



## APTA Credentialed Clinical Instructor Program: Policies and Procedures Manual for Levels 1 & 2

March 1, 2020

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## APTA Credentialed Clinical Instructor Program

### Guide to Colored Boxes Used in the Policies & Procedures Manual

**NOTE:** If you experience any type of color blindness, please contact CCIP staff at [ccip@apta.org](mailto:ccip@apta.org) for assistance with the color coded material in the policies and procedures manual.

Any material in these policies and procedures relating **solely to the Level 1 course** will be distinctly marked by **blue highlighting**:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla mattis ligula non ornare tincidunt. Duis ullamcorper dictum sem vitae mollis. Duis congue, quam eu vehicula semper, augue metus placerat urna, vel gravida erat turpis vel turpis. In non sapi in ligula dignissim pharetra nec ut ipsum. Donec dignissim augue id egestas. Donec convallis convallis justo nec tristique. Proin elementum maecenas. Quam ornare sodales tempor. Cras efficitur libero laoreet est maximus. Sed ac iaculis. Cras at pharetra ex, ac commodo felis. Suspendisse consequat gravida pretium. Curabitur commodo porta metus at venenatis. Nullam sit amet imperdiet erat. Vivamus non ultrices odio. Maecenas felis nisi, egestas sit amet aliquet quis, efficitur non risus. Vestibulum ac imperdiet justo.

SAMPLE TEXT

Any material in these policies and procedures relating **solely to the Level 2 course** will be distinctly marked by **green highlighting**:

Etiam tempus turpis iaculis arcu consectetur egestas. Sed tempor erat ut erat tincidunt, et porttitor felis consequat. Donec sed augue vestibulum, aliquet dolor. Sed cumsuman velit. Phasellus eget tincidunt odio. Suspendisse ut lectus sit amet risus rhoncus. Sed ut fermentum massa. Mauris gravida nisi a massa efficitur varius. Maecenas scelerisque ultrices. Maecenas scelerisque ultrices enim eget maximus. Sed porta congue. Sed ligula rutrum nec. Sed semper vitae ex id blandit. Vestibulum consectetur in vitae venenatis. Phasellus vehicula eget tortor eget dignissim. In at tellus a dui malesuada molestie sit amet vitae nisl. Pellentesque id urna id est fermentum iaculis a a lorem.

SAMPLE TEXT

Any material in these policies and procedures relating **to both the Level 1 and Level 2 course** will be distinctly marked by **orange highlighting**:

**Level 1** Praesent sagittis augue id mauris tempus, in sollicitudin lacus egestas. Phasellus molestie mattis neque quis facilisis. Etiam quam arcu, sagittis vitae. Sed non, vehicula dapibus nisi. In in finibus justo, vel semper nisl. Quisque dui nunc, egestas. Sed varius a mi. Suspendisse ligula urna, pellentesque ac aliquet in, efficitur.

SAMPLE TEXT

**Level 2** Nullam mollis, ex et eleifend. Sed turpis enim maximus lectus, sit amet finibus massa augue eget erat. Suspendisse id molestie sem, eu laoreet dolor. Nunc est odio, varius id interdum sed, feugiat et est.

**Credentialed Clinical  
Instructor Program  
Policies  
&  
Procedures**



## APTA Credentialed Clinical Instructor Program

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### Credentialed Clinical Instructor Program

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#### I. PROGRAM DESCRIPTION

- A. This voluntary program is designed for persons in health professions interested in or involved with clinical education (Clinical Instructors, Site Coordinators of Clinical Education, and Academic Coordinators/Directors of Clinical Education) and is recognized by the American Physical Therapy Association as the Credentialed Clinical Instructor Program.

The Level 1 course is divided into two distinct parts:

- Part I: CI didactic curriculum via an interactive course format.
- Part II: Credentialing process to assess participant's achievement of curricular outcomes through an Assessment Center.

Parts I and II are designed to be used together to first provide and then assess the knowledge and skill identified as essential for PT and PTA CIs of PT and PTA students. This body of knowledge can be applied to students and clinical instructors in other health care professions. Only Credentialed Clinical Trainers recognized by APTA can provide CCIP. Non-physical therapy providers can take the didactic portion (Part I) only of the Credentialed Clinical Instructor Program.

- B. The [Guidelines for Clinical Instructors](#), endorsed by the APTA House of Delegates in June 1993, provide the foundation for this education program.
- C. CCIP addresses the following topics:
1. Describing the parallels between the characteristics of the practitioner and clinical educator.
  2. Planning and preparing for students during their clinical education experiences.
  3. Identifying student learning needs and areas of competence.
  4. Designing high-quality learning experiences for students at all levels of experience.
  5. Implementing clinical teaching methods and supervisory techniques that support ongoing adult learning.
  6. Providing effective and summative evaluation.
  7. Identifying legal and supervisory implications for clinical educators, including issues presented by Americans with Disabilities Act legislation, Medicare regulations, and the Patient's Bill of Rights.
  8. Managing a student who is demonstrating exceptional or problem performance.
- D. Learning outcomes for each PT and PTA participant completing the didactic portion of CCIP (Part I) are measured through an open-book Assessment Center (Part II – credentialing process). This

process provides PT and PTA participants with an opportunity to apply information learned from the didactic curriculum in six simulated situations. Encouraging use of the course manual during the Assessment Center will demonstrate the manual's usefulness as a reference document. Successful completion of all stations in the Assessment Center results in the awarding of the APTA Clinical Instructor Credential. Candidates for Clinical Instructor Credentialing must achieve a passing score on all stations of the Assessment Center to be considered successful.

1. Non-physical therapy providers are not eligible to receive the APTA Clinical Instructor Credential; however, they will receive CEU credits/contact hours.

The Level 2 course brings two constructs together in one professional development program that advances both clinical teaching and best practice when providing student clinical education. Using a case-based and applied approach to education, this program both applies and goes beyond, the concepts of the structured and effective learning environment from CCIP Level I to allow participants to further develop their clinical teaching skills and construct a clinical curriculum. The program's unique philosophy and design will enable clinical educators to achieve the best outcomes for student learning.

B. Program outcomes. At the conclusion of the Level 2 CCIP, participants will be able to:

1. Discuss the benefits and key components of a clinical curriculum.
2. Advance clinical teaching concepts learned in the Level 1 CCIP as applied to the novice–expert clinical practice continuum.
3. Integrate professionalism and ethics into a clinical curriculum that promotes the guiding principles to achieve the “Vision for the Physical Therapy Profession” (2013) and the Core Values.
4. Diagnose and foster a student’s clinical reasoning.
5. Outline a clinical curriculum to meet key student learning experiences critical to patient–client practice in their practice.
6. Integrate key learning experiences in a clinical curriculum critical to developing an interprofessional education and collaborative practice-ready student.
7. Integrate key student learning experiences in a clinical curriculum critical to advocacy and role as an advocate.

## II. CREDENTIALLED CLINICAL INSTRUCTOR BENEFITS

A. Benefits to PT and PTA clinical educators who have successfully completed CCIP are as follows:

1. Enhanced knowledge and skills in the provision of:

**Level 1:** Physical therapy clinical education.

**Level 2:** Physical therapy clinical education.

2. Career development opportunity within clinical education.
3. Individualized credential that recognizes personal and professional achievement regardless of setting.

4. Earned CEU units:

**Level 1:** 1.6 CEUs/16 contact hours.\*

**Level 2:** 1.7 CEUs/17 contact hours.\*

5. National recognition by APTA, including registration in a national database.

B. Benefits to non-physical therapy providers who complete the didactic curriculum:

1. Opportunity to strengthen the process of clinical education within the respective discipline based on current education theory, literature, and experience.
2. Career development opportunity within clinical education.
3. Enhanced knowledge and skills in the provision of clinical education.
4. Earned Certificate of Level 1 Completion for 1.2 CEUs/12 contact hours.
5. Earned Certificate of Level 2 Completion for 1.3 CEUs/13 contact hours.

### III. PROGRAM CONFIGURATION

The Level 1 CCIP is designed to accommodate the needs of the learner. As a result, this program may be offered in three different formats: 1. Parts I and II together. 2. Part II alone. 3. Part I alone for non-physical therapy providers. Parts I and II are offered for a range of novice and experienced clinical educators. Part II alone is offered for the experienced PT and PTA clinical educator, who has supervised students and participated in clinical education continuing education programs. Part I alone is offered to non-physical therapy providers.

The Level 2 CCIP consists of the following components:

A. Pre-course assignments.

B. Didactic curriculum via an interactive course format.

C. Credentialing process to assess participant's achievement of curricular outcomes through competency assessment in five parts. This process provides PT and PTA participants with an opportunity to apply information learned from the didactic curriculum. Encouraging use of the course manual during the Assessment Center will demonstrate the manual's usefulness as a reference document. Successful completion of the open-book Assessment Center results in the awarding of APTA Level 2 Credentialed Clinical Instructor Certificate.

Part 1: Advanced Clinical Teaching

Part 2: Professionalism and Core Values

Part 3: Clinical Reasoning



#### Part 4: Advocacy

#### Part 5: Draft Clinical Curriculum

### IV. ELIGIBILITY CRITERIA FOR THE CLINICAL EDUCATOR

Any PT, PTA, or other health care professional in the U.S. or Canada, regardless of experience supervising students or previous CI training, is eligible for the Level 1 course with **ALL** of the following:

- A. Current license as a PT, PTA, or other health care professional.
- B. Clinical competence in providing services as either a PT, PTA, or other health care professional in accordance with state laws and regulations, as authorized by the individual's direct supervisor.

Any PT, PTA, or other health care professional is eligible for the Level 2 course with **ALL** of the following:

- A. Current license as a provider.
- B. Clinical competence in providing services as a PT, PTA, or other health care professional in the U.S. and Canada and in accordance with state/province laws and regulations, as authorized by the individual's direct supervisor.
- C. APTA Level 1 Credentialed Clinical Instructor status. Other health care professionals may provide evidence of Level 1 training equivalency completed through their professional organization.
- D. Since receiving the APTA Level 1 credential has supervised at least one student in clinical practice, overseen the supervision of at least one student in clinical practice, or have been actively involved in student learning and education.

### V. ELIGIBILITY CRITERIA FOR NON-PHYSICAL THERAPY PROVIDERS

- A. Non-physical therapy providers outside the U.S. are not eligible to attend APTA Level 1 CCIP.
- B. Persons from disciplines other than physical therapy are permitted to complete Part I (the didactic curriculum) component of the program. PTAs and non-PTs **may** take the Assessment Center; however, they **may not** earn CEUs.
- C. Upon successful completion of Part I (the didactic curriculum), persons from disciplines other than physical therapy will receive a certificate of completion of 1.2 CEUs/12 contact hours.\* However, because they are not eligible to take the Assessment Center, they cannot receive an APTA Level 1 CI Credential Certificate.
- D. Non-physical therapy providers outside the U.S. are not eligible to attend APTA Level 2 CCIP.
- E. Persons from disciplines other than physical therapy are permitted to complete the didactic component of the program. They **may** take the Assessment Center; however, they **may not** earn CEUs.
- F. Upon successful completion of Part I (the didactic curriculum), persons from disciplines other than physical therapy will receive a certificate of completion of 1.2 CEUs/12 contact hours. However, because they are not eligible to take the Assessment Center, they cannot receive an APTA Level 1 CI Credential Certificate.

## VI. ELIGIBILITY CRITERIA FOR THE EXPERIENCED PT OR PTA CLINICAL EDUCATOR (Level 1 Assessment Center only)

Candidates who meet ALL of the following criteria may consider applying for the Level 1 Assessment Center only, if available. The decision to offer only the Level 1 Assessment Center is the sole prerogative of the Level 1 Credentialed Clinical Trainer. The criteria are:

- A. Acceptable candidate who meets all the criteria to be eligible for CCIP (Parts I and II) as a novice clinical educator.
- B. Ability to apply the principles of teaching and learning in the instructional process.
- C. Ability to define student readiness and to plan and conduct relevant learning experiences.
- D. Ability to conduct and document formative and summative evaluation of student performance.
- E. Ability to adjust supervisory approach based on students' need.
- F. Ability to communicate effectively in a variety of situations, including those involving conflict.
- G. Understanding of and experience with the management of the "exceptional" student.
- H. Knowledge of legal issues and federal regulations related to clinical education.

Participants will be awarded .4 CEUs/4 contact hours\* for successful completion of the Assessment Center.

**Note:** For more information see "Foreign-Educated Physical Therapist Participation."

## VII. APPLICATION PROCESS

Level 1 and Level 2 courses are co-sponsored with APTA and consortia, academic institutions, clinical facilities, or individual Credentialed Clinical Trainers. APTA [maintains a list](#) of CCIP courses cosponsored in the U.S. and Canada.

- A. To be eligible to attend, all participants must complete and submit, as part of the registration process, the participant dossier depending on class level, accompanying documentation, and program registration fees to the Credentialed Clinical Trainer or other designee.
- B. All applicants must submit a copy of their professional license.
- C. PT and PTA applicants paying the APTA member course fee (see **Program Registration Fees**) must submit evidence of APTA membership.
- D. The Credentialed Clinical Trainer or a designee reviews all documentation to determine the individual's acceptance into the program based on established criteria (see Eligibility Criteria above).

## VIII. NOTIFICATION OF CREDENTIALLED CLINICAL INSTRUCTOR STATUS

- A. The Credentialed Clinical Trainer will notify the PT or PTA participant of the learning outcome after reviewing the participant's scoring of his/her Assessment Center responses.
- B. A participant who does not earn a passing score on the Assessment Center **may receive 1.2 CEUs/12 contact hours (Level 1), 1.3 CEUs/13 contact hours (Level 2)** and/or seek assistance and clarification of their responses and possible remediation with the Credentialed Clinical Trainer.
- C. In a typed and electronic format, the Credentialed Clinical Trainer submits to APTA's Clinical Instructor Credentialing staff:
  1. **Updated Manual Order Form.** The updated form indicates the names of participants who attended and successfully completed the course and whether they completed the didactic program and assessment center, the didactic program only, or the assessment center only. Also included on the form are the names of participants who registered for the course, but withdrew or were otherwise unable to participate.
  2. If there is any financial reconciliation needed, the **CCIP Refund Request Form** must be completed. Reconciliation may be needed for participant cancellations that meet the **Cancellation/Refund Policy**, changes in participants, and/or use or return of any extra manuals ordered.
- D. A Clinical Instructor Credential Certificate and CEU certificate of 1.6 CEUs/16 contact hours\* (**Level 1**) or 1.7 CEUs/17 contact hours\* (**Level 2**) will be mailed to the PT or PTA participant from APTA's Clinical Instructor Credentialing staff six to eight weeks after completion of the program and receipt of postcourse materials from the trainer or course sponsor.
  1. Non-physical therapy providers will receive their Level 1 CEU (1.2 CEUs/12 contact hours\*) or Level 2 CEU (1.3 CEUs/13 contact hours certificate within the same time frame.
  2. PT and PTA participants who do not satisfactorily complete the Assessment Center or fail to attend the entire didactic curriculum as part of the program will be notified by the Credentialed Clinical Trainer that they have not met the competencies required and are not being recommended for APTA CI Credentialing. If the participant disagrees, they should be referred to the **Appeals for Denial of Credentialed Clinical Instructor or Trainer Status Policy**.
  3. PT and PTA participants who do not satisfactorily complete CCIP and/or the Assessment Center must reregister and pay the appropriate fee when retaking the course.

**\*Note:** Licensees should verify with their state licensing board for acceptance of CEUs by reviewing the relevant state practice act and/or administrative code. For more information about licensure, visit <http://www.apta.org/Licensure/>.

If you have any questions regarding this document, contact Clinical Instructor Credentialing at [ccip@apta.org](mailto:ccip@apta.org) or 800-999-2782, ext. 8528.



## APTA Credentialed Clinical Instructor Program

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### Steps to Organize and Coordinate a CCIP Course

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**Prior to course start date.**

#### **Step 1:**

If you are interested in offering a CCIP course, you will first need to find a Credentialed Clinical Trainer. A [link to the](#) list of Level 1 and Level 2 Credentialed Clinical Trainers, organized by state, may be found on APTA's website, or on page 42 of this manual under Additional Information. Reach out to at least one to discuss the specifics of your upcoming course and decide on a date and location. You will also need to determine the costs associated with your trainer. If desired, Credentialed Clinical Trainers may request an honorarium of a maximum of \$1,200 per course. If there are multiple trainers teaching the course, the trainers will determine how the honorarium will be divided. The course sponsor should also cover the trainer's costs for travel, hotel, food, supplies, and expenses for duplicating materials; these costs are not included in the trainer honorarium.

Included in the sponsoring organization's course registration is APTA's fee to cover the cost of producing and mailing the CCIP course manual, CCIP lapel pin, CI Credential Certificate, CEU certificate, and registry in an APTA database of Credentialed Clinical Instructors for PTs and PTAs. The fee for non-physical therapy providers covers the cost of the CCIP course manual, CEU certificate, and program administration.

#### **Step 2:**

Once you have decided to offer a CCIP course, notify APTA by sending a typed **Course Announcement Form** to [ccip@apta.org](mailto:ccip@apta.org) at least three months prior to the course. This form may be found on page 42 of this manual under Additional Information. After the form has been submitted, APTA will provide additional forms and information to guide you through the process.

#### **Step 3:**

Participant registration information should be collected, as per your registration deadline. Completed **participant dossiers** (typed and electronic format) should be collected from each registrant as part of your registration process. Trainers may access this form on page 42 of this manual under Additional Information.

#### **Step 4:**

Complete the **CCIP Manual Order Form** and email to [ccip@apta.org](mailto:ccip@apta.org) at least three weeks prior to the start date of the program. **Participant dossiers** should also be submitted at this time. Trainers may access these forms on page 42 of this manual under Additional Information. Print a copy of the **CCIP Manual Order Form** and send with payment in one envelope to:

Credentialed Clinical Instructor Program  
American Physical Therapy Association  
Postprofessional Credentialing Department  
1111 N. Fairfax St.  
Alexandria, VA 22314

The CCIP Manual Order Form, APTA course fees, and participant dossiers must be received by APTA at least three weeks prior to the start date of the program to ensure that the manuals will arrive within adequate time (please relay this policy to the sponsor if they are responsible for processing the payment).

**Note:** In compliance with Payment Card Industry standards, payment information may not be emailed or faxed to APTA.

**Orders and payments received after the three-week deadline may be assessed a \$100 late fee.**

The payment structure for courses is:

**Level 1 course:**

- APTA member: \$100.
- Nonmember: \$200.

**Level 2 course:**

- APTA member: \$100.
- Nonmember: \$225.

Payment for the course can be made by each individual registrant or via one lump sum payment. Payment can be made via check or money order payable to APTA or via credit card. Purchase orders are not accepted as a form of payment.

The order form should include the name of the individual to whom all the course manuals should be shipped, along with their preferred shipping address (street addresses only, **no P.O. boxes**).

The participant manuals and CI Credential pins will be shipped from APTA's external warehouse (course participants from disciplines outside of physical therapy are not eligible to receive the CI Credential Pins).

Please note that non-physical therapy providers (i.e., occupational therapists, speech-language pathologists) are eligible to participate in the course only and NOT the Assessment Center. Priority is always given to PTs and PTAs interested in participating in the program. If space is available, then persons from other disciplines may participate and will receive 1.2 CEUs/contact hours\* for attending the program. Review the [policies](#) related to persons participating in this program from disciplines outside of physical therapy.

If you are offering only a Level 1 Assessment Center, you must still complete steps 1 and 2. The APTA CCIP Manual Order Form, APTA course fees, and participant dossiers must be received by APTA at least three weeks prior to the Assessment Center to fulfill the order, mail course materials, and to ensure that participants have sufficient time to study the materials in the CI manual in advance of completing the assessment center. It is the contact person or organization that is responsible for distributing the manuals to the individual participants in advance of the program.

## **After the program.**

Participants who successfully complete the program are awarded a CI pin on-site by the trainer and can expect to receive their Credentialed Clinical Instructor and CEU\* certificates up to eight weeks after the postcourse materials have been delivered to APTA.

Please submit the following information to APTA within two weeks of course completion:

**UPDATED Manual Order Form:** After the course, confirm each participant's attendance in the final two columns of your original Manual Order Form (Attended Course and Passed Assessment columns) and email the updated form to [ccip@apta.org](mailto:ccip@apta.org). Indicate any participants who registered for the course, but withdrew or were otherwise unable to participate.

While course sponsors may be the ones to submit program forms to APTA, trainers are ultimately held responsible for precourse and postcourse logistics, including document submission. As such, sponsors need to be timely in completing their responsibilities for hosting a course. Trainers, please retain copies of the files listed above for your records and for your future portfolio submission. (See File Retention on page 14.)

To request a refund for course payments, submit a **Refund Request Form**. Trainers may access this form on page 42 of this manual under Additional Information. (See Course Refund Policy on page 17.)

## **APTA postcourse duties.**

Once APTA has received the postcourse materials:

- Participant data will be entered into APTA's Clinical Instructor database.
- Any refunds or credits will be processed.
- CI and CEU\* certificates will be sent to participants within eight weeks.

**\*Note:** Licensees should verify with their state licensing board for acceptance of CEUs by reviewing the relevant state practice act and/or administrative code. For more information about licensure, visit <http://www.apta.org/Licensure/>.

If you have any questions regarding this document, contact Clinical Instructor Credentialing at [ccip@apta.org](mailto:ccip@apta.org) or 800-999-2782, ext. 8528.



## APTA Credentialed Clinical Instructor Program

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### Administrative Aspects of CCIP

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#### I. INTRODUCTION

As part of each Credentialed Clinical Trainer's responsibility in managing and coordinating a CCIP course, inherent timelines, documentation, and payments must be fulfilled. To assist trainers in managing these responsibilities while continuing to ensure high quality of CCIP, the information below is provided for managing the administrative aspects of the program.

#### II. PRECOURSE RESPONSIBILITIES

##### A. Three months prior to course:

##### 1. Course announcement.

Credentialed Clinical Trainers are to provide APTA's Clinical Instructor Credentialing staff with a completed Course Announcement Form, on page 42 of this manual under Additional Information, at least three months prior to the course start dates.

- a. Course Announcement Forms are to be typed and submitted electronically to [ccip@apta.org](mailto:ccip@apta.org). Upon receipt, a message of confirmation will be sent.
- b. Following this timeline allows APTA to prepare for CCIP courses in a timely manner and ensure smooth operations.

##### 2. Advertising the Level 1 and Level 2 courses.

If course registration is open to the public, APTA's Clinical Instructor Credentialing staff will advertise courses through APTA's website. Additional advertising done by course sponsors must include the following:

- a. **Cancellation/course refund policy:** Individuals must cancel their registration and request a refund 72 hours prior to the start date of the course and the CI course manual must be returned to APTA. The refund amount will be equivalent to the APTA portion of the registration fee only.
- b. **CEU policy:** Neither the Clinical Instructor Credential nor CEU credit will be awarded to any participant who does not attend the full program. As the course requirements clearly stipulate, individuals must attend all of the program to earn CEUs and the CI Credential (if a PT or PTA). Licensees should verify with their state licensing board for acceptance of CEUs by reviewing the relevant state practice act and/or administrative code. For more information about licensure, visit <http://www.apta.org/Licensure/>.

## B. Four weeks prior to course:

Credentialed Clinical Trainers are responsible for the following administrative functions related to the delivery of the APTA Credentialed Clinical Instructor Program:

1. Collecting and screening participant dossiers to ensure applicants meet eligibility criteria.
  - a. Participant dossiers must be completed electronically.
  - b. Participant dossiers must be submitted prior to the program. Trainers should review all participant dossiers prior to submission in order to become familiar with the audience and to ensure that accurate registration fees are included.
2. Collecting all fees associated with CCIP to APTA per **CCIP Program Fee Policy**.

For the on-site Level 2 CCIP, providing participants with all prerequisite course materials at least three weeks in advance to allow sufficient time to complete the three Professionalism Modules and review the three articles.

3. Duplicating all materials required for providing CCIP and the Assessment Center.
4. Making arrangements as needed for persons on-site to adequately cover all stations of the Assessment Center.

## C. Three weeks prior to course: course manual orders, payments, and dossier:

1. Completed CCIP Manual Order Forms and participant dossiers must be submitted to APTA via email to [ccip@apta.org](mailto:ccip@apta.org) at least three weeks prior to the course.
  - a. Trainers are encouraged to submit a manual order form first before moving forward with payment. This allows staff to review the form, and confirm final payment amount due to APTA.
  - b. Orders that are received after the three-week deadline may be assessed a \$100 late fee to cover rush processing of the order and expedited shipping charges.

Following the three-week timeline allows APTA enough time to process the manual order, confirm payment, ship the manuals from an off-site vendor, and resolve any problems that may arise related to shipping and delivery. This timeline also ensures adequate time to prepare the online participant program evaluations.

2. **All payments must be submitted by mail and received by APTA no less than three weeks prior to the course start date.** Enclose a copy of the CCIP Manual Order Form with payment and mail in one envelope to APTA. For direct routing, mail to the attention of "CCIP." To ensure the security of payment information and to be in compliance with Payment Card Industry standards, **credit card information may not be emailed or faxed to APTA, and are only acceptable on the APTA credit card payment approved form.**
3. In the event of late registrations, extra manuals may be ordered **at the nonmember rate**. If extra manuals are ordered, payment for each additional manual must be submitted at the time of the order. If extra manuals are not used, they may be returned to APTA after the course. To receive a full refund extra manuals need to be returned within two weeks after the course is completed.



4. It is the responsibility of the Credentialed Clinical Trainer to ensure that payments are provided **accurately** and **in full** when ordering CI course manuals prior to APTA fulfilling orders in the specified timeline.
5. If the Credentialed Clinical Trainer decides to allow the sponsor to collect payment, it is still **the trainer's responsibility** to ensure that orders are correct and submitted, as required by the timeline specified.
6. Acceptable forms of payment to APTA include credit cards, checks, and money orders. Purchase orders are not an acceptable form of payment.
  - a. Credentialed Clinical Trainers have the authority to negotiate with course sponsors and decide what methods of payment are acceptable for the courses they teach.

### III. POSTCOURSE RESPONSIBILITIES

A. **Within two weeks of course completion**, trainers are to provide the following documentation in a **typed and electronic format** to [ccip@apta.org](mailto:ccip@apta.org) for processing. Trainers are responsible for precourse and postcourse logistics, including document submissions. As such, sponsors need to be timely in completing their responsibilities for hosting a course.

1. **Updated CCIP Manual Order Form.** After the course, confirm each participant's attendance in the final two columns of your original CCIP Manual Order Form (Attended Course and Passed Assessment columns) and email the updated form to [ccip@apta.org](mailto:ccip@apta.org). Indicate the participants who registered for the course, but withdrew or were otherwise unable to participate.
2. Participant evaluations are administered electronically by APTA. Sometime during the first several hours of the first day of the course, participants will receive an email containing a link to a survey requesting feedback on their CCIP experience. Aggregation of the evaluation results will be conducted by APTA. Two weeks after the initial email, a reminder will be sent to those who have not yet responded. Two weeks after the reminder email the evaluation will be closed and aggregated results will be sent to trainers.
3. If there is any financial reconciliation needed, the CCIP Refund Request Form (located on page 42 of this manual under Additional Information) must be completed. Reconciliation may be needed for participant cancellations that meet the **cancellation/refund policy**, changes in participants, and/or use or return of any extra manuals ordered.
4. Any manuals returned to the CCIP administrative staff must be in "excellent condition." Any returned manuals considered not in "excellent condition" will result in only 50% of the manual fee being returned.

#### B. File retention.

Credentialed Clinical Trainers are required to retain the following files in paper or electronic format:

1. Updated CCIP Manual Order Forms and aggregated participant evaluations should be retained until the Credentialed Clinical Trainer has received renewal of their trainer status.
2. CCIP Refund Request Forms should be maintained until the refund has been issued.

3. Assessment Center response forms for individuals who have successfully completed the course should be maintained until APTA issues certificates.
4. Assessment Center response forms for individuals who did not successfully complete the course should be maintained until all appeals are exhausted.
5. Statement of Confidentiality for all individuals who have attempted the Assessment Center should be maintained for three months.

**When discarding original documents, all items with identifiable information should be shredded.**

C. APTA postcourse responsibilities.

Once APTA has received the postcourse materials mentioned above:

1. Any refunds or credits will be processed.
2. CI and CEU certificates will be sent to participants within eight weeks.

IV. MINIMUM TIMELINE REQUIREMENTS FOR PROGRAM DOCUMENTATION

Task to Complete	Facility-Based Program Format (No Marketing)	Open Program Format (Marketing to External Groups)	Assessment Center Only Format (Level 1 only)
<b>Prior to course being held:</b>			
Disseminate marketing materials	Two months	Three to four months	Three months
Notify APTA of course via CCIP Course Announcement Form	Two months	Three to four months	Three months
Close course registration	Four weeks	Four weeks	Eight weeks
Collect participant dossiers and finalize all payments	Three to four weeks	Three to four weeks	Eight weeks
Send completed CCIP Course Manual Order Form, payment(s), and participant dossiers to APTA	Three weeks	Three weeks	Seven weeks
Manuals mailed to location specified on CCIP Manual Order Form	One to two weeks	One to two weeks	Five weeks (participants must have manual at least three weeks prior for study)
<b>Upon completion of course:</b>			
Send updated CCIP Manual Order Form (with final two columns completed)	Two weeks	Two weeks	Two weeks
APTA will send aggregated participant evaluations to trainers	Four weeks	Four weeks	Four weeks

V. PAYMENT OPTIONS WITH IMPLICATIONS

Payment Options	Processing	Potential Problems/Implications
<b>Acceptable methods of payment:</b>		
Credit card	Submit by three week deadline	Credit card declined; trainer must go back to let the person know they are not enrolled in the course, unless an alternative payment option is provided.
Checks/money orders	Submit by three week deadline	<b>Potential problems:</b> 1. Amount paid is incorrect due to a calculation error, error in category of payment (PT, PTA, or other discipline, member or nonmember). 2. Check may not clear bank processing.3. Check not payable to APTA.  <b>Implications:</b> 1. A \$100 late fee may be added to the total due to cover expedited processing and rush shipping. 2. Processing of certificates may be delayed until amount due is paid in full.
<b>Unacceptable methods of payment:</b>		
Purchase orders	<b>This option is NOT acceptable as payment for CCIP</b>	

If you have any questions regarding this document, contact Clinical Instructor Credentialing at [ccip@apta.org](mailto:ccip@apta.org) or 800-999-2782, ext. 8528.



## APTA Credentialed Clinical Instructor Program

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### Program Course Fees

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#### I. STANDARD COURSE FEES

Included as part of the sponsoring organization's course registration is APTA's fee to cover the cost of producing and mailing the course manual, lapel pin, CI Credential Certificate, CEU certificate, and registry in an APTA database of Credentialed Clinical Instructors for PTs and PTAs.

##### Level 1 course:

- APTA member: \$100.
- Nonmember: \$200.

##### Level 2 course:

- APTA member: \$100.
- Nonmember: \$225.

The fee to complete the Assessment Center (Part II only) is \$100 for members and \$200 for nonmembers.

#### II. INTERNATIONAL PARTNERS PROGRAM

APTA offers an International Partners Program for \$50 that entitles a Canadian PT/physiotherapist or PTA access to all APTA member information on APTA's website as well as reduced costs on conferences, courses, and more. If an ACCE or CI joins the International Partners Program, they will pay the APTA member fee of \$100 (Level 1) or \$100 (Level 2), plus the same additional costs required by the host/sponsor site.

#### III. CANCELLATIONS/REFUNDS

It is mandatory that all registration materials for CCIP include the following refund policy in writing:

Individuals must cancel their registration and request a refund 72 hours prior to the start date of the course and return the CCIP course manual. The amount of refund will be equivalent to the APTA portion of the course fee only.

#### IV. ESTABLISHING TOTAL COURSE COSTS FOR PARTICIPANTS

The total course cost should be established by the sponsoring organization. In addition to APTA fees, the sponsor may charge additional fees to cover course related expenses.

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## APTA Credentialed Clinical Instructor Program

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### Course Refund Policy

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It is mandatory that all CCIP registration materials include the program refund policy in writing.

Individuals must cancel their registration and request a refund 72 hours prior to the start date of the course, and the CI course manual must be returned to APTA. The refund amount will be equivalent to the APTA portion of the registration fee only.

#### **Refunds:**

- Refunds will be issued once the updated CCIP Manual Order Form (with final two columns completed) is returned to APTA after completion of the course.
- Refunds will be issued in the same method as the original payment was received by APTA — either via check or a credit issued to the original credit card — and issued to the original payer.

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## APTA Credentialed Clinical Instructor Program

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### Foreign-Educated Physical Therapist Participation

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Foreign-educated PTs who are not licensed as PTs in the U.S., its territories, or Canada are eligible to participate in CCIP under the following provisions:

1. The participant must be able to read, write, and speak English.
2. The participant must provide a copy of their international license/registration/certification as a PT.
3. The participant is required to complete and submit all parts of the participant dossier form.

CCIP fee-structure will remain the same (see Program Course Fees on page 16). Foreign-educated PTs may elect to join the APTA International Partners Program for \$50 to be eligible for the member rate CCIP fee.

Program fees must be paid in U.S. dollars. Program fees are to be paid via credit card, check, or money order. Purchase orders will not be accepted.

Foreign-educated PTs will be awarded 1.2 CEUs\* for successful completion of the didactic component of the Level 1 program and 1.3 CEUs for the Level 2 program. The participant need not complete the Assessment Center and will not earn the Clinical Instructor Credential. The Clinical Instructor Credential is only awarded to PTs and PTAs licensed in the U.S., its territories, and Canada.

Foreign-educated PTs may request the CI credential retroactively upon licensure in the U.S., however they must first pass the assessment center.

All other program policies and deadlines remain in effect.

**\*Note:** Licensees should verify with their state licensing board for acceptance of CEUs by reviewing the relevant state practice act and/or administrative code. For more information about licensure, visit <http://www.apta.org/Licensure/>.

If you have any questions regarding this document, contact Clinical Instructor Credentialing at [ccip@apta.org](mailto:ccip@apta.org) or 800-999-2782, ext. 8528.

# **Credentialed Clinical Trainer Policies**



## APTA Credentialed Clinical Instructor Program

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### APTA Credentialed Clinical Trainers/Level 1 & Level 2 Trainer Courses

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#### I. PROGRAM DESCRIPTION

- A. CCIP Trainer Courses are designed to prepare individuals to teach and administer the didactic program and assessment centers of the CCIP courses. Only Credentialed Clinical Trainers who have successfully passed the Level 1 Trainer Course, may teach the Level 1 CCIP, and only those who have successfully completed the Level 2 Trainer course may teach the Level 2 course.

- B. Course length and purpose.

APTA's Level 1 Trainer course is a three-day instructional course established for the purpose of training individuals to provide the voluntary APTA Level 1 course. Training is based on adult and active experiential learning approaches and focuses on the participant's ability to teach a valid and reliable curriculum to others. It is presumed that participants will have a command of didactic content related to clinical teaching, supervision, and evaluation upon entering this course. By the end of this course, participants will be expected to demonstrate familiarity with content contained within CCIP and to satisfactorily manage the Assessment Center. In addition, participants will be expected to competently teach selected content by integrating active teaching strategies to different levels and types of learners, and to demonstrate the ability to independently conduct the APTA Level 1 course.

APTA's Level 2 Trainer course is a two-day instructional course established for the purpose of training Credentialed Trainers to provide the voluntary APTA Level 2 course. Training is based on adult and active experiential case-based learning approaches and focuses on the participant's ability to teach a valid and reliable curriculum to others. It is presumed that Credentialed Trainers will have a command of didactic content related to establishing a clinical curriculum, professionalism and ethics, clinical reasoning, patient-client management, interprofessional education and collaborative care, advocacy, and Level 2 clinical teaching upon entering this course. By the end of this course, participants will be expected to demonstrate competency in teaching content contained within the Level 2 course and to satisfactorily manage the Assessment Center. In addition, participants will be expected to competently teach selected content by integrating active teaching strategies to different levels and types of learners and to demonstrate the ability to independently conduct the APTA Level 2 CCIP course.

- C. Outcomes of the CCIP Trainer Course are measured through self-assessment and evaluation by course faculty. Only Credentialed Clinical Trainers may serve as faculty to teach the CCIP Trainer Course. Faculty evaluations include assessment of the participant's performance in multiple dimensions as observed throughout the course and overall recommendations provided by faculty regarding successful attainment of the course criteria. The Credentialed Clinical Instructor Program Advisory Work Group makes the final decision regarding the awarding of Clinical Trainer credentials by determining if the participant has successfully met the criteria to be awarded Credentialed Clinical Trainer status based on faculty evaluations, ability of candidates to accurately self-assess, and the attainment of performance criteria.



1. Level 1 and Level 2 Trainer courses can only be provided by APTA trained faculty, who must adhere to all policies and procedures as outlined in this manual.
2. Faculty members are required to make recommendations regarding candidates' performance for Credentialed Clinical Trainer status to CCIW. Faculty members provide feedback and input into the final performance appraisal for candidates completing the course and are also responsible for providing individual feedback to candidates during a designated time for debriefing.
3. **Level 1** approved candidates will receive a certificate from APTA indicating their status as a Credentialed Clinical Trainer for a period of three years. Following three years the trainer will be required to renew their status, with subsequent renewals lasting for five years. **Level 2** approved candidates will receive a certificate from APTA indicating their status as a Credentialed Clinical Trainer for a period of five years, with a renewal required every five years.

## II. CREDENTIALLED CLINICAL TRAINER BENEFITS

The benefits to the individual, their employer, and the profession by becoming a Credentialed Clinical Trainer include:

- A. Support for career enhancement in areas such as promotion, tenure, educational advancement, and career ladder advancement.
- B. National recognition as a Level 1 and/or Level 2 Credentialed Clinical Trainer, including being listed in an online national database of Credentialed Clinical Trainers qualified to provide the voluntary APTA CCIP(s) for which they are credentialed.
- C. Access to trainer resources posted to the password-protected CCIP trainer online community, which is managed by APTA's CCIP staff.
- D. Support from APTA's CCIP staff to assist Credentialed Clinical Trainers in finding partners, where feasible, to co-teach the voluntary APTA Level 1 and/or Level 2 course.
- E. Opportunities to network with other Credentialed Clinical Trainers at an annual Credentialed Clinical Trainer Forum at APTA's Combined Sections Meeting.
- F. Opportunity, if desired, to receive an honorarium for services (in addition to travel, hotel, food, supplies, and expenses for duplicating materials, if applicable), of a maximum of \$1,200 per program. If multiple trainers are teaching the program, the trainers will determine how the honorarium will be divided. Trainers are eligible to receive this honorarium for each course.
  1. The particular fee was set to provide a mechanism for the Credentialed Trainer to be able to pay to maintain APTA national, chapter, and education section dues to continue to meet one of the eligibility requirements to maintain status as a Credentialed Clinical Trainer.
  2. The only exception to the above honorarium is when the Credentialed Trainer teaches a Level 1 or Level 2 course as a part of an institution's academic program (i.e., Transition DPT). Under this circumstance, the Credentialed Trainer has the latitude to negotiate remuneration for teaching services consistent with other adjunct faculty associated with that institution. Thus, the trainer is not to be constrained by the \$1,200 limit, which is the maximum honorarium the trainer can receive when the program is taught as a continuing education model (for CEUs/contact hours) rather than for academic course credit.

### III. ELIGIBILITY CRITERIA FOR APPLYING TO ATTEND A CCIP TRAINER COURSE

All applicants must demonstrate **evidence** of **ALL** of the following:

- Status as a PT or a PTA as evidenced by current documentation that meets state regulations to provide physical therapist services as a PT or PTA (e.g., licensure, certification, registration), if applicable.
- Current membership in APTA or International Partners Program.
- Significant experience in physical therapy clinical education, which demonstrates depth and breadth of instruction. Examples of significant experience may include:
  1. Minimum two years as a CCCE or ACCE/DCE.
  2. Three years combined experience as a CCCE and ACCE/DCE.
  3. Five years of experience as a CI, and having demonstrated ability to manage exceptional students, to manage ethical/legal issues involving students, to mentor students' professional development beyond the traditional clinical experience, and/or collaboration with the CCCE and/or ACCE/DCE related to clinical education program development, mentoring of less experienced CIs, and/or management of student issues.
- Experience as a CI for students.
- APTA Credentialed Clinical Instructor status.
- Teaching experience including different levels of learners and class size.
- Commitment and willingness to provide ongoing training of clinical educators for a minimum of three years.
- Professional activities and professional development in clinical education and education.
- Access to a viable mechanism of support (e.g. consortia, academic institution, employer/clinic facility, area health education center, other) for providing APTA CCIP.
- APTA Credentialed Clinical Trainer for a minimum of three years and successfully having completed one portfolio renewal without conditional status.
- APTA Level 2 Credentialed Clinical Instructor status.
- Commitment and willingness to provide ongoing training of clinical educators for a minimum of five years.
- Completion of the **Trainer Application** by the stated deadline to include **ALL** of the following:
  1. Applicant dossier, including a reference from the applicant's direct supervisor.
  2. Self-assessment form completed by the applicant.
  3. Reference form completed by a student/learner who the applicant has supervised or taught.

4. Reference form completed by a colleague/peer who has observed the applicant's performance as a clinical or academic teacher. For clinical educators, it is recommended that a reference letter is written by the CCCE and/or DCE/ACCE.

#### IV. APPLICATION PROCESS FOR A CCIP TRAINER COURSE

- A. Coordination of the application process, courses, and credentialing is managed by APTA's CCIP staff.
- B. A call for applicants is made available, based on the need for new Credentialed Clinical Trainers and budget considerations, in APTA publications and outlines the eligibility criteria and application process.
- C. Applicants are required to submit completed documentation to APTA's Clinical Instructor Credentialing staff by specified deadlines.

#### V. APPLICATION DECISION-MAKING PROCESS

- A. Each trainer application, whether for Level 1 or Level 2, is masked and reviewed by a panel of two or three CCIW members, and rated for acceptance according to specific, weighted criteria established by CCIW. The criteria include ALL of the following:
  - Eligibility requirements.
  - Employment history.
  - Applicant's self-assessment.
  - Geographic distribution and needs of the current trainer pool.
  - Professional activities.
  - Professional development/continuing education.
  - Teaching experience.
  - Responses to three clinical education scenarios.
  - References.
  - Consideration of any past conditional renewal status or reinstatements.
- B. To ensure anonymity, panel members will not review Level 1 applicants who are from their geographical region.
- C. Rating decisions by the panel for inviting applicants to participate in a CCIP Trainer Course may be designated as "highly recommend," "recommend," "recommend with reservations," or "not recommend" and must include comments substantiating their ratings.
- D. Ratings must be congruent between panel members for an invitation to be extended to an applicant, or for denial to occur.
- E. In all cases, applicants are notified in writing of the panel's decision by APTA's CCIP staff.
  1. Approved applicants are scheduled for a course by APTA and provided with all course materials, including:

- **Level 1: an initial self-assessment and a covenant.**
- **Level 2: a covenant.**

The course registration fee is due prior to the course.

2. Applicants who are not recommended to attend the trainer course are notified in writing, by APTA's Clinical Instructor Credentialing staff on behalf of CCIW, indicating the areas of deficiencies found in their application. Applicants may choose to reapply for a subsequent course offering.

## VI. CREDENTIALING DECISIONS OF CCIW

- A. Faculty members meet to discuss participants' performance during the course and agree upon performance ratings based on the observations of all faculty members. Participant ratings on each of the criteria listed above must achieve a score of "adequate" (four points on a seven-point scale) or above to be considered for Credential Clinical Trainer status. Participant self-assessments will be considered as part of the evaluation process.
- B. Following each trainer course, faculty forward the following to APTA's CCIP staff, who then present this information to CCIW:
  1. **Trainer Final Participant Self-Assessment** with developmental action plan.
  2. **Trainer Faculty Assessment** on the participant's performance on the following rated criteria: participant's comfort with the content, confidence in the delivery of the content, and readiness to independently organize and deliver the entire Level 1 and/or Level 2 CCIP.
- C. Decisions of CCIW from the review of the participant's performance assessments for the trainer course are as follows:
  1. Participant is approved for Level 1 or Level 2 Credentialed Clinical Trainer status.
    - a. The participant is notified and listed in APTA's database of Level 1 and/or Level 2 Credentialed Clinical Trainers, with all associated benefits and responsibilities.
    - b. **The new Credentialed Clinical Trainer will receive a letter awarding trainer status and a certificate from APTA, granting:**
      - Level 1: An initial three-year term as a trainer.**
      - Level 2: An initial five-year term as a trainer.**
    - c. CCIW may prescribe, on a case-by-case basis, remediation to achieve the criteria prior to awarding Level 1 or Level 2 Credentialed Clinical Trainer status.
  2. Participant is NOT approved for Credentialed Clinical Trainer status.
    - a. CCIW notifies the participant via letter not awarding trainer status that they have not successfully met the criteria for earning Level 1 or Level 2 Credentialed Clinical Trainer status. The participant may appeal this decision in writing within 30 days following notification of denial of trainer status and provide a suggested, written plan for remediation to address deficits identified during the trainer course.

- b. The individual has the option to repeat the course at full cost. The decision to reapply for a subsequent CCIP Trainer Course is left to the candidate and should be attempted only after improved teaching performance and content mastery based on feedback received following the course.
- D. Candidates participating in the Level 1 or Level 2 trainer course are not eligible to teach the program prior to notification of receiving their Credentialed Clinical Trainer Certificate following the review by CCIW.

## VII. ELIGIBILITY FOR CREDENTIALLED CLINICAL TRAINER RENEWAL

A. To be eligible for renewal after the initial (3-year) term as a Level 1 Credentialed Clinical Trainer, the trainer must complete the **Trainer Renewal Portfolio** documenting **ALL** of the following:

- Provide, independently or team-teach, a minimum of three voluntary courses to a minimum of 30 persons within the three years of initial credentialing.
- Independently teach all six sections of the Level 1 didactic curriculum and coordinate and manage the Assessment Center (e.g., providing participant directions, answering questions, ensuring participants move through the stations, assisting participants with the review of their scoring) within a three-year time period.
- Complete the Trainer Renewal Portfolio.
- Provide any additional learning experiences that enhanced their capabilities as a trainer.
- Review and sign a new covenant.

B. To be eligible for renewal after the initial (5-year) term as a Level 2 Credentialed Clinical Trainer, the trainer must complete the Trainer Renewal Portfolio documenting ALL of the following:

- Provide, independently or team-teach, a minimum of five voluntary APTA courses to a minimum of 50 persons within five years of initial Level 2 Clinical Trainer credentialing or Level 2 Clinical Trainer credential renewal. The trainer must teach: 1) at least 2 Level 1 courses, 2) at least 2 Level 2 courses, and 3) at least one remaining course that may be either Level 1 or Level 2.
- Independently teach all sections of the Level 1 course and all sections of the Level 2 course and manage both Assessment Centers.
- Complete the Trainer Renewal Portfolio in year five following the awarding of the Level 2 Credentialed Clinical Trainer status.
- Commitment to give evidence that all renewal criteria have been successfully met.

C. Renewal requirements for Level 1 and Level 2 include:

- Consent to a minimum of a three-year commitment (Level 1) or five-year commitment (Level 2) to providing the Level 1 or Level 2 course.
- Maintain membership in APTA or International Partners Program.
- Maintain access to a viable mechanism of support (e.g., consortia, academic institution, employer/clinical facility, Area Health Education Centers, other) to provide Credentialed Clinical Instructor Programs.

- Ability to manage administrative aspects within specified time frames using proper documentation and forms.
- D. To be eligible for additional renewals, the Level 1 and/or Level 2 Credentialed Clinical Trainer must complete the **Trainer Renewal Portfolio** documenting **ALL** of the following:
- Provide, independently or team-teach, a minimum of five voluntary APTA Level 1 courses to a minimum of 50 persons within the five years of Clinical Trainer Credential renewal.
  - Independently teach all sections of the Level 1 didactic curriculum and coordinate and manage the Assessment Center (e.g., providing participant directions, answering questions, ensuring participants move through the stations, assisting participants with the review of their scoring) within a five-year time period.
  - Complete the Trainer Renewal Portfolio.
  - Provide any additional learning experiences that enhanced their capabilities as a trainer.
  - Review and sign a new covenant.
  - Provide, independently or team-teach, a minimum of five voluntary APTA courses to a minimum of 50 persons within five years. The trainer must teach: 1. at least two Level 1 courses. 2. at least two Level 2 courses. 3. the remaining course(s) may be either Level 1 or Level 2.
  - Independently teach all sections of the Level 1 course and all sections of the Level 2 course and manage both Assessment Centers.
  - Complete the Trainer Renewal Portfolio in year five following the awarding of the Level 2 Credentialed Clinical Trainer status.
  - Commitment to give evidence that all renewal criteria have been successfully met.
  - Consent to a minimum of a five-year commitment to providing CCIP.
  - Maintain membership in APTA or International Partners Program.
  - Maintain access to a viable mechanism of support (e.g., consortia, academic institution, employer/clinical facility, area health education centers, other) to provide CCIPs.
  - Ability to manage administrative aspects within specified time frames using proper documentation and forms.

## VIII. PROCESS FOR RENEWAL OF CREDENTIALLED CLINICAL TRAINER STATUS

- A. A Credentialed Clinical Trainer will have fulfilled all administrative responsibilities as delineated in the **Administrative Aspects of the Credentialed Clinical Instructor Program**.
- B. Based on their renewal cycle, each Credentialed Clinical Trainer will submit a **Trainer Renewal Portfolio** no later than May 31 of their renewal year. Should May 31 fall on Memorial Day, portfolios may be submitted by June 1. Requests for trainer renewal portfolios will be sent out by mid-April each year. All trainer renewal portfolios must be submitted to APTA by email.

Trainer renewal portfolios shall include documentation to evidence **ALL** of the following:

- Teaching of all sections of didactic curriculum (for those teaching both programs, teaching all sections of both the Level 1 and Level 2 curriculum).
  - Coordination and management of the Assessment Center (for those teaching both programs, managing both Level 1 and Level 2 Assessment Centers).
  - Compilation of aggregate data from course evaluations.
  - Meeting the responsibilities of the Credentialed Clinical Trainer.
  - Provide any additional learning experiences that enhanced capabilities as a Level 1 and/or Level 2 Credentialed Clinical Trainer.
  - Indicate willingness to continue providing the APTA CCIP at least:
    - Level 1: Five times for an additional five years.
    - Level 2: Five times for an additional five years.
    - Both courses: Level 1 course two times, Level 2 course two times, and one additional course of either level to a minimum of 50 persons for an additional five years.
- C. There is no fee for submitting a renewal portfolio, however a late fee of \$100 may be assessed for any trainer renewal portfolio that is received past the deadline.

## IX. CREDENTIALLED CLINICAL TRAINER RENEWAL DECISIONS OF CCIW

- A. CCIW will review the trainer's portfolio to determine if the individual has met the competencies for Credentialed Clinical Trainer renewal.
- B. CCIW will review CCIP participants' course evaluations in the aggregate as compiled by APTA.
- C. Outcomes of the CCIW review of Clinical Trainers for renewal are as follows:
  - 1. The Clinical Trainer is renewed for an additional five years.
    - a. The Clinical Trainer is notified of the decision for renewal as a Credentialed Clinical Trainer for another five years after CCIW has met to review all documentation.
    - b. The Clinical Trainer is retained in APTA's database of Credentialed Clinical Trainers, with all associated benefits and responsibilities.

- c. The Clinical Trainer will be emailed a certificate awarding credentialing status for another five years.
2. The Clinical Trainer is awarded a conditional renewal.
    - a. CCIW may, at its discretion, provide the Clinical Trainer with a conditional renewal if the trainer has not met all of the renewal criteria due to extenuating circumstances. Specific conditions will be identified by CCIW in writing that the trainer must meet within a specified time period. If those conditions are not met within the parameters provided, then the credential shall be revoked.
    - b. The Clinical Trainer will be issued a new Credentialed Clinical Trainer certificate for a period of six months to fulfill the conditions specified at the time of awarding a conditional renewal. During this period of time the trainer will be required to schedule a program to meet the condition(s), submit the relevant written documentation to demonstrate the specified condition(s) have been met including program evaluation(s), and to permit time for CCIW review to review and discuss the documentation to determine Credential Clinical Trainer status.
    - c. CCIW will review written documentation provided by the Clinical Trainer by a date specified in the conditional renewal. The trainer will identify specifically how they have met the conditions specified by the conditional renewal. Following a review of the Clinical Trainer's written documentation within 60 days of submission:
      - i. If CCIW finds that the individual has met the conditions as established by the conditional renewal, the Clinical Trainer will be issued another Credentialed Clinical Trainer certificate for an additional 4 1/2 years to complete the five-year cycle.
      - ii. If CCIW finds the individual has **not** met the conditions as established in the conditional renewal, the credential will expire on the sixth-month date indicated on the conditional renewal certificate. At that time, the Clinical Trainer can no longer provide CCIP.
      - iii. If the Clinical Trainer elects **not to fulfill** the conditions as specified in the conditional renewal or **delays in submitting** documentation, the credential will expire on the sixth-month date indicated on the conditional renewal certificate. At that time, the Clinical Trainer can no longer provide CCIP until such time as written documentation is submitted and a formal review is provided by CCIW.
      - iv. During the conditional renewal review process (60 days) by CCIW, the trainer is not entitled to schedule or teach CCIP until final disposition of their credentialed status has been determined by CCIW.
      - v. Conditions fulfilled as a result of the awarding of a conditional renewal cannot be applied to future portfolio renewal documentation.
3. The Clinical Trainer is **not** approved for renewal status.
    - a. The Clinical Trainer is notified that Credentialed Clinical Trainer status has been revoked after CCIW has met to review all documentation.
    - b. Trainers who want to be reconsidered must follow the **Process for Reinstatement Following Revocation of Clinical Trainer Credential**.



D. CCIW reserves the right to review a Credentialed Clinical Trainer midrenewal cycle.

**\*Note:** Anything **bolded** in this document references an item of importance or a policy or form that can be found elsewhere.

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## APTA Credentialed Clinical Instructor Program

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### Revocation of Credentialed Clinical Trainer Status

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The CCIP Advisory Work Group reserves the authority to revoke the active status of a credentialed trainer, pending a review of relevant information and a group consensus. Any trainer whose status is in question will be made aware of the situation and asked to provide their perspective as an important part of the review process.

Conditions which mandate the revocation of an individual's status as a Credentialed Clinical Trainer include the following:

- The individual fails to maintain APTA membership. Canadian trainers must maintain participation in APTA's International Partners Program.
- The individual fails to meet part of the renewal commitment requirements.
- The participant evaluations of the individual's performance at two or more courses are sufficiently adverse, in the judgment of CCIW, to compel the conclusion that the individual has not satisfactorily demonstrated mastery of presentation and content of CCIP (i.e., presentation scores with more than 50% below a rating of four (above average)).
- CCIW determines (after giving the individual notice and an opportunity to respond to any adverse evidence) that the individual engaged in fraud, misrepresentation, or other irregular behavior in attaining the status of a Credentialed Clinical Trainer or in carrying out responsibilities in connection with the credentialing of clinical instructors.
- The individual fails to complete the renewal portfolio, or voluntarily surrenders their trainer credential status.

Additionally, CCIW may revoke an individual's status as a Credentialed Clinical Trainer if reliable evidence indicates that a state licensing authority has taken licensing action against this individual. It is the duty of the trainer to notify CCIP of any disciplinary action or legal matters have been taken against them.

Trainer status may also be revoked if CCIW determines that an individual has plead guilty or nolo contendere to a charge involving a serious crime (i.e., one classified as a felony or punishable by imprisonment for six months or more) substantially related to the qualifications, functions, or duties of a PT or PTA, has been found guilty of such a crime after a trial, or has been convicted of such a crime.

If you have any questions regarding this document, contact Clinical Instructor Credentialing at [ccip@apta.org](mailto:ccip@apta.org) or 800-999-2782, ext. 8528.



## APTA Credentialed Clinical Instructor Program

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### Appeals Process for Denial of Credentialed Clinical Instructor or Trainer Status

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- I. PROCEDURE FOR REVIEW OF CREDENTIALING DENIALS: JURISDICTION OF CCIP ADVISORY WORK GROUP
  - A. Credentialing decisions are based on a participant's performance during prescribed education programs:
    1. Participants of CCIP are recommended for Clinical Instructor Credentialing by Credentialed Clinical Trainers based on their performance and successful completion of the Assessment Center.
    2. Participants of the CCIP Trainer Course are credentialed as Clinical Trainers by CCIW based on faculty evaluations and recommendations, with consideration of participants' self-assessments.
  - B. The participant must make appeals for denial of credentialing in writing to CCIW within 30 days of notification of the denial. The written request for reconsideration must specify the grounds on which the reconsideration is based and the specific remedy requested.
    1. The chair of CCIW will review the request, including any additional information provided by the participant.
    2. The chair will seek input from the trainer(s)/faculty who taught the course.
    3. The chair will present the request for reconsideration and pertinent information to CCIW.
    4. CCIW will review the request for reconsideration and will notify the participant with the results within 60 days of receipt of the request for reconsideration.
    5. Following this process, there is no further appeal mechanism.
- II. PROCEDURE FOR REVIEW OF GRIEVANCE
  - A. Any individual who provides in writing a grievance or concern regarding any aspect of CCIP and/or the trainer process will be reviewed by CCIW within 60 days of the receipt of the grievance. The process to be used in responding to this grievance is as follows:
    1. Complaints must be submitted in writing to CCIW.
    2. CCIW will review and discuss the complaint within 60 days.
    3. CCIW will investigate the facts of the complaint to clarify the issues of all parties involved.
    4. Staff will consult APTA legal counsel regarding any legal issues that may be associated with the grievance.

5. Based on the facts of the grievance and consultation of legal counsel, CCIW will render a decision on a case-by-case basis and provide a written response to the individual who filed the grievance.

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## APTA Credentialed Clinical Instructor Program

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### Reinstatement of Credentialed Clinical Trainer Status

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The Credentialed Clinical Instructor Work Group reserves the authority to reinstate the active status of a Credentialed Clinical Trainer, pending a review of relevant information and a group consensus. Trainer reinstatements will be issued for a three-year term, after which the Credentialed Clinical Trainer will return to a five-year renewal cycle.

- I. An individual whose status as a Credentialed Clinical Trainer was revoked for failure to maintain membership in APTA may petition CCIW for reinstatement upon rejoining APTA. CCIW shall grant the petition upon satisfying itself that this individual is a member of APTA.
- II. An individual whose status as a Credentialed Clinical Trainer was revoked for failure to meet the portfolio commitment requirements, who fails to complete a portfolio renewal, or voluntarily surrenders their credentialed trainer status may petition CCIW for reinstatement by detailing the circumstances of their lapse in teaching or decreased enrollment with a plan to remedy both situations. CCIW will determine on a case-by-case basis whether the trainer may continue to provide CCIP and will specify the conditions and circumstances that the individual must meet in order to be reinstated.

A petition to CCIW must include an explanation of the deficits listed above, including specific reasons why the individual was unable to meet the established performance criteria for acceptable portfolio renewal requirements or why the portfolio was not submitted.

- A. With respect to the Petition for Reinstatement as a Credentialed Clinical Trainer, correspondence must include a comprehensive plan that specifically delineates how the individual will successfully meet the expected performance criteria for the next renewal period to meet the renewal requirements.
- B. The individual will resubmit a current portfolio completing applicable sections. Thus, for persons who have not been able to provide CCIP courses during the initial credential or renewal period, Parts I and III of the portfolio will be completed. For persons who have been able to complete a portion of the criteria, Parts I, II, and III are to be completed with current information. CCIW will review the portfolio focusing on the individual's goals, ongoing professional development in clinical education, and any other related aspects to assist in the decision-making process.
- C. Upon receipt of this information, members of CCIW will review the correspondence and portfolio documentation to make a status decision regarding reinstatement of the applicant and the conditions that are to be met, if reinstatement is to be awarded to include:
  1. Issuing of the Credentialed Clinical Trainer certificate and the dates for which the individual has been renewed. In the case where the individual might be penalized for remaining within the prior scheduled renewal period, the dates for credential renewal will move forward providing additional time for the individual to be able to meet the criteria.

2. Requiring the first time the individual provides the program, it will be cotaught with another active Credentialed Clinical Trainer. This will allow the individual to be supported, updated on any changes or documentation, and to share ideas and obtain feedback from another Credentialed Trainer who has been current in providing CCIP.
  3. Option of asking the individual to audit the next available CCIP Trainer Course if deemed necessary to ensure currency and competence.
- D. An individual whose Credentialed Clinical Trainer status has lapsed or who has voluntarily elected not to submit portfolio documentation will be permitted only one opportunity to seek reinstatement as a Credentialed Clinical Trainer from CCIW.
- III. An individual who fails to maintain mastery of both content and the presentation of Level 1 and/or Level 2, which includes aggregate presentation scores with more than 50% below the above average category as supported by participant comments, including but not limited to, lack of familiarity with the material, inability to answer questions, inability to adequately cover the material in the allotted time, or changing the content or sequence, must complete **ALL** of the following:
- A. Petition CCIW, explaining the deficits listed above.
  - B. Describe a plan to remediate the deficits that includes an estimated time for remediation. Remediation may include, but is not limited to:
    1. Repeating CCIP Level 1 and/or Level 2 trainer course at the clinical trainer's expense.
    2. Coteaching with a Credentialed Clinical Trainer willing to mentor those sections of the course that have been critiqued for delivery issues.
    3. Mentoring and assessment by a Credentialed Clinical Trainer for active teaching techniques.
    4. Submission of letters of support in relation to remediation plans.
    5. Other specific requirements as determined by CCIW.
- IV. An individual whose status as a Credentialed Clinical Trainer was revoked on account of fraud, misrepresentation, or irregular behavior may petition CCIW for reinstatement. CCIW may grant such a petition if it determines that doing so would be in the best interest of the profession.
- V. An individual whose status as a Credentialed Clinical Trainer was revoked because of licensing action by state authorities or evidence of their commission of a serious crime may petition CCIW for reinstatement. CCIW may request information related to the incident, such as disposition and resolution, and may grant such a petition if it determines that doing so would be in the best interest of the profession.

**Note:** A list of trainers is available at <http://www.apta.org/CCIP/ListofTrainers/> to aid in finding someone who may be able to assist with mentoring.

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**Credentialed Clinical Instructor  
Program Advisory  
Work Group  
Information**



## **APTA Credentialed Clinical Instructor Program**

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### **Mission of the CCIP Advisory Work Group and CCIP**

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The mission of CCIW is to enhance the education of PT and PTA students through comprehensive, valid, and reliable education and credentialing of clinical instructors, and to further the professional development of clinical educators.

#### **I. PURPOSE OF CCIW**

The purpose of CCIW is to provide programmatic policy oversight and maintenance for APTA's CCIP. Primary responsibilities include review of program policies, trainer applications, and trainer renewals, maintenance of Level 1 and Level 2 CCIP curricula, and formation of subgroups as needed when work is deemed necessary, but beyond the scope of routine or standard work group responsibilities.

#### **II. MISSION OF THE CREDENTIALLED CLINICAL INSTRUCTOR PROGRAM**

Expand the use of technology in support of CCIP.

Consider initiatives related to clinical education that expand the body of knowledge of and training in clinical education.

Forecast trends in clinical education and propose the development of credentialing or other voluntary professional development activities, which will enhance the education of PT and PTA students, and further the professional development of clinical educators.

Encourage collaboration with other health professions to advance clinical teaching.

#### **III. STATEMENT OF CONFIDENTIALITY**

All persons involved in CCIP, Level 1 and Level 2 Train-the-Trainer Course, and CCIW commit to holding confidential all personal information encountered about participants during the process. This includes information on candidate applications, portfolio reviews, information related to participants' performance during an individual program or course, and any and all other information deemed to be confidential by CCIW or APTA.





## **APTA Credentialed Clinical Instructor Program**

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### **CCIP Advisory Work Group Structure and Guidelines**

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The CCIP Advisory Work Group exists to provide programmatic policy oversight and maintenance for the Level 1 and Level 2 courses of APTA's CCIP.

#### **I. STRUCTURE**

The work group is composed of nine individuals, each of whom is a credentialed Level 1 trainer of CCIP, has accrued at least three years of service in this role, and has renewed their trainer credential at least once. Each member agrees to a term of service lasting three years, with service terms staggered to reflect three levels of experience on CCIW. Each year the three most senior trainers will complete their term of service and relinquish their responsibilities to three new members. This approach ensures continuity within the work group while promoting involvement of new members.

Procedural and content differences between the Level 1 and Level 2 courses require that at least one member of each tenure be a credentialed trainer of the Level 2 course. This ensures that at least three Level 2 trainers are available to provide expertise and insight in service as part of the work group.

The work group's activities will be coordinated by a chair, who is selected by CCIP staff from among the group's members and who must have a minimum of one year of group experience to qualify. This individual's three-year CCIW trajectory is as follows: Serve as a work group member during the first year; serve as chair during the second year; and serve as immediate past chair during the third year. This third year will allow the immediate past chair to mentor the next chair. Working in conjunction with APTA, the chair will be responsible for setting agenda items, facilitating group discussions, determining and assigning individual responsibilities, and providing general leadership and direction.

#### **II. TERM OF SERVICE**

Serving as a member of the work group requires commitment to a term of service lasting three years, beginning on July 1 and ending on June 30. Once a trainer has completed a term of service, they may choose to reapply for an additional term of service and will be considered eligible for reappointment. Following two consecutive terms, an individual may reapply after at least one year without serving on CCIW.

#### **III. ELIGIBILITY**

Trainers interested in serving on the work group must have accrued at least three years of experience in teaching Level 1 credentialing courses and renewed their trainer credential at least once in order to be eligible. Level 2 trainer credentialing is not a prerequisite, but may serve as an important consideration as part of the application review process. Additional factors that may influence consideration include, but are not limited to, prior service with other association work groups, committees or task forces, as well as involvement with the association's component or national leadership.

All trainers who meet the specified prerequisite requirements and who have an interest in serving on the work group are encouraged to apply.

- A. A call for new CCIW members is issued each April, with a deadline of mid-May for applications to be submitted.
- B. Following a review by CCIP staff and CCIW, successful candidates will be notified. Per APTA policy, selection to the work group is at the discretion of APTA.

#### IV. TASKS AND EXPECTATIONS

The work group's primary responsibilities include the following:

- **Policy review.** Maintenance of program policies and review of relevant procedural guidelines. This includes updating and revising formal program documentation to reflect adjustments as necessary. The policy review process takes place on an annual basis, with any changes being put into effect Aug. 1.
  - When required, preside over issues, conflicts, or questions relating specifically to the interpretation and/or implementation of program policy. Actionable recommendations shall be decided upon and provided to staff by means of individual ballot. In such cases the chair shall not possess a vote, except in the event of a four-to-four tie, in which case they will issue the tie-breaking ballot.
- **Trainer renewal.** Implement the review process necessary for credentialed trainers to renew their active status and conduct assessments of individual renewal applications, providing recommendations accordingly.
- **Trainer applications.** Review and assess applications to the Level 1 and Level 2 trainer courses, based on candidate qualifications and with concurrent consideration of the needs of the program. Review and assess evaluations of those completing the Level 1 and Level 2 trainer courses, awarding credentialed trainer status to those who successfully meet the criteria.
- **Curriculum maintenance.** Periodically review, assess, and determine appropriate changes to the Level 1 and Level 2 CCIP curricula.
- **Subgroups.** At the discretion of staff and CCIW, subgroups may be formed to conduct work that is deemed necessary, but beyond the scope of routine or standard work group responsibilities. Subgroup membership will be approved by APTA, but will subsequently fall under the guidance of CCIW. Each subgroup will be led by a member of CCIW, who will serve as a liaison between the two groups. It is not required that a CCIW member serve as chair of a subgroup.

#### V. MEETINGS

CCIW meets twice a year in person, once at APTA's Combined Sections Meeting and once at APTA headquarters. In addition, they meet twice a year via conference call, and any other time a meeting is deemed necessary by either CCIW or CCIP staff.

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# Glossary of Terms



## APTA Credentialed Clinical Instructor Program

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### Glossary of Terms

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**Academic coordinator/director of clinical education:** Person employed by the academic institution responsible for maintaining the affiliation contract between the academic program and the clinical site. This individual reviews student performance evaluations from clinical instructors and assigns a grade for the course. Also acts as a resource for clinical instructors and sites for problem-solving with students and training clinical instructors. The ACCE/DCE also may teach in the educational program's classroom setting (e.g., academic faculty, classroom instructor, academic program director).

**Note:** In some models, faculty also may serve as clinical instructors (e.g., nursing, dental, medical models).

**Clinical experience:** Designated period of time scheduled at a clinical site for a student to practice skills under the supervision of a qualified instructor/preceptor. Written and verbal evaluation of the student's performance is provided by the clinical instructor and contributes to the completion of an educational degree, postprofessional residency, fellowship, or certificate program (e.g., internship, preceptorship, residency, fellowship).

**Clinical instructor:** Clinician employed by the clinical site who is responsible for teaching and supervising the student, approving the learning objectives for the clinical experience, and evaluating the student's performance at the clinical site (e.g., preceptor, field instructor, student supervisor).

**Clinical site:** Location(s) where the clinical experience occurs; facility that agrees to supervise students under a contract/affiliation agreement with the student's academic program. The clinical site is also a possible location/facility for a residency or fellowship program.

**Credentialed Clinical Instructor Program Advisory Work Group:** The work group is composed of 12 individuals, each of whom is a Credentialed Clinical Trainer and has accrued at least three years of service in this role. At least 1 member of the group must be a PTA, and at least 2 members must be clinicians. The work group is selected and coordinated by APTA to provide programmatic policy oversight and maintenance of APTA's CCIP.

**Dossier:** Document completed by the participant prior to attending the Level 1 or Level 2 CCIP course to ensure competence as a clinician.

**Evaluation tools:** A form or instrument containing standards or criteria for assessing student's clinical performance. A tool used to describe a specific incidence of performance, and for the student to provide self-assessment. Examples include Clinical Performance Instrument, PTMACS, American Occupational Association Fieldwork Evaluation for the Occupational Therapist, Clinical Instructor Evaluation of Student Performance, Anecdotal Record, and Weekly Planning Form.

**Level 1 Credentialed Clinical Trainer:** A PT or PTA who provides the Level 1 CCIP to qualified individuals. CCIW awards this person with the Credentialed Clinical Trainer status based on their performance in and completion of the Level 1 CCIP Trainer Course.

**Level 1 Clinical Instructor:** A PT or PTA who has completed the Level 1 CCIP and successfully passed the Assessment Center.

**Level 1 Credentialed Clinical Trainer Faculty:** This individual serves as a faculty member for the Level 1 CCIP Trainer Course. They serve as educator, evaluator, coach, and role model for participants during the trainer course and is appointed by CCIW to serve in this role. They must have earned Credentialed Clinical Trainer status.

**Level 2 Credentialed Clinical Instructor:** A PT or PTA who has completed the Level 2 CCIP and successfully passed the Assessment Center.

**Level 2 Credentialed Clinical Trainer:** A PT or PTA who provides the Level 2 Credentialed Clinical Instructor Program to qualified individuals. The Credentialed Clinical Instructor Program Advisory Work Group awards this person with the Level 2 Credentialed Clinical Trainer status based on their performance in and completion of the Level 2 CCIP Trainer Course.

**Level 2 Credentialed Clinical Trainer Faculty:** This individual serves as a faculty member for the Level 2 CCIP Trainer Course. They serve as educator, evaluator, coach, and role model for participants during the trainer course and is appointed by CCIW to serve in this role. They must have earned Level 2 Clinical Trainer status.

**Portfolio:** A compilation of the work of the Credentialed Clinical Trainer to be used by CCIW to assess their ability to continue to offer the Level 1 and/or Level 2 CCIP.

**Site Coordinator of Clinical Education:** Person employed by the clinical site responsible for scheduling student experiences, training clinical instructors, communicating with the educational program(s), monitoring contracts between the facility and the educational programs, and ensuring compliance with clinical experience standards (e.g., student coordinator, residency director, student program director).

**Student:** Person enrolled in an educational program responsible for achieving a designated set of skills and performance behaviors at a clinical site. The student is also responsible for obtaining the necessary preparation for the clinical experience and providing feedback to the clinical instructor (e.g., intern, resident, trainee).

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## APTA Credentialed Clinical Instructor Program

### Additional Information

#### Level 1

**Precourse Forms** are available in the [Precourse Documents folder](#) of the Level 1 CCIP Community.

- [Steps to Coordinate a Program.](#)
- [Level 1 Course Announcement Form.](#)
- [CCIP Credit Card Payment Form.](#)
- [Level 1 Manual Order Form.](#)
- [Agreement of Participation.](#)
- [Confidentiality Agreement.](#)
- [Level 1 Dossier.](#)

**Postcourse Forms** are available in the Postcourse Documents folder of the Level 1 CCIP Community.

- [Level 1 Refund Request Form.](#)

#### Level 2

**Precourse Forms** are available in the [Precourse Documents folder](#) of the Level 2 CCIP Community.

- [CCIP Level 2 Course Coordination-V02.18.pdf.](#)
- [CCIP Announcement Form-V12.18.docx.](#)
- [CCIP Credit Card Payment Form - V1.17.doc.](#)
- [CCIP Level 2 Manual Order Form - V06.19.xlsx.](#)
- [CCIP Level 2 Dossier - V9.19.docx.](#)
- [CCIP Level 2 Pre Course Assignments - V1.19.docx.](#)

**Postcourse Forms** are available in the [Postcourse Documents folder](#) of the Level 2 CCIP Community.

- [CCIP Level 2 Refund Request Form - V9.19.docx.](#)

#### Other Forms and Information

- [Level 1 Trainer Renewal Portfolio.](#)
- [Level 2 Trainer Renewal Portfolio.](#)
- [CCIP Advisory Work Group Roster.](#)
- [List of Credentialed Clinical Trainers.](#)

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