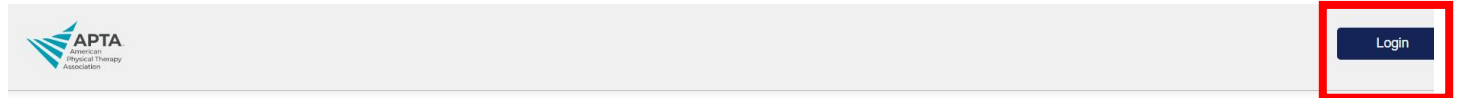


Director of Clinical Education/ Associate Director of Clinical Education Administrative Staff User Guide

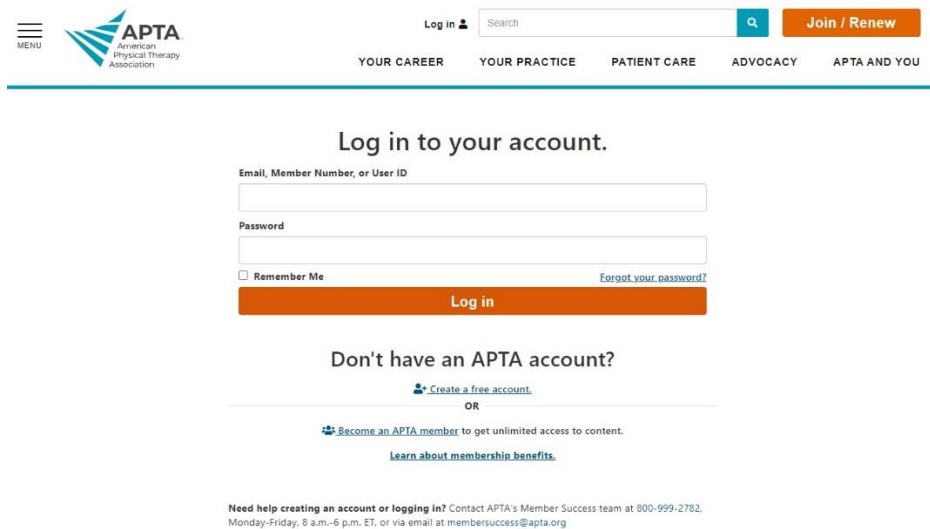
Login

1. Go to <https://cpi.apta.org>
2. Click **Login**.



Welcome to APTA's Clinical Performance Instrument 3.0! To troubleshoot login issues, contact APTA's Member Success team at membersuccess@apta.org. For questions about the instrument contact CPI@apta.org or call 703-706-8582.

3. Log in to your account using your APTA login credentials.



Log in to your account.

Email, Member Number, or User ID

Password

Remember Me [Forgot your password?](#)

Log in

Don't have an APTA account?

[Create a free account.](#)

OR

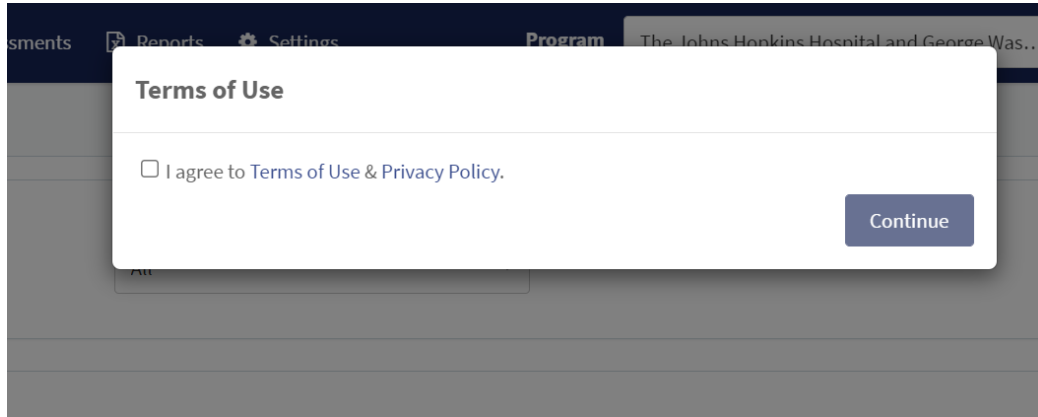
[Become an APTA member](#) to get unlimited access to content.

[Learn about membership benefits.](#)

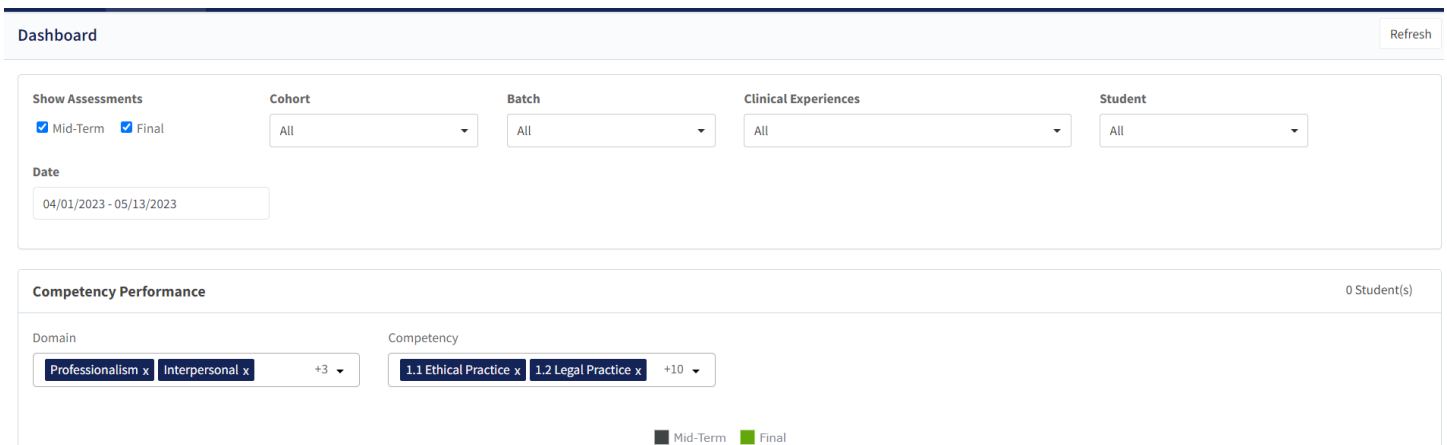
Need help creating an account or logging in? Contact APTA's Member Success team at 800-999-2782, Monday-Friday, 8 a.m.-6 p.m. ET, or via email at membersuccess@apta.org

For login issues: Email [APTA Member Success](mailto:membersuccess@apta.org) or call 800-999-2782 or 703-684-2782.

4. Agree to the **Terms of Use**.



5. The **Dashboard** appears.



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

For login issues: Email [APTA Member Success](#) or call 800-999-2782 or 703-684-2782.

Menu Options



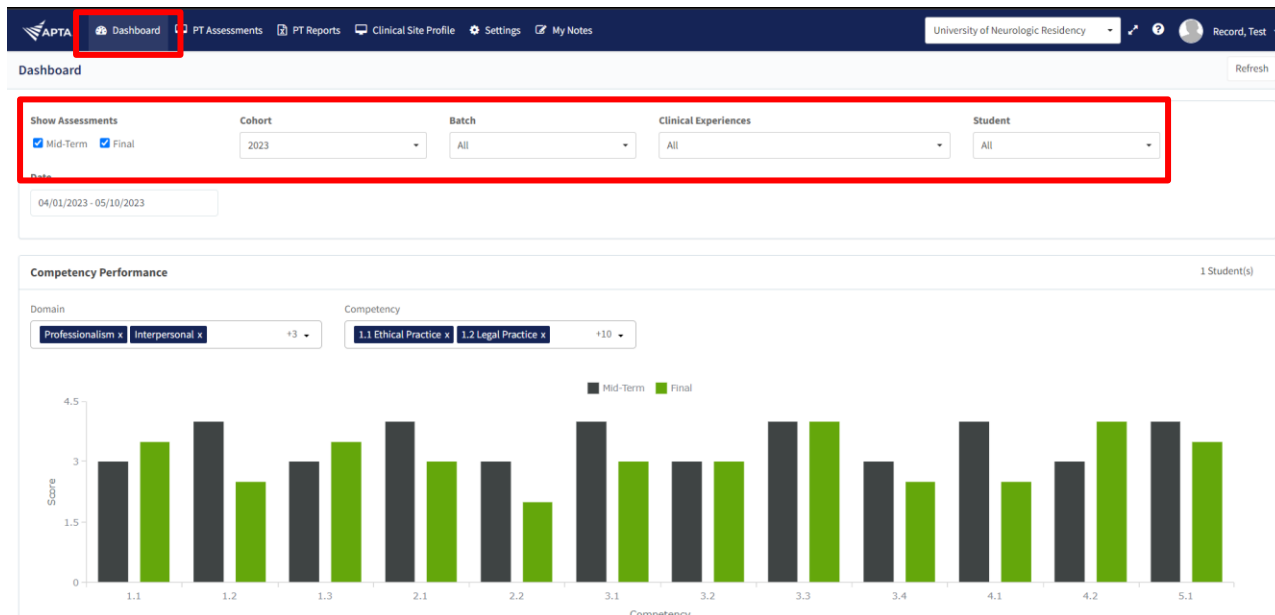
Dashboard

	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.

Dashboard

Refresh

Show Assessments

Mid-Term Final

Cohort

2023

Batch

All

Clinical Experiences

All

Student

All

Date

04/01/2023 - 05/10/2023

Competency Performance

1 Student(s)

Domain

Professionalism x Interpersonal x +3

UnSelect All

Search

Professionalism

Interpersonal

Technical/Procedural

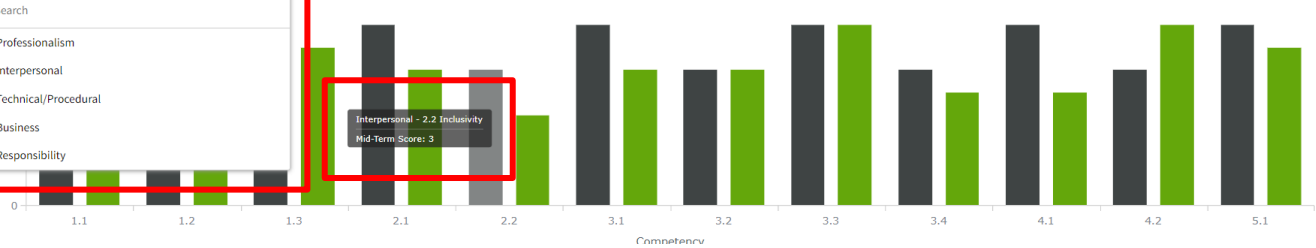
Business

Responsibility

Competency

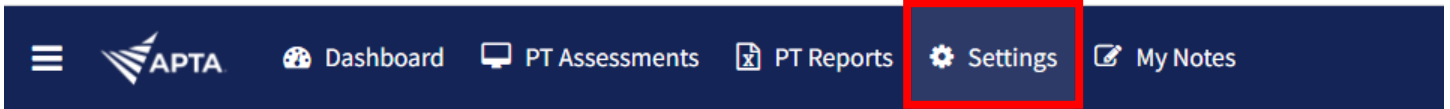
1.1 Ethical Practice x 1.2 Legal Practice x +10

Mid-Term Final

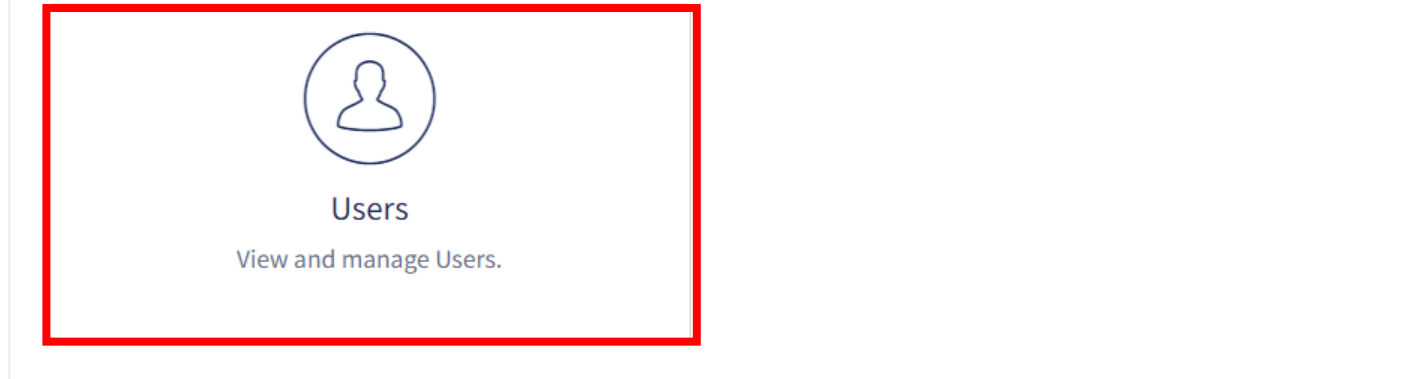


Viewing Program Users

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



Settings

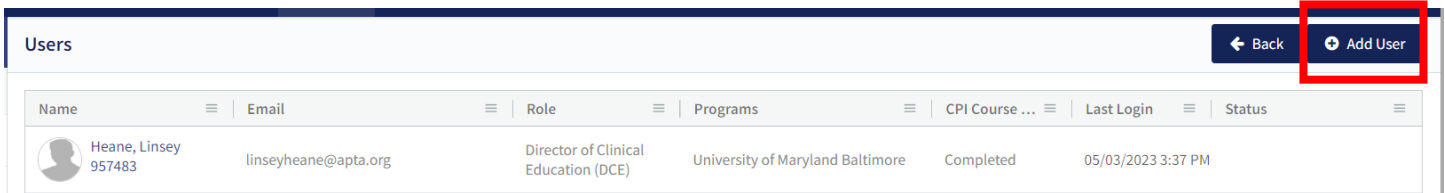


3. View current program users, user's role, CPI Training completion Status, and last login of users associated with your program.

Name	Email	Role	Programs	CPI Course ...	Last Login	Status
 Heane, Linsey 957483	linseyheane@apta.org	Director of Clinical Education (DCE)	University of Maryland Baltimore	Completed	05/03/2023 3:37 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.nul	Adjunct Faculty	University of Maryland Baltimore			Active Inactive Retire
 record, test 628201	jojo_super77@yahoo.com	Associate DCE	University of Maryland Baltimore			


Adding New Program Users

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



Users

← Back Add User

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	

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

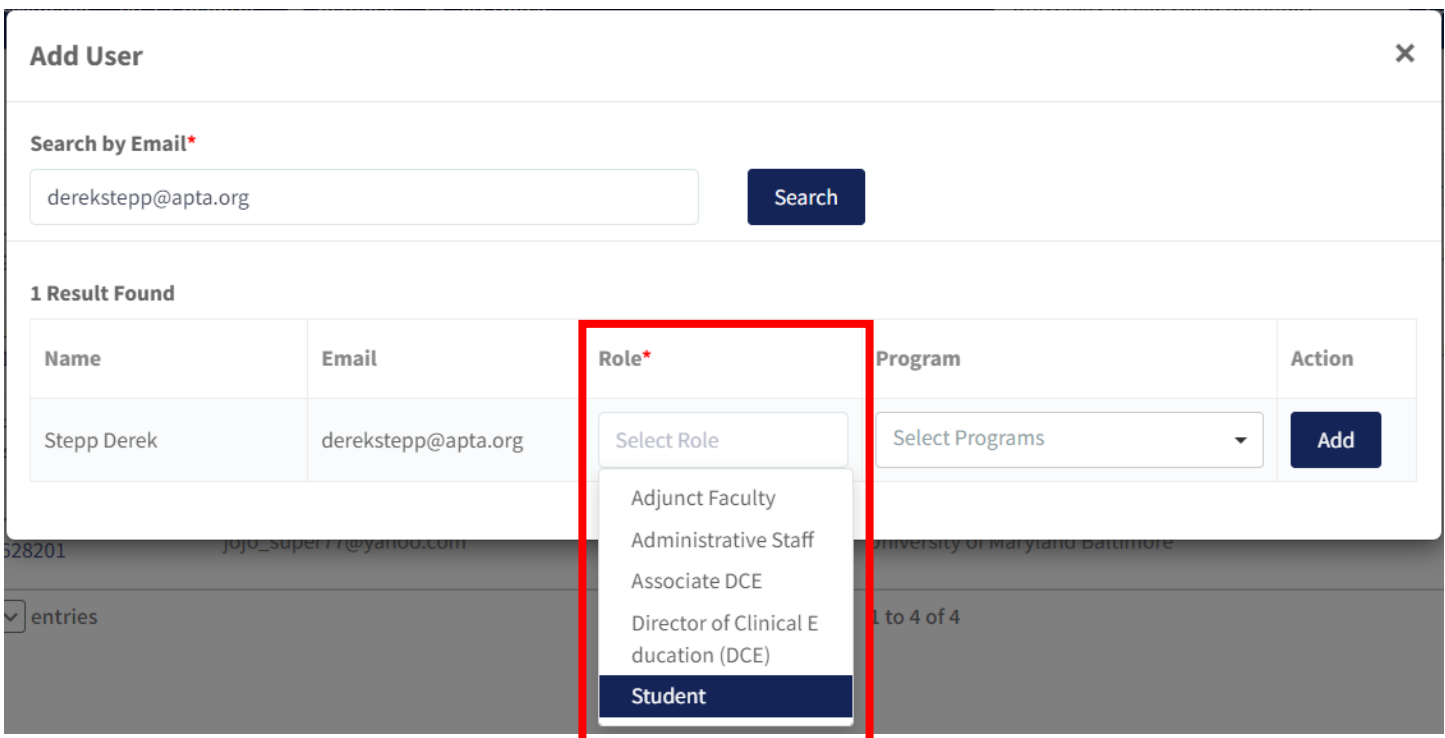
Add User

Search by Email*

derekstepp@apta.org

Search

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

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

Add User ✕

Search by Email*

 Search

1 Result Found

Name	Email	Role*	Program*	Action
Stepp Derek	derekstepp@apta.org	Administrative Staff ▾	<div style="border: 1px solid #ccc; padding: 5px;"> Select Programs University of Maryland Baltimore </div>	Add

5. Click **Add**.

Add User ✕

Search by Email*

 Search

1 Result Found

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

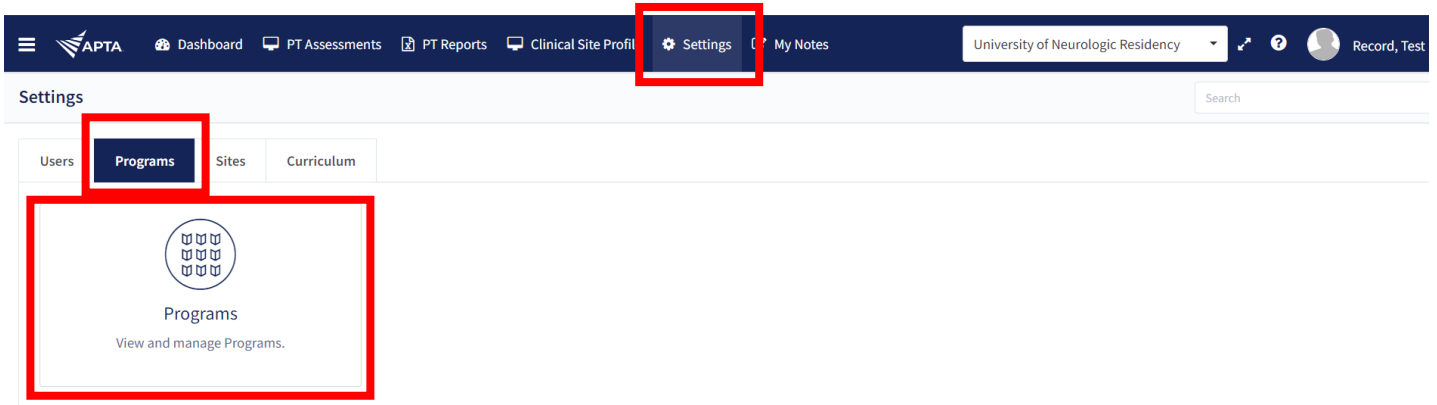
Please Note: The Administrative Staff will have similar permissions in Competency AI as the DCE/ADCE. These users will be able to create schedules, assessments, etc. just as the DCE/ADCE can.

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

View Program Details

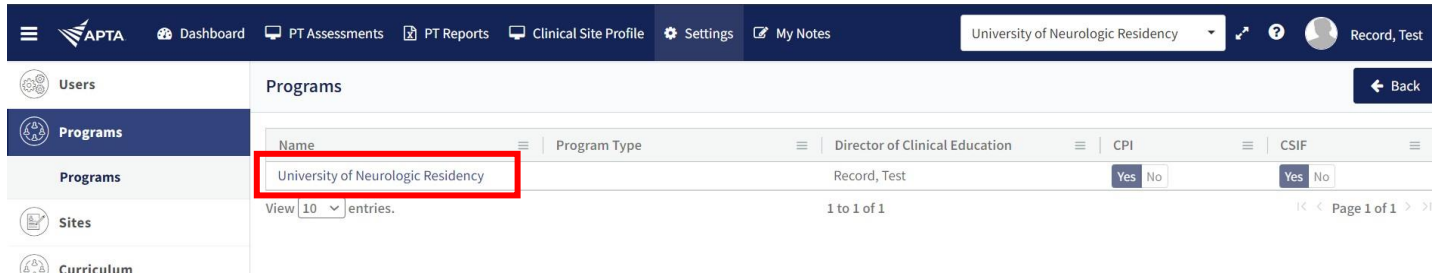
Note: Programs have been created by an APTA Administrator.

1. Click **Settings**.
2. Click **Programs** from menu tab.
3. Click the **Programs** box.



The screenshot shows the APTA Settings page. The 'Settings' menu item in the top navigation bar is highlighted with a red box. Below it, the 'Programs' sub-menu item is also highlighted with a red box. A large red box highlights the 'Programs' card, which contains a grid icon and the text 'Programs' and 'View and manage Programs.'

4. Select the program.



The screenshot shows the APTA Programs list. The 'Programs' menu item in the left sidebar is highlighted with a red box. The table below shows one program entry: 'University of Neurologic Residency', which is also highlighted with a red box. The table has columns for Name, Program Type, Director of Clinical Education, CPI, and CSIF. The CPI and CSIF columns have 'Yes' and 'No' buttons. The table shows '1 to 1 of 1' entries.

Name	Program Type	Director of Clinical Education	CPI	CSIF
University of Neurologic Residency		Record, Test	Yes No	Yes No

- 5. Review basic program details.
- 6. Set assessment sharing permissions.

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)

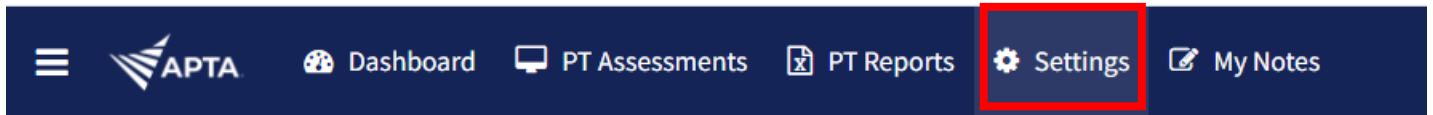
Manually
(Permission to manually provided from assessments page)

Clinical Sites

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

Adding Clinical Sites

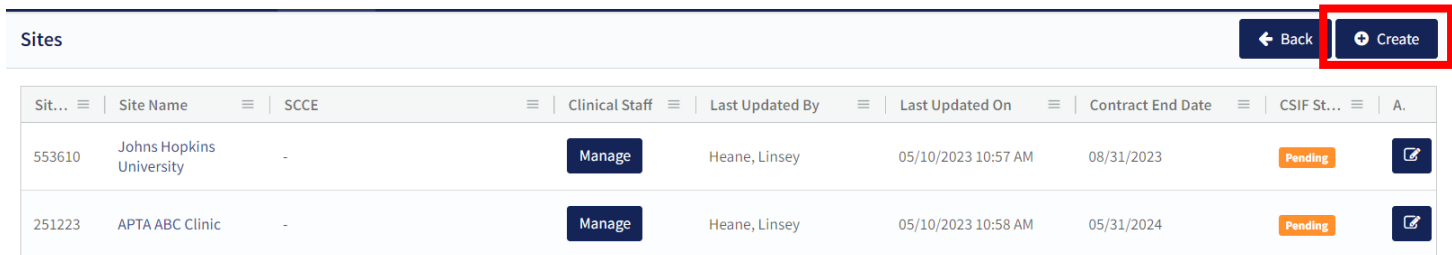
1. Click **Settings** from the top menu bar.
2. Click **Sites**, followed by the **Sites** box.



Settings



3. Click **+Create**



4. 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.
5. Enter the contract dates with the clinic and the email address of the SCCE (must be the email address associated with their APTA account).

6. Click **Save**.

Add Site
✕

Name of Clinical Center

Contract Auto Renew

Contract Start Date *

Contract End Date *

Add Site Coordinator Of Clinical Education

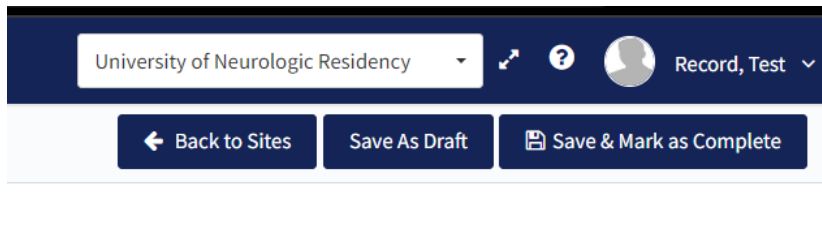
Search by Email

Saving 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

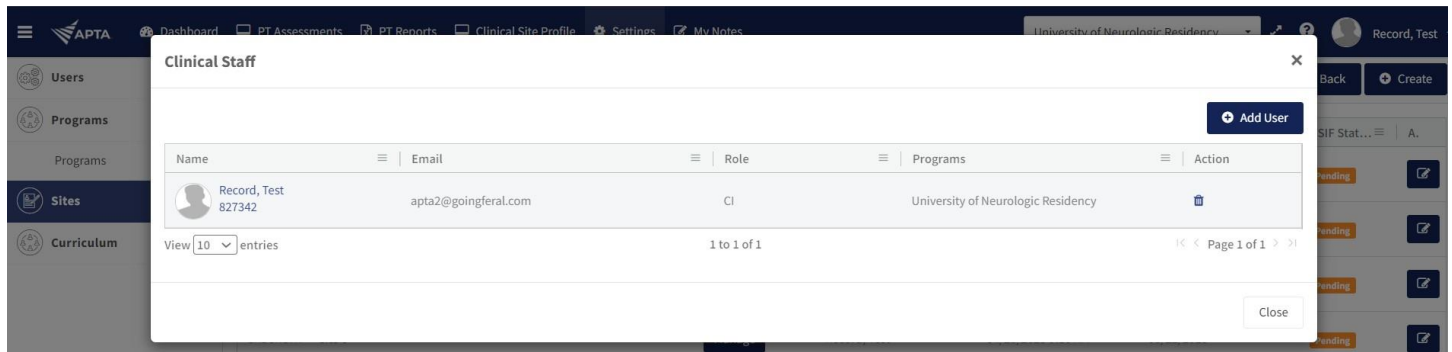
Back to Sites brings you back to the Sites page in Settings. **CHANGES WILL NOT BE SAVED**



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

Site ID	Site Name	SCCE	Clinical Staff	Last Updated By	Last Updated On	Contract End Date	CSIF Stat...	A.
B9XU4ADV	Sidney Kimmel Medical College	Record Test (test2@gmail.com)	Manage	Record, Test	05/09/2023 3:18 PM	04/27/2023	Pending	
MKXPO60Y	Ab Medical College	Record Test (test2@gmail.com)	Manage	Record, Test	04/27/2023 2:22 PM	05/30/2023	Pending	

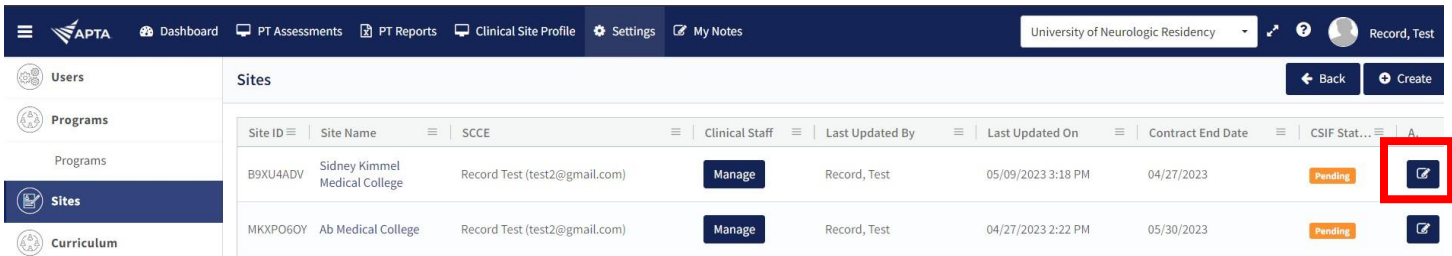
8. Click **+Add User** to add a CI associated with this site by their email address or the trash can to delete clinical staff associated with this site then close the window



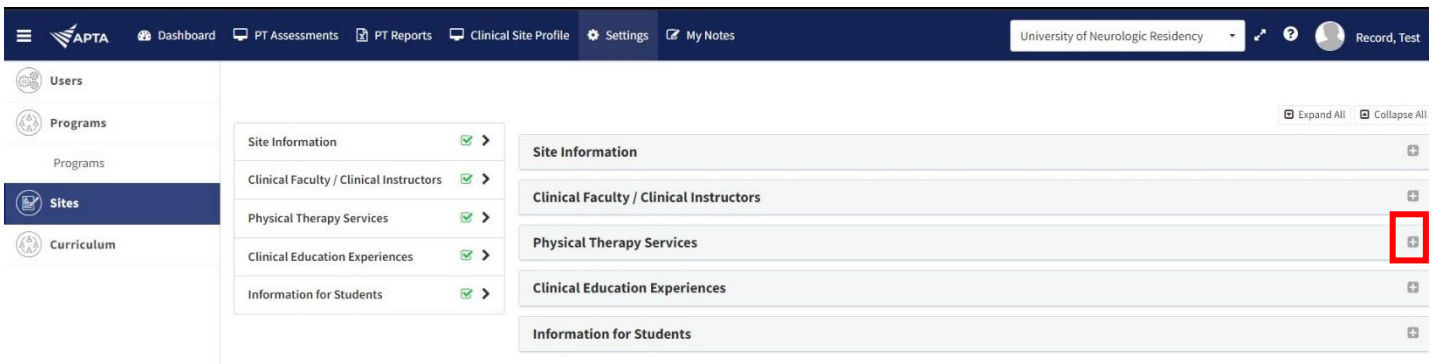
Editing Clinical Site Information

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

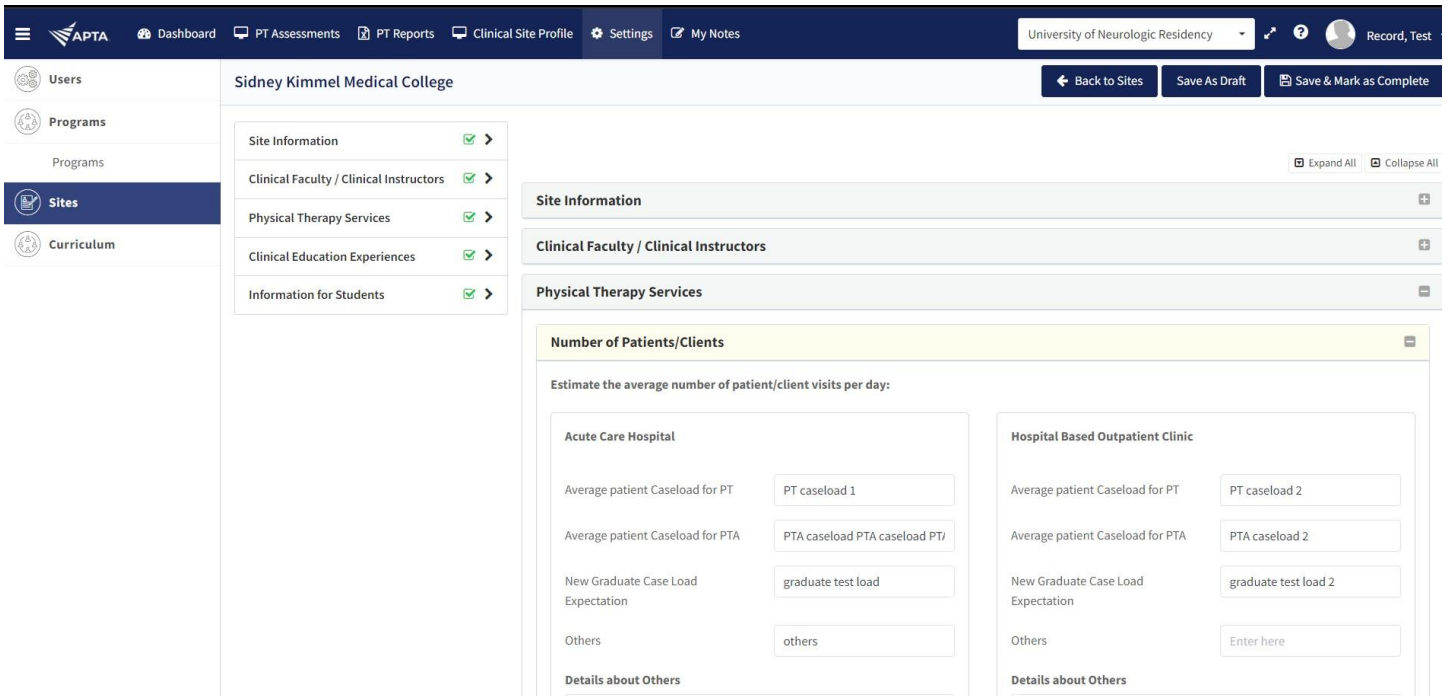
1. Click the edit icon to add and edit FULL site information



2. 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.



3. Complete each section and SAVE.




Saving 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**

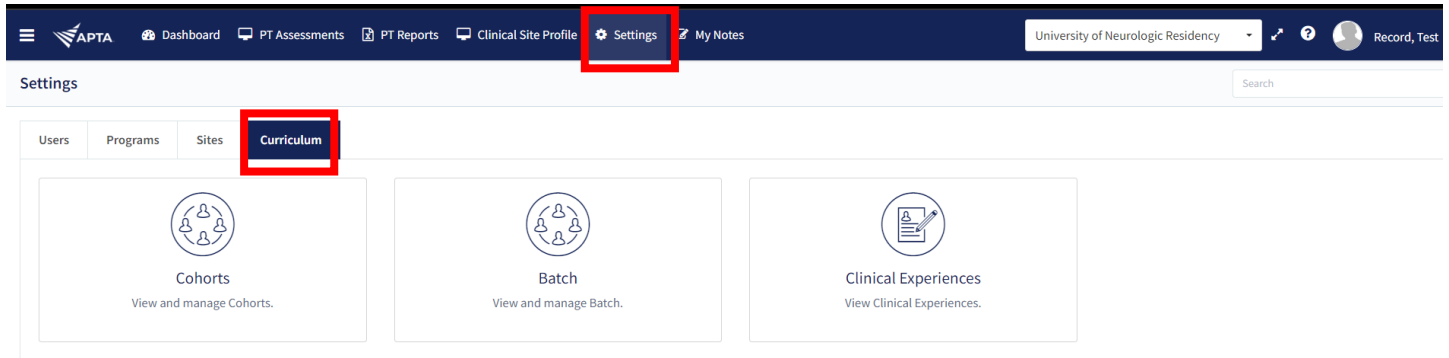


Curriculum

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

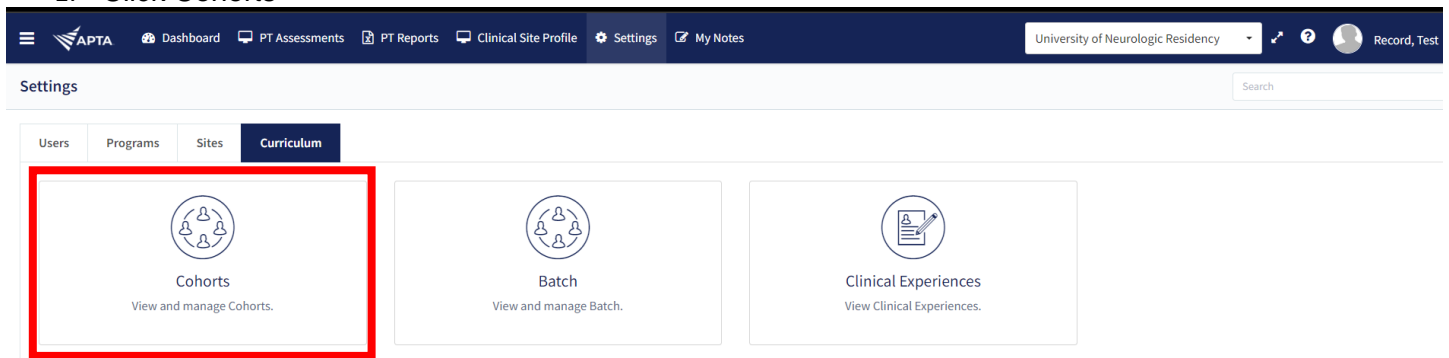
Note: A batch is a learner group within a cohort. A batch may include the entire cohort or selected learners. For example, the cohort is the Class of 2025 and the batch is 2023 Summer Session I.

1. Click Settings > Curriculum



Cohorts

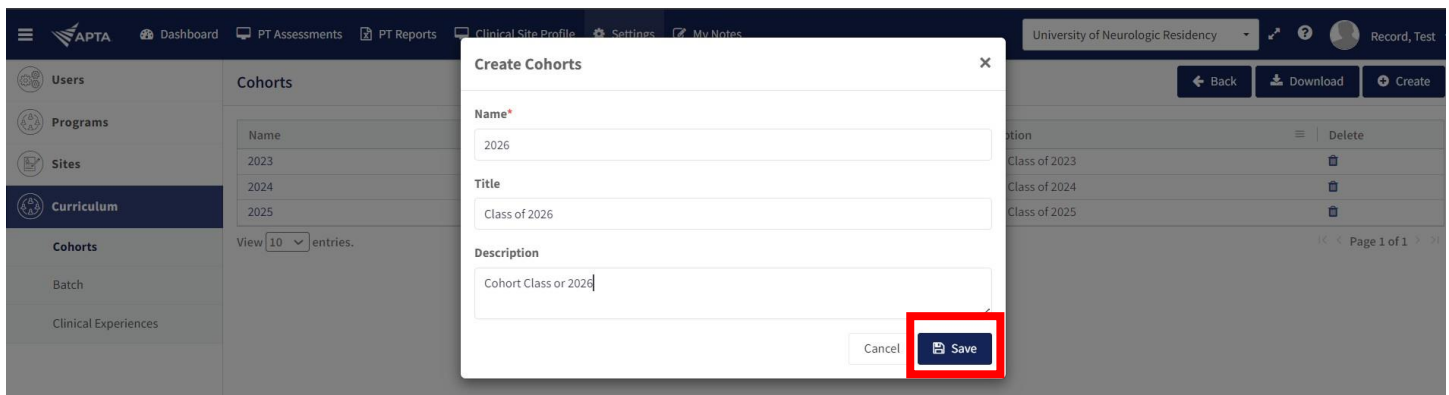
1. Click Cohorts



2. Select +Create to add a new cohort

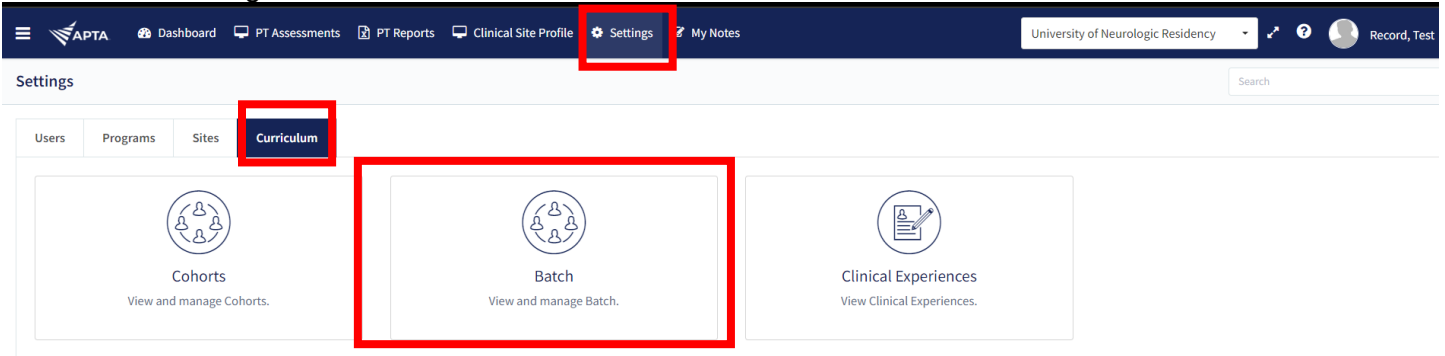


3. Enter the Cohort Name (required) Title and Description (optional). Click **Save**.

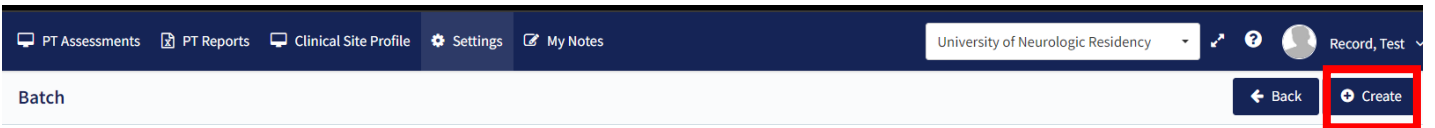


Batch

1. Click Settings > Curriculum > Batch



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



3. Enter batch details and click **Save**.

Create Batch ✕

Name*

Description

Cohort*

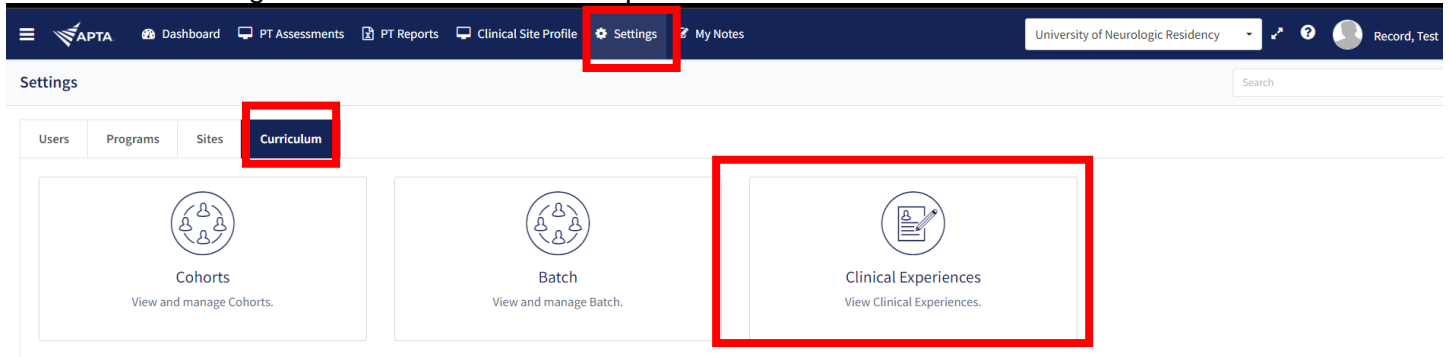
Learner(s)*

4. Click Batch name to edit Batch Information

Name	Description	Cohort	Delete
Batch 2 2023	test description	2023	
Batch 1 2023		2023	

Clinical Experiences

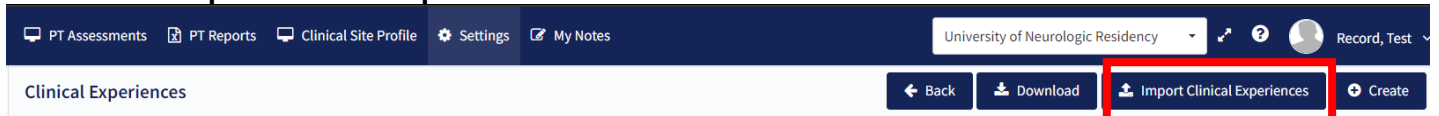
1. Click Settings > Curriculum > Clinical Experience



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.

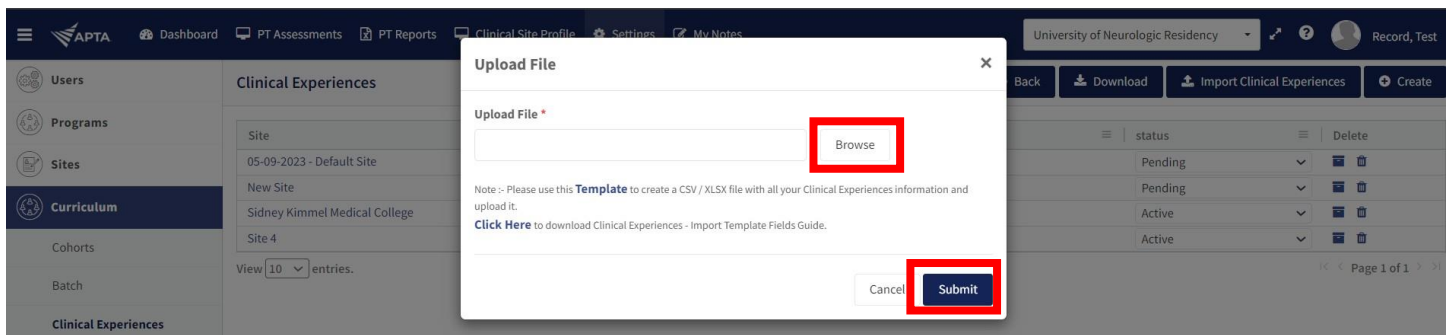
1. Click **Import Clinical Experiences**



The template will be provided here for you to download if you do not already have it. Also linked in the pop-up screen 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.*

2. Click **Browse** to locate your spreadsheet from your computer to upload into 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**

Site	Cohort	Start date	End date	status	Delete
05-09-2023 - Default Site	2023	05/01/2023	05/09/2023	Completed	
Sidney Kimmel Medical College	2023	04/15/2023	05/31/2023	Active	
Sidney Kimmel Medical College	2023	05/10/2023	05/30/2023	Pending	
Site 4	2023	05/24/2023	06/28/2023	Active	

Manual Process

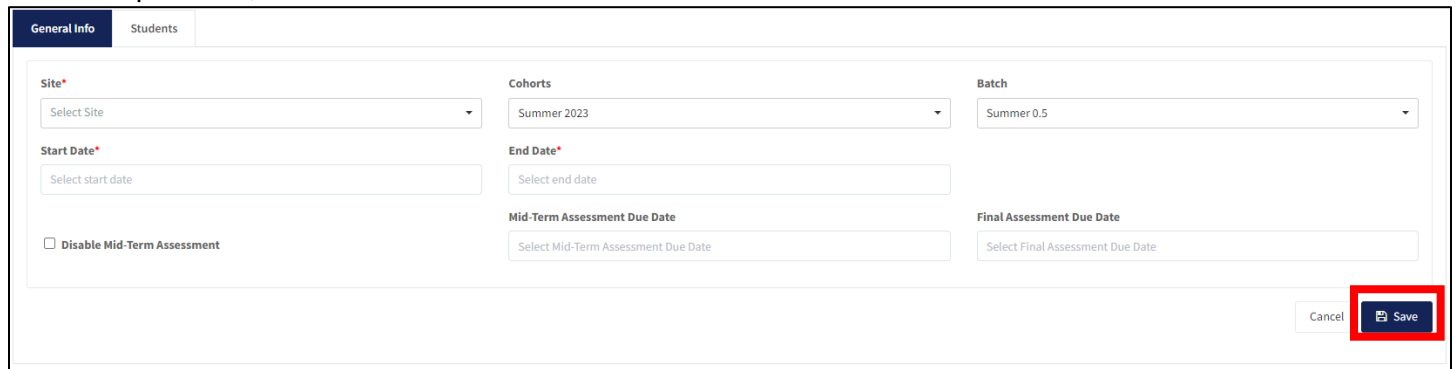
1. Click **+Create** function to create a single Clinical Experience.



2. 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







3. 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.

Edit Clinical Experience - Sidney Kimmel Medical College ← Back to List

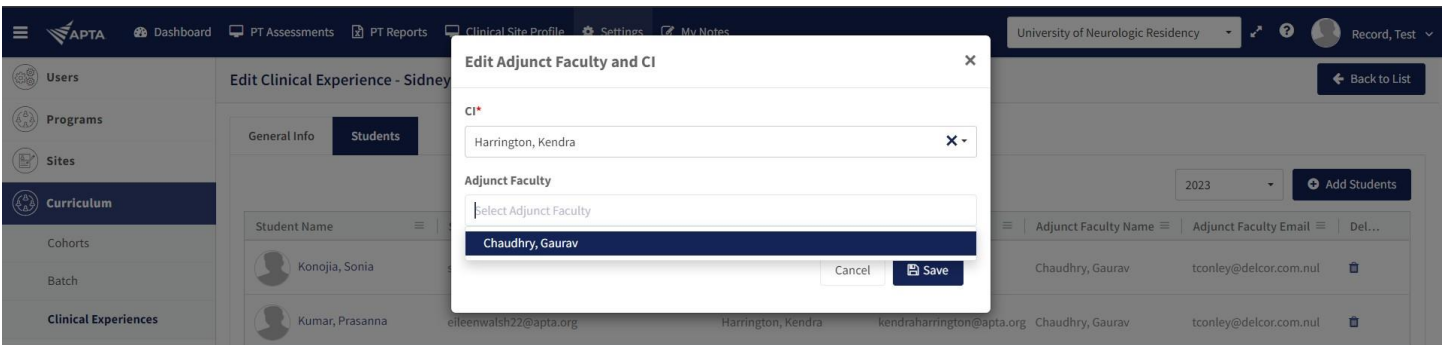
General Info **Students**

2023 + Add Students

Student Name	Student Email	CI Name	CI Email	Adjunct Faculty Name	Adjunct Faculty Email	Del...
 Konojia, Sonia	something@apta.org	Pisapati, Sowjanya	testing5@verizon.net	Chaudhry, Gaurav	tconley@delcor.com.nul	
 Kumar, Prasanna	eileenwalsh22@apta.org	Harrington, Kendra	kendraharrington@apta.org	Chaudhry, Gaurav	tconley@delcor.com.nul	

1 to 2 of 2 Page 1 of 1 >>

4. 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**.



The screenshot shows the 'Edit Adjunct Faculty and CI' pop-up window. The 'CI*' dropdown menu is open, showing 'Harrington, Kendra' as the selected option. The 'Adjunct Faculty' dropdown menu is also open, showing 'Chaudhry, Gaurav' as the selected option. The background shows the 'Students' tab with the same table as in the previous image.