding the SCCE to the site. 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.
2. Click **Sites**, followed by the **Sites** icon.



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

Site ID	Site Name	SCCE	Clinical S...	Last Updated By	Last Updated On	Contract End Date	CSIF S...	Act...
152225	APTA City Center	-	Manage	Heane, Linsey	09/25/2023 11:08 AM		Pending	
370771	APTA Center	-	Manage	Heane, Linsey	09/26/2023 3:25 PM		Pending	

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

Clinical Staff ✕

+ Add User

Name ↑	Email	Role	Programs	Action
No data available				

View entries 0 to 0 of 0

Page 0 of 0

Close

5. 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

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

Add User ✕

Search by Email*

Search

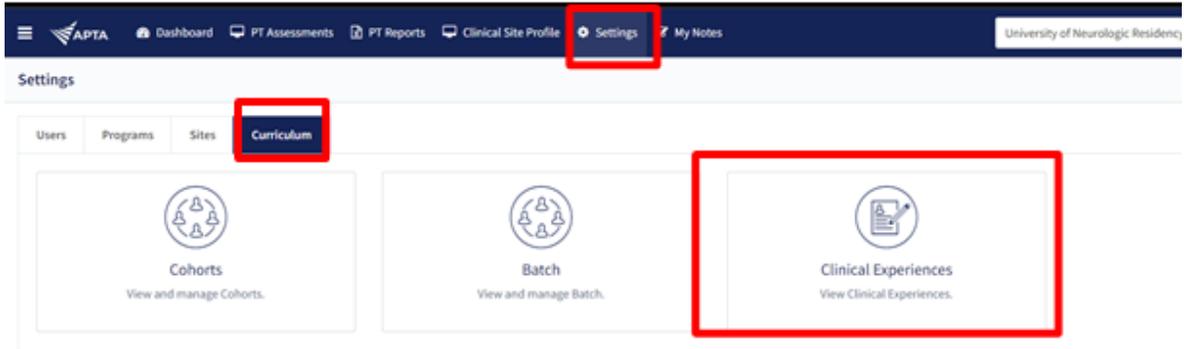
1 Result Found

Name	Email	Role	Program	Action
Hunter, Ian	ianhunter@apta.org	CI	University of Maryland Baltimore	Add

Pairing Students and CIs

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

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

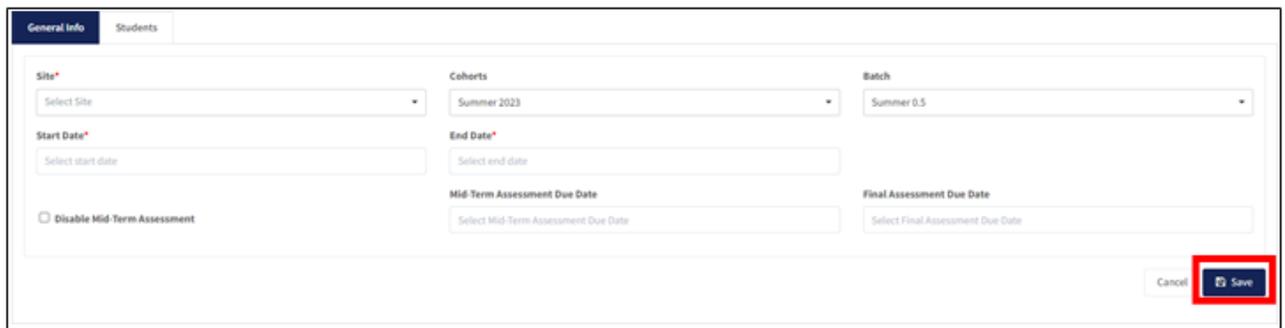


3. Click **+ Create** to create a single clinical experience.

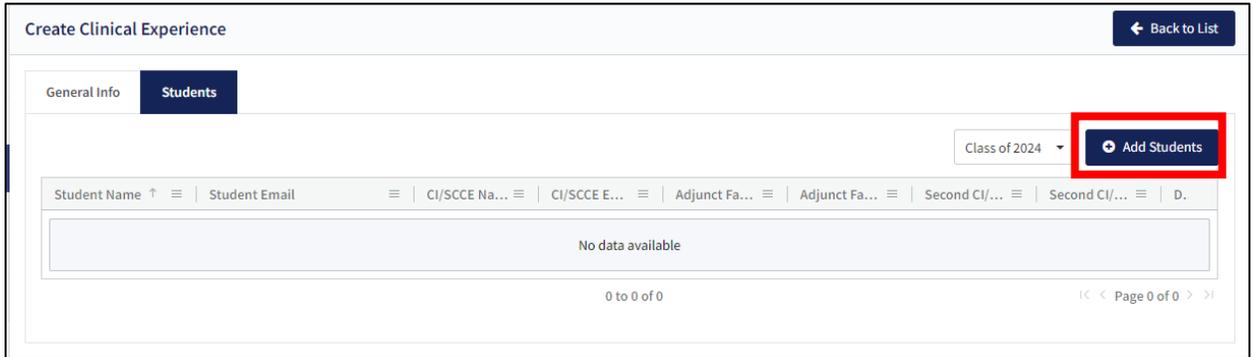


4. Select the Site Name, Cohort and Batch. Enter the clinical experience start and end dates. Although listed, the Midterm and Final due dates are not required.
 - If this clinical experience does not require a midterm, check the checkbox to disable the midterm.

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

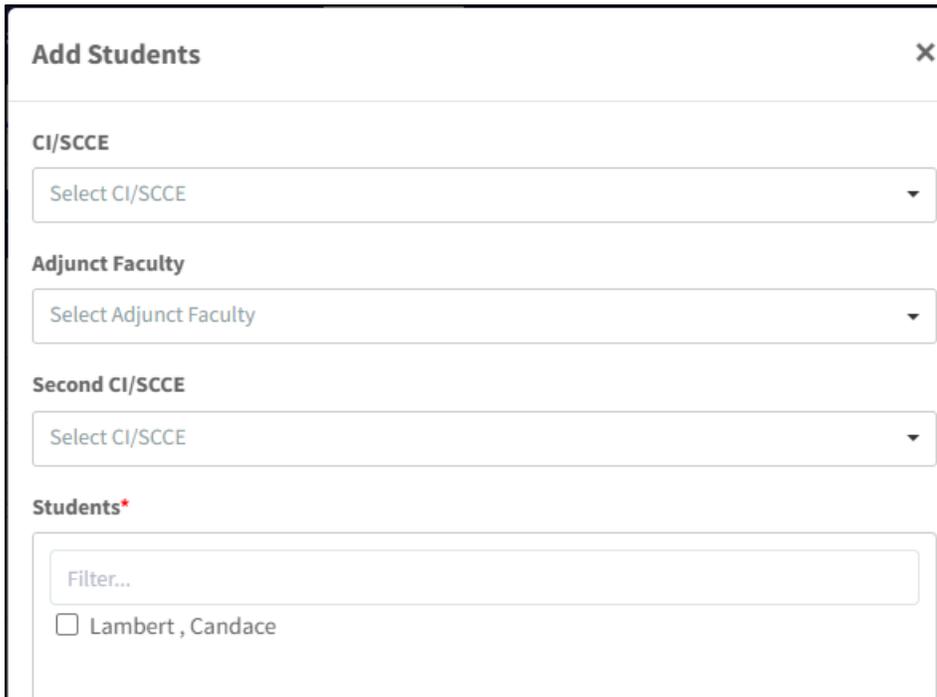


5. The screen will automatically switch to the Student tab. Click **+ Add Student**.

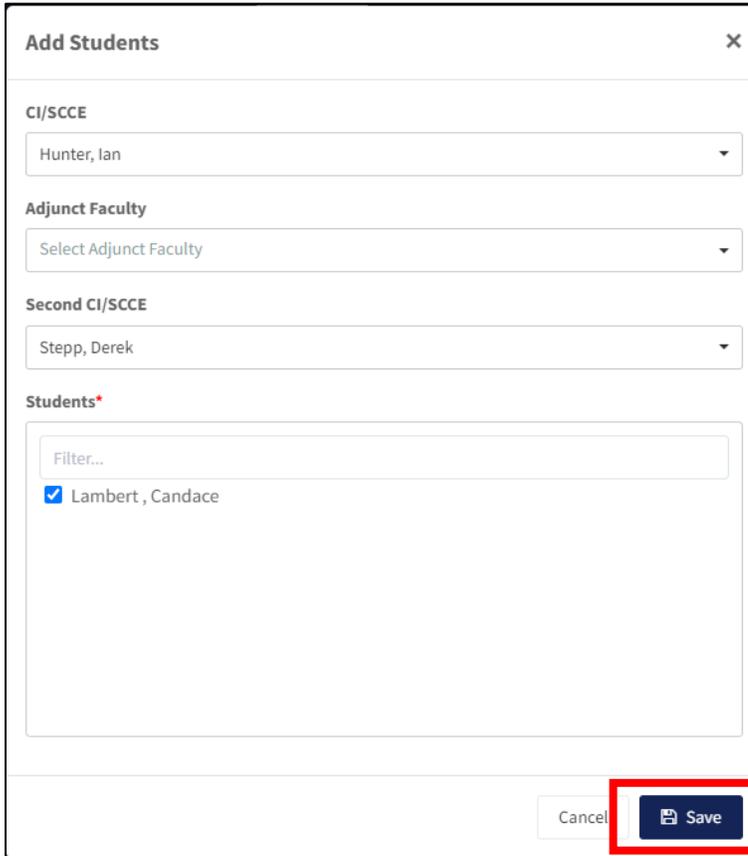


6. In the pop-up window, select the CI from the first drop-down menu and choose the student from the list of students at the bottom.

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

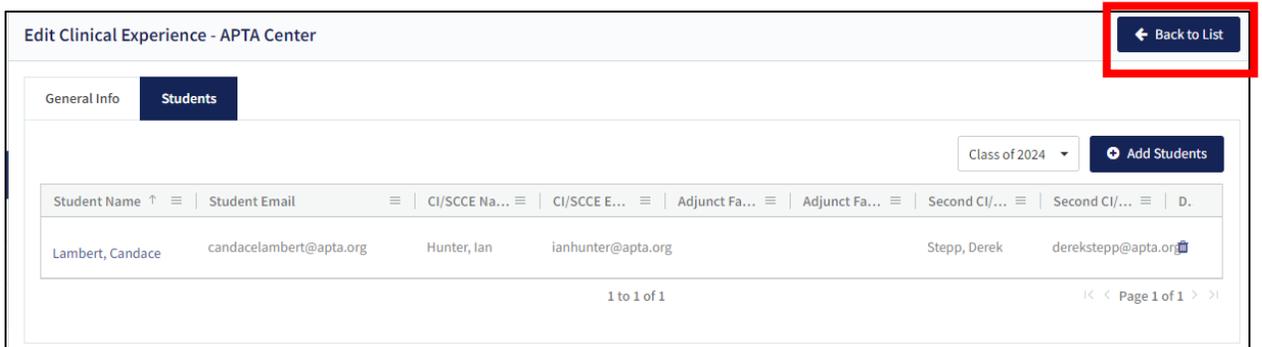


7. Once all the necessary fields have been completed, click **Save**.



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**



Student Name ↑	Student Email	CI/SCCE Na...	CI/SCCE E...	Adjunct Fa...	Adjunct Fa...	Second CI/...	Second CI/...	D.
Lambert, Candace	candacelambert@apta.org	Hunter, Ian	ianhunter@apta.org			Stepp, Derek	derekstepp@apta.org	

- Once you finish creating the clinical experience, it appears on the main list as Pending. To release the evaluation 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!**

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	



- 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 Dashboard **PT Assessments** PT Reports Clinical Site Profile Settings My Notes University of Maryland Baltimore

Assessments

Mid-Term Final

Assessments Overall Status
0%

0 Assessment(s) Complete

1 Assessment(s) Pending

Clinical Experience	Student	Cohort / Batch	Self Asses...	Assigned CI/...	CI Asses...	Shared	Due Date
APTA Center (10/01/2023 - 12/01/2023)	Lambert, Candace	Class of 2024 / PTH 123 Summer Clinical 2 - Class of 2024	Not Started	Hunter, Ian Stepp, Derek	Not Started		Select Date

View 150 entries 1 to 1 of 1

Automatic/Spreadsheet Process for Creating Clinical Experiences

The general workflow with the automatic process is as follows:

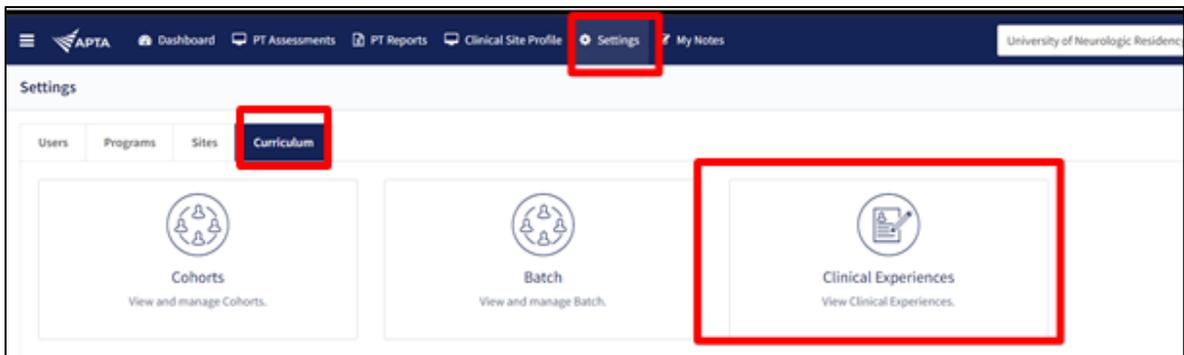
1. Add/Create clinical sites.
2. Create cohort.
3. Obtain and complete spreadsheet.
4. Import spreadsheet to create clinical experiences.
5. Release clinical experiences to students and CIs.

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

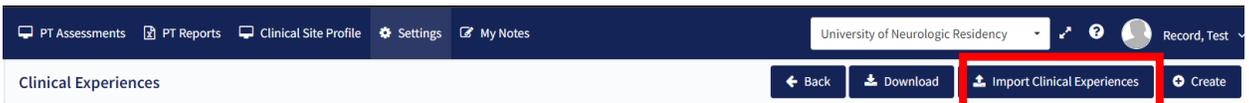
Obtaining and Completing Import Spreadsheet

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

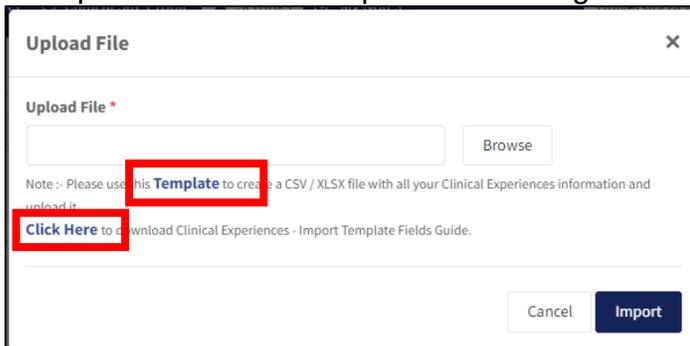
1. Click **Settings** from the top menu bar.
2. Click **Curriculum**, followed by the **Clinical Experiences** icon.



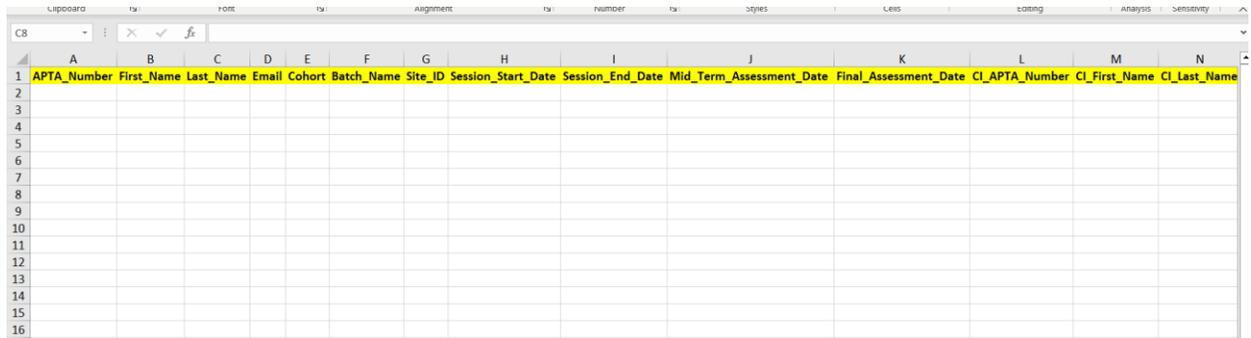
3. Click **Import Clinical Experiences**



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.



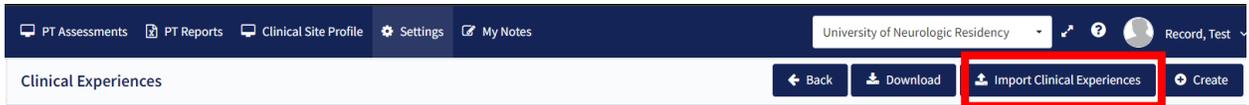
1	APTA_Number	First_Name	Last_Name	Email	Cohort	Batch_Name	Site_ID	Session_Start_Date	Session_End_Date	Mid_Term_Assessment_Date	Final_Assessment_Date	CI_APTA_Number	CI_First_Name	CI_Last_Name
2														
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														

The following columns are required:

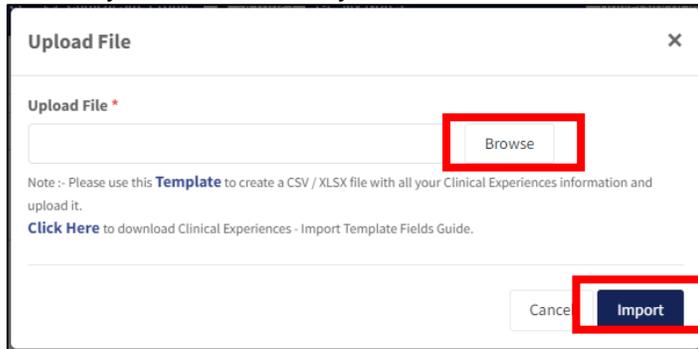
- B – Student First Name
- C – Student Last Name
- D – Student Email Address
- E – Student Cohort (must already be named in the system)
- F – Student Batch
- G – Site ID
 - This ID is found on the Sites page in the first column.
- H – Session Start Date
- I – Session End Date
- M – CI First Name
- N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



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



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

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

Clinical Experience Import Data

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

1 to 2 of 2

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.

10. 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 ...	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

Skip Invalid Records

Cancel Submit

11. 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	🗑️

12. To release the evaluation 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!**

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	🗑️



Confirmation

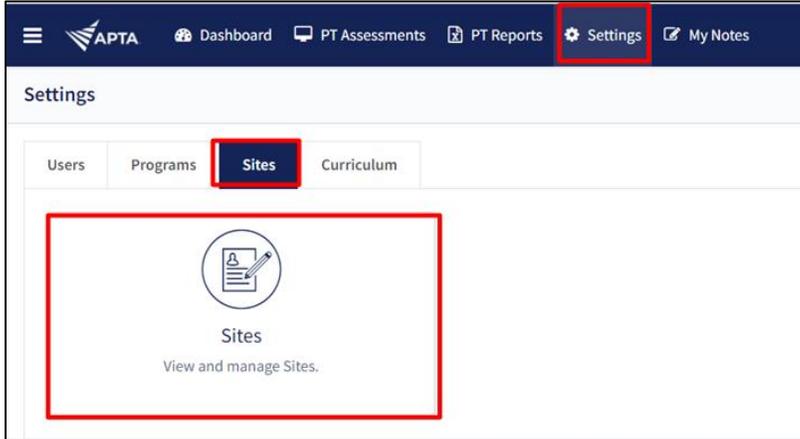
Are you sure you want to active clinical experience?

Cancel **Yes, change it!**

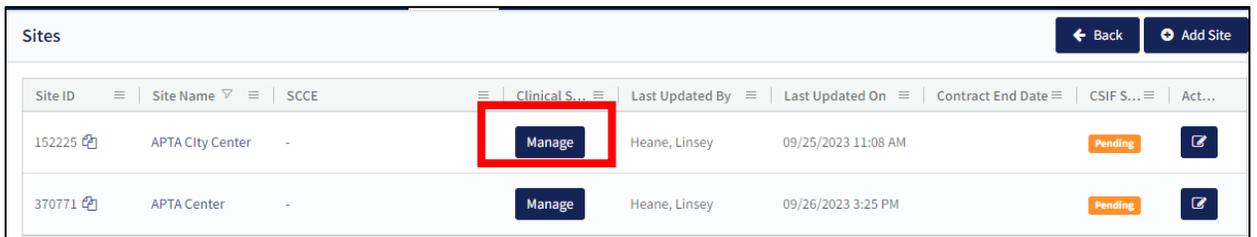
13. To confirm the release, click **PT/PTA Assessments** in the top ribbon, and you will see the active evaluation. Your student and their CI will see it the same way on their screen under the PT/PTA Assessment tab.

Adding a Second CI

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

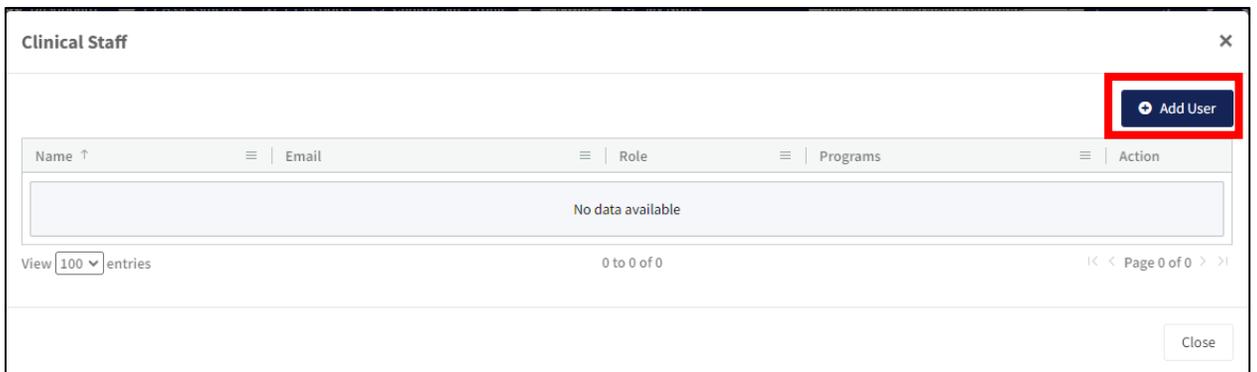


3. Find the site you want to add the CI to and click **Manage**.



Site ID	Site Name	SCCE	Clinical S...	Last Updated By	Last Updated On	Contract End Date	CSIF S...	Act...
152225	APTA City Center	-	Manage	Heane, Linsey	09/25/2023 11:08 AM		Pending	
370771	APTA Center	-	Manage	Heane, Linsey	09/26/2023 3:25 PM		Pending	

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



5. 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.



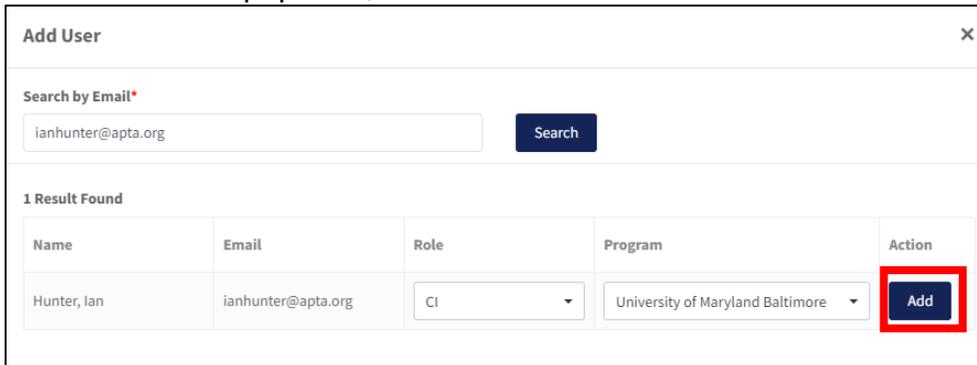
Add User

Search by Email*

ianhunter@apta.org

Search

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



Add User [Close]

Search by Email*

ianhunter@apta.org

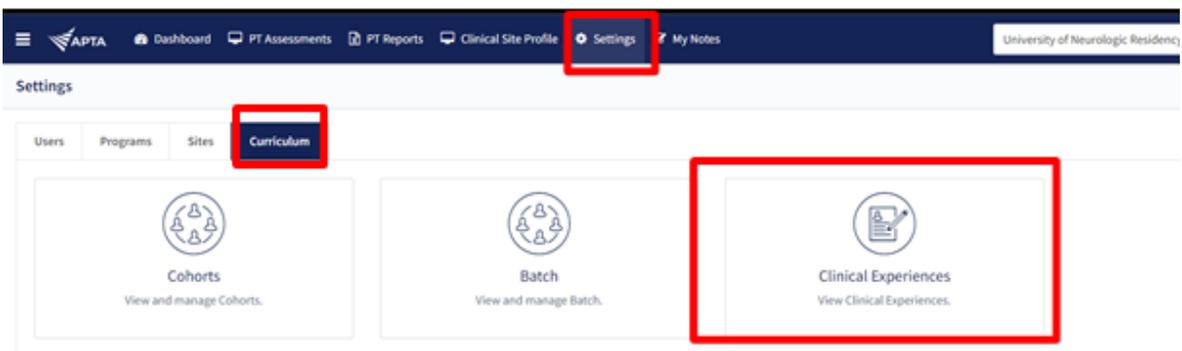
Search

1 Result Found

Name	Email	Role	Program	Action
Hunter, Ian	ianhunter@apta.org	CI	University of Maryland Baltimore	Add

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

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



APTA Dashboard | PT Assessments | PT Reports | Clinical Site Profile | **Settings** | My Notes | University of Neurologic Residency

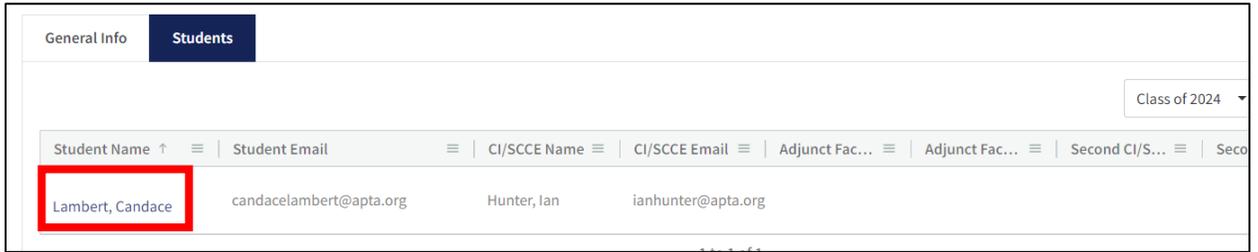
Settings

Users | Programs | Sites | **Curriculum**

Clinical Experiences
View Clinical Experiences.

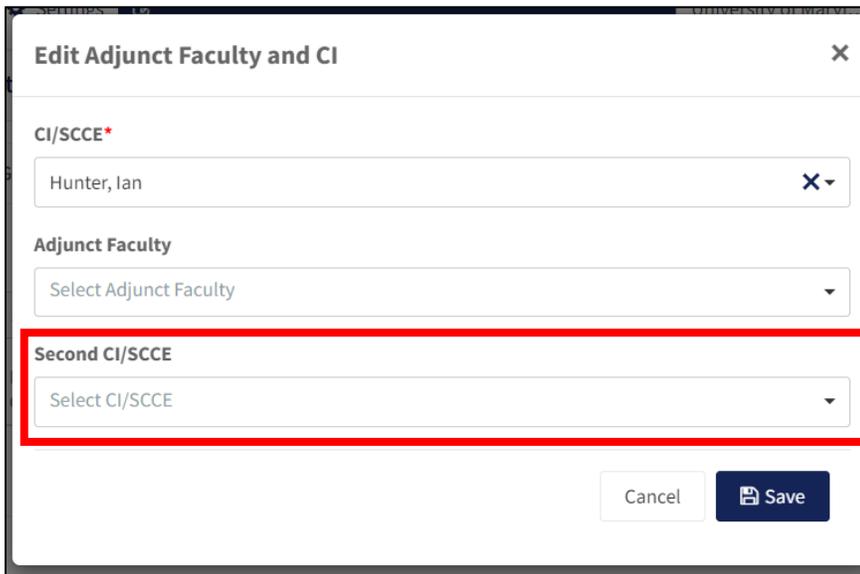
9. Find and click the site name then switch to the student tab.

10. Click the Student's name.



Student Name ↑	Student Email	CI/SCCE Name	CI/SCCE Email	Adjunct Fac...	Adjunct Fac...	Second CI/S...	Seco
Lambert, Candace	candacelambert@apta.org	Hunter, Ian	ianhunter@apta.org				

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



Edit Adjunct Faculty and CI [X]

CI/SCCE*
Hunter, Ian [X]

Adjunct Faculty
Select Adjunct Faculty [v]

Second CI/SCCE
Select CI/SCCE [v]

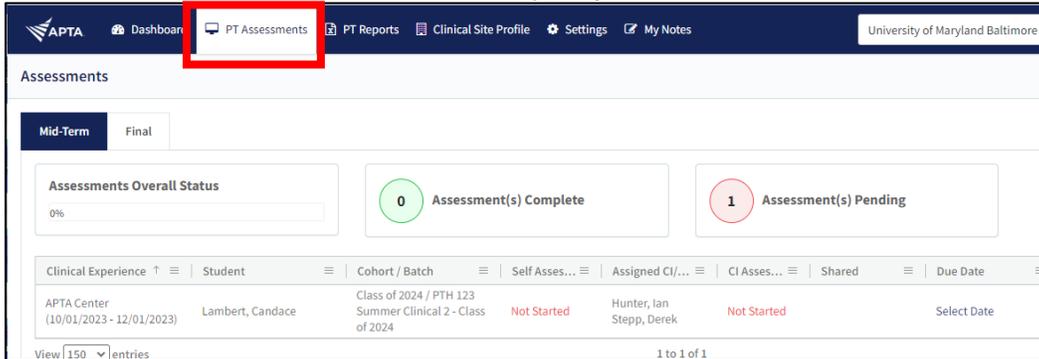
Cancel [Save]

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.

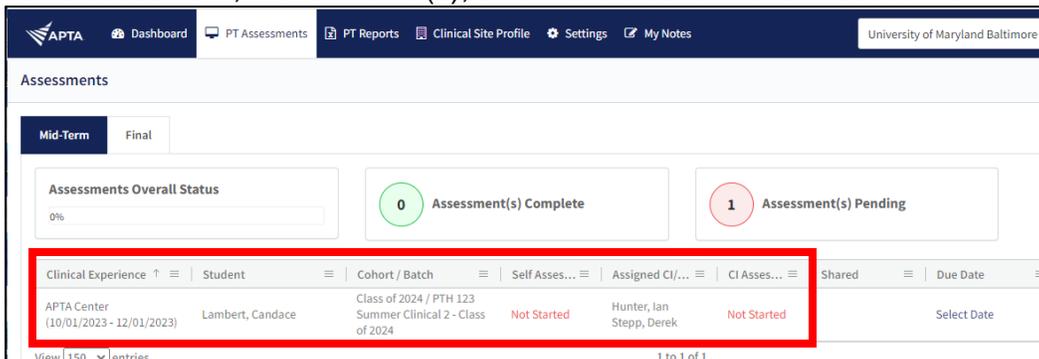
Viewing Assessments

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



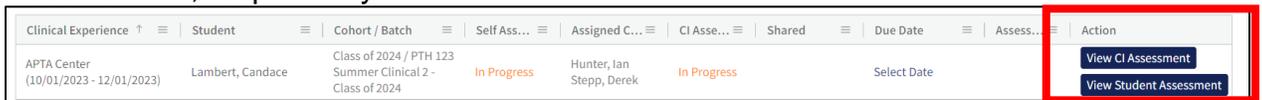
Clinical Experience	Student	Cohort / Batch	Self Asses...	Assigned CI/...	CI Asses...	Shared	Due Date
APT Center (10/01/2023 - 12/01/2023)	Lambert, Candace	Class of 2024 / PTH 123 Summer Clinical 2 - Class of 2024	Not Started	Hunter, Ian Stepp, Derek	Not Started		Select Date

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.



Clinical Experience	Student	Cohort / Batch	Self Asses...	Assigned CI/...	CI Asses...	Shared	Due Date
APT Center (10/01/2023 - 12/01/2023)	Lambert, Candace	Class of 2024 / PTH 123 Summer Clinical 2 - Class of 2024	Not Started	Hunter, Ian Stepp, Derek	Not Started		Select Date

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 Asses...	Assigned C...	CI Asse...	Shared	Due Date	Assess...	Action
APT Center (10/01/2023 - 12/01/2023)	Lambert, Candace	Class of 2024 / PTH 123 Summer Clinical 2 - Class of 2024	In Progress	Hunter, Ian Stepp, Derek	In Progress		Select Date		View CI Assessment View Student Assessment

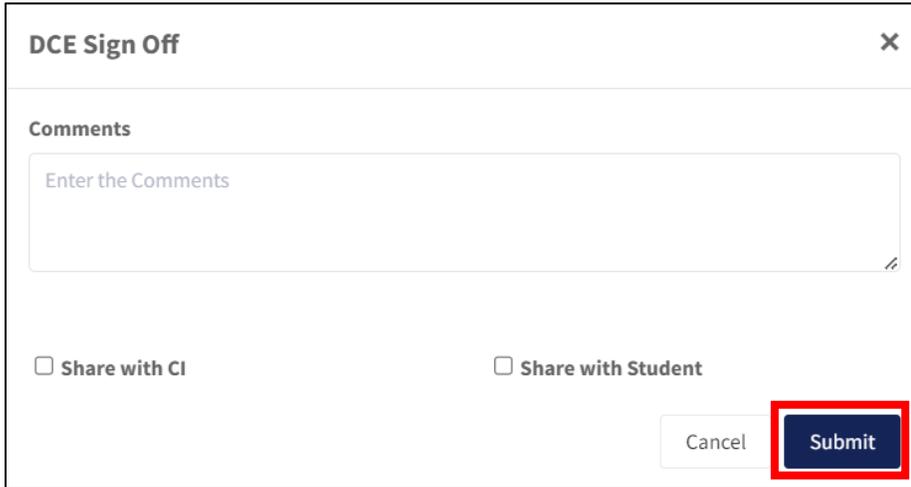
4. Upon completion of the assessments, the status will change to Complete, and the assessments can be reviewed in its entirety.

DCE Sign Off

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



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



A modal form titled 'DCE Sign Off' with a close button (X) in the top right. It contains a 'Comments' section with a text input field labeled 'Enter the Comments'. Below the input field are two checkboxes: 'Share with CI' and 'Share with Student'. At the bottom right, there are two buttons: 'Cancel' and 'Submit' (highlighted with a red box).

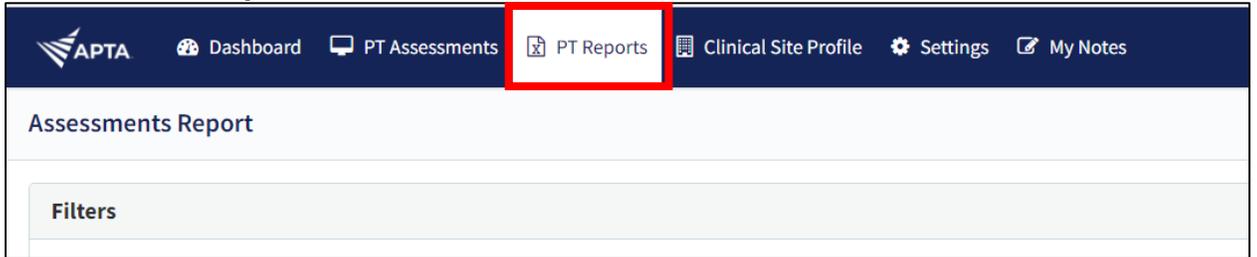
3. Upon clicking Submit, the DCE Sign Off button will turn green to indicate that the sign off process is complete.



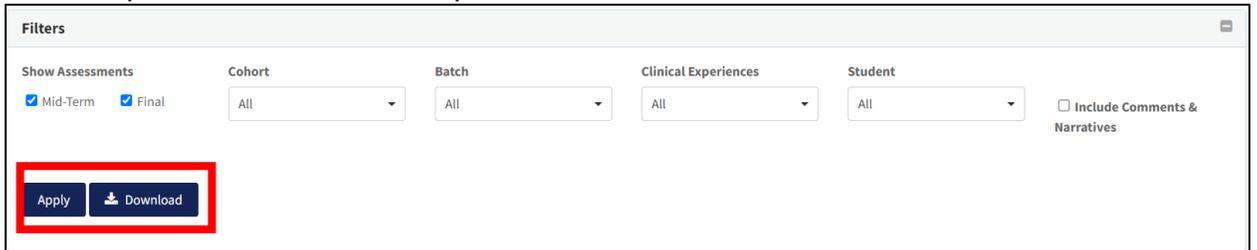
PT/PTA Reports

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.

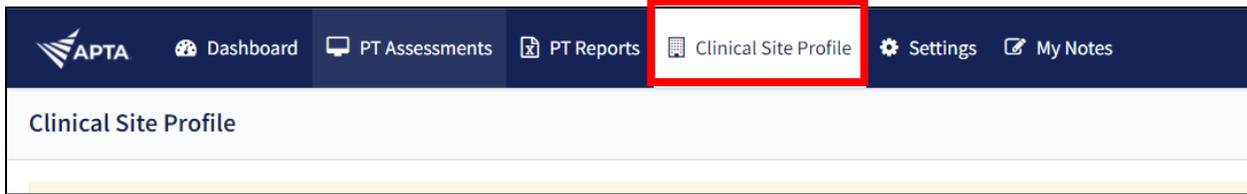


Here is an example of how the data is presented in the CPI.

Lambert Candace - CI Assessment														
Clinical Experience	Assessment	Su...	1.1	1.2	1.3	2.1	2.2	3.1	3.2	3.3	3.4	4.1	4.2	5.1
APTA Center (10/01/2023 - 12/01/2023)	Mid-Term	10/06/2023	4	5	4	4	4	5	4	5	4	4	4	4

Lambert Candace - Self Assessment														
Clinical Experience	Assessment	Su...	1.1	1.2	1.3	2.1	2.2	3.1	3.2	3.3	3.4	4.1	4.2	5.1
APTA Center (10/01/2023 - 12/01/2023)	Mid-Term	10/06/2023	5	5	5	5	5	5	5	5	5	5	5	5

Clinical Sites Profile/CSIF

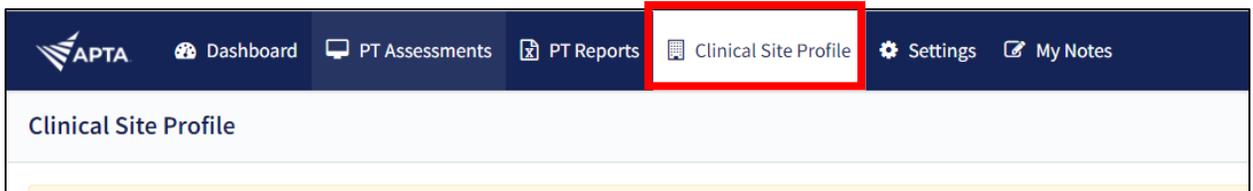


The Clinical Sites Profile (or CSIF) is a listing of clinical sites with a completed profile. This list differs from the list on your Sites page (after you click Settings). The Site Profiles includes the following information:

- Site Information
 - Address
 - Clinical Site Classifications
 - Clinical Site Location
 - Affiliated PT and PTA Educational Programs
- 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 Clinical Site Profiles/CSIF

1. Click **Clinical Site Profile**.

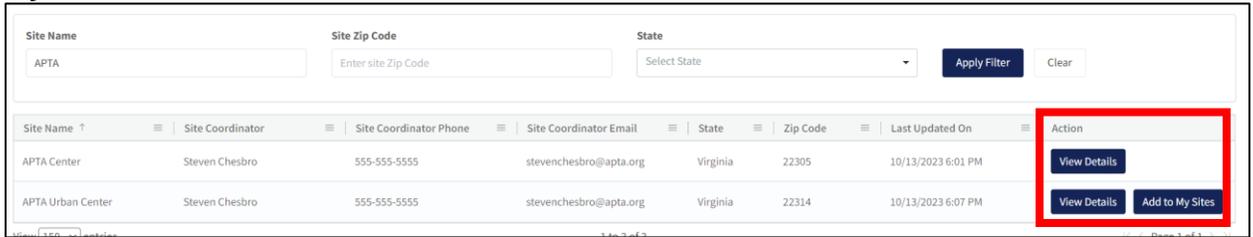


2. Use the search filters to search for a specific site name, zip code or state. Click **Apply Filter**.



A screenshot of the search filters for Clinical Site Profiles. It features three input fields: 'Site Name' with the placeholder 'Enter site name', 'Site Zip Code' with the placeholder 'Enter site Zip Code', and 'State' with a dropdown menu showing 'Select State'. To the right of these fields are two buttons: 'Apply Filter' (highlighted with a red box) and 'Clear'.

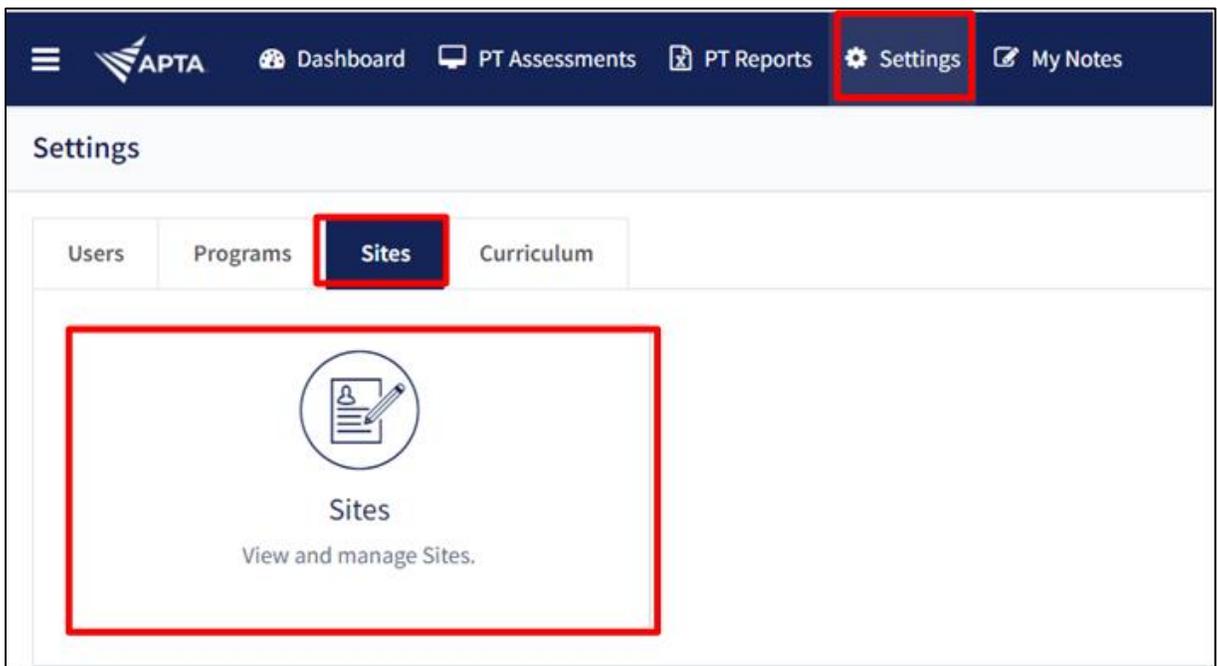
- Once the site(s) you are looking for populates, click **View Details**. If the site is not already in your sites list and you want to include it in your list, click **Add to My Sites**.



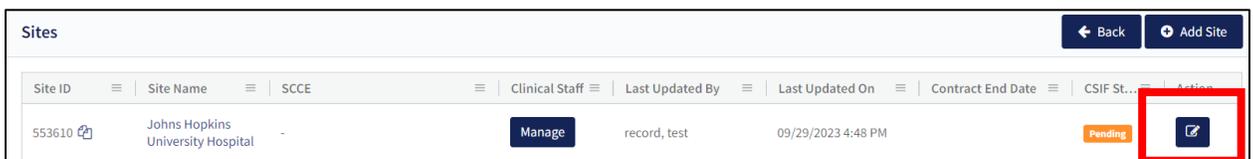
Editing the Clinical Site Profiles/CSIF

The CSIF only shows sites that have a completed profile. Use the following instructions to edit the CSIF for a site affiliated with your program.

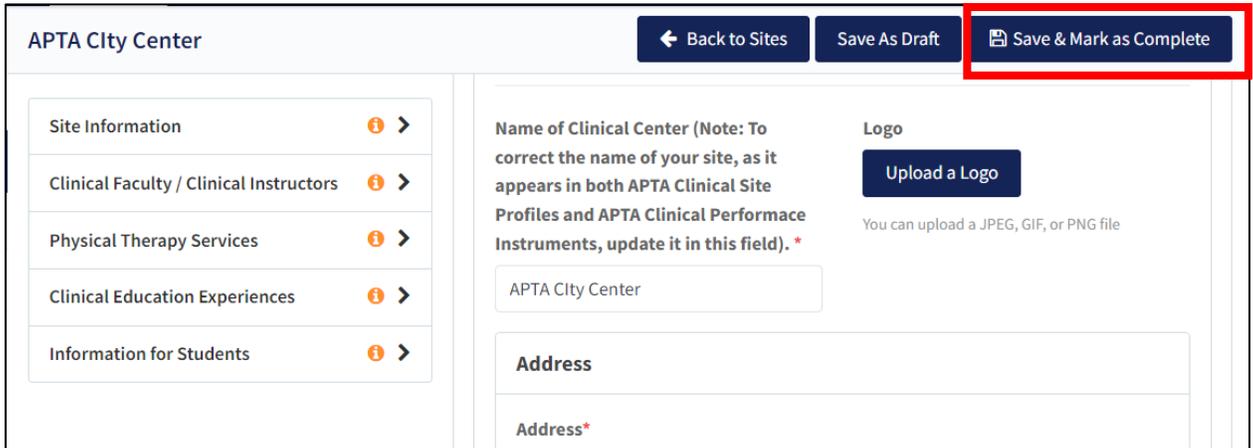
- Click **Settings** from the top menu bar.
- Click **Sites**, followed by the **Sites** icon.



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

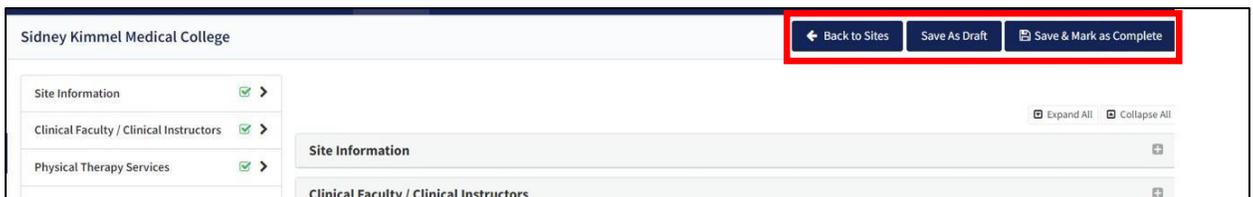


- Complete the elements of each category. The orange indicators next to the category names will change to a green checkmark once all required fields are completed. Once completed, click **Save & Mark as Complete**.



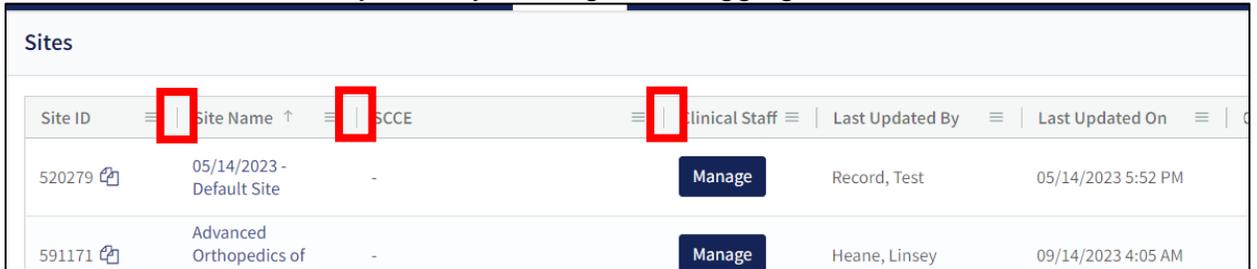
Note: Save Site Information

- 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 site information is **complete** enough to share to the CSIF.
- Back to Sites brings you back to the Sites page in Settings. **CHANGES WILL NOT BE SAVED.**



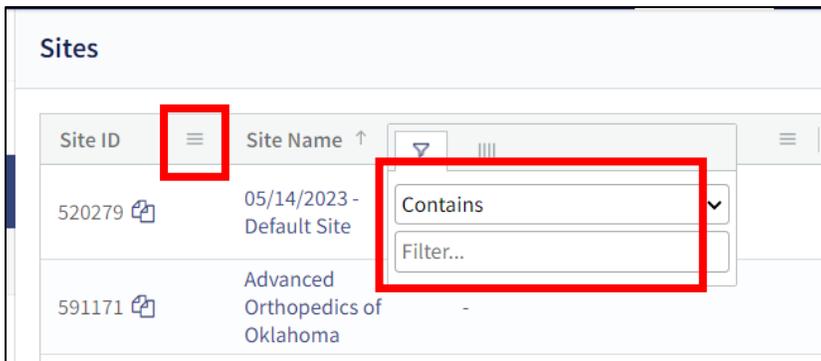
CPI Tips and Tricks

1. Column widths can be adjusted by clicking and dragging the lines of the columns.



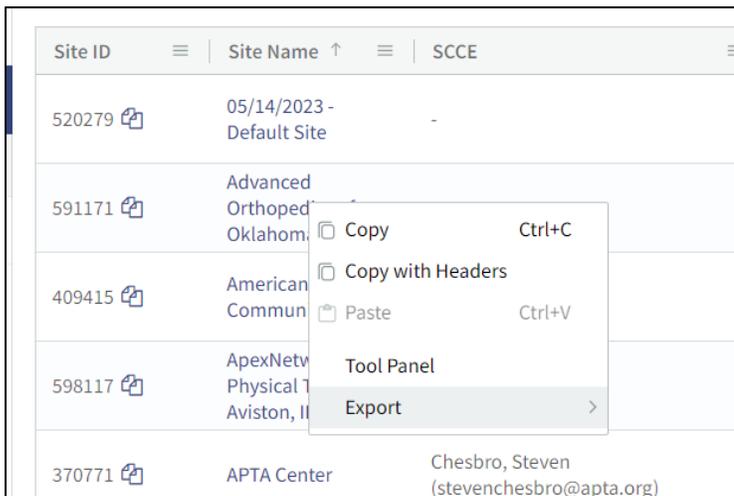
Site ID	Site Name	SCCE	Clinical Staff	Last Updated By	Last Updated On
520279	05/14/2023 - Default Site	-	Manage	Record, Test	05/14/2023 5:52 PM
591171	Advanced Orthopedics of	-	Manage	Heane, Linsey	09/14/2023 4:05 AM

2. Clicking the three horizontal lines next to each column header will allow you to filter the column.



Site ID	Site Name	SCCE
520279	05/14/2023 - Default Site	-
591171	Advanced Orthopedics of Oklahoma	-

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



Site ID	Site Name	SCCE
520279	05/14/2023 - Default Site	-
591171	Advanced Orthopedics of Oklahoma	-
409415	American Commun	-
598117	ApexNetw Physical T Aviston, IL	-
370771	APTA Center	Chesbro, Steven (stevanchesbro@apta.org)

4. Prior to making any edits to an ACTIVE clinical experience, switch it to pending, make your edits, then switch it back to active. No data will be lost.
5. Do NOT delete anything unless you are absolutely sure you do not need the information.