



THE COLLEGE OF
OPTOMETRISTS

**Clinical Learning in Practice (CLiP)
CLiP Portal guidance for Assessors**

February 2026

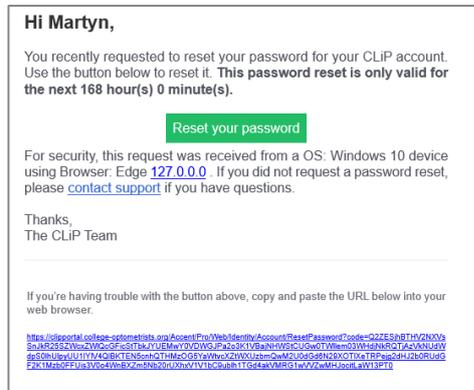
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Getting started

When the College activates your CLiP Portal account, you will receive an email from the system inviting you to set up a password. This will be straightforward if you click on it and do the set-up as soon as you receive the email.

The email is from sender 'Accent' and address no-reply@hicom.co.uk



There is a time limit on these emails but if it has expired when you come to use it, you can follow these steps:

- After you click the link in the email it may take you to a notice saying that it's expired.
- Click 'Login' in top right anyway.
- It takes you through to a normal username/password login window.
- Click 'Forgot password'
- It will send you a new email and you can use that.

[Link to the CLiP Portal](#)

You should be able to access the Portal on computer, phone or tablet. However, many of the logbook grids will be better viewed on a larger screen.

Navigation and functions

- You will find the main menu on the left side of the screen.
- You can Pin the menu so that it stays in place.
- When you navigate to different pages, you can move back by selecting again from the main menu or by clicking on the breadcrumb trail at the top of the page.
- Menu options and most other functions on the Portal are single-click, but you will need to double-click if you're opening a row in a grid.
- The grids in the Portal have usual Microsoft Dynamics functionality – you can use filters and you can change the order of columns by clicking on the column title.
- Grids show 20 items by default but you can always increase this using the filter at the bottom of the grid.
- You can also add or remove columns and save any new configurations so that the grid looks the same the next time you log in.

Viewing your student's account

When you log in, the home page of the Portal will show you a table with the assessments which have been assigned to you. You can double-click on the row in this table with your student's name to access the details.

Formnameid	Surname	Assessment event name	Assessment type	Assessment date time	Meeting type	Postcode	Meeting ID
Steve	Wood	1R Visit - Louise UAT - October - 3	Remote Visit				
Steve	Wood	1R Visit - Louise UAT - October - 2	Remote Visit				
Irene	Jones	1R Visit - Louise UAT - October	Remote Visit	31/10/2025 11:00	Virtual	NRL DHD	
Joshua	Morgan	UAT CLIP 1R assessments - Louise	Remote Visit	04/11/2025 09:30			
Paul	Smith	UAT CLIP 1R assessments - Louise	Remote Visit	03/11/2025 09:00			
		UAT CLIP 1R					

When you access your student's account, a second menu will appear beside the main one, which allows you to access the student's information, including dashboards and logbook:

Dashboards

The Risk dashboard can be accessed from the student's menu. It shows all the available fields the student can complete in the logbook with a count and a RAG rating against each one.

For example, if a student has two logbook entries in total where they have recorded 'Youth 12-16' in patient age group, the 'Count of logbook entries' column will display '2'. As this is a 'Medium' risk item, the RAG rating will be 'Red' and will change to amber when the student reaches 5 entries.

Measure	Category	Sub category	Count of logbook entries	Has interaction	Has reflection	Has notes (Y/N)	Student role	Risk level	RAG status
				yes no	yes no	yes no			
Other characteristics	challenges	Learning difficulties	1	✓	✗	✗	Consulting	High	Red
Other characteristics	challenges	Needs help to communicate	1	✓	✗	✗	Consulting	High	Red
Patient age group		Child 6-11	7	✓	✗	✗	Consulting	High	Red
Patient age group		Infant 3-5	1	✓	✗	✓	Consulting	High	Red
Patient age group		Middle-aged 46-60	6	✓	✗	✗	Consulting	Medium	Amber
Patient age group		Young adult 17-45	22	✓	✓	✓	Consulting	Low	Green
Patient age group		Youth 12 -16	2	✓	✗	✗	Consulting	Medium	Red

The Risk dashboard grid has similar functionality to the logbook, so you can change the columns you see and can filter items – see logbook guidance below.

Note on dashboard functionality:

At the time of preparing this guidance, the Risk dashboard does not include a line for items which your student has not selected at all – that is, items with a '0' count will not be included in the list. We are working on developing a separate display for this.

There is also an Assessment summary dashboard in development – while this is available on the student's menu, we do not recommend using this dashboard at this time.

The College will check and confirm dashboard counts for you, and confirm in advance of the visits, until this is fixed.

Viewing logbook entries

Select 'Logbook' in your student's menu to view their logbook grid.

The grid includes:

- 'Search' field in the top right of the grid which will perform key word search of logbook fields and notes.
- Customisable column display including columns relating to assessment tasks and learning outcomes.
- 'Show/hide columns' and 'Grid configurations' options in the top right of the grid, which allow you to customise the view.
- 'Items per page' in bottom left, which allows you to show more than 20 rows per page.
- Count in the bottom right corner to show how many entries you are viewing and what the total number of entries is e.g. '1-20 of 50 items'.

You need to double click on a row to view a logbook entry.

Confirmed and approved entries

See the CLiP Assessment Handbook for what 'confirm' and 'approve' mean and how supervisors should use them.

If an entry is confirmed or approved, it will be noted in the top right corner of the entry, with details of who did this.

Note on dashboard functionality:

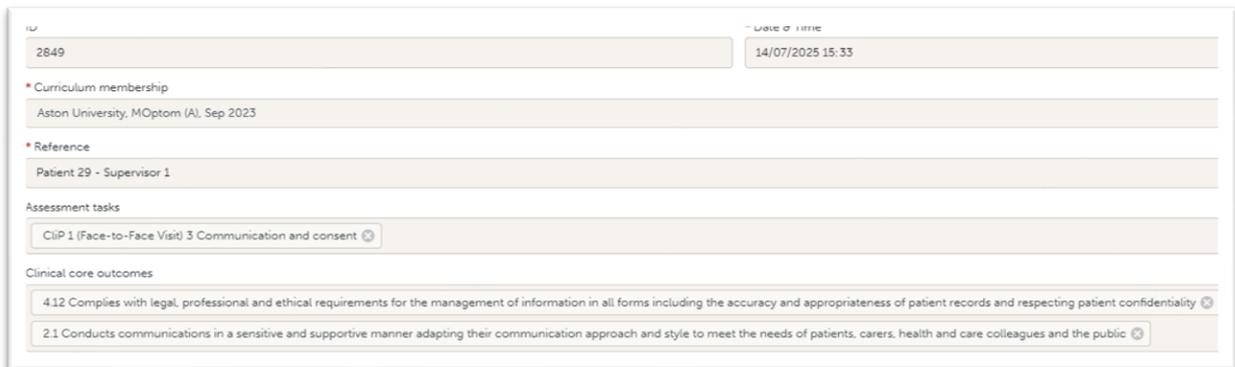
At the time of preparing this guidance, we are asking Supervisors not to confirm and approve logbook entries while this functionality is developed further. This will make no difference as far as the assessment visit is concerned.

Entries linked to assessment tasks

When your student selects an entry for assessment, they are told to do certain things in the system to flag to you, as the Assessor, that this is an entry you can review at an assessment visit.

The student should refer to the logbook checklist in their visit guidance and select information in the fields at the top of each logbook entry. This can include selecting up to two 'Clinical core outcomes' per entry and assigning the entry to one or more 'Assessment tasks'.

You can set the logbook grids and filters to show you entries which the student has selected for assessment.



The screenshot shows a logbook entry form with the following sections:

- ID:** 2849
- DATE OF ENTRY:** 14/07/2025 15:33
- Curriculum membership:** Aston University, MOptom (A), Sep 2023
- Reference:** Patient 29 - Supervisor 1
- Assessment tasks:** CiIP 1 (Face-to-Face Visit) 3 Communication and consent
- Clinical core outcomes:**
 - 4.12 Complies with legal, professional and ethical requirements for the management of information in all forms including the accuracy and appropriateness of patient records and respecting patient confidentiality
 - 2.1 Conducts communications in a sensitive and supportive manner adapting their communication approach and style to meet the needs of patients, carers, health and care colleagues and the public

See below for adjusting the logbook grid view.

Adjusting the logbook view

How to adjust the logbook grid to the view you want:

- You can add or remove columns to the grid to get the view you prefer e.g. add a 'Task' column to the grid by selecting 'Show/hide columns' at the top of the grid and ticking the box for 'Task'.
- You can click on the heading of each column to order the whole grid by that category. For example, if you want to order the grid by assessment task, you can click on the top of the column (next to the word 'Task') to order the column by task number. A green arrow appears to remind you the column is ordered that way. Click again to reverse the order.
- You can write words in the blank spaces at the top of the columns to filter by certain items.
- If you want to see more than the default 20 entries on one page, you can adjust the number in 'Items per page' at the bottom of the logbook grid.

Saving and clearing logbook grid views:

- If you want to save changes to the grid so your selections stay the same for next time you log on, go to 'Grid configuration' next to 'Show/hide columns' and choose 'Save configuration'. Next time you go in, a green symbol appears to show you have a configuration saved (see below).
- 'Grid configuration > Save configuration' will save the selection of columns you have displayed and should also save your filters until the next login.
- If you want to keep the column selection but remove all the filters you've applied, use 'Clear filters'.
- If you want to re-set the column selection, use 'Grid configuration > Reset configuration'.
- This is a useful **troubleshooting** measure. If you expect to see entries in your grid view and you can't see them, then you may have used a filter and forgotten it was selected. Try using 'Clear filters' first and see if that works. If it doesn't, then re-set the Grid configuration as a second step.

See next section for our recommended selection for your logbook view.

Recommended logbook grid view

The columns which are selected by default when you open the logbook may not be the best selection for when you and the student start to prepare entries for assessment visits. Here's our recommended selection for your grid view:

- In 'Show/hide columns', untick:
 - College member number
 - Interaction
 - Interaction date/time
 - Reflection
 - Note...
- ...and then tick:
 - Clip
 - Visit type
 - Task
- In 'Grid configuration > Save configuration'
- Then, when you want to filter the grid to see only entries the student has selected for a particular assessment visit, filter by:
 - Clip: filter for parts 1 or 2 (only required when your student proceeds to CLiP Part 2 – type '2' in the blank box at top of column and 'Enter')
 - Visit type: filter by Remote or Face-to-face visit (start typing 'remote' or 'face' in blank box and it should come up)
 - Click top of Task column (next to where it says 'Task') to order the items by Task number
 - Include in assessment: Click 'Yes' to see only what the student has selected – this may not be necessary if they have assigned all relevant entries to tasks.

See screenshots below.

View of student logbook page with:

- 'Yes' selected on 'Include in Assessment'
- Task column added and table ordered by task number
- Items per page set to 100

ID	College Member Number	Reference	Task ↑	Date/Time	Include In Assessment	Interaction	Interaction Date/Time	Reflection	Note	Active
2831		Vulnerable with carer	relationships - Consent	14/07/2025 11:33	yes	yes	16/06/2025 11:30	X	X	✓
2830		Patient 16 - consent under 12	3a. Patient relationships - Consent	14/07/2025 11:31	yes	yes	16/06/2025 10:30	X	X	✓
2829		Patient 15 - Adult consent	3a. Patient relationships - Consent	14/07/2025 11:17	yes	yes	07/07/2025 16:30	X	X	✓
2824		Patient 13 - Consent under 12	3a. Patient relationships - Consent	14/07/2025 10:52	yes	yes	16/06/2025 09:00	X	X	✓
2841		Patient 23	3b. Patient relationships - Patient care (privacy, dignity, equality, inclusivity)	14/07/2025 14:54	yes	yes	09/06/2025 13:45	X	X	✓
2839		Patient 22	3b. Patient relationships - Patient care	14/07/2025 14:42	yes	yes	09/06/2025 11:45	X	X	✓

Page 1 of 1 | 100 items per page | 1 - 43 of 43 items

View of student logbook page with:

- Previously saved grid configuration
- 'Clip' and 'Visit types' columns added; selection by CLiP part (1) and Visit type (Face-to-face)
- Grid columns for Interaction, Reflection etc removed

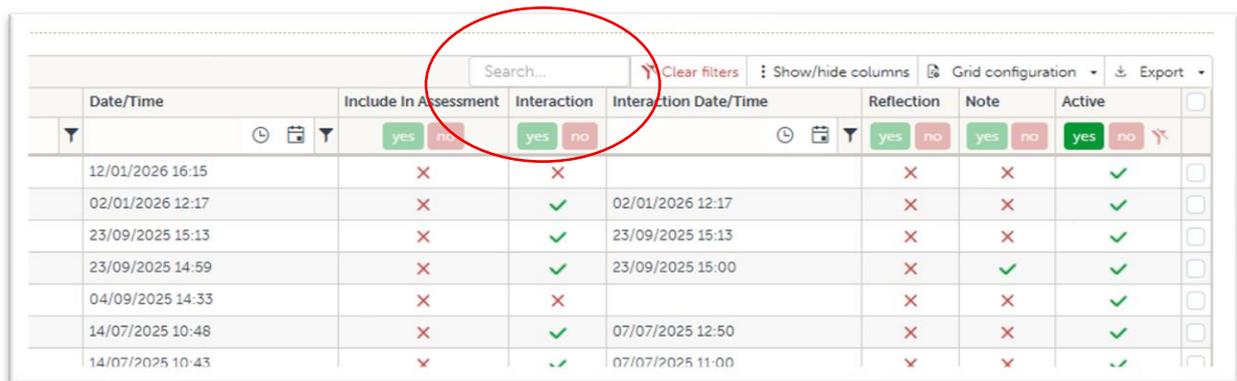
Green symbol shows grid configuration is applied

ID	Reference	Clip	Visit type	Task	Date/time	Include In Assessment	Active
4932	Patient 51	CLiP	Face-to-Face Visit	3 Communication and consent	17/12/2025 10:16	yes no	yes no
4733	Patient 7	CLiP 1	Face-to-Face Visit	3 Communication and consent	12/12/2025 15:21	yes no	yes no
4931	Patient 45	CLiP 1	Face-to-Face Visit	4 Patient care	17/12/2025 10:11	yes no	yes no

Filters applied for view of items selected for 1F

Clear filters here

Searching for other items



The screenshot shows a logbook grid with a search bar at the top. The search bar is circled in red. The grid has columns for Date/Time, Include In Assessment, Interaction, Interaction Date/Time, Reflection, Note, and Active. The search bar is located at the top of the grid, and the 'Clear filters' button is also visible.

Date/Time	Include In Assessment	Interaction	Interaction Date/Time	Reflection	Note	Active
12/01/2026 16:15	×	×		×	×	✓
02/01/2026 12:17	×	✓	02/01/2026 12:17	×	×	✓
23/09/2025 15:13	×	✓	23/09/2025 15:13	×	×	✓
23/09/2025 14:59	×	✓	23/09/2025 15:00	×	✓	✓
04/09/2025 14:33	×	×		×	×	✓
14/07/2025 10:48	×	✓	07/07/2025 12:50	×	×	✓
14/07/2025 10:43	×	✓	07/07/2025 11:00	×	×	✓

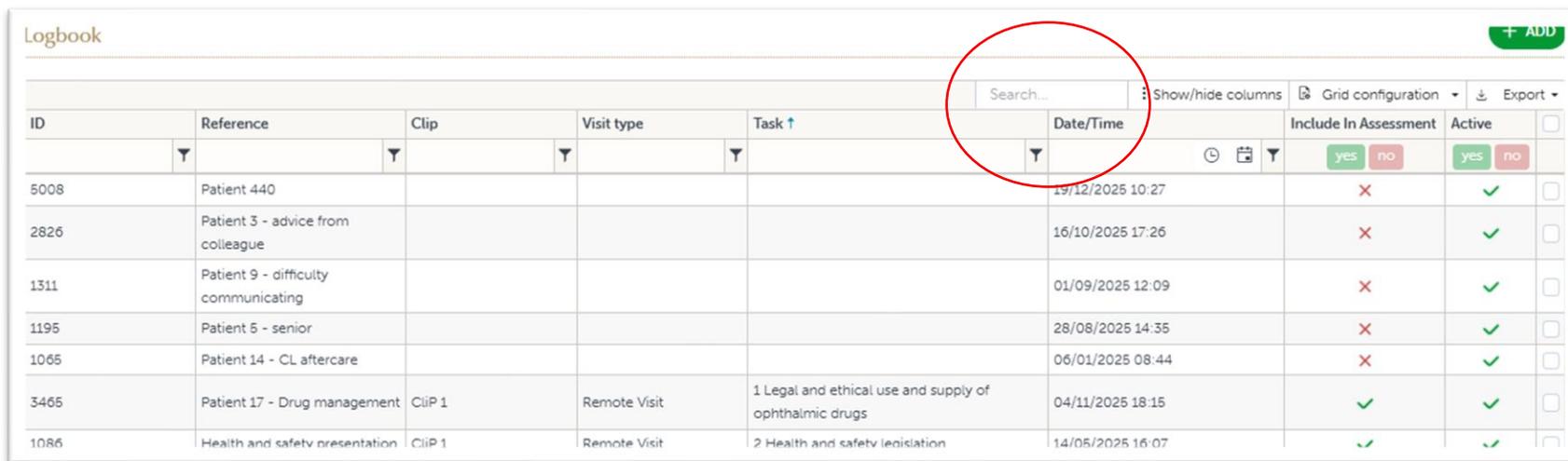
There are tasks in the face-to-face visits in which Assessors will use the 'Search' field at the top of the logbook grid to enter key words to see selections from the student's logbook which they have not selected for assessment. This will include examples of entries with pathology, particular types of dispense or patient types (see Student guidance for visits for more detail). If you want to check such areas before visits, you can also use the search function for this.

If you want to search from the student's entire logbook, remember to **clear filters** before you start.

You will see that search results start to change as you type more information. The search is based on exact matches, so it is safest to use key words based on the information in the logbook drop-downs (see the Risk framework in the Assessment Handbook). For example, the term 'dispense' is used in the logbook drop-downs and should give you results, but if you type 'dispensing' it may reduce the number of results because 'dispensing' is not how it's worded in the logbook option.

See below for examples.

'Search...' field

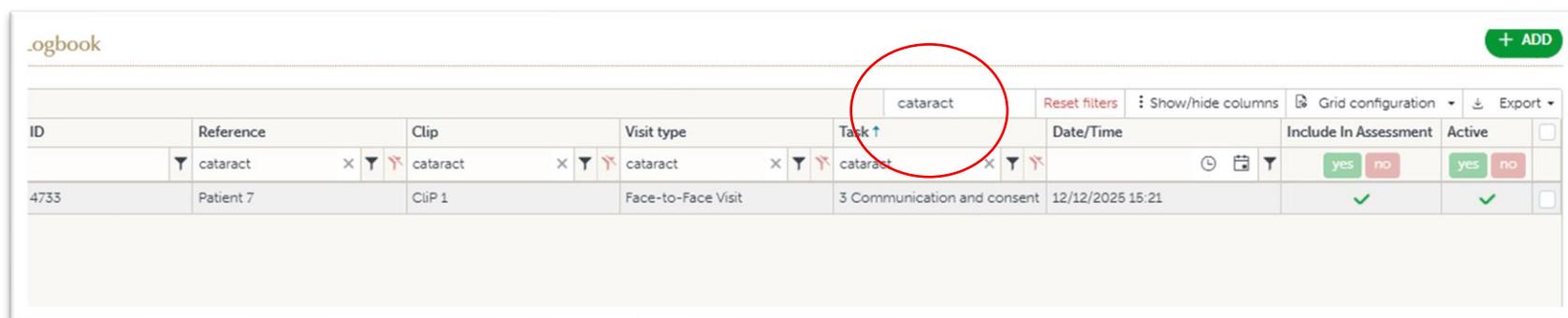


The screenshot shows a logbook interface with a search bar at the top right, circled in red. The search bar contains the text "Search...". Below the search bar are several utility buttons: "Show/hide columns", "Grid configuration", and "Export". The main table has columns for ID, Reference, Clip, Visit type, Task, Date/Time, Include In Assessment, and Active. The "Include In Assessment" column has "yes" and "no" buttons. The "Active" column has "yes" and "no" buttons. The table contains several rows of logbook entries.

ID	Reference	Clip	Visit type	Task ↑	Date/Time	Include In Assessment	Active
5008	Patient 440				19/12/2025 10:27	no	yes
2826	Patient 3 - advice from colleague				16/10/2025 17:26	no	yes
1311	Patient 9 - difficulty communicating				01/09/2025 12:09	no	yes
1195	Patient 5 - senior				28/08/2025 14:35	no	yes
1065	Patient 14 - CL aftercare				06/01/2025 08:44	no	yes
3465	Patient 17 - Drug management	Clip 1	Remote Visit	1 Legal and ethical use and supply of ophthalmic drugs	04/11/2025 18:15	yes	yes
1086	Health and safety presentation	Clip 1	Remote Visit	2 Health and safety legislation	14/05/2025 16:07	yes	yes

Filters have been cleared in the grid, above. Note that with filters cleared the 'yes' and 'no' in 'Include in Assessment' are not highlighted and we can see logbook entries with an 'x', meaning the student has not selected them to include in the assessment.

With search term



The screenshot shows the same logbook interface as above, but with the search bar circled in red and containing the word "cataract". The "Reset filters" button is visible next to the search bar. The table shows only one entry that matches the search term.

ID	Reference	Clip	Visit type	Task ↑	Date/Time	Include In Assessment	Active
4733	Patient 7	Clip 1	Face-to-Face Visit	3 Communication and consent	12/12/2025 15:21	yes	yes

The word 'cataract' is typed in to 'Search' and the logbook filters to entries containing that word without needing to press Enter.

Assessment form and results

When you double click your student's name from the CLiP Portal Dashboard (home page) it should take you through to the 'Assessment detail' page – click the gold 'Go to assessment form button' to add results:

Assessment detail - Edit

Name: Irene Jones Outcome: [Dropdown]

Assessment date: 26/01/2026 11:40 Submission deadline: 19/01/2026 Meeting type: Virtual Assessor: Gaynor Kirk

Assessment form: CLIP Part One remote visit (CLIP 1R)_UAT_V2 (117) **GO TO ASSESSMENT FORM**

Pass

Outcome comments: OutcomeCommentsDesc

The form is split into different pages for each task. Any sub-tasks are included on the same page. The tiles along the top (see tile for Task 1 highlighted below) will take you straight to that task, or you can click 'Next' at the bottom to work through in order.

CLIP Part One remote visit (CLIP 1R)_UAT_V2

Assessment form (1) Confirm & submit

1. Legal and ethical use and supply of ophthalmic 2. Health and safety legislation 3. Patient relationships 4. Service Evaluation Project (project orientation) Setting and Supervision Survey

Task 1 - Legal and ethical use and supply of ophthalmic drugs (10 minutes)

Task 1 - Legal and ethical use and supply of ophthalmic drugs (10 minutes)

The student will be questioned about at least one interaction in which a drug has been used (student must have patient record available to share on screen), exploring processes and protocols used by the student to ensure legal compliance and safe, appropriate use.

* From 3.5b(i) Adheres to legal requirements for the use and supply of common ophthalmic drugs. Uses common ophthalmic drugs, safely to facilitate optometric examination and the diagnosis / treatment of ocular disease. (DOES)

* 4.11 Adheres to the ethical principles for relationships and to legislation relating to

- On each page there are drop-down fields for Pass/Fail.
- If you mark an item as Fail, a field will appear for you to choose the SPOKE indicator which summarises the area which led to failure.
- There is also a free-text comments box.

The student survey is included as a task in the Assessment form and the student has access to this section. The student survey should be completed by the student 1 week before the assessment visit, along with the other logbook elements.

When all parts of the Assessment form have been completed, you need to 'Confirm and submit' (top right of the form screen).

Document version	Date	Update
1.1	23/01/2026	Version for assessor training
1.2	19/02/2026	Notes on current functionality edited