



THE COLLEGE OF
OPTOMETRISTS

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

June 2026

Contents

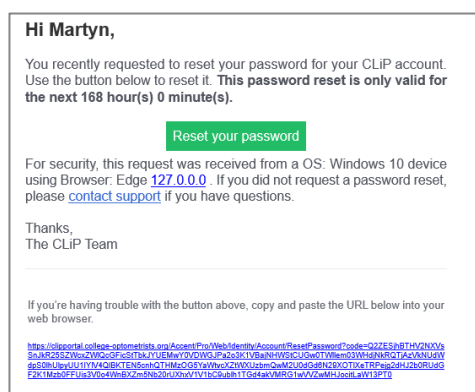
| | |
|---|----|
| CLiP Portal guidance | 3 |
| Getting started..... | 3 |
| Navigation and functions | 3 |
| Viewing your student's account | 3 |
| Dashboards..... | 4 |
| Viewing logbook entries..... | 5 |
| Confirming logbook entries | 5 |
| Linking entries to assessment tasks | 6 |
| Adjusting the logbook view | 7 |
| Recommended logbook grid view..... | 8 |
| Searching for other items..... | 11 |
| Assessment visits and results..... | 13 |

CLiP Portal guidance

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

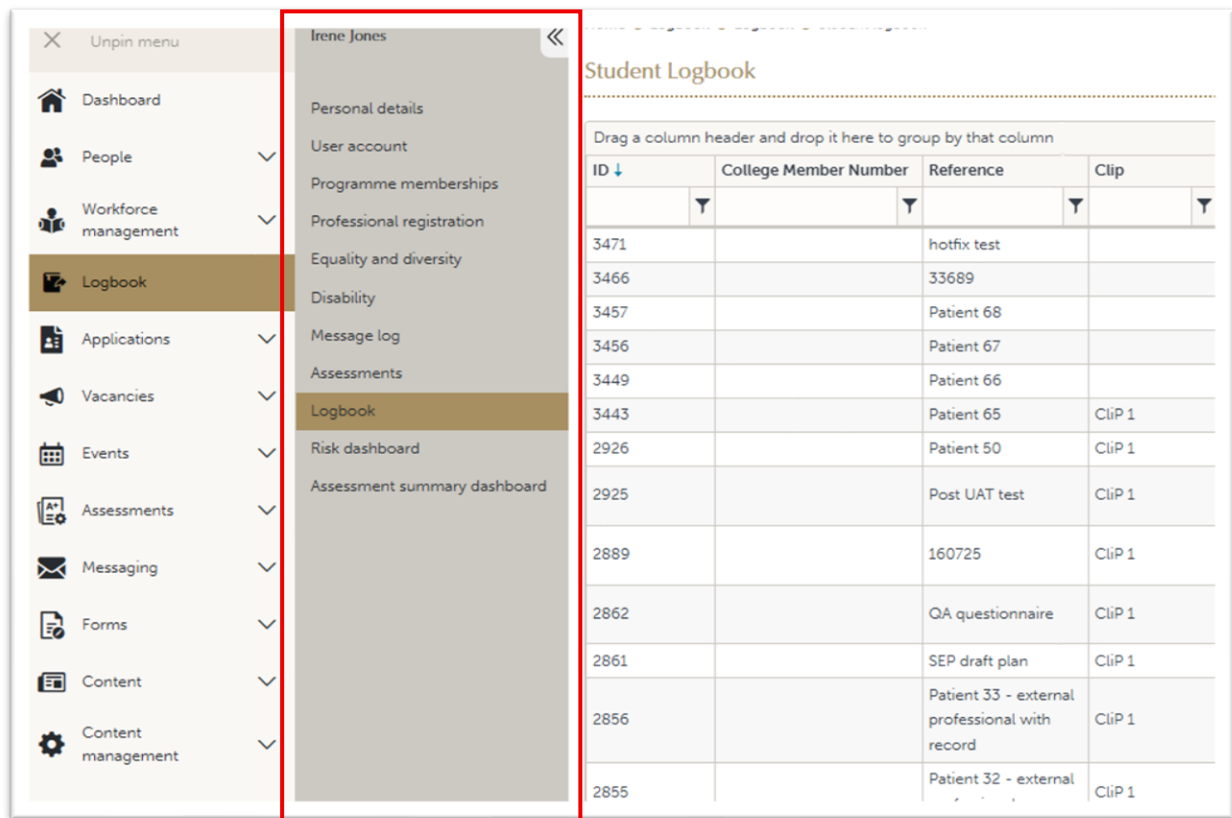
- You will find the main menu on the left side of the screen.
- You can Pin the menu so that it stays in place.
- When you navigate to different pages, you can move back by selecting again from the main menu or by clicking on the breadcrumb trail at the top of the page.
- Menu options and most other 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

You can view your student's account by choosing People > Students from the main menu on the left side of the screen and then double click on the row showing your student.

After you have done this once, your student should show up in 'Recent activity' on your Dashboard (the Portal home page) and you can single-click to access.

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 | Communications 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.

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.

Confirming logbook entries

The CLiP Assessment Handbook outlines what 'confirm' means and how you should use it – this is basically the way you verify in the Portal that you have checked, or spot-checked, a selection of your student's logbook entries for and verify that they are genuine and complete.

Note on 'Confirm' functionality in the Portal:

At the time of publishing this guidance, we need to ask Supervisors not to confirm logbook entries. This is because the system is making confirmed entries difficult to edit – we are working on a fix for this. In the meantime, Supervisors should continue to check student entries as outlined above, but will not use the 'Confirm' button in the Portal logbook until we update on this.

The way you confirm entries in the Portal is either within the entry or in bulk.

To confirm a logbook entry you have opened:

- In an open logbook entry, use the gold button 'Change confirmed/approved' in the top right of the screen and select 'Confirm logbook entry'.
- If you are approving an entry for the Assessor to review, use 'Approve logbook entry'.
- If a logbook entry is already confirmed or approved, you can undo it using the same button – it will now have 'Unconfirm' option.

To confirm in bulk:

- View the logbook grid.
- It may be useful to use 'Show/hide' columns (see below for instructions) to show the 'Confirm' column so you can filter on what has not been confirmed.
- Tick entries in the boxes on the right of the grid to select them.
- Use the gold 'Actions' button in the top right of the screen to 'Confirm' or 'Approve' in bulk.

Linking entries to assessment tasks

If your student selects an entry for assessment, it will be flagged to the Assessor as one they 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 displays a logbook entry form with the following sections:

- ID:** 2849
- DATE & TIME:** 14/07/2025 15:33
- Curriculum membership:** Aston University, MOptom (A), Sep 2023
- Reference:** Patient 29 - Supervisor 1
- Assessment tasks:** CiP 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

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

THE COLLEGE OF OPTOMETRISTS

Irene Jones

Personal details
Message log
Assessments
Logbook
Risk dashboard
Assessment summary dashboard

| 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

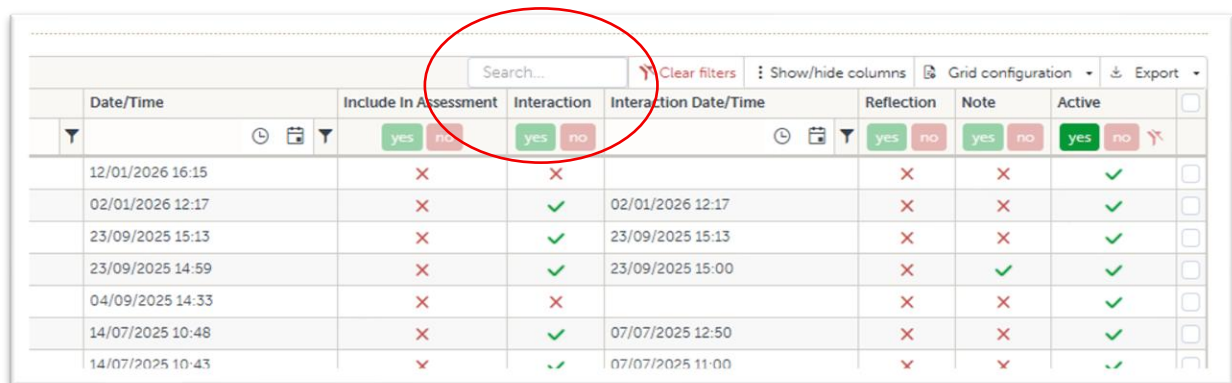
Green symbol shows grid configuration is applied

| 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 'Include In Assessment' and 'Interaction' columns have 'yes' and 'no' buttons. The 'Reflection' and 'Note' columns have 'yes' and 'no' buttons. The 'Active' column has 'yes' and 'no' buttons. The grid contains several rows of data with various status indicators (X and checkmarks).

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

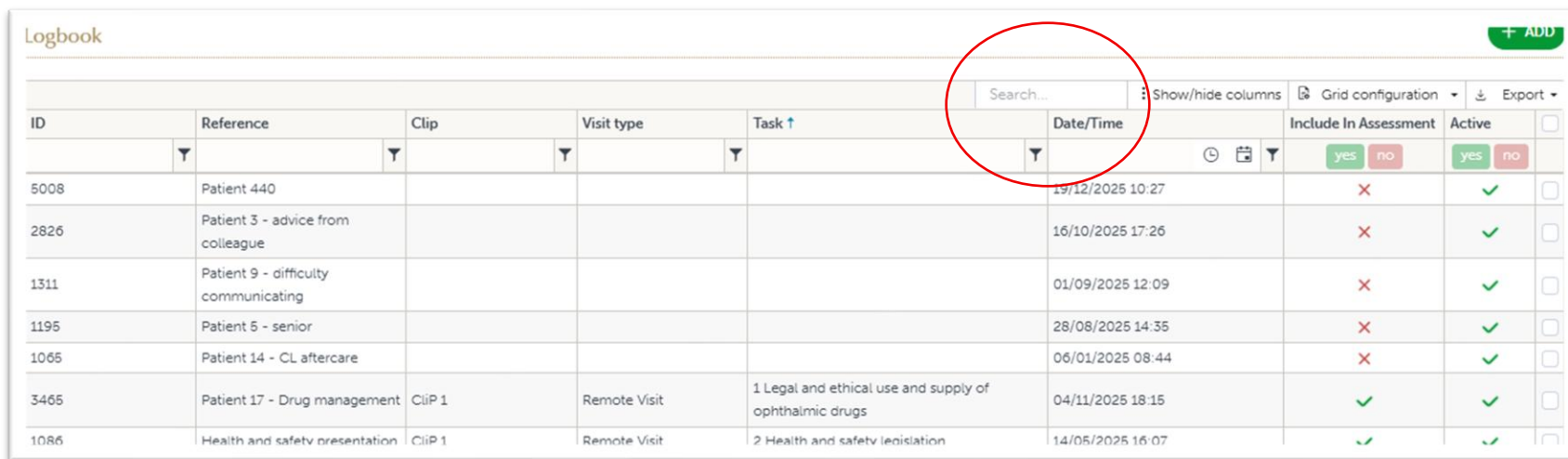
There are tasks in the face-to-face visits in which Assessors will use the 'Search' field at the top of the logbook grid to enter key words to see selections from the student's logbook which they have not selected for assessment. This will include examples of entries with pathology, particular types 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

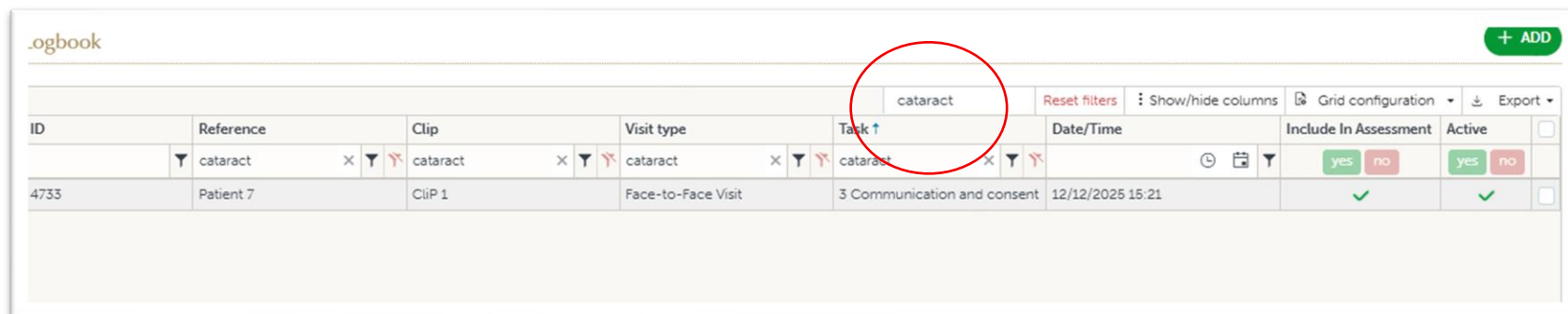


The screenshot shows a logbook interface with a search bar at the top. The search bar contains the text "Search..." and is circled in red. Below the search bar is a table with columns: ID, Reference, Clip, Visit type, Task, Date/Time, Include In Assessment, and Active. The table contains several rows of data, including patient records and tasks. The "Include In Assessment" column has "yes" and "no" buttons, and the "Active" column has "yes" and "no" buttons. A red 'x' is visible in the "Include In Assessment" column for the first three rows.

| 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 containing the word "cataract". The search bar is circled in red. The table below shows that only one entry is displayed, which is the entry for Patient 7. The "Include In Assessment" column has a "yes" button highlighted in green, and the "Active" column has a "yes" button highlighted in green. A red 'x' is visible in the "Include In Assessment" column for the first three rows.

| 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 visits and results

Your student will have access to an Assessment Events area and will be able to view the assessment form which the Assessor completes.

Supervisors will have access to this information as well, but this is not set up at the time of writing. We will update this information in due course.

| Document version | Date | Update |
|-------------------------|-------------|--|
| 1.1 | 20/01/2026 | First version |
| 1.2 | 26/06/2026 | Introductory material transferred to Supervisor quick-guide Notes on 'confirm' and Risk dashboard functionality added |
| | | |
| | | |