

CLiP Portal

Logbook - Creating an Entry





GETTING STARTED

Once you have received your credentials for the CLiP Portal you are able to log in and access the dashboard. This dashboard has links to all sections of the system to which you have been granted access, this varies from person to person but certain functions are global provided you have an active account.

The system is accessed by the following URL: <https://clipportal.college-optometrists.org/>

1.1 LOGGING IN

If you already have your credentials you can log in from the home page.

THE COLLEGE OF
OPTOMETRISTS

Email

Password

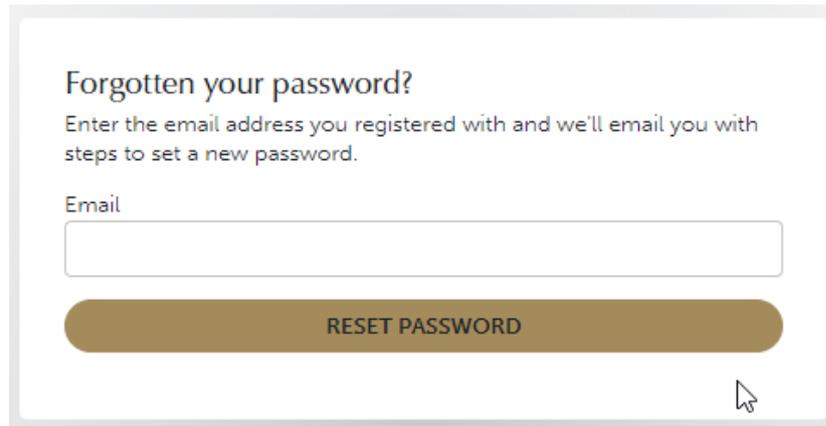
LOGIN

Trouble logging in? [Reset password](#)

Or try reconfirming your email. [Resend email confirmation](#)

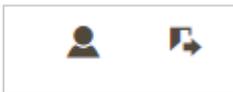
1.2 RESETTING YOUR PASSWORD

If you do not know, or have forgotten your password you can reset it from the homepage too. Select “Reset password” to be navigated to the below page, input your registered email address and press “RESET PASSWORD” and you will receive an email with a link to allow you to change your password.

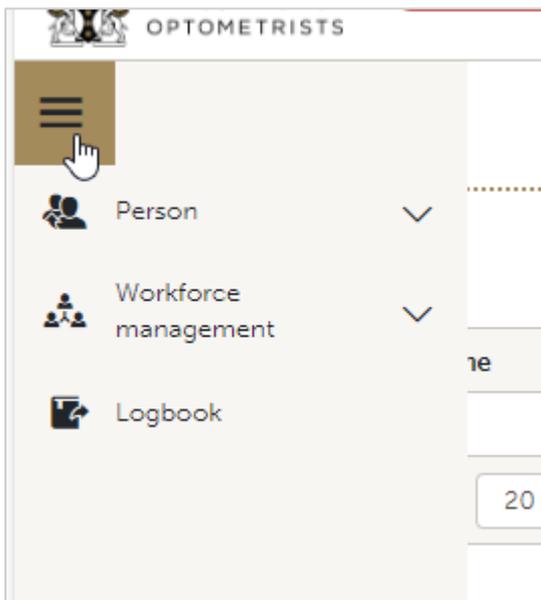


1.3 CLIP PORTAL DASHBOARD

Once you have logged into the system you will be taken to the dashboard, this area provides you links to your account in the top right corner as well as tiles on the main screen allowing navigation to different parts of the system.



The left hand menu items will also allow navigation to the parts of the system to which you have been granted access. It is possible to freeze the menu in place by clicking the icon on the top left.



LOGBOOK

You can navigate to the Logbook either by clicking Logbook on the left hand menu or from the dashboard tile.



2.1 LOGBOOK LIST PAGE

When navigating to the Logbook you are presented with a list of entries which have been created. From here you are able to add new entries, in addition to filtering, selecting and exporting existing entries. The grid allows you to open an entry by double clicking on the record row.

+ ADD EXPORT RESET FILTERS SHOW/HIDE COLUMNS GRID CONFIGURATION Search...								
ID ↓	Reference	Date/Time	Interaction	Interaction Date/...	Reflection	Note	Status	
			yes no		yes no	yes no		
1068	Example Entry 3	22/03/2024 08:59	✓	22/03/2024 08:59	✓	✗	Active	<input type="checkbox"/>
1067	Example Entry 2	22/03/2024 08:57	✓	22/03/2024 08:57	✗	✗	Active	<input type="checkbox"/>
1066	Example Entry 1	22/03/2024 08:57	✗		✗	✗	Active	<input type="checkbox"/>

Default columns have been set for the grid. However it is possible to display a column for any of the fields within the Entry, Interaction, Reflection and Note records, this then allows for any additional columns to be filtered. To do this, click SHOW/HIDE COLUMNS in the grid header, select the columns you would like to show/hide and Apply the setting,

+ ADD EXPORT RESET FILTERS SHOW/HIDE COLUMNS GRID CONFIGURATION Search...								
ID ↓	Reference	Date/Time	Interaction	Interaction Date/...	Reflection	Note	Status	
			yes no		yes no	yes no		
1071	Example Entry 6	22/03/2024 09:49	✗				Active	<input type="checkbox"/>
1070	Example Entry 5	22/03/2024 09:45	✗				Active	<input type="checkbox"/>
1069	Example Entry 4	22/03/2024 09:42	✗				Active	<input type="checkbox"/>
1068	Example Entry 3	22/03/2024 08:59	✓	22/03/2024 08:59			Active	<input type="checkbox"/>
1067	Example Entry 2	22/03/2024 08:57	✓	22/03/2024 08:57			Active	<input type="checkbox"/>
1066	Example Entry 1	22/03/2024 08:57	✗				Active	<input type="checkbox"/>

1 SHOW/HIDE COLUMNS

- Curriculum Membership
- Reference
- Date/Time
- Interaction
- Patient Identifier
- Interaction Date/Time
- Location
- Location Other
- Setting Type
- Student Role
- Patient DOB
- Patient Title

2

3 Apply

The Interaction, Reflection and Note columns display a green tick where that record type has been saved against an Entry.

2.2 CREATING A LOGBOOK ENTRY

To add a new Logbook Entry click the green “ADD” button at the top of the grid, you will be immediately taken to a blank Entry form. This is the first step in creating an Entry.

Mandatory fields are marked with an asterisk.



The screenshot shows the 'Logbook entry' form. At the top right, there are buttons for '+ ADD INTERACTION', '+ ADD REFLECTION', '+ ADD NOTE', 'SAVE', and 'EXIT'. The form fields are:

- Date & Time***: 22/03/2024 09:26
- Status***: Active
- Curriculum membership***: Example University, Model B, 2023 Cohort
- Reference***: (Empty field)
- Upload your files (optional)**: A section with a 'Select files...' button and a message: 'You can only upload .txt, .bmp, .doc, .docx, .jpeg, .jpg, .pdf, .png, and .heif file types. You can upload up to 5 file(s). Have a maximum file size of 3 MB. Have a maximum file name length of 120 characters. No file(s) uploaded.'

Step	Information
1.	Select your Curriculum membership. Where there is only one option the system will auto select this.
2.	Input your reference (think of a short, relevant name for the record).
Optional	You may choose to attach files to your entry.
3.	Click "SAVE".

Once saved, the system will now allow you to create an Interaction, Reflection or Note record against your Logbook Entry, these records are optional.

2.2.1 ADDING AN INTERACTION

To add an Interaction to an Entry, click the green "ADD INTERACTION" button at the top of the Entry record. When you click, the Interaction section will display under the entry details.

This screenshot shows the 'Logbook entry' form after saving. The 'ADD INTERACTION' button is highlighted with a yellow box. The form fields are:

- ID**: 1070
- Date & Time***: 22/03/2024 09:45
- Status***: Active
- Curriculum membership***: Example University, Model B, 2023 Cohort
- Reference***: Example Entry 5



The Interaction section can be collapsed and expanded by clicking anywhere on the section header.

The interaction record contains a number of mandatory fields which are marked with an asterisk. Once complete, the record can be saved using the “SAVE” button located in the Entry header. The header position remains fixed at the top of the page for ease of accessing the action buttons.

If you do not wish to save the Interaction, a red “CANCEL” button can be found at the bottom of the record. Cancelling the record creation will delete the Interaction.



Field	Information
Patient Identifier*	Real names must not be used.
Data and time of Interaction*	This field defaults to the date and time that the interaction was created, it can be overwritten if required. You can input a date using the calendar icon date picker or by typing .
Patient's date of birth*	You can input a date using the calendar icon date picker or by typing.
Setting type*	One value can be selected.
Patient type*	One value can be selected.
Location	One value can be selected. If your location is not available in the list, "Other" can be selected.
Patient age group	One value can be selected.
Location (Other)	This becomes mandatory where "Other" has been selected in the Location field.
Vulnerable	Check box if patient is vulnerable
Student role*	One value can be selected.
Accompanied by	One value can be selected.
Supervisor	Free text (Supervisor's name, where relevant).
Other characteristics	Multiple values can be selected.
Conditions	Multiple values can be selected.
Visual needs	Multiple values can be selected.
Tasks undertaken	Multiple values can be selected.
Consultation notes?	Free text (any additional notes you want to record about the interaction).

2.2.2 ADDING A REFLECTION

To add a Reflection to an Entry, click the green "ADD REFLECTION" button at the top of the Entry record. When you click, the Reflection section will display under the entry details. All fields within the Reflection record are optional.

The screenshot shows the top of a logbook entry form. At the top right, there are five buttons: '+ ADD INTERACTION', '+ ADD REFLECTION' (highlighted with a yellow box), '+ ADD NOTE', 'SAVE', and 'EXIT'. Below the buttons, the form fields are: 'ID' with the value '1071', 'Date & Time*' with the value '22/03/2024 09:49', and 'Status*' with a dropdown menu showing 'Active'.



Reflection

What is this a reflection on?

Characters allowed 3000, characters entered 0

What are your thoughts and feelings about the interaction or event?

Characters allowed 3000, characters entered 0

Evaluation – what was good and bad about it?

Characters allowed 3000, characters entered 0

Analysis – can you explain or expand on what happened?

Characters allowed 3000, characters entered 0

Conclusion – what have you learned? Could anything have been done differently?

Once complete, the record can be saved using the “SAVE” button located in the Entry header.

If you do not wish to save the Reflection, a red “CANCEL” button can be found at the bottom of the record. Cancelling the record creation will delete the Reflection.

2.2.3 ADDING A NOTE

To add a Note to an Entry, click the green “ADD NOTE” button at the top of the Entry record. When you click, the Note section will display under the entry details. The note record has only one field which is mandatory, text must be entered before it can be saved.

Home • Logbook • Edit

Logbook entry

+ ADD INTERACTION + ADD REFLECTION + ADD NOTE SAVE X EXIT

ID 1071 Date & Time* 22/03/2024 09:49

Status* Active



Once complete, the record can be saved using the “SAVE” button located in the Entry header.

If you do not wish to save the Note, a red “CANCEL” button can be found at the bottom of the record. Cancelling the record creation will delete the Note.

2.2.4 EDITING AN ENTRY

An existing entry can be opened by double clicking the record on the list page, this also allows the record to be updated.

You can delete an entry by updating the Status field to “Deleted” and saving the record. Deleted entries are not shown in the list page by default.

It is also possible to delete an Interaction, Reflection and Note within an Entry. To do this, press the “DELETE” button at the bottom of the section of the record type.



Note

Narrative *

|

Characters allowed 4000, characters entered 0

2.3 SEARCHING AND FILTERING ENTRIES

The Logbook list page offers a number of features to enable you to locate specific Logbook entries based on their content.

2.3.1 SORTING AND FILTERING

By default, the grid is sorted by ID in descending order. You can sort the grid by a column of your choice by clicking the column header. The first click will sort by that column in ascending order, the second click will sort in descending order.

ID	Reference	Date/Time	Interaction ↑	Interaction Date/Time	Reflection	Note	Status
1071	Example Entry 6	22/03/2024 09:49	✘		✘	✘	Active

All columns displayed on the Entry grid can be filtered using the filter row at the top of the grid. Each field type has specific filter parameters.

ID	Reference	Date/Time	Interaction ↑	Interaction Date/Time	Reflection	Note	Status
1071	Example Entry 6	22/03/2024 09:49	✘		✘	✘	Active

1. To filter text, type in the text box within the filter row
2. To change the filter parameter click the funnel icon. You can then select the parameter
3. Date/Time can be chosen using the clock and calendar time and date pickers
4. You can filter Interaction, Reflection and Note using the Yes and No buttons
5. To clear all filters click the "RESET FILTERS" button

Individual filters can be cleared using the red funnel icon.



ID	Reference	Date/Time	Interaction ↑	Interaction Date/
	Example Entry 6		yes no	
1071	Example Entry 6	22/03/2024 09:49	✓	

2.3.2 KEYWORD SEARCH

The Search allows you to enter keywords as criteria for filtering all Logbook entries. This applies to all text based and drop down fields including those which are not being actively displayed on the grid.

As an example if you search “Contact lens” you will be shown results for any records in which you have typed “contact lens” or where a “Contact lens” option has been selected in the Visual needs drop down within the Interaction field. The matching results are displayed in the grid below.

ID ↓	Reference	Date/Time	Interaction	Interaction Date/...	Reflection	Note	Status
	Contact...		yes no		yes no	yes no	Contact...
1071	Example Entry 6	22/03/2024 09:49	✓	22/03/2024 12:13	✗	✗	Active
1067	Example Entry 2	22/03/2024 08:57	✓	22/03/2024 08:57	✗	✗	Active

2.4 EXPORT

Logbook entries can be exported and downloaded in either PDF or Excel format. The right-most column of the grid is used to select entries you want to export. When exporting, the selected records are exported in the same order in which they are displayed on the grid.

ID	Reference	Date/Time	Interaction	Interaction Date/...	Reflection	Note	Status
	contact...		yes no		yes no	yes no	conta... (2)
	✓	22/03/2024 12:13			✗	✗	Active (1)
	✓	22/03/2024 08:57			✗	✗	Active

1. Select individual records by selecting the row
2. Select all records which are currently being displayed by selecting in the column header. The number in brackets confirms the total number of records selected
3. Click Export
4. Chose the format you want to export and download



2.4.1 EXCEL EXPORT

When exporting to Excel, all fields across the Entry, Interaction, Reflection and Note are export, regardless of whether these record types have been created against the entry. Fields which are empty will be empty within the export.

A	B	C	D	E	F	G	H	I
ID	Entry Date Time	Status	Curriculum Membership	Reference	Patient Identifier	Date and time of Interaction	Location	Loc
1067	22/03/2024 08:57	Active	Example University, Model B, 2023 Cohort	Example Entry 2	John Smith	22/03/2024 08:57	14 NORTH VIEW	
1071	22/03/2024 09:49	Active	Example University, Model B, 2023 Cohort	Example Entry 6	John Crane	22/03/2024 12:13	1 POLICE HOUSE	

2.4.2 PDF EXPORT

When exporting to PDF, fields are displayed only where they belong to a record type which has been created against the Entry. For example, if you export an entry which does not have an Interaction, none of the Interaction fields will be exported. A page break is inserted to separate each Logbook entry.



Entry

ID	1067
Entry date time	22/03/2024 08:57
Status	Active
Curriculum membership	Example University, Model B, 2023 Cohort
Reference	Example Entry 2

Interaction

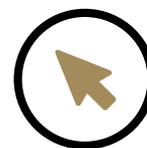
Patient identifier	John Smith
Date and time of Interaction	22/03/2024 08:57
Location	14 NORTH VIEW
Location other	
Setting type	University eye clinic
Student role	Consulting
Patient DOB	30/01/1986
Patient type	Patient
Supervisor	
Patient age group	Young adult 17-45
Vulnerable?	False
Accompanied by	
Other characteristics	
Conditions	
Visual needs	
Tasks undertaken	
Consultation notes	Contact lens



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