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

1. Go to https://cpi.apta.org

2. Click Login.

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

For login issues: Email APTA Member Success 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.
Dashboard

The Compency.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.
Viewing Program Users

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

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Role</th>
<th>Programs</th>
<th>CPI Course Status</th>
<th>Last Login</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heane, Linsey</td>
<td><a href="mailto:linseyhaan@apta.org">linseyhaan@apta.org</a></td>
<td>Director of Clinical Education (DCE)</td>
<td>University of Maryland Baltimore</td>
<td>Completed</td>
<td>05/03/2023 3:37 PM</td>
<td>Active</td>
</tr>
<tr>
<td>Johnson, William</td>
<td><a href="mailto:billjohnson@apta.org">billjohnson@apta.org</a></td>
<td>Student</td>
<td>University of Maryland Baltimore</td>
<td>Completed</td>
<td>05/08/2023 4:25 PM</td>
<td>Active</td>
</tr>
<tr>
<td>Record, Test 472067</td>
<td><a href="mailto:membershiptest@apta.org">membershiptest@apta.org</a></td>
<td>Adjunct Faculty</td>
<td>University of Maryland Baltimore</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>record, test 628201</td>
<td><a href="mailto:jojo_super77@yahoo.com">jojo_super77@yahoo.com</a></td>
<td>Associate DCE</td>
<td>University of Maryland Baltimore</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

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

3. Select **Role** from drop down list to indicate the user’s role in the program.
4. Select the **Program** from the drop-down list to indicate the program this user is associated with.

5. Click **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.

4. Select the program.
5. Review basic program details.
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.
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.**

Adding Site Information

Name of Clinical Center

- [ ] Contract Auto Review

Contract Start Date

Contract End Date

Add Site Coordinator Of Clinical Education

Search by Email

Enter Email Address

Search

Close 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**

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

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**

### Sidney Kimmel Medical College

#### Site Information

<table>
<thead>
<tr>
<th>Site Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical Faculty / Clinical Instructors</td>
<td></td>
</tr>
<tr>
<td>Physical Therapy Services</td>
<td></td>
</tr>
<tr>
<td>Clinical Education Experiences</td>
<td></td>
</tr>
<tr>
<td>Information for Students</td>
<td></td>
</tr>
</tbody>
</table>

#### Number of Patients/ Clients

Estimate the average number of patient/client visits per day:

<table>
<thead>
<tr>
<th>Acute Care Hospital</th>
<th>Hospital Based Outpatient Clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average patient Case load for PT</td>
<td>PT Case load 1</td>
</tr>
<tr>
<td>Average patient Case load for PTA</td>
<td>PT Case load 2</td>
</tr>
<tr>
<td>New Graduate Case Load Expectation</td>
<td>PT Case load 3</td>
</tr>
<tr>
<td>Others</td>
<td>PTA Case load 1</td>
</tr>
<tr>
<td>Details about Others</td>
<td>PTA Case load 2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Others</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details about Others</td>
<td>Enter here</td>
</tr>
</tbody>
</table>

**Back to Sites**  **Save As Draft**  **Save & Mark as Complete**
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

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.

4. Click Batch name to edit Batch Information
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.
**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.
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**.