PTA CPI Web Instructions for a CI

Login to PTA CPI Web at https://cpi2.amsapps.com

1. Your **username is your email address** provided to the school you are working with.
2. **If you have previously created a password in PTA CPI Web or PT CPI Web, please use that password to login.** If you do not have a password or forgot your password, please follow these steps to create your password:

    i. Go to the CPI Web address (https://cpi2.amsapps.com).
    ii. Click on the link "I forgot or do not have a password".
    iii. Enter your User Name in the box provided.
    iv. Click on the Continue button.
    v. Check your email account inbox for further instructions on how to set/update your password.

    PLEASE NOTE: Make sure to close out of any internet browsers containing CPI Web prior to accessing the link in your email as this may result in an error when trying to set/reset your password. The link to change/create your password that is included in this message will expire 24 hours after the message has been created. If you try to access the link after 24 hours, you will receive a notification that the temporary authorization link is invalid. If this should occur, you will need to click on the 'I forgot or do not have a password' link located on the login page for CPI Web to receive a new password reset link.

Update Information – This needs to be done at least once per year (If your information is up-to-date, please go to Editing the CPI)

1. Click on the **'My Info'** tab to update your information. You **must update the APTA Data Release Statements** found in the Data Authorization section**. Also, please make sure that your credentials and certifications are accurately listed.**
2. When you are finished editing, hit the '**Update**' button.

Verify APTA PTA Training – This can only be done if you are assigned to evaluate a student on an Open evaluation (If you've previously done this, please go to Editing the CPI)

1. **Click on your student's name in the 'My Evaluations'** section on your home page or click on the **Edit link** found in the **Actions column** in the **Evaluations tab**.
2. You are prompted to verify if you have completed the APTA PTA CPI Training. **If you have completed the training, please click the 'I have completed the APTA PTA CPI online training and assessment.' button.**

    a. If you have not completed the training, please follow the directions on the page to take the APTA PTA CPI Training.
    b. If the email address you took the training with is different than your username, you will be prompted to enter the email address registered with APTA.
    c. If you are having issues verifying you've completed the training, please contact PTA CPI Web Support at ptcpiwebsupport@liaison-intl.com. Please provide your name, email address used to take the training, and the date you completed the training so that we can manually verify your training completion.

Editing the CPI

1. Once you have verified you have completed the APTA PTA CPI Training, you will see all 14 sections of the CPI.
    a. You can edit one criterion at a time by clicking on the **'Edit Now'** link on the right.
    b. You can edit all criteria at the same time by clicking on the **'Edit All'** column header link.
2. Click on 'View Essential Skills', 'View Introduction', and 'View Instructions' to view the details of how to fill out the CPI.
3. Mouse over any underlined word to view an APTA glossary definition. This is available for the Performance Dimensions and the Anchor Points on the APTA Rating scale.
4. **Add comments to the comment box and select the rating for the student on the slider scale. For the Interventions, please make sure to select whether a skill was Performed, Observed, or Not Available.**
5. When you are done editing a section, click on the **'Section Sign Off'** checkbox and hit the **'Save' button**. **Hitting Save will save the work edited on all criteria. Be sure to save your work!! If you leave the page without saving, your comments could be lost!!**

Signing off on the CPI

1. Once all sections are marked as **'Completed'**, please sign-off on your CPI. In order to sign-off, you would need to click on the **Evaluations tab** and then on the **'Sign-off' link** found in the **Actions column**. Once this has been done, you would need to scroll to the bottom of the page, select the checkbox associated with the signature, and then click on the **'Save' button**.
2. **Once you sign off on your CPI, you are unable to make any further edits!** Your student will be able to view your CPI only if they have also signed off on their own CPI.

Viewing your CPI with your Student and Signing-Off on your student's CPI

1. Click on the **Evaluations** tab.
2. Click on **'View'** link in the **Actions column**.
3. Use the filters to see the comments from both the student and the CI at the same time.
4. In the **Evaluations** tab, you will also see a **link to 'Sign-off'** on your student's CPI indicating you've discussed the performance with your student. Please follow the Sign-off procedures listed in the previous section to complete the sign-off on your student's CPI.

Additional Features/Tips:
Creating a Critical Incident Report using CPI Web (only to be used as needed)

1. To create a Critical Incident Report, click the link that says **'[Critical Incident]'**.
2. Record the details of the incident clearly and concisely without reflecting any biases into the **Behavior, Antecedent, Consequence, and Comments** text boxes.
3. Once you are finished recording the incident, click on the **'Submit Critical Incident'** button. When a Critical Incident report is properly submitted, the following text will appear on the screen in bold green lettering, **'You have successfully filed a Critical Incident Report.'** If you do not see this text displayed on the screen, please click on the **'Submit Critical Incident'** button again.
4. Once submitted, a Critical Incident Report notification will be emailed to the CCCE, ACCE and student.
5. Any completed Critical Incident Reports can be found in the **Critical Incidents** tab where it can be viewed and additional comments can be entered.

Submitting a Significant Concern - This <u>MUST</u> be accompanied by a Critical Incident Report using CPI Web
1. Select the **Significant Concern checkbox**.
2. A pop-up box will appear with the following text. **'You have indicated a Significant Concern for this criterion. A Significant Concern must be accompanied with a Critical Incident report. Click "OK" to document and submit a Critical Incident report. Click "Cancel" to uncheck the Significant Concern for this criterion.'**
3. If you click on the **'OK' button**, the **Critical Incident Report** text boxes will automatically appear. Please follow the steps listed above to create and submit the **Critical Incident Report**. **PLEASE NOTE: If the Critical Incident Report is not submitted, the Significant Concern will not be submitted. Once a Significant Concern and accompanying Critical Incident Report are submitted, these CANNOT be reversed!**
4. If you click on the **'Cancel' button, the Significant Concern will not be submitted.**

Adding Post-Assessment Comments to the CPI:
1. Once you sign-off on the CPI, you cannot go back in to make further edits. After your meeting and review with the student, if you needed to enter in additional comments about the CPI, you would be able to add **post-assessment** comments to the CPI by clicking on the '**View'** link in the **Evaluations** tab and then adding in the comments in the appropriate box near the bottom of the page. Post-assessments can only be made by the CI or student once they have signed-off on their own evaluation as well as signed-off on each other's evaluations.

Here are some things to note when there are multiple CIs assigned to evaluate one student in CPI Web:
1. Only one CPI is created. All of the CIs would work on the CI portion of the CPI and the student would work on one self evaluation.
2. Each CI would have a separate comment box for all of the criteria. They would be able to see what the other CI had written, but they are unable to edit the other CI's comments.
3. There is only one rating scale for each criterion for the CIs. This is a shared scale amongst the CIs listed on the evaluation meaning that one CI can edit the rating that was selected by the other CI.
4. The minimum requirements to mark the section sign-off box for each criterion are that at least one CI comment box must be completed for the criterion and there must be a rating selected for the criterion. For example, if one CI commented on the CPI and the other CI agreed with what the other CI had written, the other CI wouldn't be required to enter in any comments on the CPI.
5. Once all of the section sign-offs have been checked and the evaluation is listed as Completed, either CI would be able to Sign-off that the evaluation is completed by clicking on the Sign-off link found in the Actions column in the Evaluations tab.

   PLEASE NOTE: Once the evaluation part has been signed-off on, it will lock out any other CIs from being able to edit that evaluation part.

If you have any questions, comments or run into any issues using PTA CPI Web, please contact Support at