



THE COLLEGE OF
OPTOMETRISTS

**Clinical Learning in Practice (CLiP)
Supervisor CLiP Portal guidance**

January 2026

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Purpose of this guidance

This guidance is written for Practice Education Leads and Task Supervisors for students on the Clinical Learning in Practice programme. It provides some quick reference guides for how they should be working with their students, and points you to the more detailed guidance in other documents.

There are also instructions for using the CLiP Portal to view student accounts, logbooks, dashboards and assessment results.

Main guidance documents

We encourage CLiP supervisors to refer to the introductory sections of the CLiP Assessment Handbook and to refer to the marking criteria for each assessment visit there, when you are helping students to prepare.

The Student guidance for each assessment visit, while written for a student audience, is also an essential resource for supervisors and is an easier introduction to each visit than the more detailed Assessment Handbook.

Supervision checklists

This checklist summarises the activities the supervisory team should undertake with the student on a weekly basis, and where you can find guidance on how to do this:

Action	Guidance
Check that student is following the right procedure in patient consultations, they are handling patients safely and supervisors are in practice to intervene if necessary	Assessment Handbook section 'Patient consultations'
Observe student in practice and provide guidance on developing clinical skills	Assessment Handbook section 'GOC learning outcomes' – 'Clinical core outcomes' table
Check logbook entries and 'confirm' entries	Assessment Handbook section 'Reviewing logbook entries'
Check Risk dashboard against expectations for the next assessment visit	Assessment Handbook section 'Student risk profile and dashboard'
Support the student to ensure they get the right working hours, consulting time, patient numbers, other duties and learning day arrangements	Employer Handbook section 'Arrangements for the student's employment' and 'Expectations for the CLiP student experience' / Assessment Handbook section 'Patient consultations'
Weekly check-in meeting with student	Workplace supervisor training course

The following checklist sets out how the supervisor should help the student to prepare for the first assessment visit, CLiP 1R, in the weeks leading up to that visit:

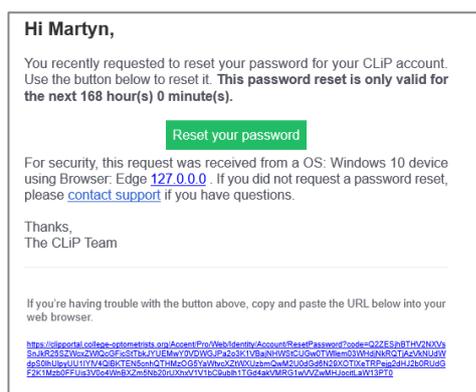
When	Action	Reference
Week 5 of CLiP Part 1	Check student's logbook against the requirements for the 1R visit and identify gaps	Student guidance for CLiP 1R section 'Quick reference for logbook requirements'
Week 6 of CLiP Part 1	Check student has ideas for Service Evaluation Project – review and discuss (planning only)	Service Evaluation Project instructions and templates
Week 6 of CLiP Part 1	Check student has a confirmed date for CLiP 1R and note it	Assessment Handbook section 'Assessment visits' gives outline dates – and student should receive email notification by this point
Week 7 of CLiP Part 1	Check student's logbook against the requirements for the 1R visit and identify gaps	Student guidance for CLiP 1R section 'Full logbook checklist'
Week 7 of CLiP Part 1	Check progress of Service Evaluation Project and discuss – has student started/completed the 'Planning' section of the workbook?	Service Evaluation Project instructions and templates
Week 8 of CLiP Part 1	Check student is selecting entries to submit for assessment and anonymising the related in-practice patient records correctly	Assessment Handbook section 'Reviewing logbook entries'
Week 8/9 of CLiP Part 1	Carry out checks of student logbook entries for CLiP 1R and 'Approve' entries for assessment	Assessment Handbook section 'Reviewing logbook entries' and Student guidance for CLiP 1R section 'Full logbook checklist'
Week 9 of CLiP Part 1	Final check that all 1R logbook entries are ready, including the Service Evaluation Project planning work and anonymised in-practice patient records	Assessment Handbook section 'Reviewing logbook entries' and Student guidance for CLiP 1R section 'Full logbook checklist'

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

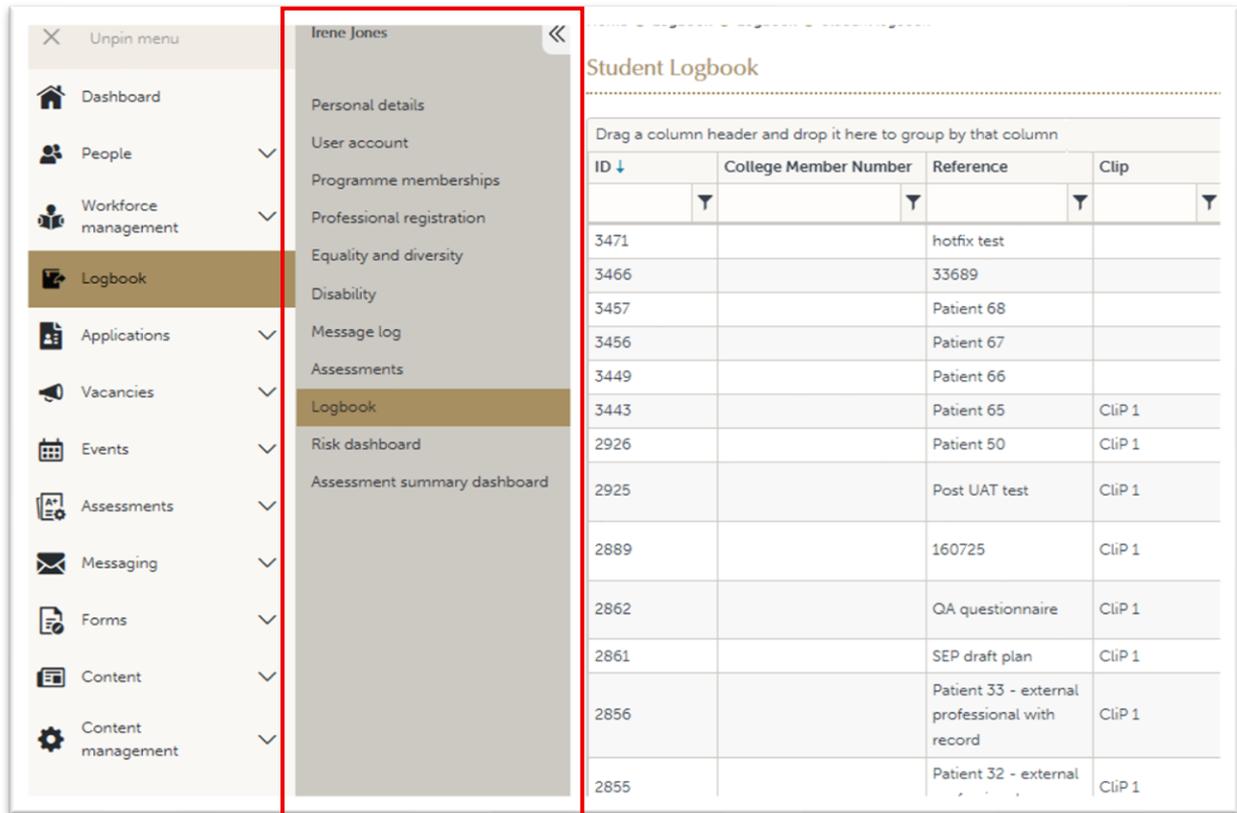
- You will find the main menu on the left side of the screen.
- You can Pin the menu so that it stays in place.
- When you navigate to different pages, you can move back by selecting again from the main menu or by clicking on the breadcrumb trail at the top of the page.
- Menu options and most other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

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

The way you do this in the Portal is either within the entry or in bulk.

To confirm or approve 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' or 'Unapprove' options.

To confirm or approve in bulk:

- View the logbook grid.
- It may be useful to use 'Show/hide' columns (see below for instructions) to show 'Confirm' and 'Approve' columns 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 fields and content:

- 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:** 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

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	✓

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

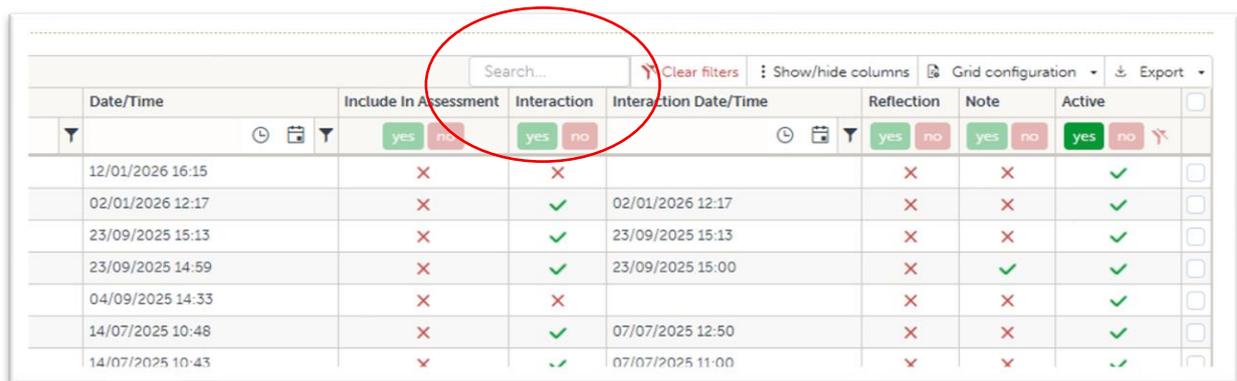
Green symbol shows grid configuration is applied

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 'X' and '✓' marks.

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	✓

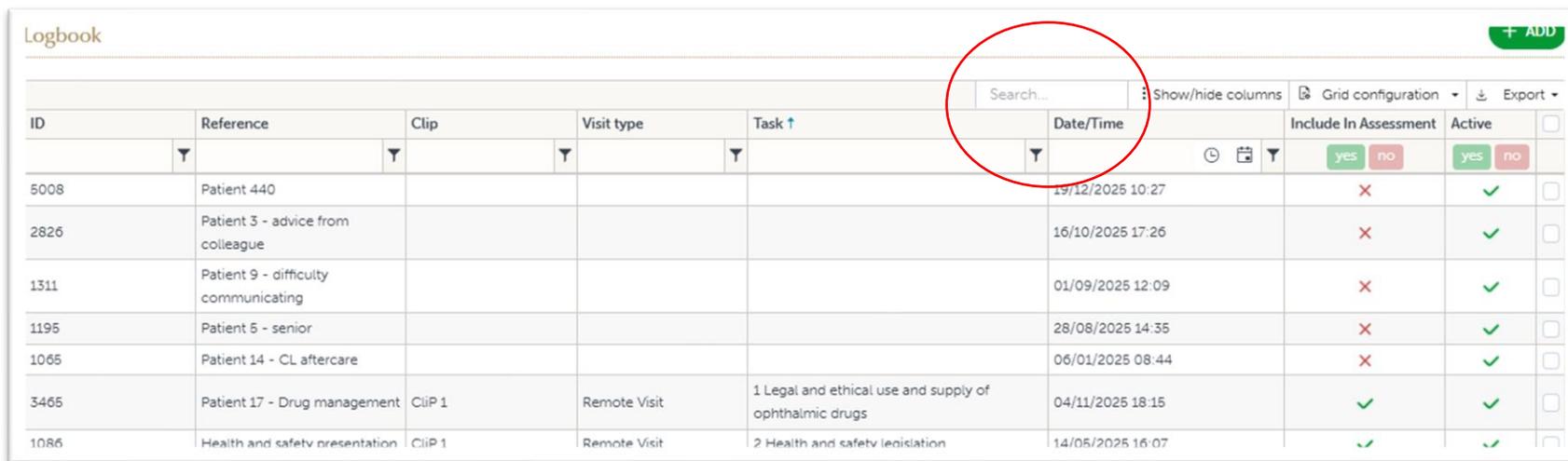
There are tasks in the face-to-face visits in which Assessors will use the 'Search' field at the top of the logbook grid to enter key words to see selections from the student's logbook which they have not selected for assessment. This will include examples of entries with pathology, particular types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

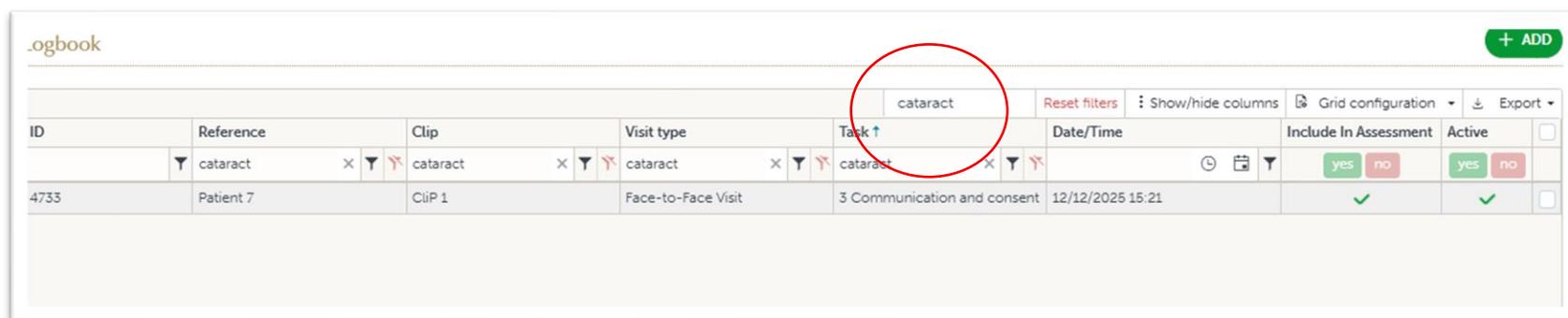


The screenshot shows a logbook interface with a search bar at the top right, circled in red. The search bar contains the text "Search...". Below the search bar are several utility buttons: "Show/hide columns", "Grid configuration", and "Export". The main table has columns for ID, Reference, Clip, Visit 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 now visible. The table shows only one entry, ID 4733, which has been filtered by the search term. The "Include In Assessment" and "Active" columns are highlighted in green for this entry.

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

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