

Physical Therapist Assistant Manual for the Assessment of Clinical Skills (PTA MACS) – Third Edition Instructions

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Planning Learning Experiences

- Prior to the clinical experience, the Academic Coordinator of Clinical Education (ACCE) establishes the grading criteria.
- Prior to the clinical experience, the student determines skills that potentially can be practiced at the assigned facility.
- The Clinical Instructor (CI) indicates skills that the facility is able to offer as learning experiences.
 - At the initiation of the clinical experience, the student and the CI review the skill assessment sheets to familiarize themselves with the individual skills and their objectives; the CI communicates expectations for completion based on objectives for each skill and demands for the specific facility.
 - The student and CI plan learning experiences to promote completion of the selected skills.



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Using Formative Evaluation in Clinical Teaching

- The program recommends ongoing, informal feedback as well as a formal meeting at least weekly to discuss performance, review the PTA MACS, and devise planned learning experiences.
- The student is primarily responsible for successfully completing required skills and actively seeking opportunities to learn.
- Students should periodically re-evaluate their own performance.
- The student uses the PTA MACS skill assessment sheet for ongoing self-assessment, independently of, and **prior to the CI's assessment**.
- After the CI rates the student's performance, the assessment ratings are compared. When ratings disagree, the student and the CI discuss the reasons using the specifics of the performance objectives for the skill.

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Using Formative Evaluation in Clinical Teaching

- The student and CI develop a plan of action for the remainder of the clinical experience based on the strengths and weaknesses identified during the assessment process.
- The CI documents final evaluation of the student's performance on completion of the clinical experience.
- Written documentation and direct communication with the educational program by the student and CI are required to ensure early recognition of and solutions to problems.
- When questions or problems arise, the ACCE should be contacted as soon as possible.
- The ACCE assigns the student's grade for the clinical course.

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Essentials of Documentation of Student Performance

- · All documentation is in permanent ink.
- \cdot The student completes the information at the top of all pages.
- Any errors on the forms are marked through with a single line, and the CI initials the change in rating. Correction fluid is not used.
- The student may assist with clerical support on the forms, but the CI must sign or initial each form in the appropriate place(s).
- The CI must initial each skill separately. Do not use long arrows to indicate approval of multiple skills on the Progress Report or Master List.
- Following the final student conference, the student will send the Progress Report (pink sheets) and Student Evaluation of Clinical Education Experience (SECEE – green sheets) immediately to the ACCE according to the instructions provided by the academic program.

Sections of the PTA MACS

- · Section 1 Philosophy, general instructions, and glossary (tan pages)
- · Section 2 Facility Identification Information Form and Master List (blue pages)
- · Section 3 Entry-level skill assessments (Skills 1-26 white pages)
- · Section 4 Site-specific skill assessments (Skills 27-37 yellow pages)
- Section 5 Progress Report forms (pink pages)
- · Section 6 Student Evaluation of Clinical Education Experience (green pages)

Entry-Level Skill Assessments (Skills 1-26 - white pages)

- Each sheet defines an entry-level skill and contains grids and boxes for recording necessary information.
- The objectives define the skills an entry-level physical therapist assistant should complete prior to graduation.
- The skill components and number of skills a student must complete are dependent upon the grading criteria of the individual physical therapist assistant program.



Entry-Level Skill Assessments (Skills 1-26 - white pages)

- · Each skill assessment sheet consists of at least two facing pages.
- On the right-side page of the skill assessment sheet there are:
 - · A skill title at the top of the page
 - A rating grid for recording the student's and CI's ratings of skill performance at midterm and final evaluations
 - A practice setting grid for recording the type of clinical setting in which the skill was practiced
 - · A list of objectives applicable to the skill
 - · A box for feedback on specific joints or interventions, if applicable
 - A box at the bottom for recording comments related to practice or improvement needed

Entry-Level Skill Assessments (Skills 1-26 - white pages)

- The left-side page of each skill assessment sheet consists of:
 - · A explanation of ratings for student performance
 - A box for comments describing excellent performance of the skill on the rightfacing page
 - Remember the comment box on the left-side page pertains to the skill on the rightside page, not the skill on the previous page.
 - There may be additional pages of ratings for a skill with many subtasks (skills 17, 18, and 20). These will come after the initial two pages. These skills are annotated with "See Individual Skills" under the skill title.

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Recording on the Skill Assessment Sheets

- At midterm and final, the student completes a self-evaluation rating in the appropriate column, then the CI records a rating.
- The CI denotes the practice setting by recording the clinical experience number and facility initials in the appropriate space (the same as those recorded on the Facility Identification Information Form – page 1 of the blue sheets). The CI can indicate more than one practice setting.
- Ratings and comments on previously approved skills are not necessary. If the student practices a previously approved skill at the current facility, but the CI does not enter a rating for the clinical experience, the CI is indicating agreement with the previous rating.

- The following rating scale is used with the PTA MACS:
 - Above entry level (+): Student surpasses entry-level standards for this setting by meeting all applicable objectives; practices the skill safely, effectively, consistently, and efficiently.
 - Entry Level (~): Student meets entry-level standards for this setting by meeting all applicable objectives; practices the skill safety and effectively.
 - · Blank: Student has had no opportunity to practice the skill.



- The following rating scale is used with the PTA MACS:
 - Not Independent (NI): The student is below entry-level standards for this setting and is not independent in performance of this skill because of one or more of the following:
 - Student requires cueing, prompting, reminding, instructing, guiding, or correcting to perform applicable objectives for the skill.
 - \cdot Student does not safely perform the skill.
 - \cdot Student demonstrates errors in performance of the skill.
- NOTE: The CI must document specific behaviors that need improvement, referring to the objectives of the skill when applicable.
- Documentation must be in the comment box on the right-side page of the applicable skill assessment sheet.

- The following rating scale is used with the PTA MACS:
 - Unacceptable (U): The student is well below entry-level standards for this setting because of one or more of the following:
 - Student engages in a single grievous incident that demonstrates gross unprofessional, unsafe, illegal, or unethical behavior.
 - Student does not meet applicable objectives even with repeated assistance from the CI to correct deficits.
 - Student practices the skill in an unsafe and/or ineffective manner despite repeated guidance from the CI, including written documentation of the incident(s) or problem(s).
 - The CI or CCCE must call the ACCE as soon as possible once the student earns this rating

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- Guidelines for documenting the Unacceptable (**U**) rating:
 - The CI must document the specific behavior(s) that resulted in the rating and need improvement, citing the objectives of the skill when applicable.
 - Document the extent and type of guidance, instruction, or counseling provided to the student leading up to the "U" rating.
 - Documentation must be in the comment box on the right-side page of the applicable skill assessment sheet. If the documentation exceeds the space available for comments the CI must sign and date all additional documentation.

Site-Specific Skills (Skills 27-37 - yellow pages)

- · The skills in this section are specialized skills that may not be available at every site.
- These skills usually require a specialized clinical experience to provide the student the opportunity to practice.
- If a clinical facility offers these learning experiences, the CI should use these skill sheets to document student performance.
- Additional skills that are unique offerings at a specific facility may be added to this section by the CI using the blank site-specific skill assessment sheets (35-37).
- The category, skill components, and number of site-specific skills a student must complete are dependent upon the grading criteria of the individual physical therapist assistant program.

Example 1: Initial approval of a skill (white skill assessment sheets)

Clinical Z S Experience # Mid Final Mid Final Mid	Mid Final		
	ivitu Filiai	Mid Final	Mid Final
Student Rating			
CI Rating			
Practice Setting: Enter Clinical Experience # and facility	y initials for appl	licable setting(s)	
Acute Rehab (IP/OP) Pediatric (IP/OP/ISD) OP Ontho	LTC/SNF	ICU/CCU/NICU	Home Health

Objectives applicable to this skill; score student on objectives that are applicable at your facility:

- a. Determines patient appropriateness for exercising.
- b. Determines exercise parameters (duration, speed).
- c. Uses manual techniques, body mechanics, and equipment safely and effectively.

Example 2: NI and U rating (white skill assessment sheets)

6		5		4		3		2				Clinical
Fina	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Experience #
-										NI	NI	Student Rating
				3						NI	21	CI Rating
		ting(s)	icable set	s for appl	lity initial	# and faci	perience	linical Ex	g: Enter C	ice Settin	Practi	
e Health	Home Health		ICU/CC	/SNF	LTC/SNF		OP Ortho		Pediatric ((IP/OP)	Rehab	Acute
	_											1-BRMC

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Objectives applicable to this skill; score student on objectives that are applicable at your facility:

- a. Monitors patient response and modifies interventions accordingly within the POC.
- Recognizes when interventions have been inappropriately delegated and initiates clarification and modification with the supervising PT.
- c. Recognizes when interventions should not be provided due to changing medical status and defers to the supervising PT.
- d. Progresses the patient within the objective parameters documented in an established PT plan of care.
- e. Discusses pertinent changes in patient status with appropriate personnel.



Example 2: NI and U rating comments (white skill assessment sheets)

Date	Objectives/behaviors requiring practice or improvement	CI	Facility
3-3-17	Tom has consistently made changes to the treatment plan outside the plan of care without prior approval of the PT. See attached examples.	24	BRMC
3-24-17	Tom has shown some improvement, but continues to struggle with objective c.	J-H	BRMC



Example 3: Approval of Skills on a Log

• The CI initials equipment or techniques used and may also add unlisted equipment or techniques (see next slide).



Example 3: Approval of Skills on a Log

Skills 17.1–17.5 Interventions: Therapeutic Exercise

Rate the student's performance for each type of therapeutic exercise. The CI initials equipment or techniques used and may also add unlisted equipment or techniques.

17.1 Aerobic Activities

Clinical		1		2		3		4		5		6
Experience #	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Final
Student Rating					1							
CI Rating		2.4.5			~							1.1
Elliptical T	rainer	K	2 Station	ary Bike		U	E Ergome	eter	_			
Stair StepperTreadmill				[n	terval Tra	ining	-					

Example 4: Site-Specific Skills (yellow pages)

1. Skills 27-34 are the same as examples 1 and 2.

2. Skills 35-37 are blank to use for any specific skill not covered in the PTA MACS.

- a. Record the type of skill in the blank labeled "Site Specific Skill."
- b. In the space under objectives, the CI will list objectives applicable to the skill at that facility.

Example 4: Site Specific Skills

						S	ite Secif	ic Skill:_	2	Vound Vi	AC	Skill 3
Clinical Experience #	Mid	Final	Mid	2 Final	Mid	3 Final	Mid	4 Final	Mid	5 Final	Mid	6 Final
		1	1410	- and	in in	- mai		1 mai	Mild	1 mai	INITO	1 mai
Student Rating	N9	1										
CI Rating	Ng	1							21	1.3	-3-14	
	Pract	ice Settin	g: Enter (linical Ex	perience	# and fac	ility initia	is for appl	icable set	tting(s)		
Acute	Rehab	(IP/OP)	Pediatric ((P/OP/ISD)	OP	Ortho	LTC	/SNF	ICU/CO	U/NICU	Home Health	
1-SRMC												
	1					_						

Objectives applicable to this skill; score student on objectives that are applicable at your facility:

- a. Identifies contraindications for VAC.
- b. Identifies appropriate wounds for VAC.
- c. Problem solves difficult seals.
- d. Identifies situations for continuous as intermittent pressure.



- The Progress Report is a summative evaluation that is completed for each clinical experience. It is employed at midterm and final evaluations and during the student/Cl conferences of the clinical experience. It serves the following purposes:
 - It provides the CI a template for recording an organized summative evaluation of the student's performance.
 - \cdot It provides the student a written summative evaluation of his/her performance.
 - It provides the academic program a record of the student's clinical performance at each clinical site.
 - \cdot It provides a duplicate record of past performance, if needed.
 - It includes a section where previously approved skills may be challenged and reapproved.

- The comments reflect the overall performance of the student in cognitive, affective, and psychomotor domains of learning within each section of the PTA MACS.
- Approvals, challenges, and/or reapprovals from previous clinical rotations are not recorded on the progress report for the current clinical experience.
- Midterm and final conferences are scheduled between the CI and the student to discuss the Progress Report.



- · The CI records summative comments prior to the midterm and final conferences
 - At the midterm evaluation, complete the "Midterm Summative Assessment" sections of the Progress Report
 - The CI's ratings of the student's performance on all skills attempted are transferred from the individual skill assessment sheets to the "Skill Summaries" sheet of the Progress Report.
 - $\cdot\,$ If the student assists in transferring the ratings, the CI verifies the ratings for accuracy.
 - $\cdot\,$ If a skill is not attempted, leave the rating blank.

- At the final evaluation of the clinical experience, the following are completed:
 - The CI's ratings of the student's performance on all skills attempted are transferred from the individual skill assessment sheets to the rating summary sheet of the Progress Report.
 - If the student assists in transferring the ratings, the CI verifies the ratings for accuracy.
 - \cdot If a skill is checked off at midterm, the final rating is left blank.
 - The CI completes the "Final Summative Assessment" section of the Progress Report.

- The CI also completes the "Final Evaluation of Student Performance" (complete both scales).
 - · Scale 1: "Level of performance at this clinical experience"
 - The CI rates the performance of the student according to the specific level of clinical and academic experience for this affiliation.
 - \cdot A hash mark (I) is placed on the line designating the rating.
 - · Scale 2: "Level of performance compared to entry-level PTA"
 - The CI rates the performance of the student according to the skills expectation level of a newly licensed, entry-level physical therapist assistant at the clinical instructor's facility.
 - \cdot A hash mark (I) is placed on the line designating the rating.

- The CI and student sign and date the report to indicate they discussed the information in the report. (Note that a signature does not necessarily constitute agreement with the evaluation.
- · The CI completes the Clinical Instructor Credentials section of the Progress Report.



Example 5: Progress Report Skill Summaries (pink pages)

	Progress Report (Skill Sur	-	5)	Clinical Expe	rience #: _1
Skills	Rat		Date/Cl	Date/CI	Date/CI
	Midterm	Final	Approved	Challenged	Reapproved
SECTION 1: Professional Behaviors					
1. Professionalism	1		3-3-17 924		
2. Commitment to Learning	~		3-3-17 24		
3. Interpersonal Skills			3-3-17 JA		
4. Communication	N9	~	3-24-17 24	In a concernation	
Effective Use of Time & Resources	N9	~	3-24-17 224	The second second	
6. Use of Constructive Feedback	N9	N9		- 20-2-1	
7. Problem Solving	N9	N9			

Facility Identification Form and Clinical Skills Master List (blue pages)

- The Facility Identification Form allows the academic program and subsequent Cls to quickly interpret the initials on the Clinical Skills Master List.
- The Clinical Skills Master List is used to record achievement of a skill. This sheet is completed before the final PTA MACS meeting with the student.
- It is a summary of the student's progress toward achieving entry-level skills. It also serves as a table of contents for the skill assessment sheets.
- The Master List also includes a section where a previously approved skill may be challenged and reapproved.

Example 6: Master List Approval

- The CI indicates the date, facility, and enters his/her initials to indicate approval of the student's skill performance.



Example 6: Master List Approval

Example 6: Master List Approval

Chill.		Approved			Challenged		1	Reapproved	
Skills	Date	Facility	CI	Date	Facility	CI	Date	Facility	CI
SECTION V: Healthcare Environment									
22. Safety				(The style)	1000000				
23. Interprofessional Practice	3-23-17	BRMC	24	1000	1000000000	182			
24. Documentation	3-23-17	BRMC	24						
25. Billing and Payment				1	Sub-Fo				



Example 7: Challenge of a Skill

- A challenge of an approved skill may be necessary if:
 - The differing demands of the two clinical settings may call for a higher level of skill performance.
 - The student's performance has deteriorated significantly since the skill was approved.
 - $\cdot\,$ The student is unable to successfully transfer the skill from one clinical setting to another.
- Challenging and reapproving a skill requires documentation on three separate forms: the skills assessment form, the progress report, and the master list.

Example 7: Challenge of a Skill

- To document a challenge:
 - Record the challenge at the time the deficiency is identified to ensure time to plan corrective measures before the student leaves the facility
 - Record the challenge on the individual skill assessment sheet by marking an "NI" or a "U" in the column assigned for that clinical experience.
 - $\cdot\,$ The CI must also comment in the right-hand comment box.



Example 7: Challenge of a Skill

Skill 19.2

Therapeutic Massage

Clinical		-	-	4		3		4		5	0	
Experience #	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Fina
Student Rating	N9	1	1									
CI Rating	N9	1	Ng			1200			185			
	Pract	ice Settin	g: Enter (Clinical Ex	perience	# and fac	ility initia	Is for app	licable set	tting(s)		
Acute	Rehab	(IP/OP)	Pediatric (IP/OP/ISD)	OP	Ortho	LTC	/SNF	ICU/CC	U/NICU	Home	Health
1-BRMC					2-AN	le						

Objectives applicable to this skill

- a. Selects and provides appropriate technique based on the POC established by the PT.
- b. Positions patient properly to achieve desired results.
- c. Applies techniques correctly (e.g., hand placement, body mechanics, direction, stabilization, grade of movement, force, pressure, strokes).

Comments: required with rating of NI or U

Dat	te	Objectives/behaviors requiring practice or improvement	CI	Facility
3-9-	-18	Susan consistently requires curing to position patient properly.	CL	AMC

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PTA MACS Instructions



Example 8: Reapproving a Challenged Skill

- When the deficiencies in skill performance are corrected, there are two options for reapproval on the skills assessment sheet:
 - If the deficiency is corrected during the same clinical experience, record reapproval on the skill sheet by either:
 - \cdot Entering the new rating in the final evaluation column, or
 - If the deficiency is not corrected before the student completes the clinical experience at the facility issuing the challenge, the CI must describe in the comments what the student needs to demonstrate to be entry level. The subsequent CI is then responsible for indicating reapproval when the skill is mastered at his/her facility, using the previous CI's input to direct learning experiences.



Example 8: Reapproving a Skill (Same Clinical Experience)

Option 1

Skill 19.2

Therapeutic Massage

Clinical		1		2		3		4		5		6
Experience #	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Final
Student Rating	NE	~	1									
CI Rating	NE	1	N9	1								
	Pract	ice Settin	g: Enter (Clinical Ex	perience	# and fac	ility initia	is for app	licable set	tting(s)		
Acute	Rehab	(IP/OP)	Pediatric (IP:OP/ISD)	OPO	Ortho	LTC/SNF		ICU/CCU/NICU		Home Hea	
1-BR MC		8 96 h			2- AM	3						

Option 2

Skill 19.2 Therapeutic Massage

Clinical		1		2	3		+		5		0	
Experience #	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Final	Mid	Fina
Student Rating	NE	1	1									
CI Rating	NE	×	#9√ €£					_				
	Pract	ice Settin	g: Enter C	linical Ex	perience	# and fac	ility initia	is for appl	licable set	tting(s)	-	
Acute	Rehab	(1P/OP)	Pediatric ((P/OP/ISD)	OP Ortho		LTC/SNF		ICU/CCU/NICU		Home Health	
1-BRMC	1				2- AM	е			-			



Example 9: Challenge and Reapproval of a Skill on the Progress Report (pink pages)

- Record a challenge on the Progress Report by indicating the date and the CI's initials in the space for the challenge.
- When the deficiencies are corrected, note reapproval on both the individual skill sheet and on the Progress Report by indicating the date and the CI's initials in the space for reapproval.
 - The reapproval column is used **only** for challenged skills; it is not used for rechecking a previously approved skill.

Example 9: Challenge and Reapproval of a Skill on the Progress Report (pink pages)

Progress Report (Page 3 of 5) Skill Summaries Clinical Experience #: 1											
Skills		ting	Date/CI	Date/CI	Date/Ci						
OKIIIS	Midterm	Final	Approved	Challenged	Reapproved						
SECTION III: Interventions in Patient/Client Management	_										
19. Manual Therapy											
19.1 Passive Range of Motion	 ✓ 		11-17-17 224								
19.2 Therapeutic Massage	1		12-5-17 24	3-9-18 CL	3-30-18 CL						
19.3 Joint Mobilization	N9	1	12-5-17 94								

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Example 10: Challenge and Reapproval of a Skill on the Master List (blue pages)

- Record a challenge on the Master list by indicating the date, facility, and CI's initials in the space for the challenge.
- When the deficiencies have been corrected, note reapproval on both the individual skill assessment sheet and on the Master List by indicating the date, facility, and the CI's initials in the space for reapproval.
 - The reapproval column is used **only** for challenged skills; it is not used for rechecking of a previously approved skill.



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Example 10: Challenge and Reapproval of a Skill on the Master List (blue pages)

Example 10: Challenging and reapproving a skill on the Master List

Skills	Approved		Challenged			Reapproved			
	Date	Facility	CI	Date	Facility	C1	Date	Facility	ĊI
SECHON III: Interventions in Patient-Client Management									
19. Manual Therapy									
19.1 Passive Range of Motion	11-17-17	BRMC	24	1.1.1.1.1					
19.2 Therapeutic Massage	12-5-17	BRMC	24	3-9-18	AMC	er	3-30-18	AMC	C.L
19.3 Joint Mobilization	12-5-17	BRMC	24						

Student Evaluation of Clinical Education Experience (SECEE) Form (green pages)

- The student completes the mid-term evaluation of the clinical education experience at the midpoint of the clinical rotation and completes the entire SECEE at the end of the rotation.
- The CI and/or CCCE may keep a copy of these forms for their records.



• A knowledge of the following terms is helpful in understanding the instructions and using the PTA MACS:

• Educational Terms:

- Affective the area of learning dealing with professional behavior, communication styles and interpersonal skills.
- **Approval** to certify that a skill has met the established criteria of safe and effective performance expected of an entry-level physical therapist assistant in a specific setting.
- Assess to measure, to quantify, or to place a value or label upon something.
- **Challenge** to question performance in any area which fails to meet the expected criteria.
- **Cognitive** the area of learning dealing with organization of thoughts, problem solving abilities and documentation.

• A knowledge of the following terms is helpful in understanding the instructions and using the PTA MACS:

• Educational Terms:

- **Competency** defined skills, knowledge and attitudes required for successful performance of a skill.
- Competency-based Education a systematic curricular design that enables learning to progress step-by-step toward achievement of a specific skill, knowledge or attitude; demonstrated competence under realistic conditions is the basis for awarding credentials.
- Entry-Level Performance the level of knowledge, skill and professional behavior expected from a new PTA graduate.
- Evaluation a judgment based on a measurement or value of something; assessment.



• A knowledge of the following terms is helpful in understanding the instructions and using the PTA MACS:

• Educational Terms:

- **Psychomotor** the area of learning dealing with the performance of an activity (e.g., patient treatment technique)
- Student Evaluation of Clinical Education Experience (SECEE) evaluation tool completed by the student at the end of each clinical rotation.

Evaluation Terms:

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 Formative Evaluation - an ongoing assessment of clinical performance by the student (self-assessment) and the CI throughout the instruction phase for the purpose of providing feedback, improving learning, and revising learning experiences.



• A knowledge of the following terms is helpful in understanding the instructions and using the PTA MACS:

• Evaluation Terms:

- Objective Evaluation (Criterion-referenced) a comparison of the student's performance against the pre-established criteria of the profession to determine if the student has acquired essential knowledge, skills and behaviors.
- Summative evaluation the final assessment of student performance at the completion of the instruction period, program, course or clinical experience.



- A knowledge of the following terms is helpful in understanding the instructions and using the PTA MACS:
 - · Clinical Education Faculty Members :
 - Academic Coordinator of Clinical Education (ACCE) the academic faculty member(s) designated by the program to be responsible for the clinical education courses required by that institution. They may be referred to as Director of Clinical Education (DCE) on some campuses.
 - **Center Coordinator of Clinical Education (CCCE)** the clinical staff member designated by the clinical education facility to be responsible for the clinical education program of the facility; may also serve as a Clinical Instructor (CI).
 - Clinical Instructor (CI) the staff member designated by the clinical facility to be responsible for the teaching and direct supervision of an assigned student; may also serve as the CCCE. The CI may be a PT or a PTA.

- A knowledge of the following terms is helpful in understanding the instructions and using the PTA MACS:
 - **<u>Clinical Education Faculty Members :</u>**
 - **Director of Clinical Education (DCE)** see Academic Coordinator of Clinical Education.



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