

Clinical Performance Instrument (CPI)

Site Coordinator of Clinical Education (SCCE) User Guide

10/14/2025

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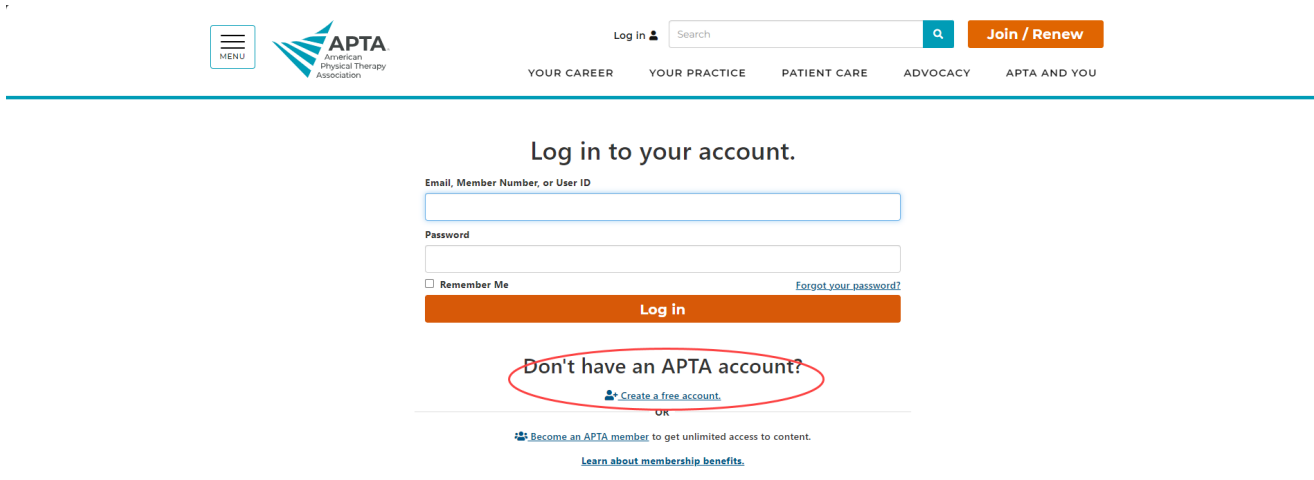
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Login

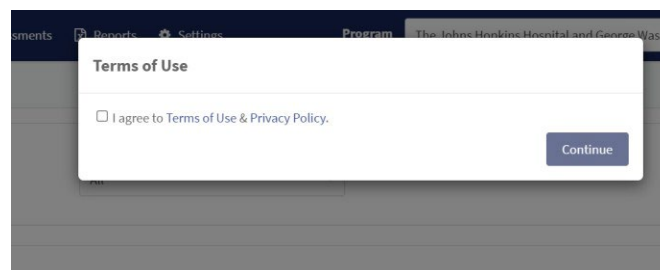
Go to <https://cpi.apta.org>
Click **Login**



Log in to your account using your APTA login credentials.



Agree to the **Terms of Use**.



Dashboard
PT Assessments
PT Reports
Clinical Site Profile
Settings
My Notes

APTA University - PT
Refresh
CPJ, SCCE1

Assessments

Midterm
Final

Assessments Overall Status
0%

0 Assessment(s) Complete

2 Assessment(s) Pending

Clinical Experience ↑	Student	Cohort / Batch	Self Assessment	Assigned CI/SCCE	CI Assessment	Due Date	Assessed On	Action
APTA Center (12/01/2023 - 01/02/2024)	CPJ, Student1	Class of 2024 / ClinEd III	In Progress	CPJ, C13	In Progress	Select Date	02/01/2024	View CI Assessment View Student Assessment
APTA Center (12/01/2023 - 01/02/2024)	CPJ, Student2	Class of 2024 / ClinEd III	In Progress	CPJ, C14 CPJ, SCCE1	In Progress	Select Date		Continue CI Assessment Significant Concerns

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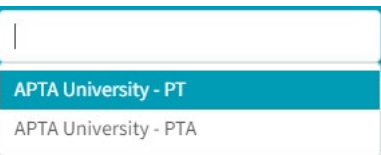
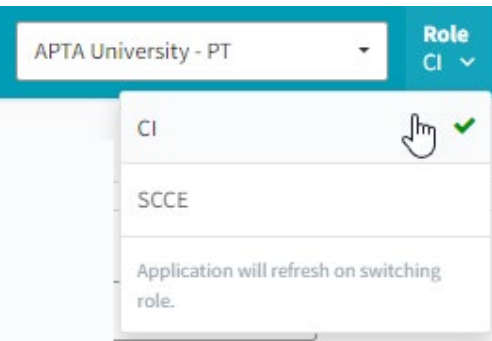


Dashboard
PT Assessments
PT Reports
Clinical Site Profile
Settings
My Notes

APTA University - PT

For login questions/issues: Email membersuccess@apta.org or call 800-999-2782 (APTA). This includes situations of multiple APTA accounts, password reset, and updating email addresses. You may also update your email address by going to [Contact Information](#). Please do not create a new account if one currently exists in the system.

Menu Options

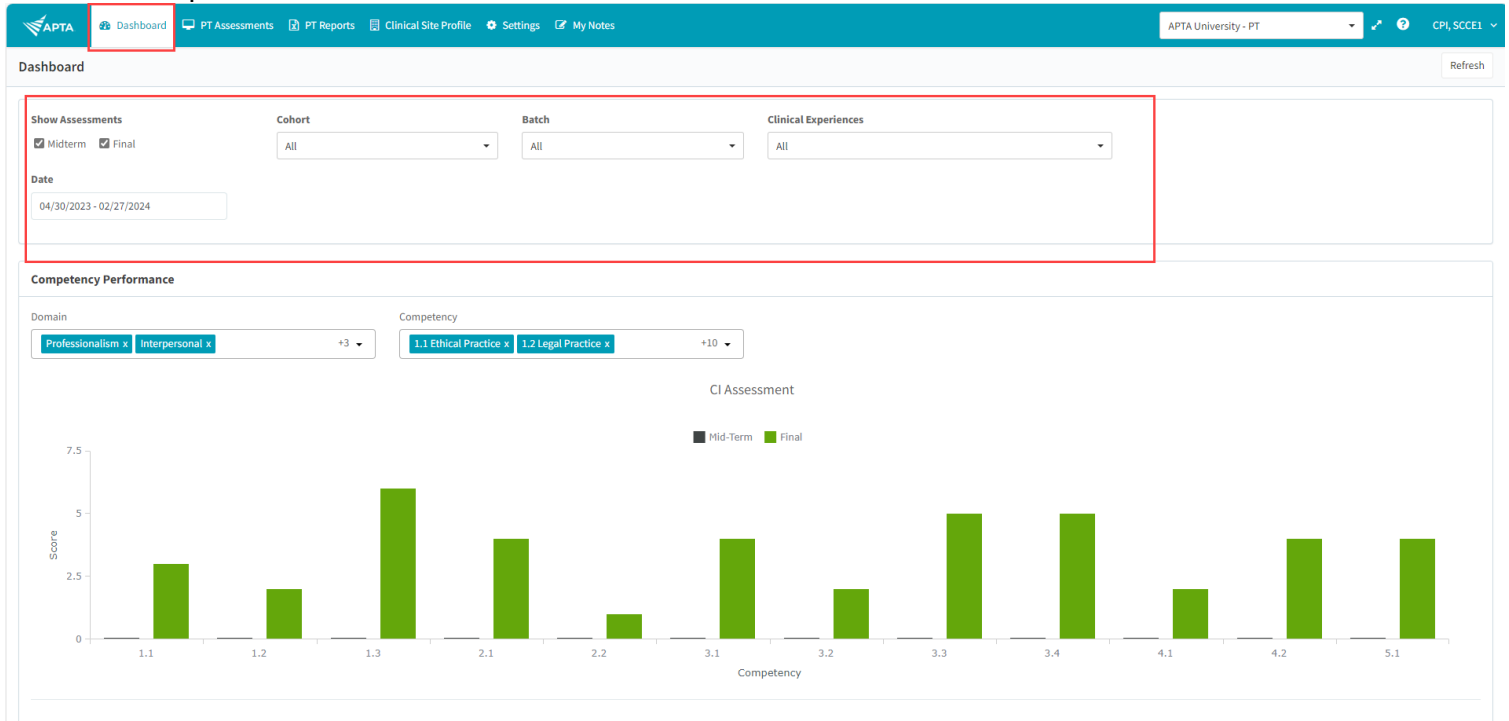
	
 Dashboard	The Dashboard shows a comprehensive and dynamic view of student competency levels. Use the dashboard filters to sort information by Mid-Term or Final Assessment, Cohort, Batch, Clinical Experience and Student.
 PT Assessments  PTA Assessments	The Assessments page is where Active Student and CI CPI evaluations can be viewed and where Significant Concerns are documented.
 PT Reports  PTA Reports	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.
 Clinical Site Profile	The Clinical Site Profile is where the CSIF lives. This page shows all completed CSIF profiles for sites associated with your program.
 Settings	The Settings tab is where you manage sites for which your are the SCCE and can view clinical experiences associated with those sites.
 My Notes	The My Notes area is available for all users to keep private notes while in the CPI 3.0.
	This dropdown is used to switch between multiple programs to which you are associated.
	This dropdown is visible to switch between multiple roles with a specific program to which a user is associated. If it is not visible the user has only 1 role associate with that program.
	Click to enter/exit full screen.

	Click to access User Guides .
	Click your User name dropdown to: • View 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 each competency score for additional information.



Clinical Sites

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

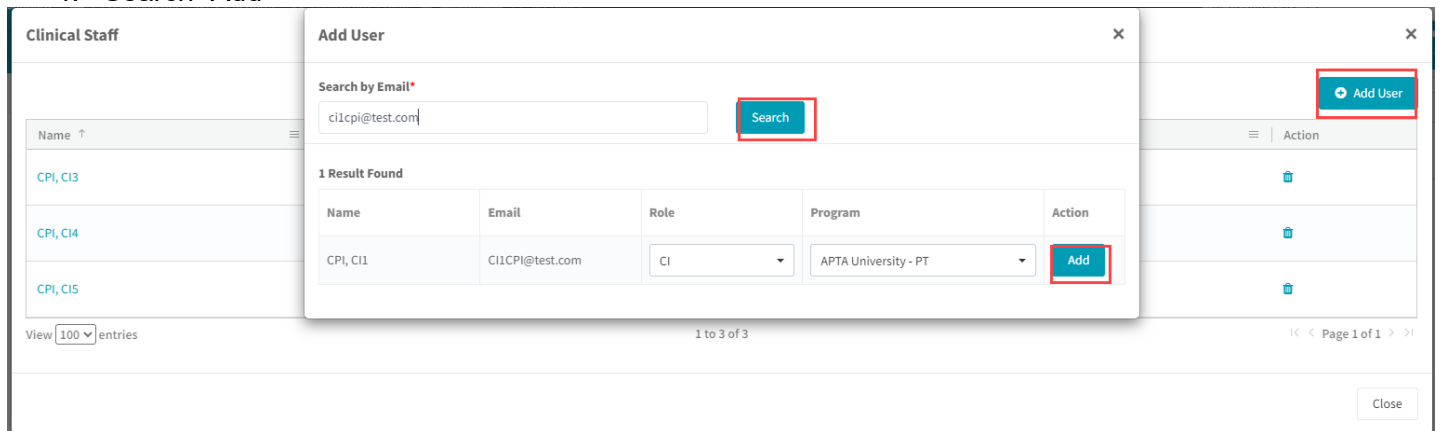
APTA is currently developing site naming guidelines to keep site names consistent across programs. [Please fill out this form](#) with your request to update an existing site's name and our team will review it--we will be posting all updated site names to the Clinical Education Hub every other Wednesday. Please let us know if you have yet to be added to the Hub.

Manage Clinical Staff



The screenshot shows the APTA system interface. The 'Clinical Staff' column is highlighted, and the 'Manage' button is visible. The 'Settings' button is also highlighted in the top navigation bar.

1. Under the **Clinical Staff** column, click **Manage** to manage site clinical staff information.
2. Click **+Add User**
3. Look up and the email address of the CI (must be the email address associated with their APTA account). Please contact your DCE to verify CI email address if no results are found.
4. Search>Add

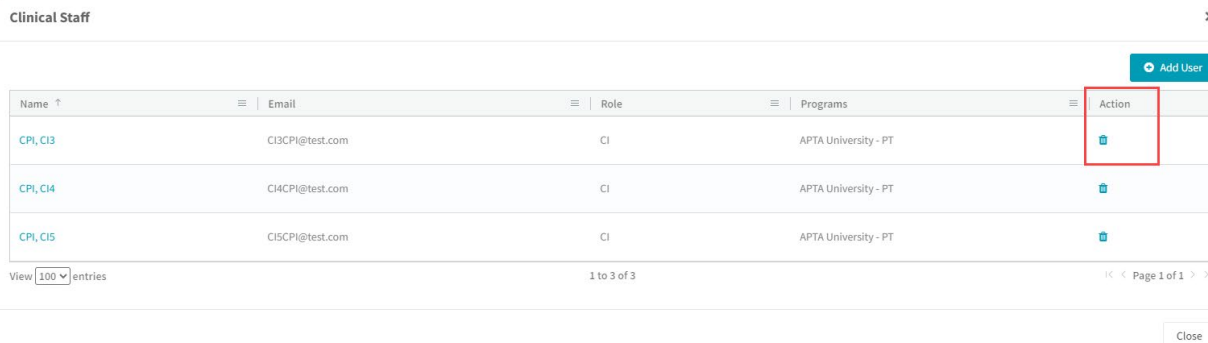


The screenshot shows the 'Add User' dialog box. The 'Search by Email' field contains 'ci1cpi@test.com'. The 'Search' button is highlighted. Below the search field, a table shows 1 result found:

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

The 'Add' button is highlighted. The 'Add User' button in the top right corner of the dialog is also highlighted.

5. Use the trash can to delete clinical staff associated with this site.
This action will disassociate the CI from the site. It WILL NOT remove them from the system
This action will also disassociate them from any Clinical Experiences and assessments they may have completed.



The screenshot shows the 'Clinical Staff' table. The 'Action' column is highlighted, and the trash can icon is visible. The 'Add User' button is also visible in the top right corner.

Name	Email	Role	Programs	Action
CPI, CI3	CI3CPI@test.com	CI	APTA University - PT	
CPI, CI4	CI4CPI@test.com	CI	APTA University - PT	
CPI, CI5	CI5CPI@test.com	CI	APTA University - PT	

Edit Clinical Site Information

Editing and maintaining the integrity of Clinical Site Information is the responsibility of the SCCE.

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



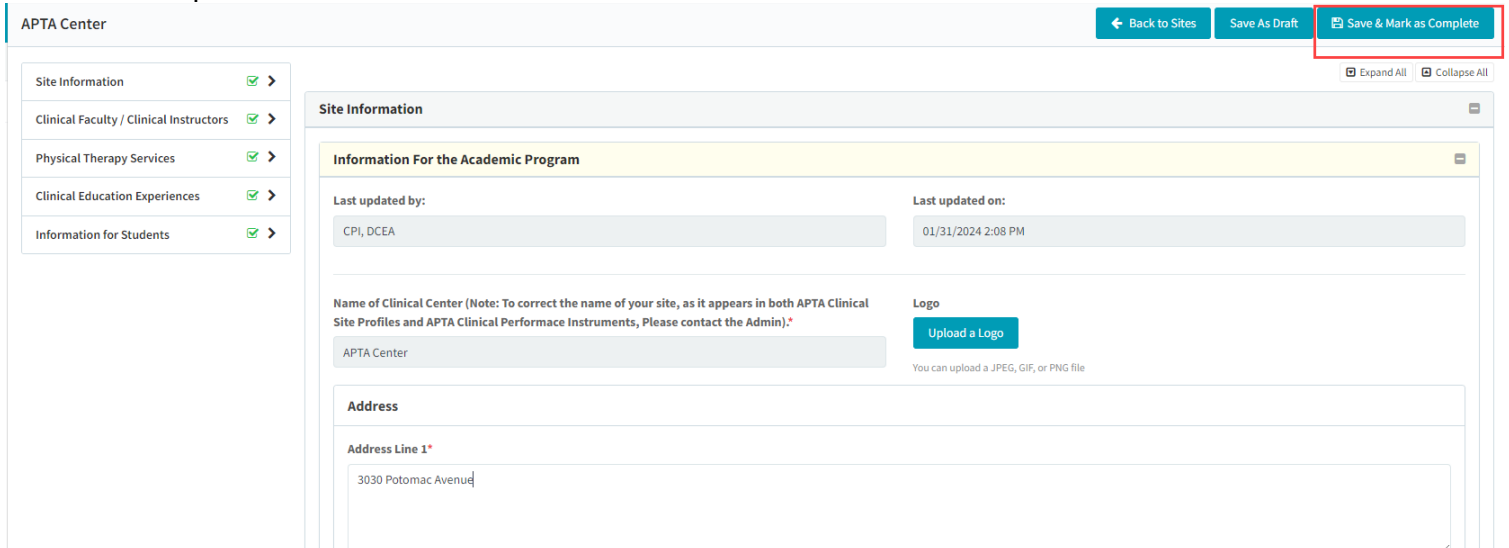
The screenshot shows the APTA Sites table. The table has columns for Site ID, Site Name, SCCE, Clinical Staff, Contract End Date, CSIF Status, and Action. The Action column contains an edit icon (pencil) which is highlighted with a red box. The table shows one entry for 'APTA Center' with Site ID 370771 and a status of 'Pending'.

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



The screenshot shows the APTA Center edit screen. On the left is a sidebar with sections: Site Information, Clinical Faculty / Clinical Instructors, Physical Therapy Services, Clinical Education Experiences, and Information for Students. Each section has a green checkmark and a right arrow. On the right is a table with the same sections. Each row in the table has a plus (+) icon to expand the section. The plus icons are highlighted with a red box.

3. Complete each section and SAVE.



The screenshot shows the APTA Center edit screen with the 'Site Information' section expanded. The section contains fields for 'Last updated by:' (CPI, DCEA), 'Last updated on:' (01/31/2024 2:08 PM), 'Name of Clinical Center' (APTA Center), and 'Address' (3030 Potomac Avenue). The 'Save & Mark as Complete' button is highlighted with a red box.

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** where it can be shared to the CSIF.

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

APTA Center

← Back to SitesSave As DraftSave & Mark as Complete

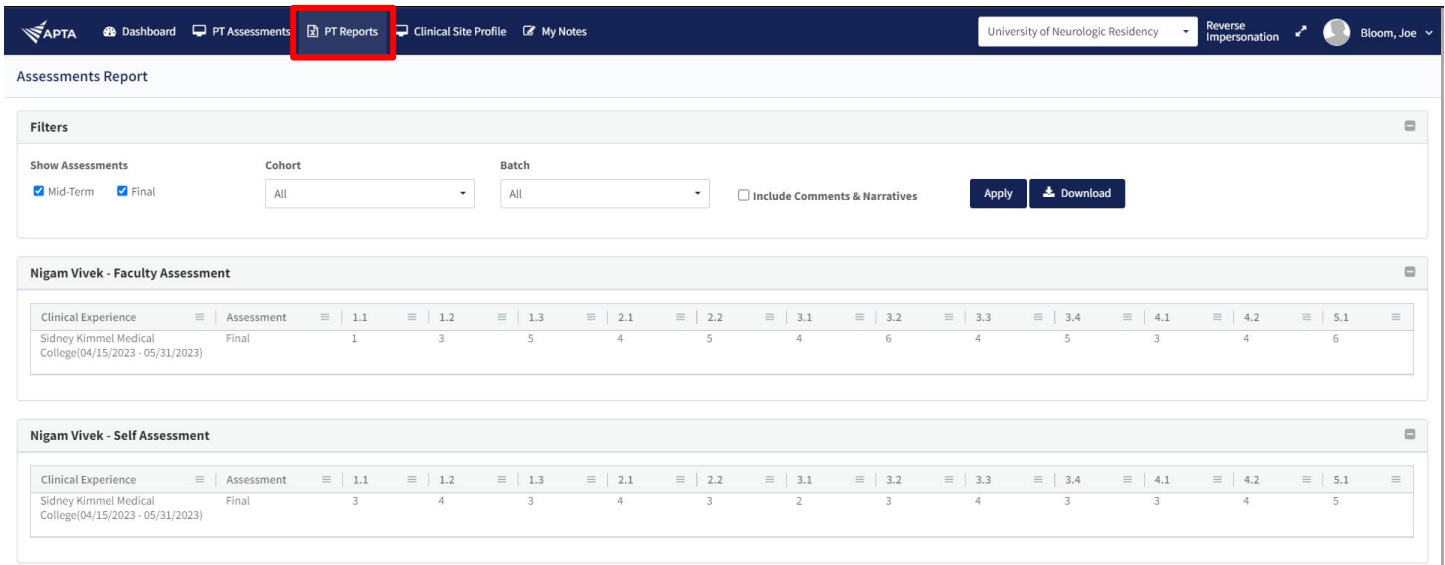
Site Information✔ >

Expand AllCollapse All

PT/PTA Reports

PT/PTA Reports allows the SCCE to view and download scores and comments. The SCCE can only view and download information for students they are associated with.

1. Click **PT Reports** or **PTA Reports**



The screenshot shows the PT Reports interface. The top navigation bar includes APTA, Dashboard, PT Assessments, **PT Reports** (highlighted with a red box), Clinical Site Profile, and My Notes. The user is logged in as Bloom, Joe. The main section is titled "Assessments Report".

Filters:

- Show Assessments: ☒ Mid-Term, ☒ Final
- Cohort: All
- Batch: All
- ☐ Include Comments & Narratives
- Buttons: Apply, Download

Nigam Vivek - Faculty Assessment

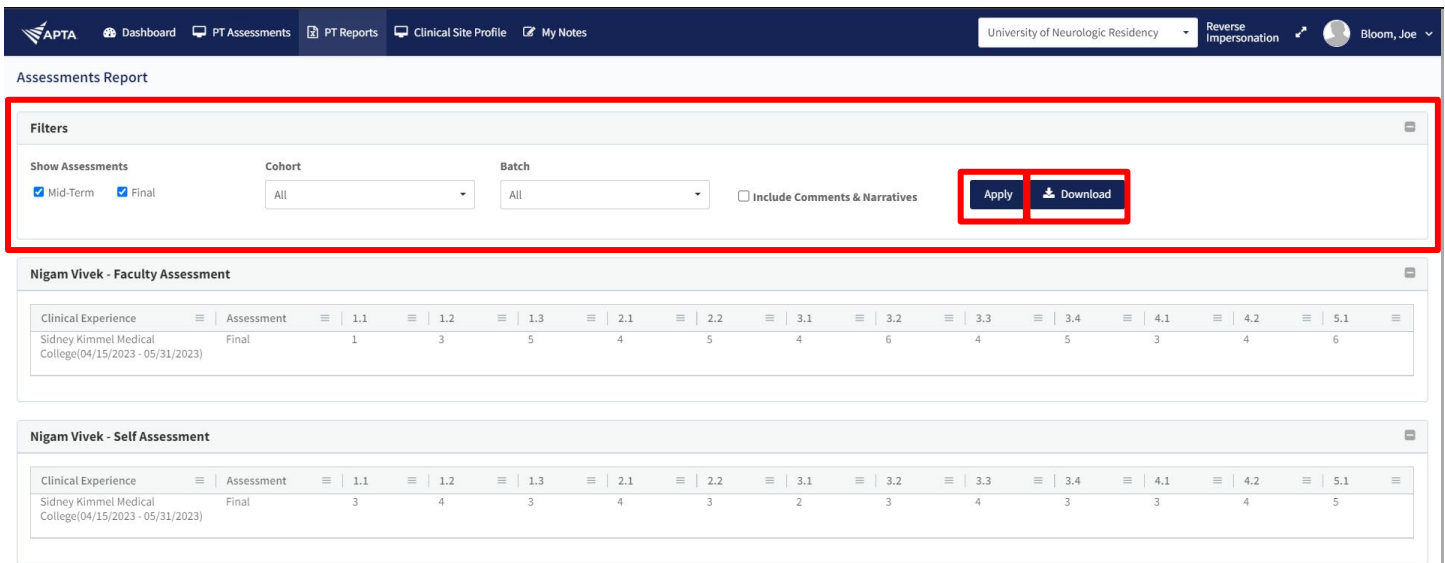
Clinical Experience	Assessment	1.1	1.2	1.3	2.1	2.2	3.1	3.2	3.3	3.4	4.1	4.2	5.1
Sidney Kimmel Medical College(04/15/2023 - 05/31/2023)	Final	1	3	5	4	5	4	6	4	5	3	4	6

Nigam Vivek - Self Assessment

Clinical Experience	Assessment	1.1	1.2	1.3	2.1	2.2	3.1	3.2	3.3	3.4	4.1	4.2	5.1
Sidney Kimmel Medical College(04/15/2023 - 05/31/2023)	Final	3	4	3	4	3	2	3	4	3	3	4	5

2. Use the filter to create your desired report

- Check "Include Comments & Narratives" to view and download comments and narrative made in both CI Assessments and Student Self Assessments.
- You MUST click **Apply** to apply the filters
- Download** creates an excel version of your results



This screenshot is identical to the previous one, but with a red box highlighting the "Apply" and "Download" buttons in the filters section.

The Clinical Site Profile allows the SCCE to view CSIF (Clinical Site Information Form) details previously completed for each clinical site they are associated with.

Note The SCCE may NOT edit clinical site information from this tab. To make edits or changes please return to the Settings tab. If there is no completed CSIF for a site, it will not appear in this list.

Click [View Details](#) to view a site's CSIF.

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Clinical Instructor Information

PT/PTA Assessment

PT Assessments are assigned by the DCE and are only visible if SCCEs have also been assigned to a student as a Clinical Instructor (CI). You may need to change your role to CI in order to see the assessments assigned to you.

APTA

Dashboard

PT Assessments

PT Reports

CSIF

My Notes

APTA University - PT

Role

CI

Reverse Impersonation

?

CPI, SCCE1

Assessments

Midterm

Final

Assessments Overall Status

0%

0

Assessment(s) Complete

1

Assessment(s) Pending

Clinical Experience ↑	Student	Cohort / Batch	Self Assessment	Assigned CI/SCCE	CI Assessment	Due Date	Assessed On	Action
APTA Sports Medicine Clinic (10/16/2023 - 08/15/2024)	CPI, Student1	Class of 2024 / DPT 2530 (2024)	Not Started	CPI, CI2 CPI, SCCE1	In Progress			Continue CI Assessment Significant Concerns

View 150 entries

1 to 1 of 1

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Use PT Assessments to complete or review assessments and track assessment completion progress.

APTA

Dashboard

PT Assessments

PT Reports

Clinical Site Profile

My Notes

APTA University - PT

Assessments

Midterm

Final

Assessments Overall Status

100%

1

Assessment(s) Complete

0

Assessment(s) Pending

Clinical Experience ↑	Student	Cohort / Batch	Self Assessment	Assigned CI/SCCE	CI Assessment	Due Date	Assessed On	Action
NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, CI1 CPI, SCCE2	Complete		02/22/2024	View CI Assessment View Student Assessment

View 150 entries

1 to 1 of 1

< > Page 1 of 1 >

Start, Continue or View Assessments

APTA Rubric evaluations have been created and mapped by APTA administrators. Click the Action for your selected student to Start or Continue an Assessment. If the assessment is complete, click the Action to view the Assessment.

Assessments

Refresh

Midterm

Final

Assessments Overall Status

0%

0

Assessment(s) Complete

1

Assessment(s) Pending

Clinical Experience ↑	Student	Cohort / Batch	Self Assessment	Assigned CI/SCCE	CI Assessment	Due Date	Assessed On	Action
NovaCare-Miami (02/01/2024 - 02/17/2024)	CPI, Student3	Class of 2025 / ClinEd I	Complete	CPI, CI1 CPI, SCCE2	In Progress			Continue CI Assessment Significant Concerns

View 150 entries

1 to 1 of 1

< > Page 1 of 1 >

Verify the student's name and evaluation (Midterm or Final), then complete the rubric by selecting the appropriate response for each criterion and adding comments.

NOTE: 2 CIs Complete Assessments.

It is important to note that the two CIs will be working on a single assessment. The portal does not support multiple users simultaneously working on an assessment. CIs will need to coordinate and add their rating and comments at different times so when they click "Save as Draft," their work will be saved in the assessment. Click "Save as Draft" regularly to refresh the page and save the contents.

The CIs will have to agree on a rating for each criterion. If one CI submits the assessment, the other CI will no longer be able to edit it, so make sure they confirm with each other prior to submission. Please have each CI sign off on their individual comments so that they can be differentiated during assessment review.

Student: CPI, Student3 CI: CPI, C11, CPI, SCCE2		Class of 2025 / ClinEd I NovaCare-Miami (02/01/2024 - 02/17/2024)		Back Save as Draft Submit		
Final PT Assessment - Clinical Instructor In Progress		PT CPI Instructions: For each performance criterion, review all descriptors and click the numbered box for the rating that best matches the student's typical behaviors. The supervision/caseload and sample behaviors span across two performance levels. When deciding between two performance levels (ex: 1 vs 2) consider where there is a preponderance of evidence and make your rating at that level. Once you click submit, you will not be able to make edits. Contact the DCE to unlock your assessment if needed.				
Performance Criteria	Beginning Performance (1)	Advanced Beginner Performance (2)	Intermediate Performance (3)	Advanced Intermediate Performance (4)	Entry-Level Performance (5)	Beyond Entry-Level Performance (6)
Professionalism 1.1: Ethical Practice Hide Description <i>Practices according to the Code of Ethics for the Physical Therapist; demonstrates respect for self, the patient/client, and colleagues in all situations.</i> Comparative Rating(s) CI Midterm: 6 Student Midterm: 2	1	2 ✓	3	4	5	6
	Supervision/Caseload: Not required for this performance criterion. Sample Behaviors (NOT an exhaustive list) - Acknowledges that there are ethical practice standards by which they should abide. - Identifies obvious unethical behaviors that occur in the clinical setting. - Identifies, acknowledges, and accepts responsibility for their actions. - Maintains patient/client confidentiality. - Engages in a polite and respectful manner with patients/clients and colleagues. More Behaviors		Supervision/Caseload: Not required for this performance criterion. Sample Behaviors (NOT an exhaustive list) - Articulates most of the policies and procedures of their clinical practice setting (e.g., OSHA, HIPAA). - Articulates most of the elements of the Code of Ethics for the Physical Therapist. - Reports clinical errors without prompting from the CI. - Gathers objective information to support questions regarding any potentially unethical More Behaviors		Supervision/Caseload: Not required for this performance criterion. Sample Behaviors (NOT an exhaustive list) - Abides by the policies and procedures of the clinical practice setting (e.g., OSHA, HIPAA). - Adheres to the elements of the Code of Ethics for the Physical Therapist. - Consistently identifies unethical behaviors. - Uses resources (e.g., hospital ethics committee) for addressing and resolving ethical More Behaviors	
	Professionalism 1.1: Ethical Practice - Areas of Strength* more comments					

Add criteria level comments on **Areas of Strength** and **Areas for Development**.

Scroll to the end of the rubric to add comments for an **Overall Summary**, **Number of Days Absent**, and **Days Absent Comments**. You cannot type alphabetical values in the Number of Days Absent box.

Overall Summary (Please include the student's strengths and areas for further development.)*

Number of Days Absent*

0

Days Absent Comments*

Once you click Submit, the CPI 3.0 is complete and you will not be able to make edits. Please review your selections and comments, then click Submit.

Save your Rubric

Clicking on a rating will automatically save the rating for that criterion. You must click to another area after making a comment for it to auto-save.

Save As Draft allows you to save an incomplete rubric without publishing it to other areas in Competency.AI. Rubrics saved as a draft will remain **in progress** until edits are complete and submitted.

Submit Once you click submit the rubric is **complete**. You will not be able to make any edits. Please review your comments and selections carefully, then click **Submit**.

Back brings you back to the PT Assessments page.

Notes: If you need to make edits to your assessment, please contact your DCE/ACCE to have them unlock the assessment.

If you are affiliated with a military program, you may experience errors when completing the assessment due to firewall restrictions. Please attempt to access the assessment from a different WiFi network prior to reaching out to support.

Viewing Combined Assessments

This feature provides the ability for SCCEs to view, download and print the assessment reports for assessments completed at their clinical site.

1. The “PDF” button will appear for SCCEs once either the CI or student has started an assessment.

Clinical Experience ↑	Student	Cohort / Batch	Self Assess... ▾	Assigned CI/SCCE	CI Assessment	Due Date	Assessed On	Action
APTA Hospital - Outpatient (10/23/2023 - 12/15/2023)	CPI, Student1	Class of 2024 / DPT 2530 (2024)	Complete	CPI, CI1	Complete	08/03/2024	07/10/2024	View CI Assessment View Student Assessment PDF

2. Clicking the “PDF” button will open a sub-menu where SCCEs can select which assessment type and comments to view. The clinical experience information at the top of the assessment PDF, student and CI assessment ratings, overall summary, number of days absent, days absent comments, and assessment submission dates will always be visible.
 - a. The assessment type options are as follows:
 - i. CI Assessment (Will be disabled if CI has not started assessment)
 - ii. Student Assessment (Will be disabled if student has not started assessment)
 - iii. Combined Assessment (Will be disabled if CI & Student assessments are not complete)
 - b. The sub-menu options are below:
 - i. All comments
 - ii. Student Only Comments
 - iii. CI Only Comments
 - iv. No Comments
 - c. There is also an option to include descriptions of each performance criteria.

Preview and Download

The PDF will only include data that has been saved in an assessment, including incomplete assessments. A blank field in the PDF indicates a response has not been saved.

Please choose which assessment to view from the list below:

☐ CI Assessment
☐ Student Assessment
☐ Combined Assessment

Please choose which comments to include from the list below. The clinical experience information, overall summary, days absent and days absent comments will always be visible.

☐ All Comments
☐ Student Only Comments
☐ CI Only Comments
☐ No Comments

Include performance criteria descriptions in the PDF?

☐ Yes ☒ No

Close

Continue

- The “PDF” button in the midterm tab will include ratings and comments from JUST the midterm. The “PDF” button in the final tab will include ratings and comments from the midterm AND final.
- Once the assessment type and comments are selected, SCCEs will be able to view the selected fields on the PDF.
- Clicking on Download button allows the user to produce the PDF document The user should be able to view, download, save, and print the assessment they choose to view.

Preview Assessment

Download PDF

PT CPI 3.0 Assessment - Midterm

Student: CPI, Student1

CI(s): CPI, CI1

Program: APTA University - PT

Clinical Site: APTA Hospital - Outpatient

Cohort / Batch: Class of 2024 / DPT 2530 (2024)

Clinical Experience Dates: 10/23/2023 - 12/15/2023

Student Midterm Submitted: 08/15/2025

CI Midterm Submitted: 07/10/2024

Professionalism 1.1: Ethical Practice

	Beginning Performance (1)	Advanced Beginner Performance (2)	Intermediate Performance (3)	Advanced Intermediate Performance (4)	Entry-Level Performance (5)	Beyond Entry-Level Performance (6)
Clinical Instructor			M			
Student		M				

Key: M = Midterm

Significant Concerns

Throughout the clinical experience, students and CIs may submit “Significant Concerns” to the DCE/ADCE. These comments pertain to incidents that have occurred throughout the clinical experience or situations that are of concern to the student or clinical instructor(s). They can submit these concerns at any time.

When a Significant Concern is reported, the DCE and ADCE will receive an automated email notification. The Significant Concern button will populate as a red button next to the assessment—clicking on it will open the dialog box.

Significant Concerns

Student : CPI, Student1
CI : CPI, CI2; CPI, SCCE1

Class of 2024 / DPT 2530 (2024)
APTA Sports Medicine Clinic (10/16/2023 - 08/15/2024)

X

Do **not** submit a comment below unless there is a performance concern(s), unsafe event(s), and/or incident(s) to report. Do **not** write “N/A”, “none”, “no safety concerns”, etc. This field is **not** required in order to complete the CPI 3.0 assessment.

Add Comments here

Once you click “submit” an email will be sent to the DCE/ADCE.

Cancel
Save As Draft
Submit

Here, you can review your comments and any replies that have been shared with you. This field is not required to complete an assessment, if no significant concerns arose during the student’s experience, please do not fill out this field.

Please note: The Significant Concerns box functions as a notification service, not a communication service.

My Notes

Use +Add Note to keep personal notes. Notes are NOT visible to any other user.

APTA
Dashboard
PTA Assessments
PTA Reports
Clinical Site Profile
My Notes

APTA University - PTA
CPI, CI1

My Notes

Add Note

Title ↑	Description	Created Date	Delete
No data available			

View 100 entries.
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Training Videos

[CI/SCCE Rubric Training Video](#)

[Reporting Significant Concerns in CPI 3.0](#)

For any questions or concerns regarding the CPI, please contact CPI@APTA.ORG or call (800) 999-2782 x

8582.