Clinical Performance Instrument (CPI)

Site Coordinator of Clinical Education (SCCE) User Guide

3/12/2026

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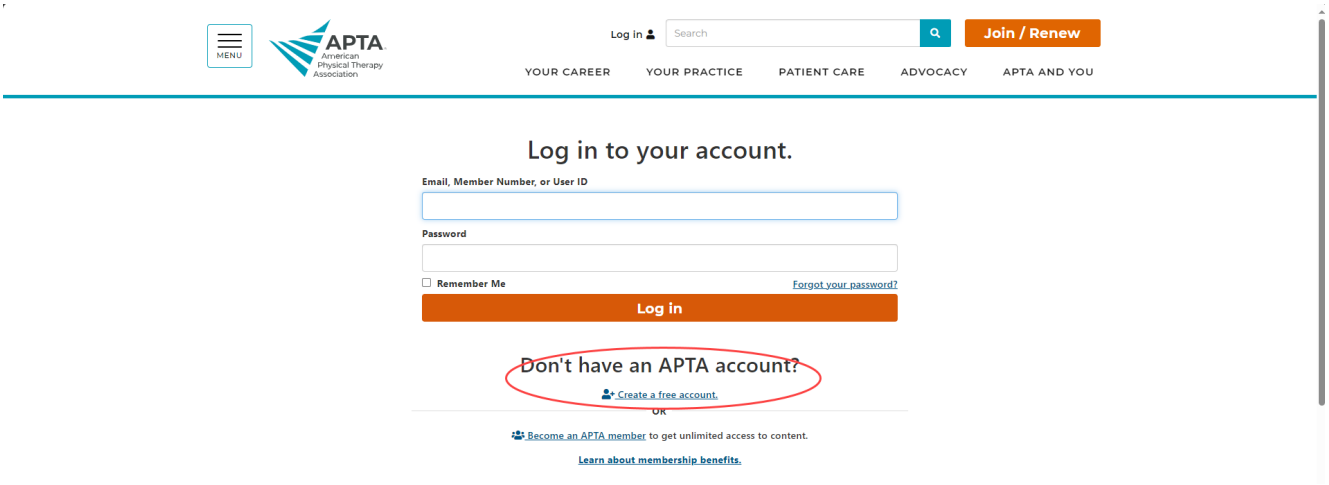
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Login

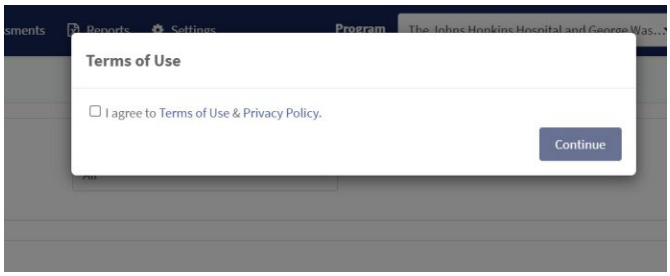
Go to https://cpi.apta.org
Click **Login**



Log in to your account using your APTA login credentials.

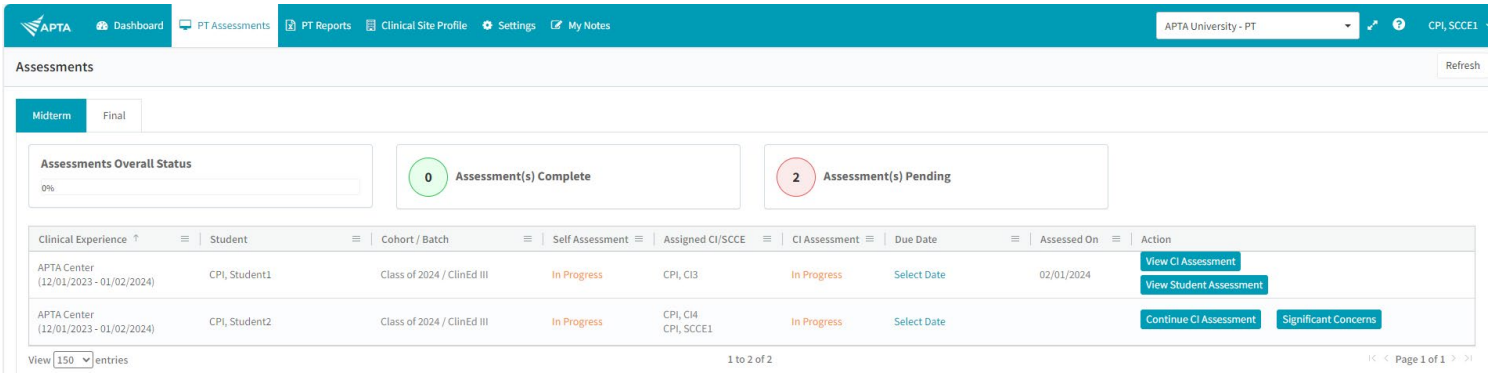


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The **Dashboard** appears.



SCCE will be only able to see data for the program(s) they are associated with. If the SCCE is associated with **multiple programs, use the program dropdown menu to switch programs.*

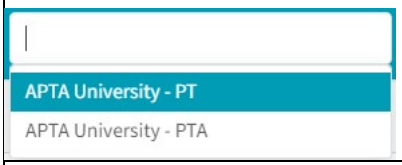
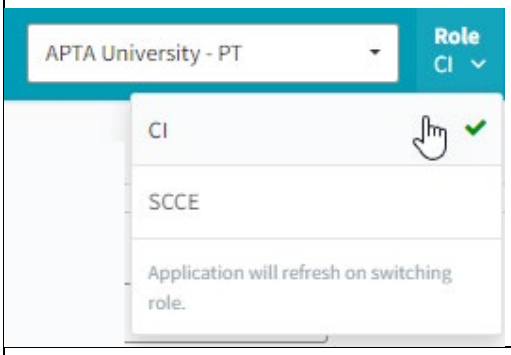


For login questions/issues: Email membersuccess@apta.org or call 800-999-2782 (APTA). This includes situations of multiple APTA accounts, password reset, and updating email addresses. You may also update your email address by going to Contact Information. Please do not create a new account if one currently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

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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**.

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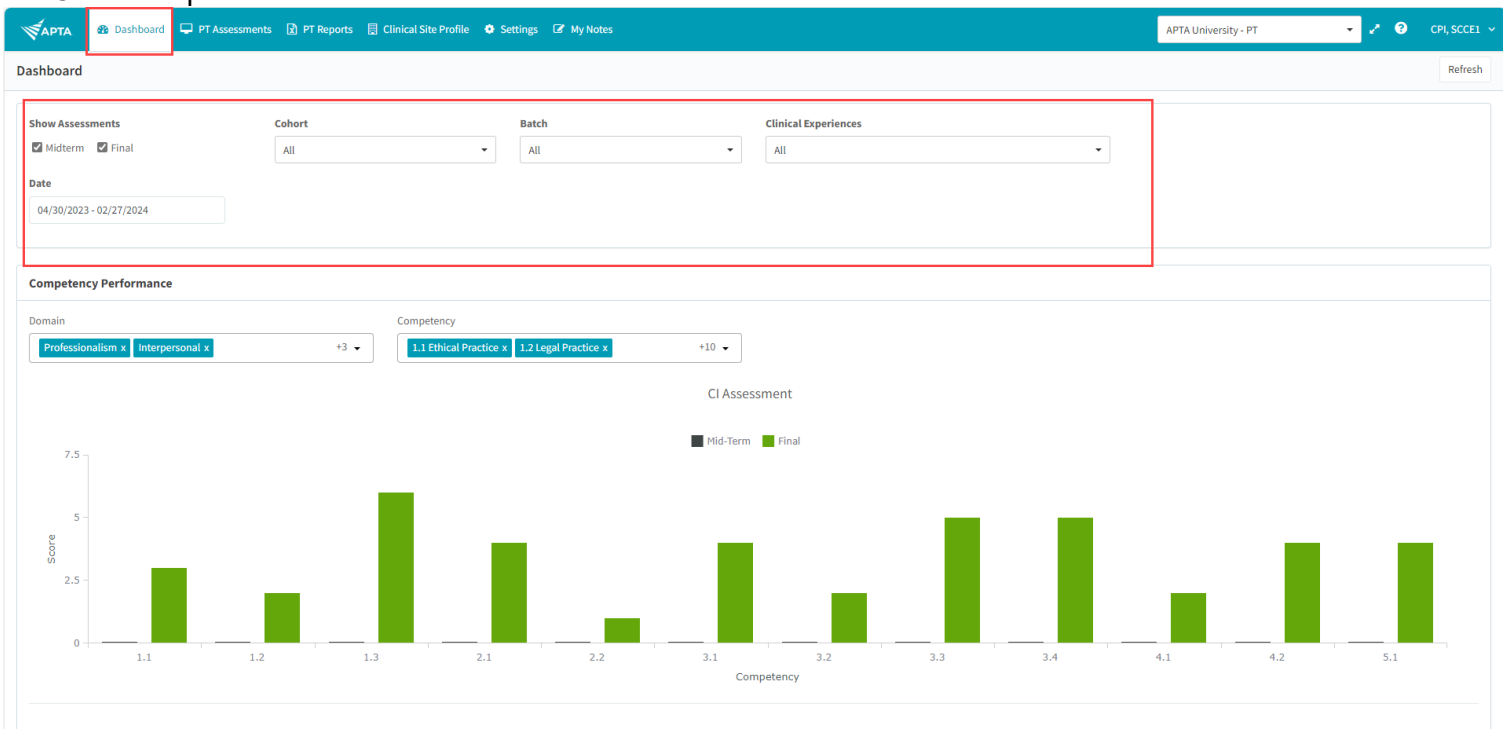
	Click to access **User Guides**.
	Click your **User name dropdown** to: • View your user profile • Log Out of the system

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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 each competency score for additional information.

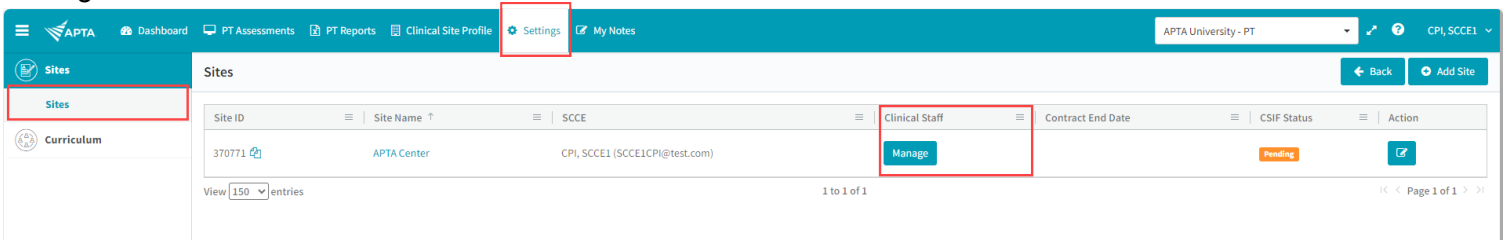


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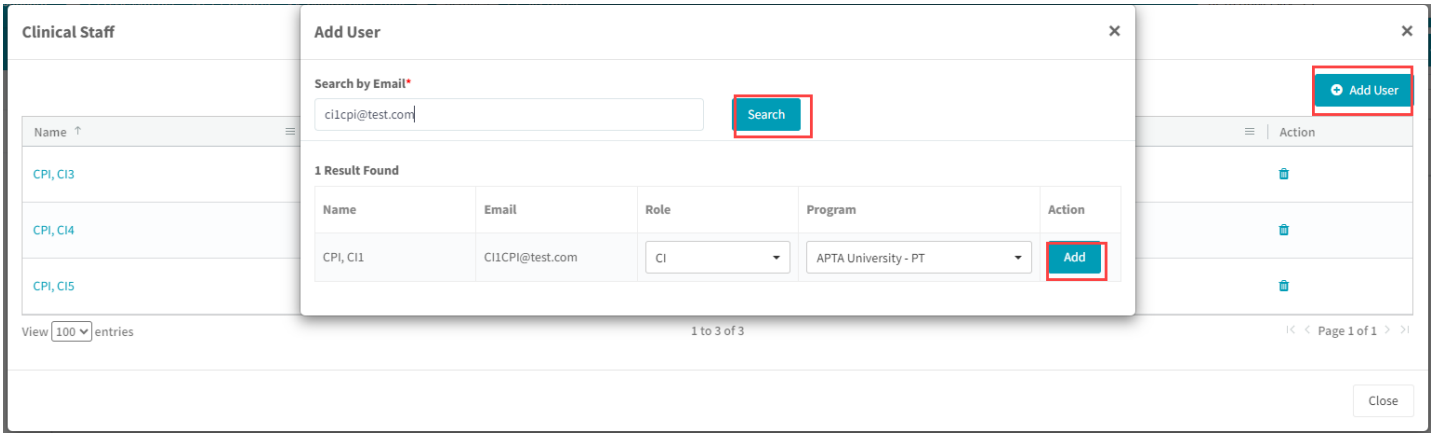
Clinical Sites

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.

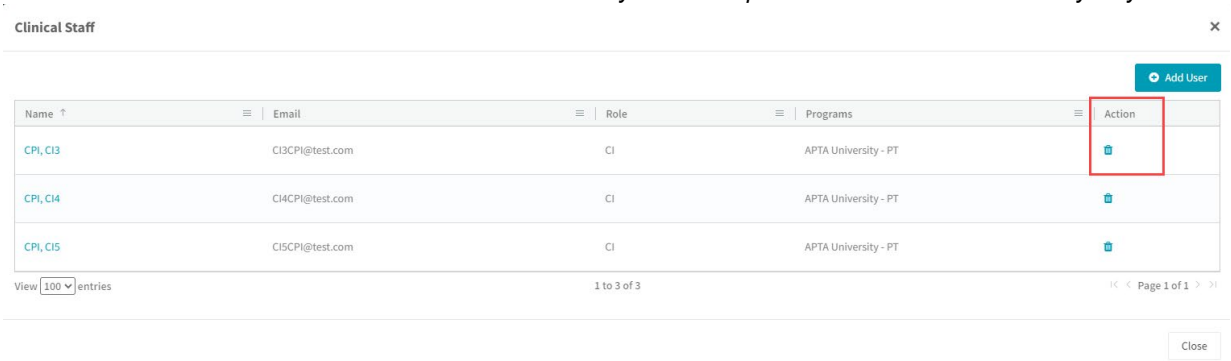
Manage Clinical Staff



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



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.



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Edit Clinical Site Information

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

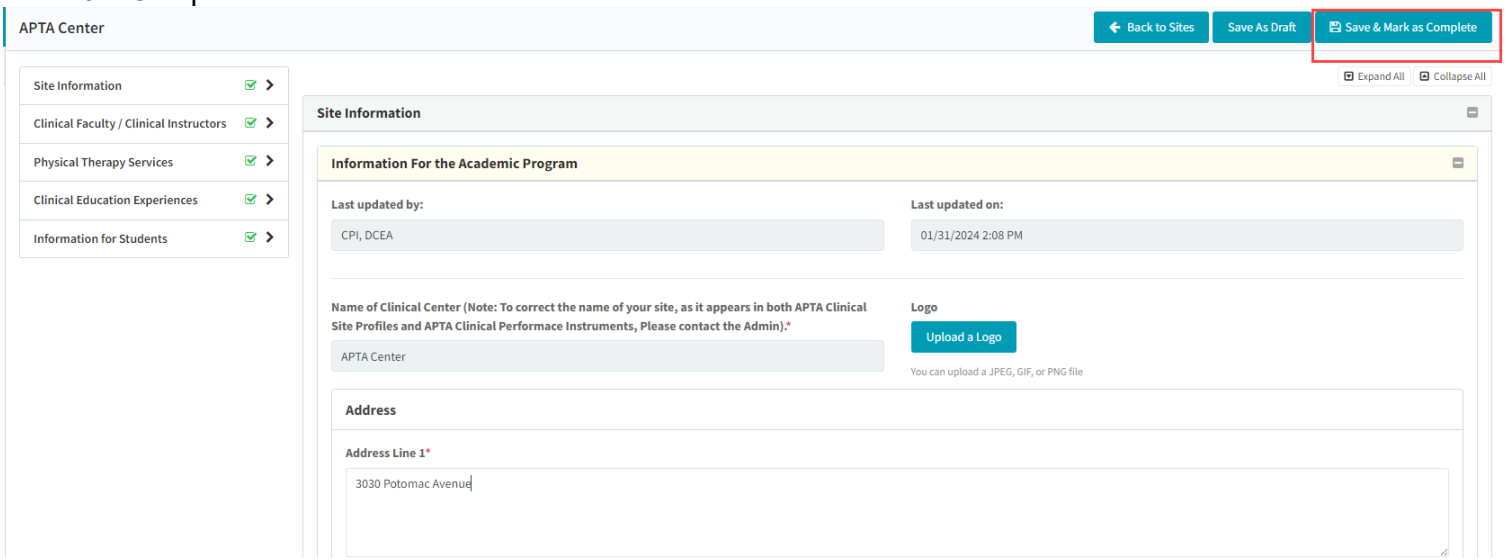
1. Click the edit icon to add and edit FULL site information



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



3. Complete each section and SAVE.



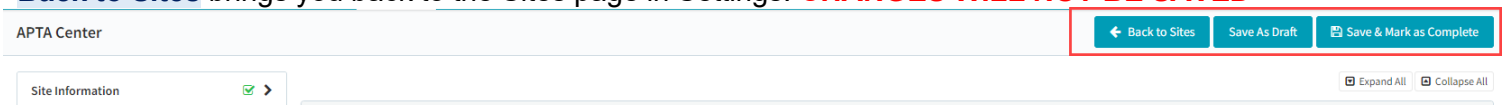
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Saving site information

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**

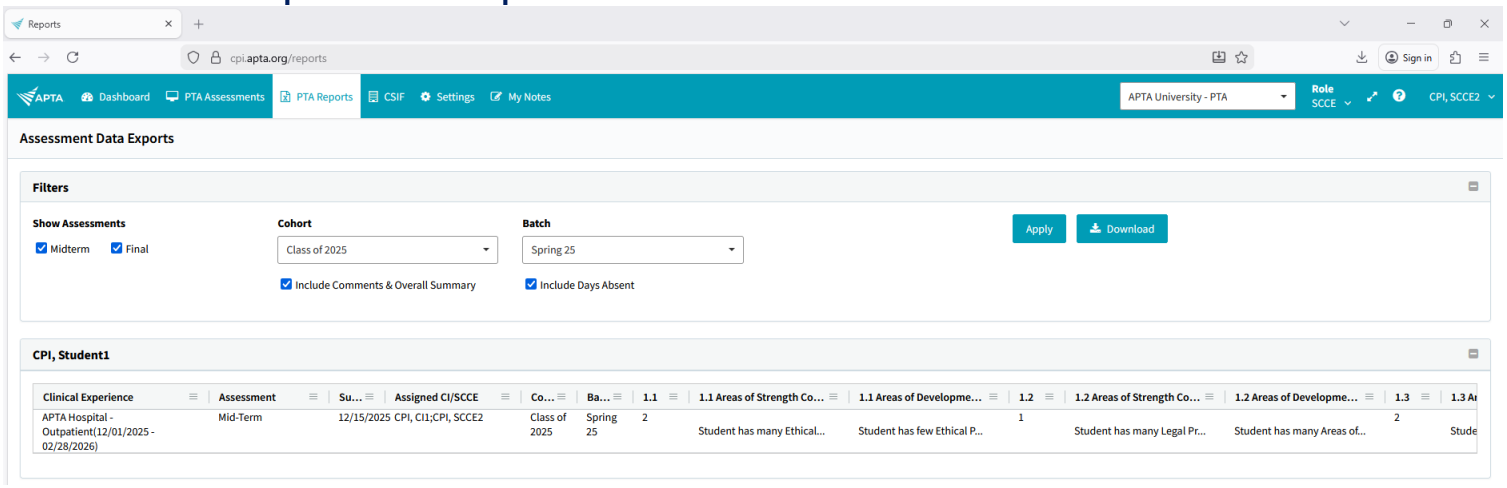


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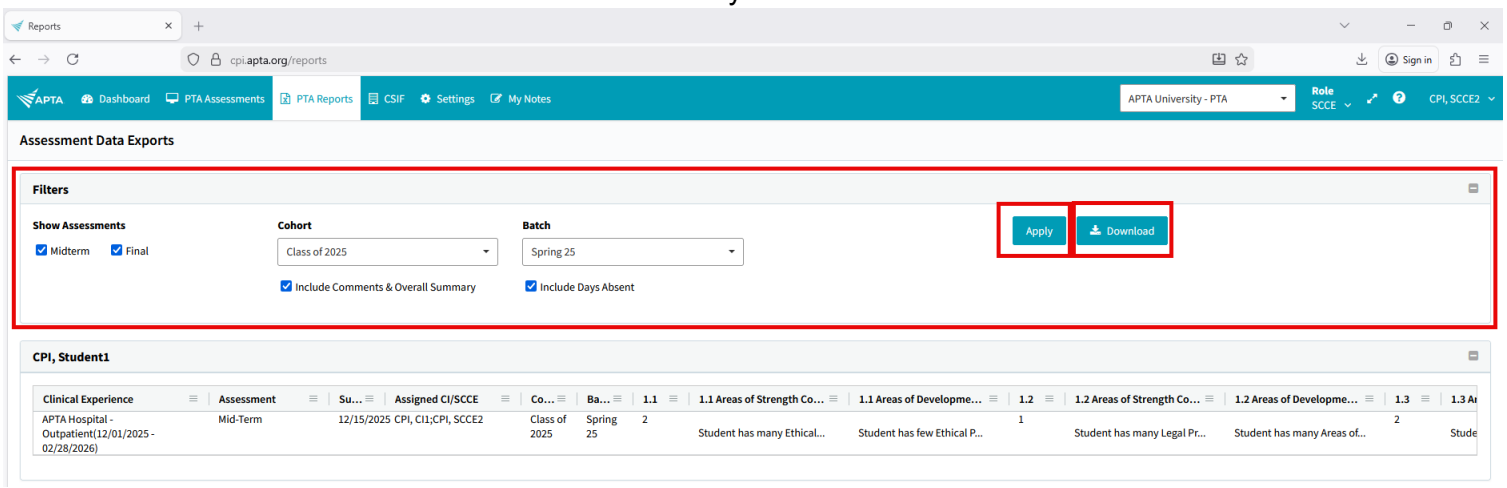
PT/PTA Reports

PT/PTA Reports allows the SCCE to view and download scores and comments in an excel spreadsheet. The SCCE can only view and download information for students who are currently completing a clinical experience at their site (the original end date of the clinical experience must not have passed yet).

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



2. Use the filter to create your desired report
   a. Check “Include Comments & Overall Summary” to view and download comments and overall summary made in both CI Assessments and Student Self Assessments.
   b. Check “Include Days Absent” to view and download the number of days absent and the comment about the student’s absent submitted by their CI.
   c. You MUST click **Apply** to apply the filters and generate the report.
   d. **Download** creates an excel version of your results.



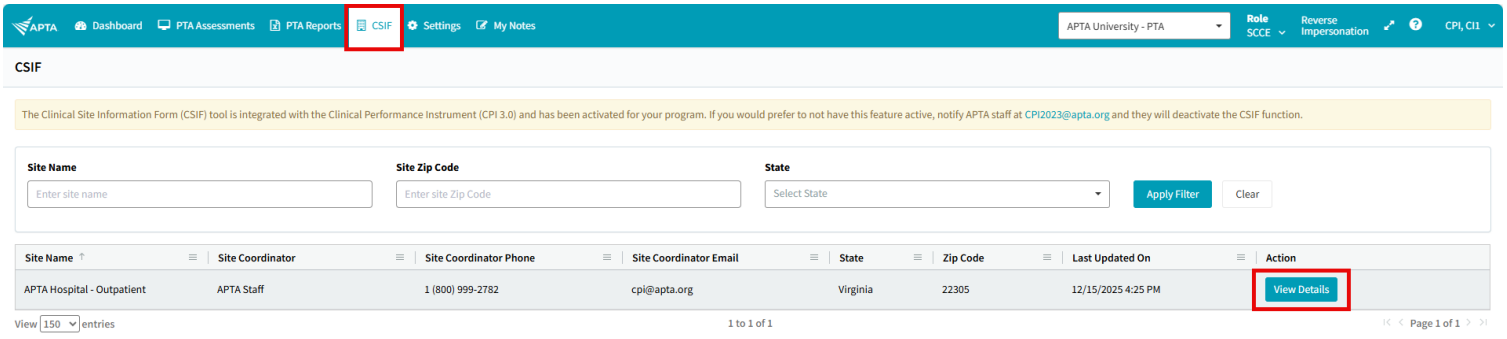
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Clinical Site Information Form

The CSIF tab 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.

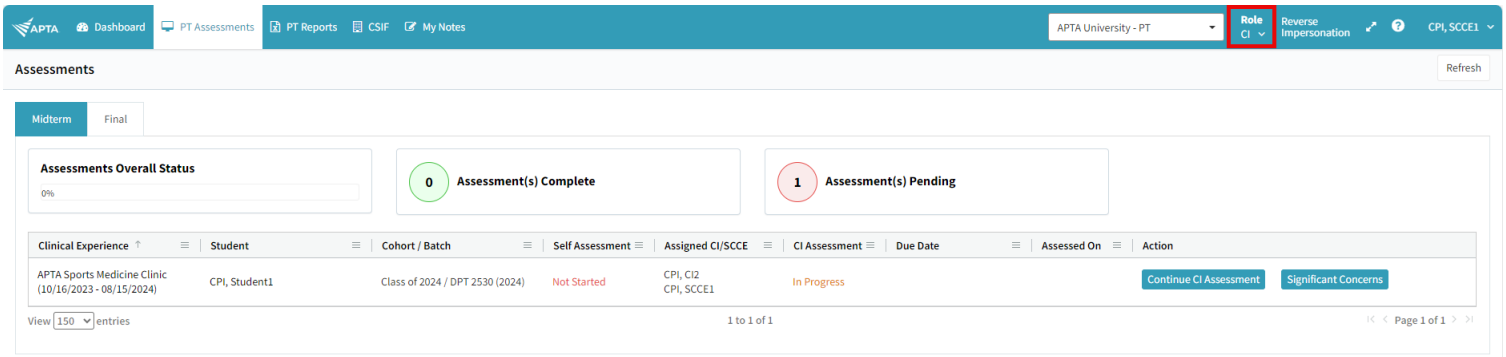


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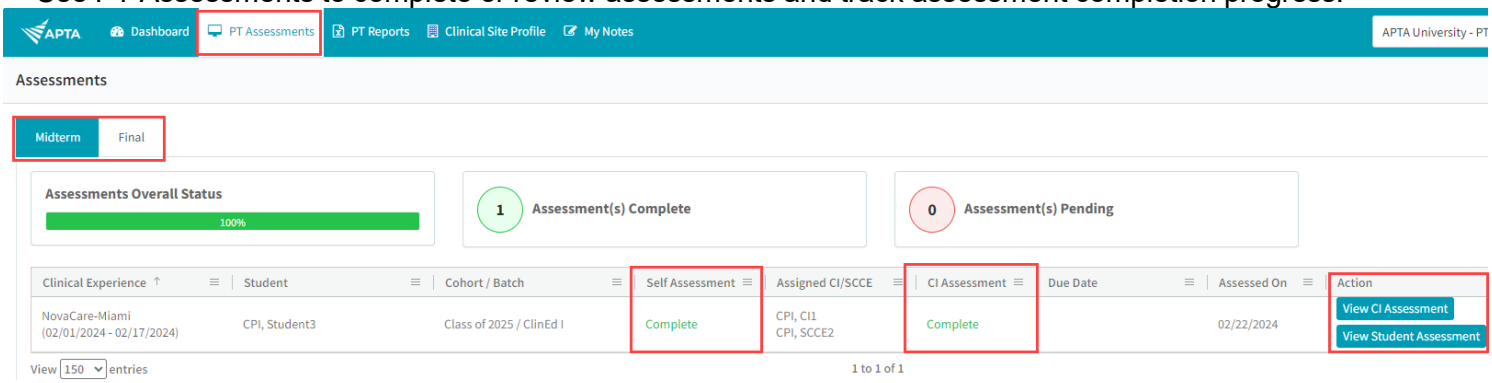
Clinical Instructor Information

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.

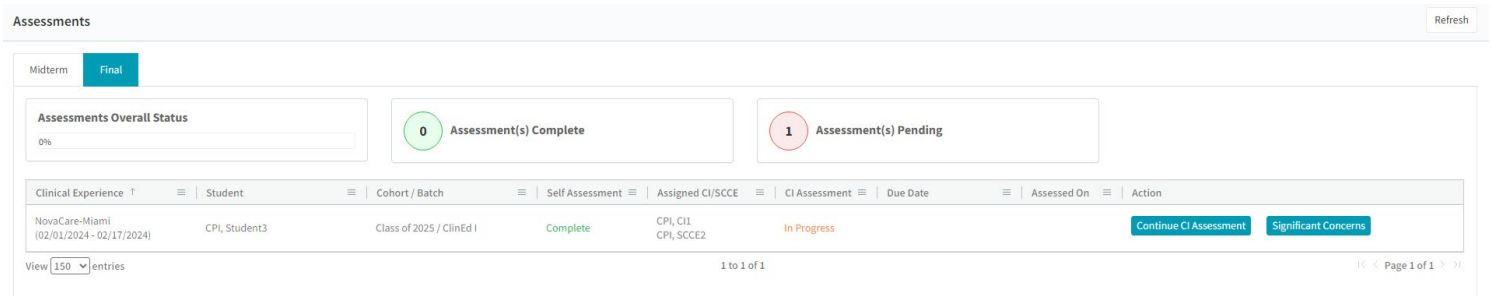


Use PT Assessments to complete or review assessments and track assessment completion progress.



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.



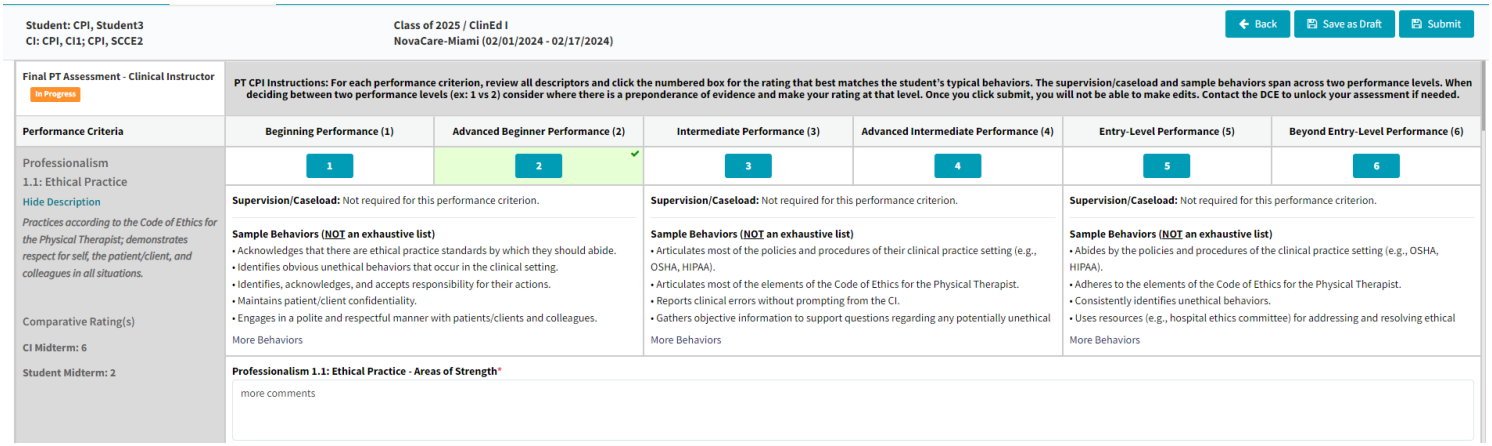
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Verify the student's name and evaluation (Midterm or Final), then complete the rubric by selecting the appropriate response for each criterion and adding comments.

NOTE: 2 CIs Complete Assessments.

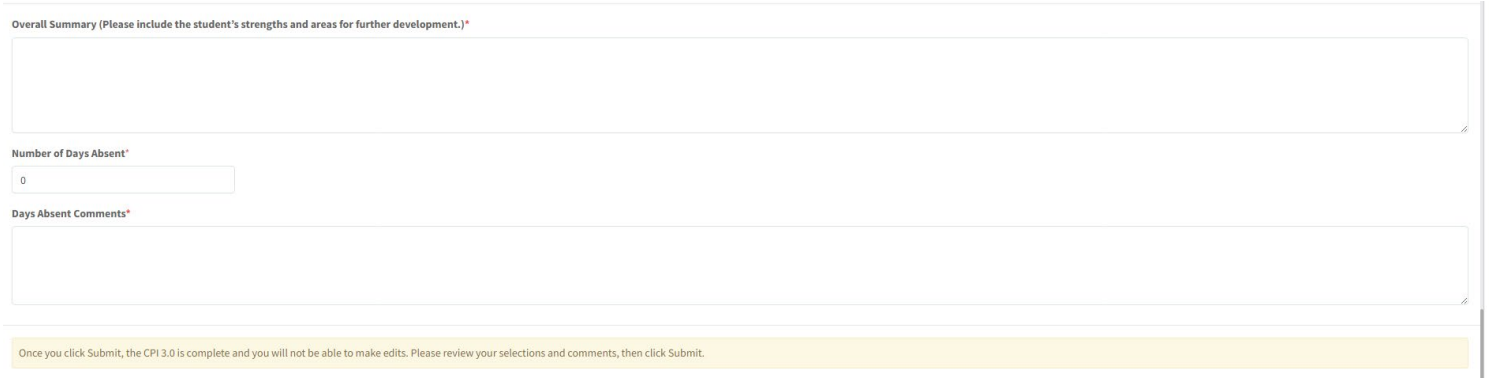
It is important to note that the two CIs will be working on a single assessment. The portal does not support multiple users simultaneously working on an assessment. CIs will need to coordinate and add their rating and comments at different times so when they click "Save as Draft," their work will be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



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.



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.

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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.

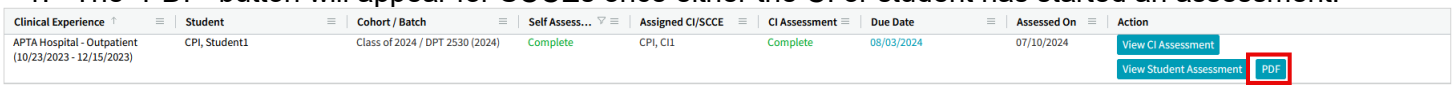
Notes: If you need to make edits to your assessment, please contact your DCE/ACCE to have them unlock the assessment.

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

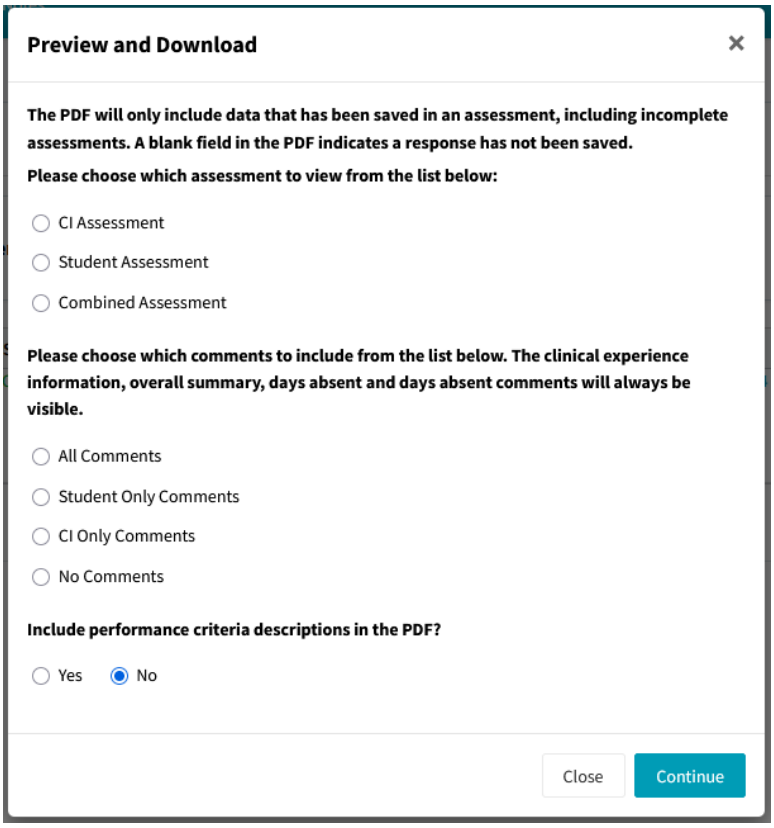
This feature provides the ability for SCCEs to view, download and print the assessment reports for assessments completed at their clinical site.

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

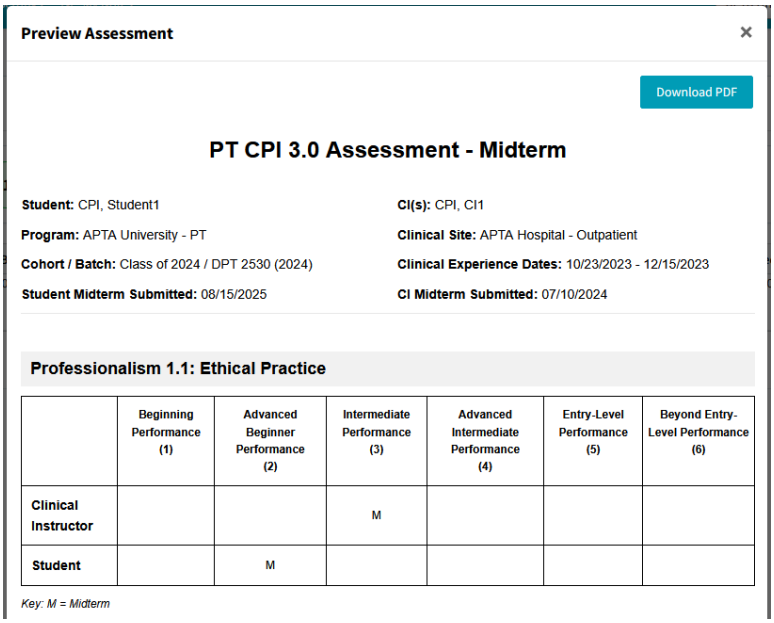


2. Clicking the “PDF” button will open a sub-menu where SCCEs can select which assessment type and comments to view. The clinical experience information at the top of the assessment PDF, student and CI assessment ratings, overall summary, number of days absent, days absent comments, and assessment submission 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.

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3. 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.
4. Once the assessment type and comments are selected, SCCEs will be able to view the selected fields on the PDF.
5. 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.

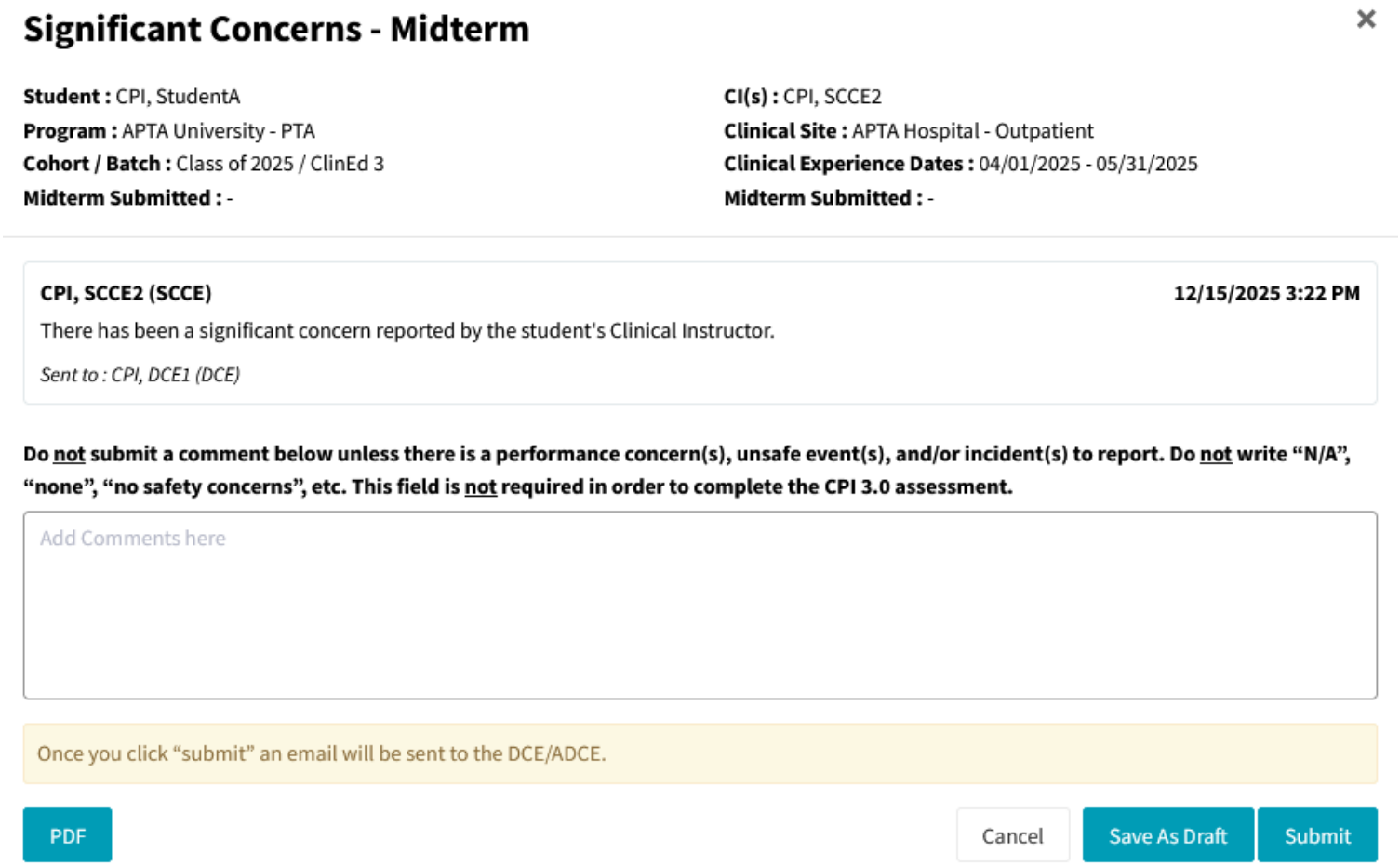


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Significant Concerns

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.



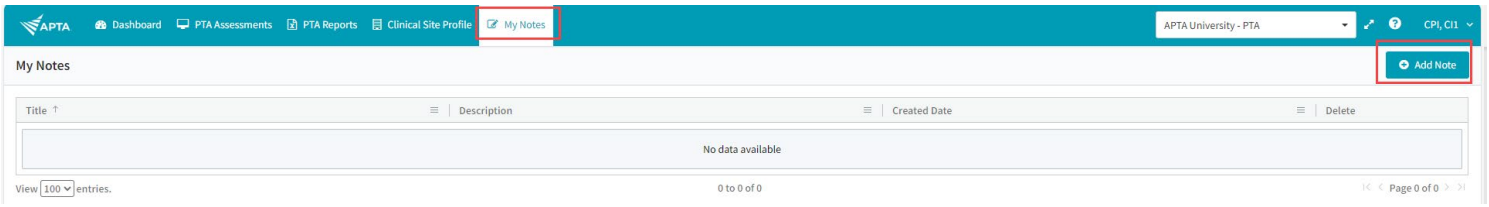
Here, you can review comments and any replies. Additionally, SCCEs will be able to export all notifications that appear in the significant concerns box by clicking on the “PDF” button in the lower, left-hand corner of the screen. Clicking the button will prompt your computer to save a PDF copy of these notifications, along with the author, timestamp, and clinical experience information to your machine for offline access. This field is not required to complete an assessment.

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.

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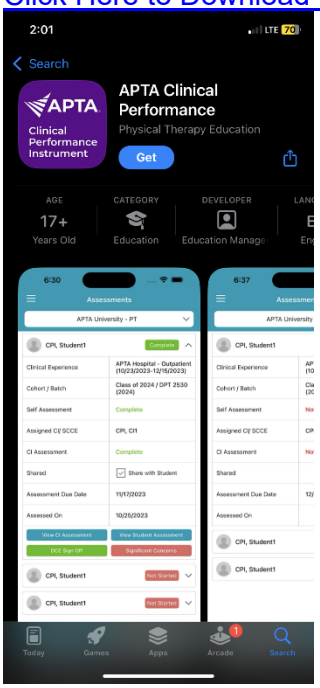
Mobile App Overview

CPI 3.0 is a cloud-based assessment tool that physical therapist and physical therapist assistant students complete, along with their clinical instructors (CIs), during their clinical experiences. While also accessible from a website, these mobile apps were built for students and CIs to complete midterm and final assessments from mobile devices and tablets. It also allows educational program staff (DCE, ADCE, Admin Staff, and Adjunct Faculty) and Site Coordinators of Clinical Educations (SCCE) to check the completion status and review what was submitted by students and clinical instructors linked to their educational program or facility. The permissions associated with each user role regarding assessment visibility mirror the permissions available on the CPI 3.0 web platform.

Downloading the CPI 3.0 mobile app

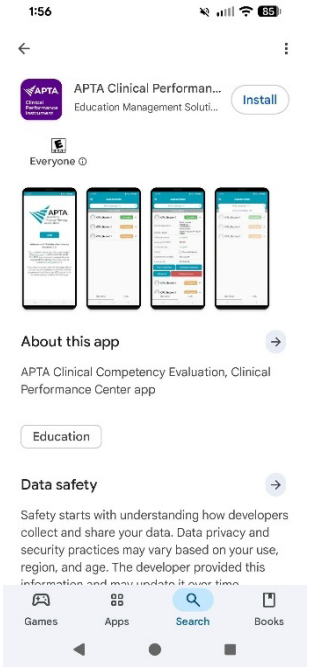
The CPI 3.0 mobile app is available exclusively for Apple and Android devices and can be downloaded and accessed free of charge from those device specific app stores. Follow the link below to download the CPI 3.0 mobile app:

Click Here to Download from the Apple App Store



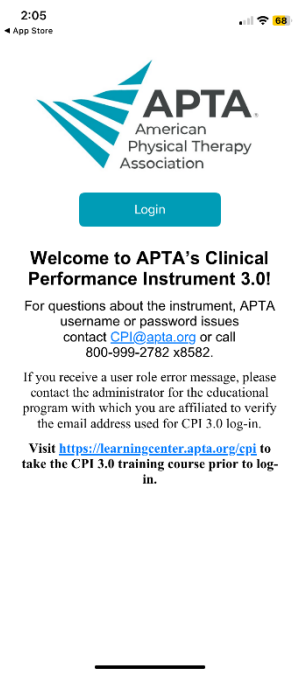
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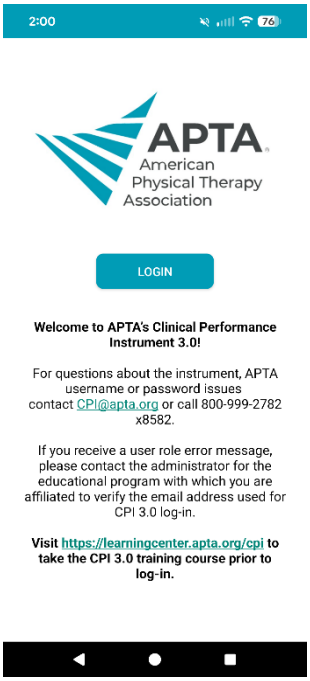
[Click Here to Download from the Google Play Store]



Accessing the CPI 3.0 mobile app

1. After downloading the app, click **Login**

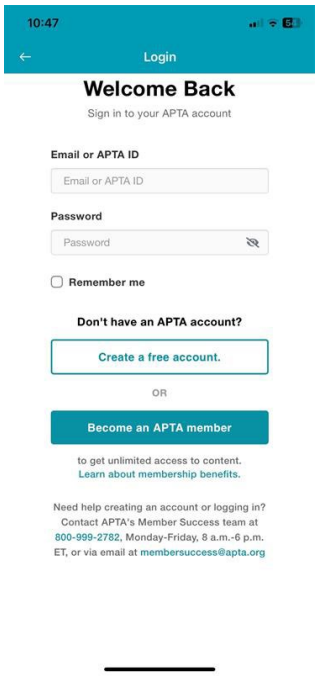




Apple Android

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2. On the next page, enter your APTA login credentials to access your CPI 3.0 account. Apple users will click the “Go” button on their keyboard after typing in the credentials to complete the log in process. Android users will click the orange “Log in” button after entering their credentials,



Apple

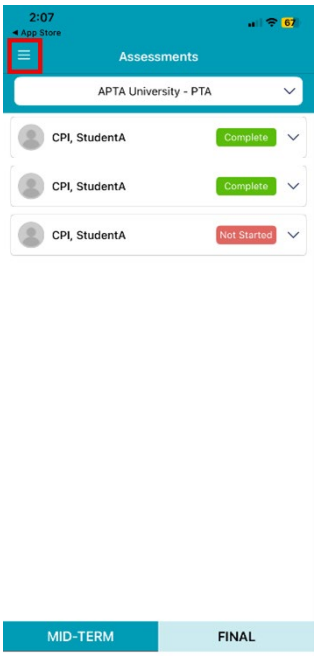


Android

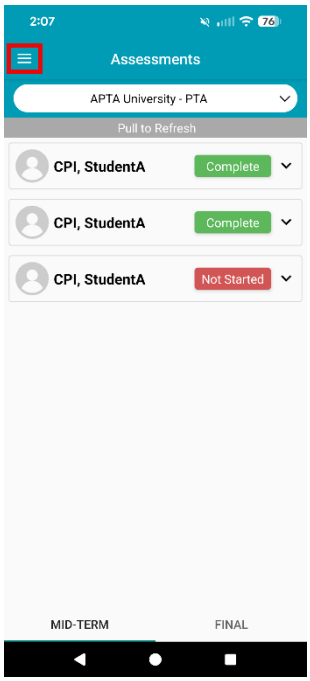
Navigating within the CPI 3.0 mobile app

After logging in, you'll be directed to the Assessments Page. At the top, you'll see the “Assessments” title. Just below, a white box displays your institution's name. If you are affiliated with multiple programs in CPI 3.0, tap the arrow to open the drop-down menu and confirm you're using the correct institution. The Assessments page can also toggle between the midterm and final assessments by selecting the corresponding tab at the bottom of the screen.

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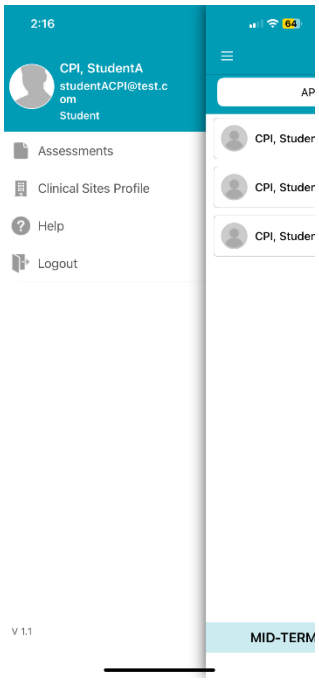
Apple



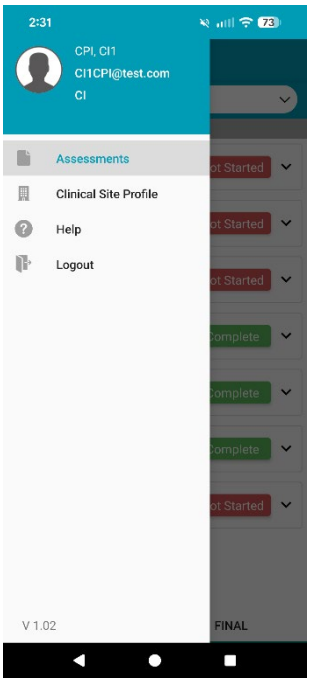
Android

On the top-left corner, tap the menu icon (three horizontal lines) to open the sidebar, which includes:

- Profile name, email address, and current role
- Assessments – view your assigned assessments
- Clinical Site Profile – view sites with completed Clinical Site Information Forms that are affiliated with your program (user role dependent)
- Help – access user guides available to you.
- Logout – Logs you out of the CPI 3.0 mobile app and returns you to the CPI 3.0 landing page. screen.



Apple



Android

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Profile

A user's name and email address are pulled from their APTA account.

- The user's first and last name can be updated online here: https://aptaapps.apta.org/MyApta/NameInformation.aspx
- The email address can be updated here: https://aptaapps.apta.org/MyApta/ContactInformation.aspx

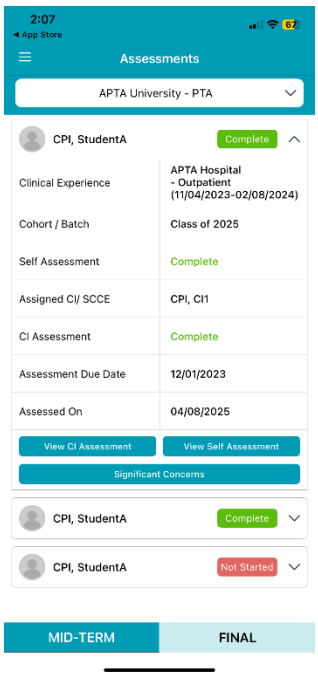
Completing Assessments

Assessment Overview

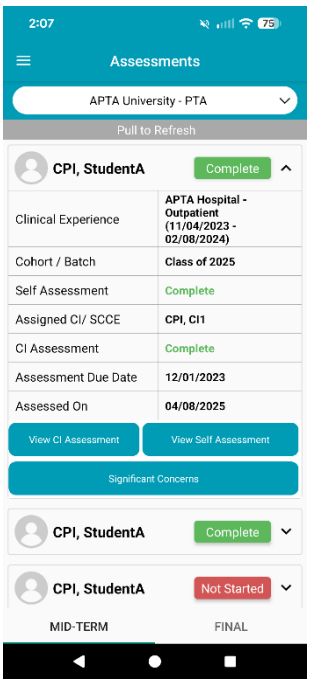
- Each box on the home screen represents an individual assessment assigned to you.
- Assessments are labeled and color-coded to indicate progress:
  - Green – Completed
  - Orange – In Progress
  - Red – Not Started
- Assessment progress is saved across both CPI 3.0 mobile and desktop applications. Assessments can be started, edited, and submitted on the mobile app or desktop computer without any data loss.

Selecting & Completing an Assessment

1. Tap an assessment to open information about the clinical experience and complete, resume, or view assessments.



Apple

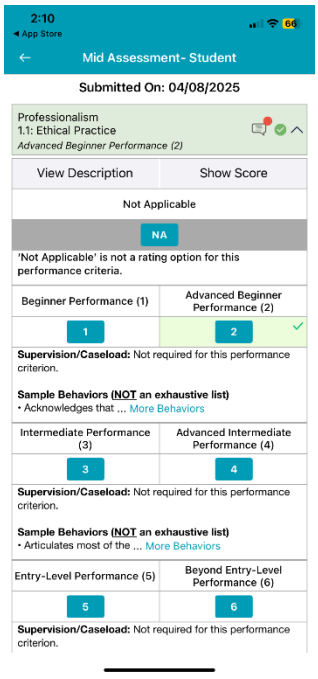


Android

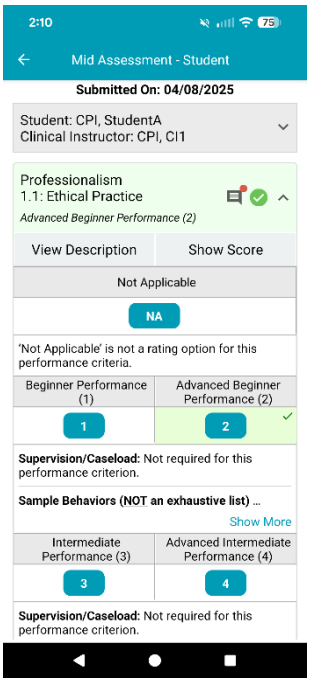
2. Opening an assessment will bring users to a page to select and edit scores and comments for specific performance criteria. Tapping on the banner or downward pointing arrow will open the score selection screen.

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- Any score can be selected or changed by tapping on the desired number. The block containing the number will turn green and a checkmark will appear next to the score selected. This selection will be recorded automatically and can be changed until the assessment is submitted.



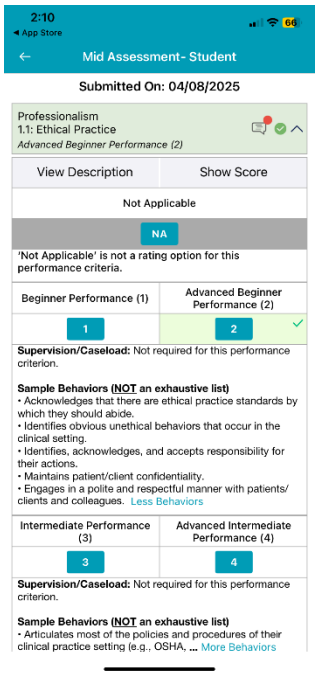
Apple

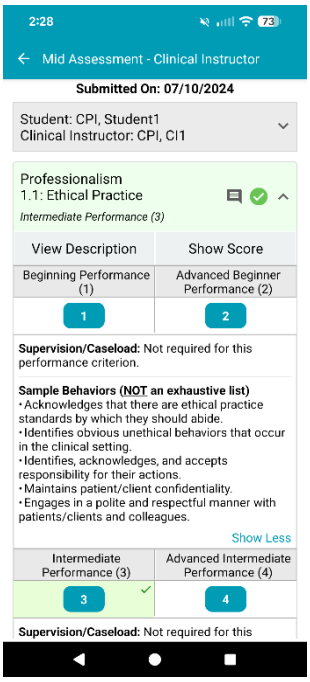


Android

3. After opening the performance criteria selection window, there is an opportunity to review the supervision/caseload requirements and sample behaviors. Below each band of assessment scores, there is a “More Behaviors” link for Apple users and a “Show More” link for Android users. Tapping on this link will reveal the full text. This text can be hidden again by tapping the “Less Behaviors” link for Apple users and a “Show Less” link for Android users.

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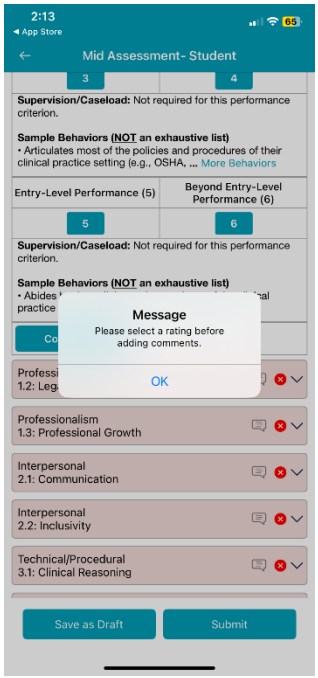


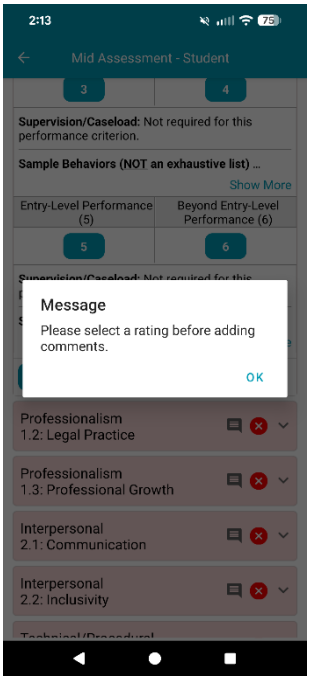
Apple Android

Adding Comments

The educational program may require comments for each performance criteria. Requirement is noted with a red asterix appearing next to the comment box name (*).

1. To add comments for the performance criteria, a number rating must be selected first. If one is not selected, a pop-up will appear prompting users to select a rating.

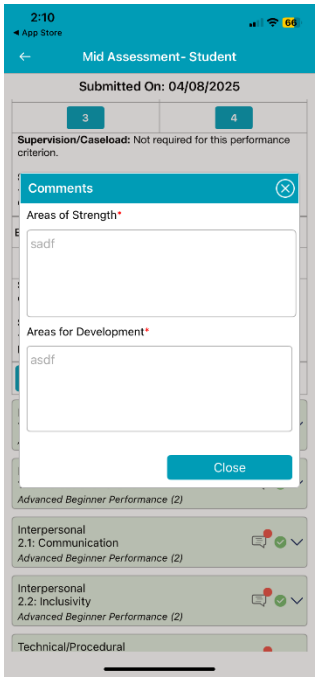




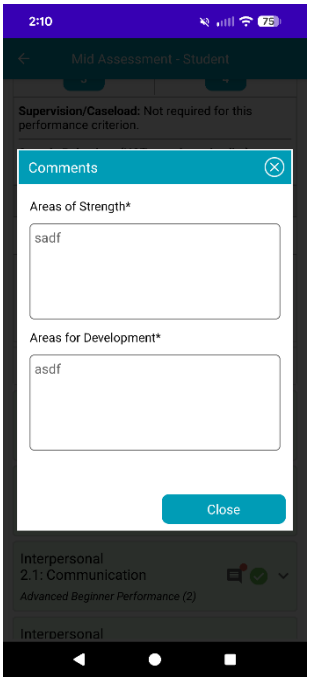
Apple Android

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2. Tap the message icon in the performance criteria banner or “Comments” box beneath the rating options.
    - After opening comments on a specific performance criterion, users will see two text boxes:
        - Areas of Strength
        - Areas of Development



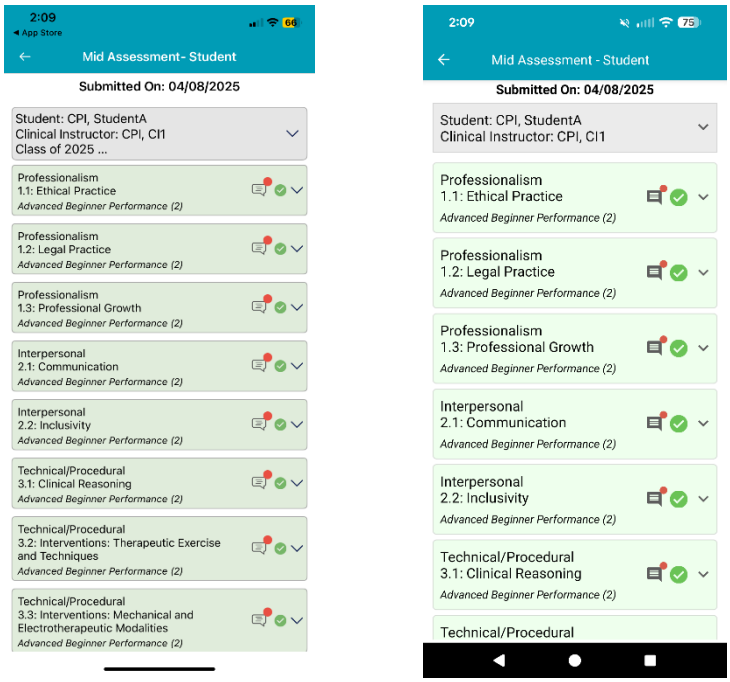
Apple



Android

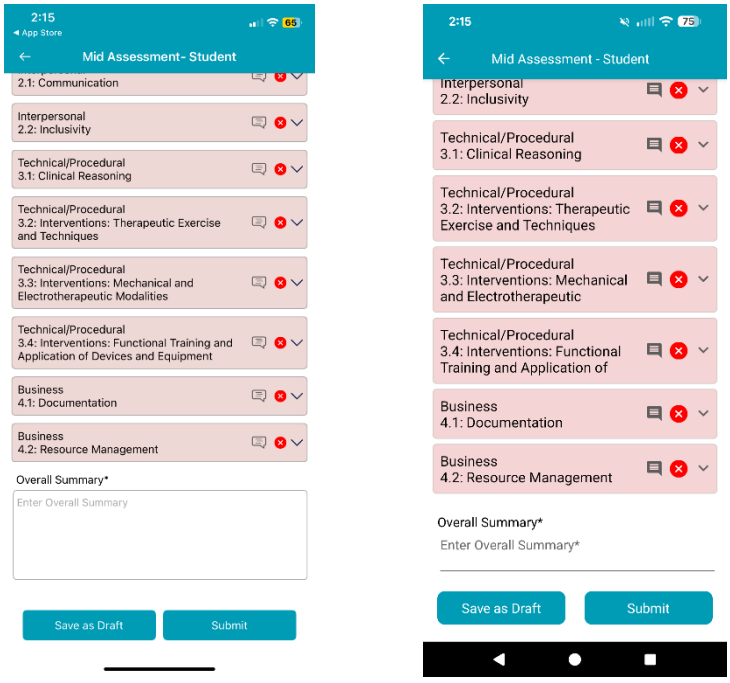
    - An error message will appear notifying the user if there are missing required comment sections before an assessment can be successfully submitted.
3. Once a comment is saved a red circle will appear on the message icon, indicating there is a comment.
    - Scroll to the bottom of the page to ensure all assessment boxes have turned green, confirming all sections are fully completed.

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Apple Android

4. All CPI 3.0 assessments are required to have an overall summary before they can be submitted. This overall summary question is found by scrolling to the bottom of the page. Tapping on the “Enter Overall Summary” text will bring up your keyboard and allow to you answer this required question.

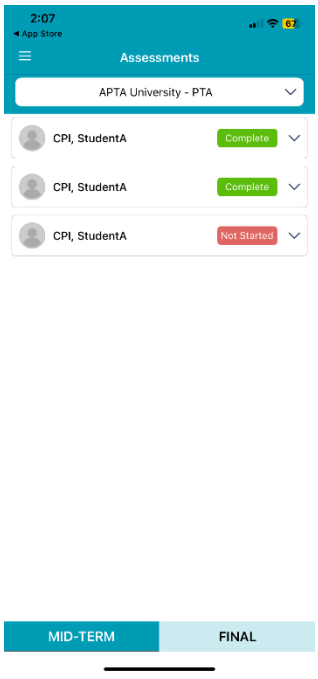


Apple Android

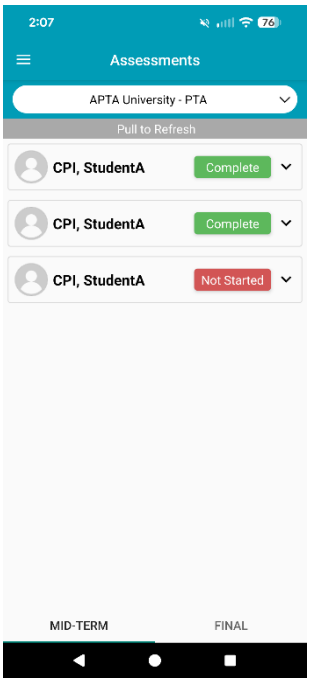
Submit or save assessment

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1. To complete an assessment, tap the Submit button in the bottom right. Once it has been submitted, users will not be able to make any changes.
    - If a user believes their assessment was accidently submitted before all comments were fully added, educational program staff can re-open an assessment. That missing content can then be added.
    - If needed, users can begin an assessment and return to complete it later. Assessment data autosaves in the mobile apps, just like the desktop version. Alternatively, users can tap on the “Save as Draft” button before closing the app, although tapping that button is NOT required to save progress.
2. After submitting, you will be redirected to the home page, and the assessment box will display a green "Complete" badge.



Apple

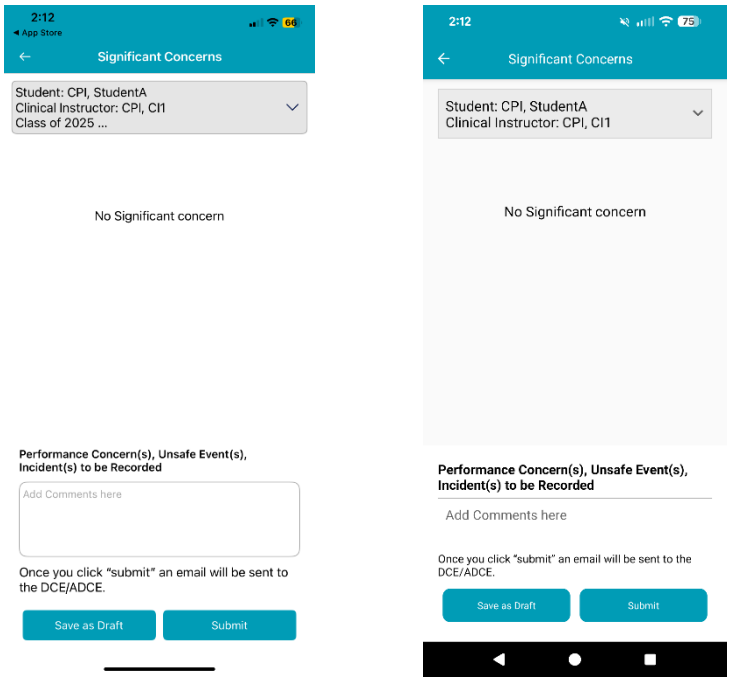


Android

Significant Concerns

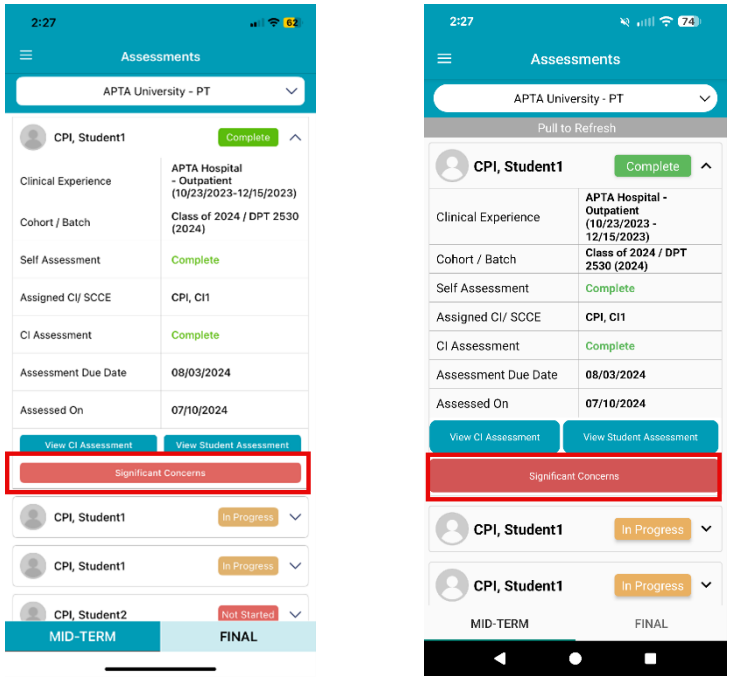
Throughout the clinical experience, students and CIs may submit “Significant Concerns” to the DCE/ADCE. These comments pertain to incidents that have occurred throughout the clinical experience or situations that are of concern to the student or clinical instructor(s). They can submit these concerns at any time. Completing this field is not necessary to submit an assessment, if no concerns occur during the experience, simply leave this section blank.

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Apple Android

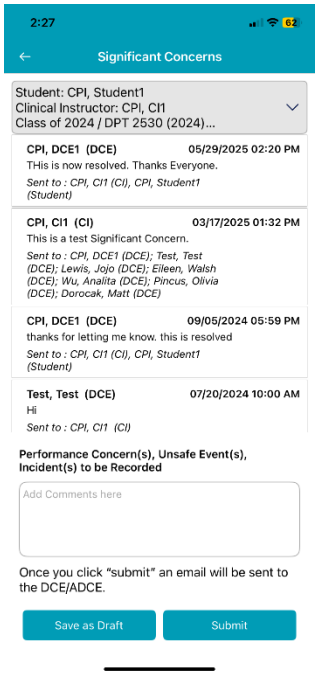
1. When a Significant Concern is reported, all program DCEs will receive email notification. The Significant Concern button will change from teal to red in the expanded assessment view for all program DCEs, ADCEs, admin staff, and the reporting user—clicking on it will open a new screen to view the concern.
    - The significant concern is visible only to DCEs and ADCEs of the program, a clinical site's SCCE (if one is identified), along with the individual who reported it. While this function is critical in reporting concerns to the school, educational program staff can also respond to the user through this section of the app.



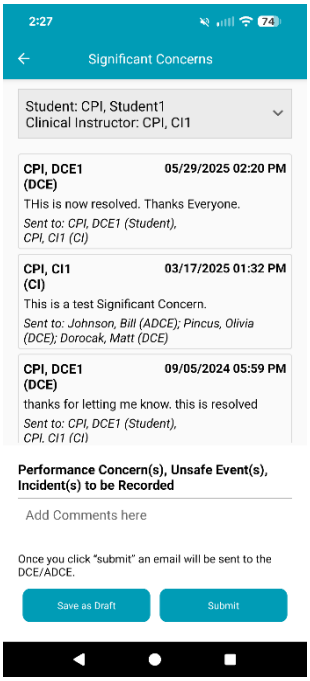
Apple Android

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2. DCE and ADCE users can choose to respond to the student or CI's concern directly or share the response with both which may be beneficial if it impacts the rest of the experience.
3. DCEs and ADCEs can "resolve" the concern on the web version of CPI, which simply provides a visual shortcut to determine if a concern has been addressed. It is not a necessary step to complete. Once a DCE or ADCE resolves a significant concern, the box will turn green.



Apple



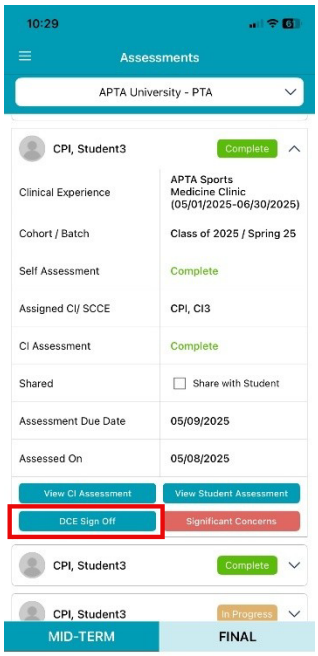
Android

DCE Sign off

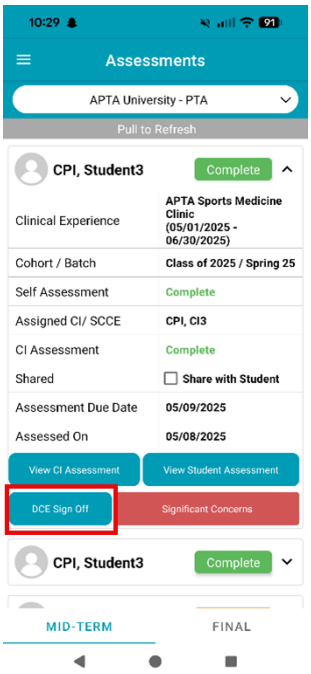
Once both the student and CI have completed either the midterm or final assessment, educational program staff can write comments. This is called DCE Sign Off. These notes can be kept private to educational program staff, shared with a student, and/or shared with a CI.

1. Once an assessment has been completed by both the student and CI, a teal DCE Sign Off button will appear next to the Significant Concerns button for DCE users.

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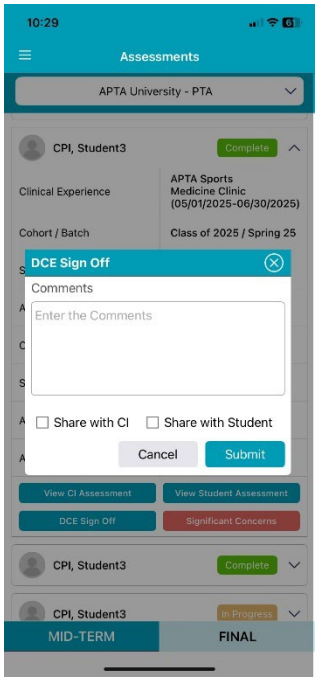


iPhone

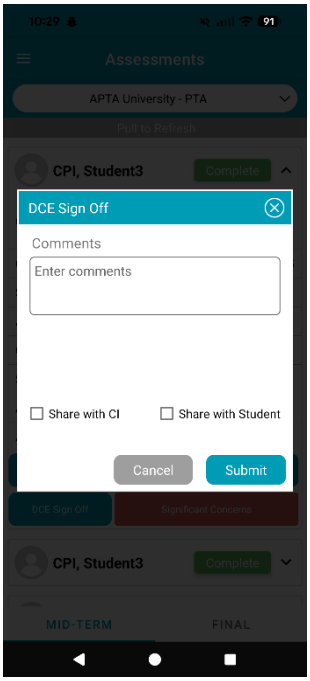


Android

2. Clicking this button will open a pop-up for comments to be entered, as well as select who can see the comments. Tapping the “Share with CI” button will allow the same DCE Sign Off button to appear next to the Significant Concerns button in the CI’s mobile app or desktop view. CIs will be able to click this button and view the DCE Sign Off comments. Tapping the “Share with Student” button will allow the DCE Sign Off button to appear next to the Significant Concerns button in the student’s mobile app or desktop view. Students will be able to click this button and view the DCE Sign Off comments. Leaving both boxes unchecked will ensure only education program staff can view the comment.



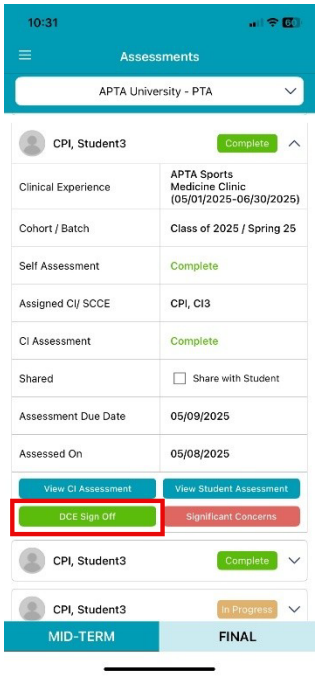
Apple



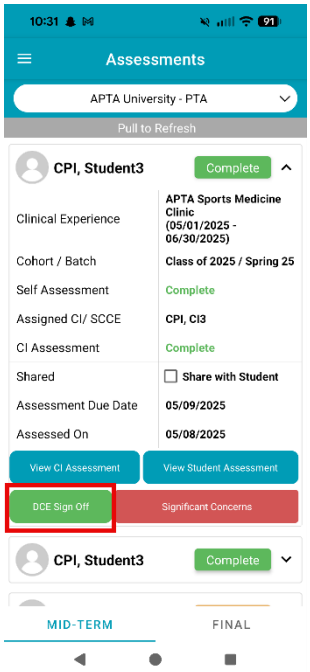
Android

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3. Clicking the “Submit” button will save the comment, share it with the selected individuals, and the DCE Sign Off button will now be green.



Apple



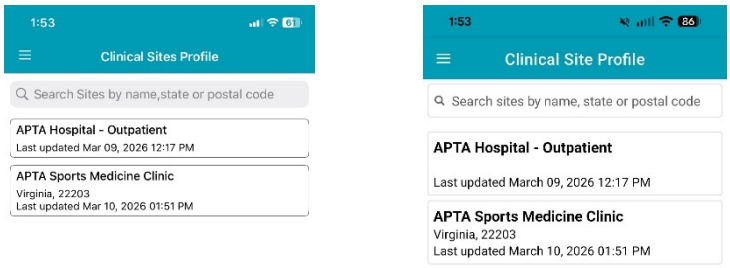
Android

Clinical Site Profile

The Clinical Site Profile page in the mobile app is a listing of clinical sites with a complete Clinical Site Information Form (CSIF). These forms can be completed from the desktop version of CPI 3.0 by SCCEs or educational program staff. The sites that are visible on this page differ by user role. Educational program staff (DCE, ADCE, and Admin Staff) can see every site in the CPI 3.0 database that has completed a CSIF. Student, CI, SCCE, and Adjunct Faculty users will only see a list of sites the school has added to their site list who have completed a CSIF.

1. Users can search for a site by tapping on the search bar at the top of the screen to enter in site details.

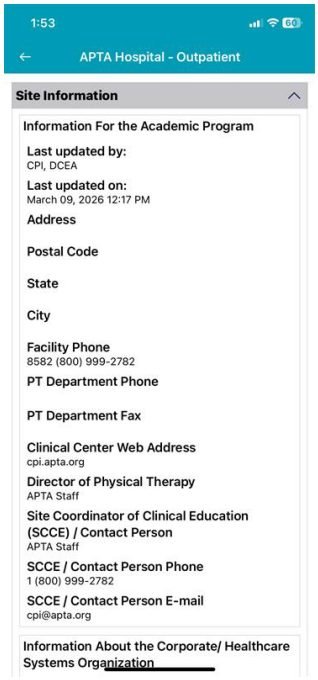
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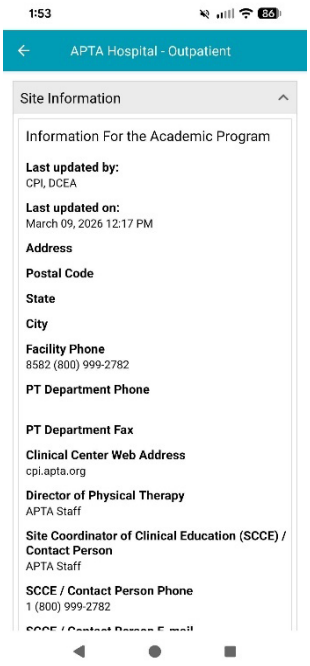


Apple Android

2. Tapping on the desired site's box will open a new page to the site's information form. The site's form includes the following information:
   - Site Information
     a. Address
     b. Clinical Site Classifications
     c. Clinical Site Location
     d. Affiliated PT and PTA Educational Program
   - Number of Clinical Faculty/Clinical Instructors
   - Physical Therapy Services
     a. Number of Patients
     b. Patient/Client Lifespan and Continuum of Care
     c. Patient/Client Diagnoses
     d. Interprofessional Practice
   - Clinical Education Experiences
   - Information for Students

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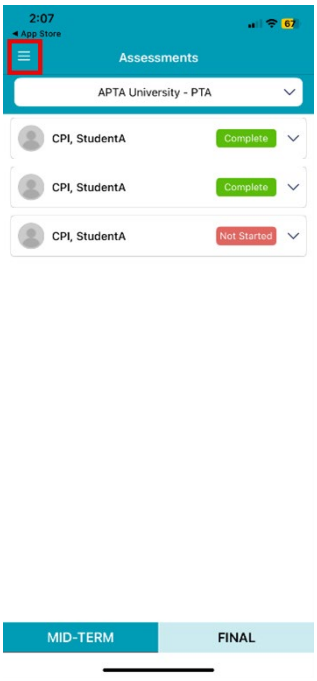


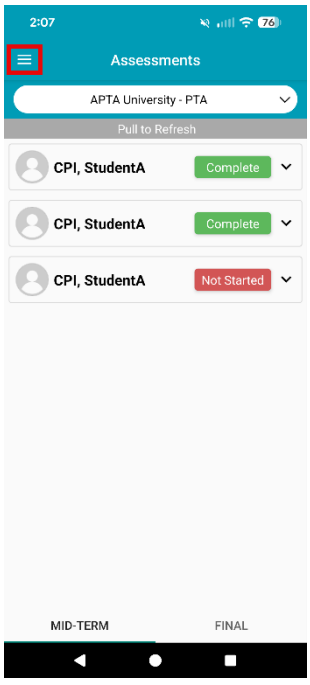


Apple Android

Help Page

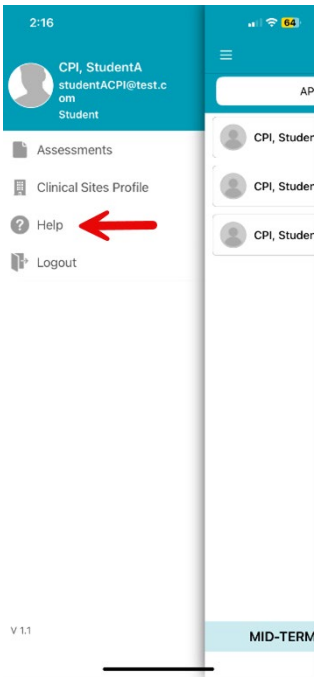
Tapping the “Help“ button in the main menu sidebar will open a User Guide which explains how to navigate the mobile or desktop site and how to accomplish specific tasks in the CPI 3.0 system. To access the “Help” button, tap the menu icon (three horizontal lines) at the top-left corner of the app. Then, tap the “Help” button.



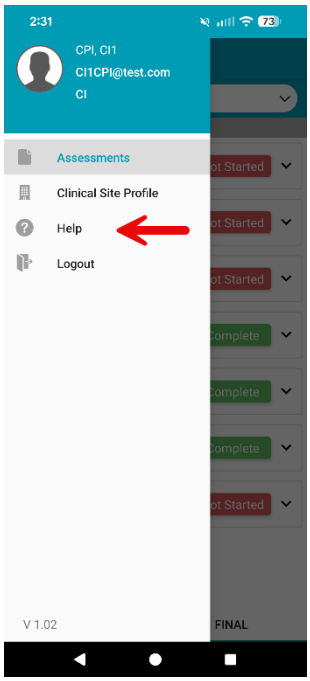


Apple Android

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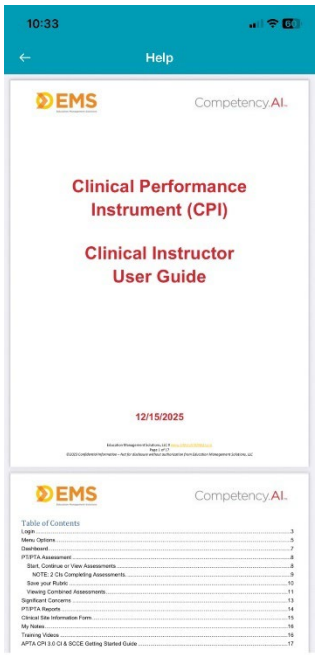


Apple

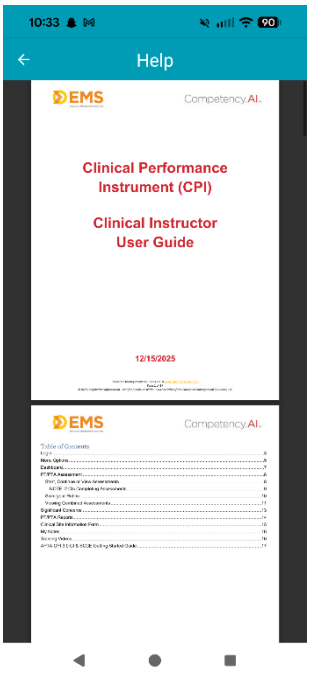


Android

Once the “Help” icon is tapped, the user’s specific guide will open.



Apple



Android

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Users with Multiple Roles

The current build of the CPI 3.0 mobile app only recognizes one user role per educational program upon sign in. The user role determines which actions can be performed on the mobile app for a specific educational program. When the user logs in, the mobile app will only recognize the “Primary Role”. The primary role assigned to a user’s account is visible on the CPI 3.0 website (not mobile app) and can be assigned or updated by DCEs, ADCEs, or Administrative Staff at the educational program.

*Please note: a CI who completed a CPI 3.0 assessment as a student, graduated, and is now serving as a CI for student(s) from their alma mater, will not be able to use the mobile app at this time. CIs who used CPI 3.0 as a student, graduated, but are currently paired with students from other educational programs are able use the mobile app to view and complete assessments. CIs who completed all their student assessments using an earlier version of the CPI or a different assessment tool are unaffected.

Technical Support

For any questions or concerns regarding the CPI 3.0 mobile app, please contact cpi@apta.org or call (800) 999-2782 and select menu option 4.

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.

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