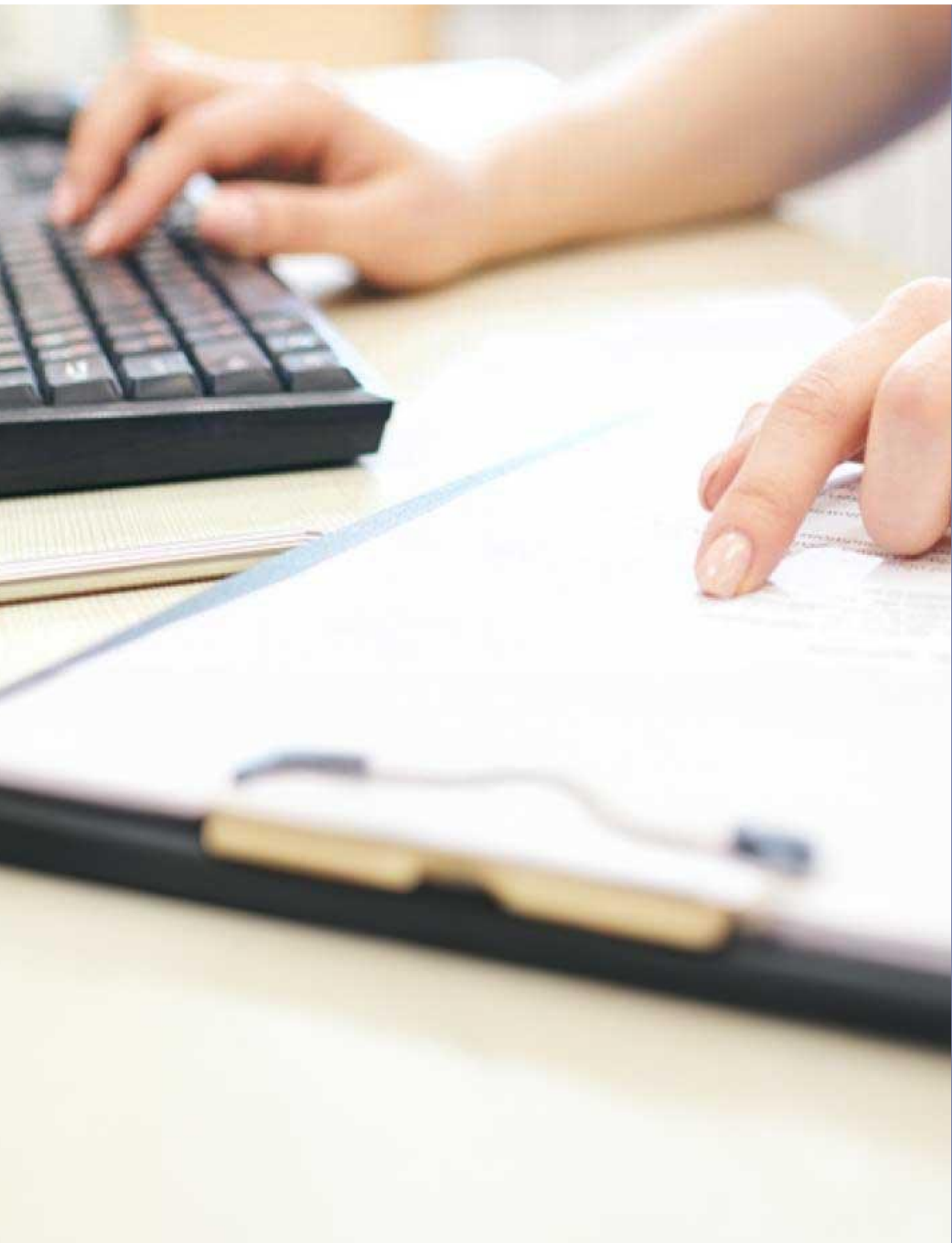
INITIAL SETUP GUIDE



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Written by Giselle Latta (RN)

www.riskclear.com.au

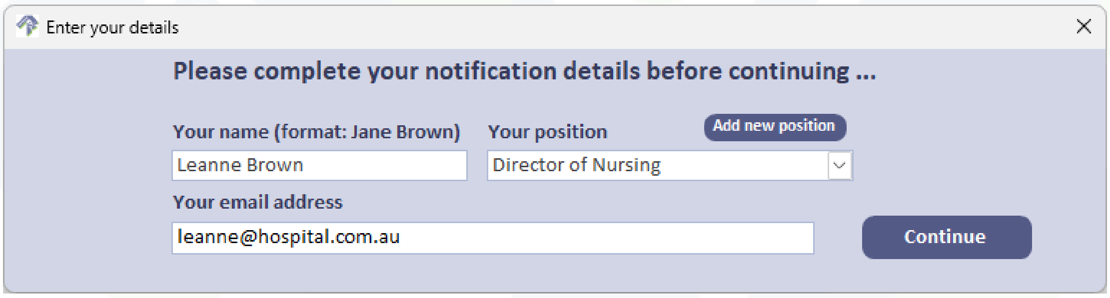
INTRODUCTION

RiskClear has been installed and is now on your desktop - you are ready to get started and make RiskClear your own. This Quick Set-up Guide will step you through the initial set up phase.

Click on the **RiskClear Icon** on your desktop to get started.

INITIAL SETUP PROMPT

On first use, RiskClear will display the personalisation form below for completion by you.



These fields will be used to identify you so that your details can be auto-filled on forms and so you can receive RiskClear-originated notification emails.

Enter **your name** in the format: First-name Last-name e.g. Jane Brown.

Click the "**Add new position**" button and enter your position (role) in the box that appears and press "OK."

Enter your email address then click the "**Continue ..." button** to open RiskClear.

Note that if you are one of multiple sites, an additional drop-down box will also appear here from which you will select your site.

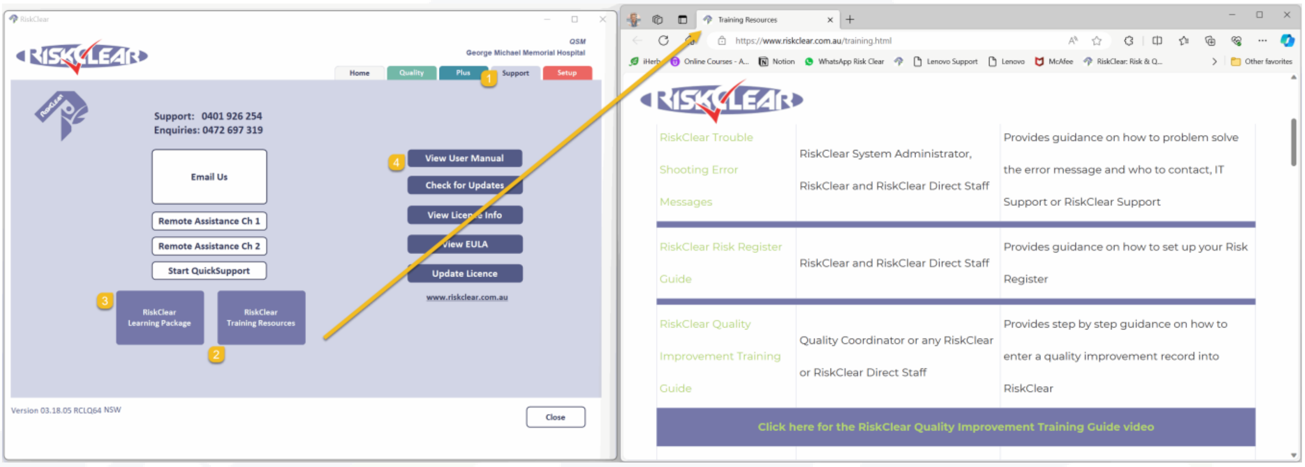
After completing all fields on this form, it will not show again. This is a once off registration process for each user.

This Guide will take you through your RiskClear Personalisation and Set-Up.

The RiskClear User Manual and Training Guides found in our Training Library can also be referenced where further detail or explanation is required.

HELPFUL TIPS:

Go to the **Support Tab (1)** in RiskClear and use this Guide in conjunction with the **RiskClear User Manual (2)** when first getting started.



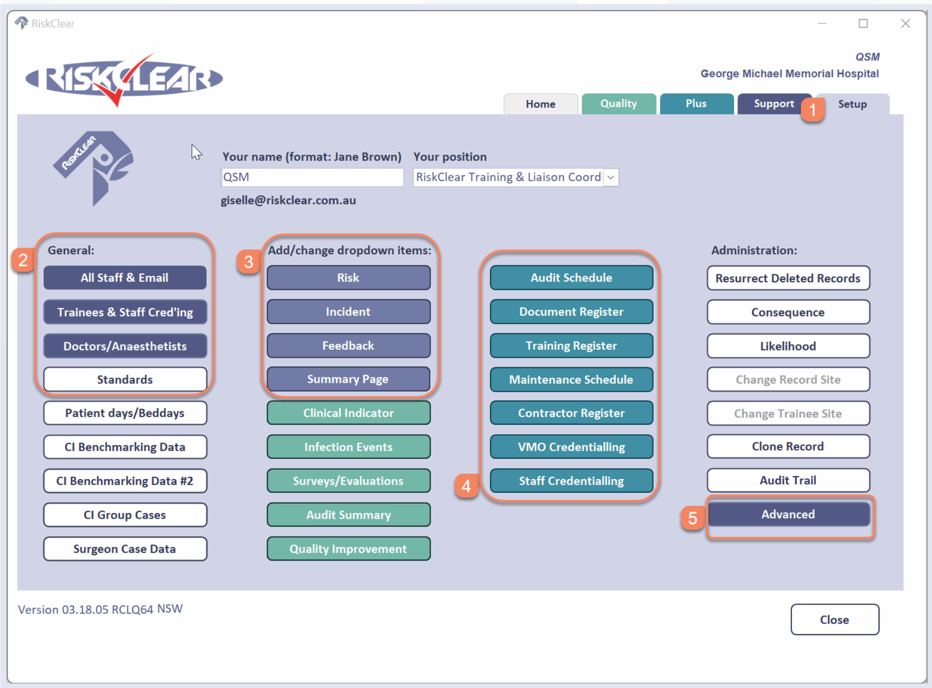
Distribute the **RiskClear Learning Package (3)** and the RiskClear Training Resources **(4)** to appropriate staff to maximise end-user knowledge and experience of the system. Ensuring your staff know how to correctly utilise RiskClear will maximise both the data quality and outputs you gain from the system.

ORIENTATION TO SETUP TAB

SETUP TAB

Allows for the personalisation of your copy of RiskClear for notification purposes as well as for the addition, alteration and hiding of information that appears in drop-down boxes throughout RiskClear.

Complete **Your Name** and select **Your Position** as shown below:



If the position is not linked to an email address when selected, it will prompt you for one. These details are used by RiskClear when sending alerts to identify the sender or allow for notifications to be sent to your position.

Alternatively, the personalisation of RiskClear to your hospital/organisation can be *completed as you go* via the **''Setup''** button that is found at the bottom of various screens within RiskClear.

GENERAL

This is where you can enter:

- All Staff & Email
- Trainees & Staff Credentialling
- Doctors
- Committees/Meetings
- Standards

You can also add/change dropdown menu items:

- Risk
- Incident
- Feedback
- Summary Page

Use Plus Items:

- Refer to the specific Training Guides for each of these functions

Access Advanced:

- This is where Senior Management and/or the RiskClear System Administrator manages permissions and notification settings

GENERAL

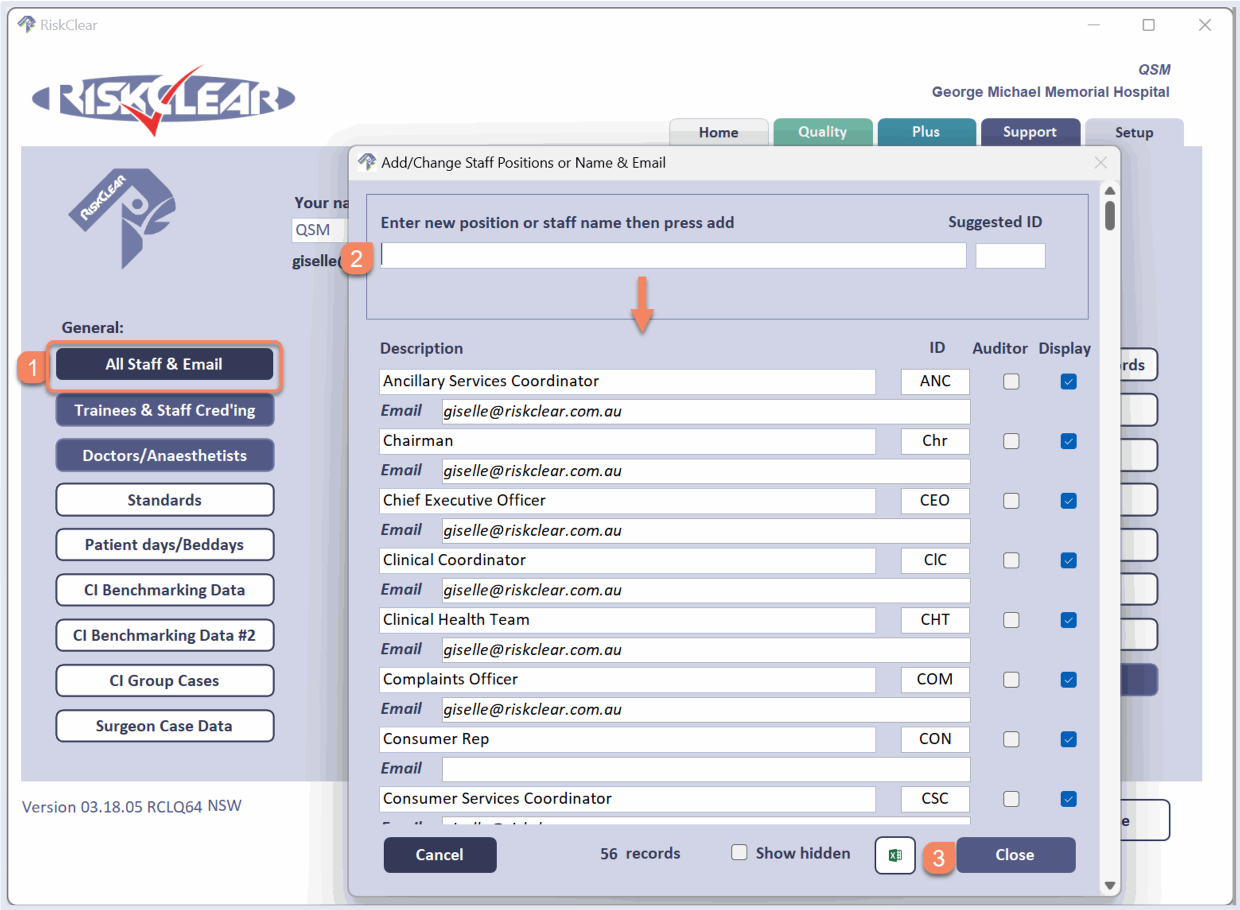
ALL STAFF & EMAIL

This is where you need to enter your *staff positions* and email details so that they appear in various drop-down menus throughout RiskClear and can receive email notifications for various actions within the system.

STEP ONE: Click on **''All Staff & Email''**

STEP TWO: Enter the **new position** of the staff member and then click **''Add''.** The position will then appear in the list as shown, where you can **also add their email address**.

STEP THREE: Click "**Close**"



TRAINEES & STAFF CREDENTIALLING

This is where you need to enter your *staff names* for training and credentialling requirements so that they show in various drop-down menus in RiskClear. This section is *name based*, whereas the previous section was *position based*.

STEP ONE: Click on **''Trainees & Staff Cred'ing''**

STEP TWO: Enter the **new staff member**'s name and then click **''Add''.** They will then appear in the list as shown, where you can **also add their email address**.

STEP THREE: Click **''Close''**

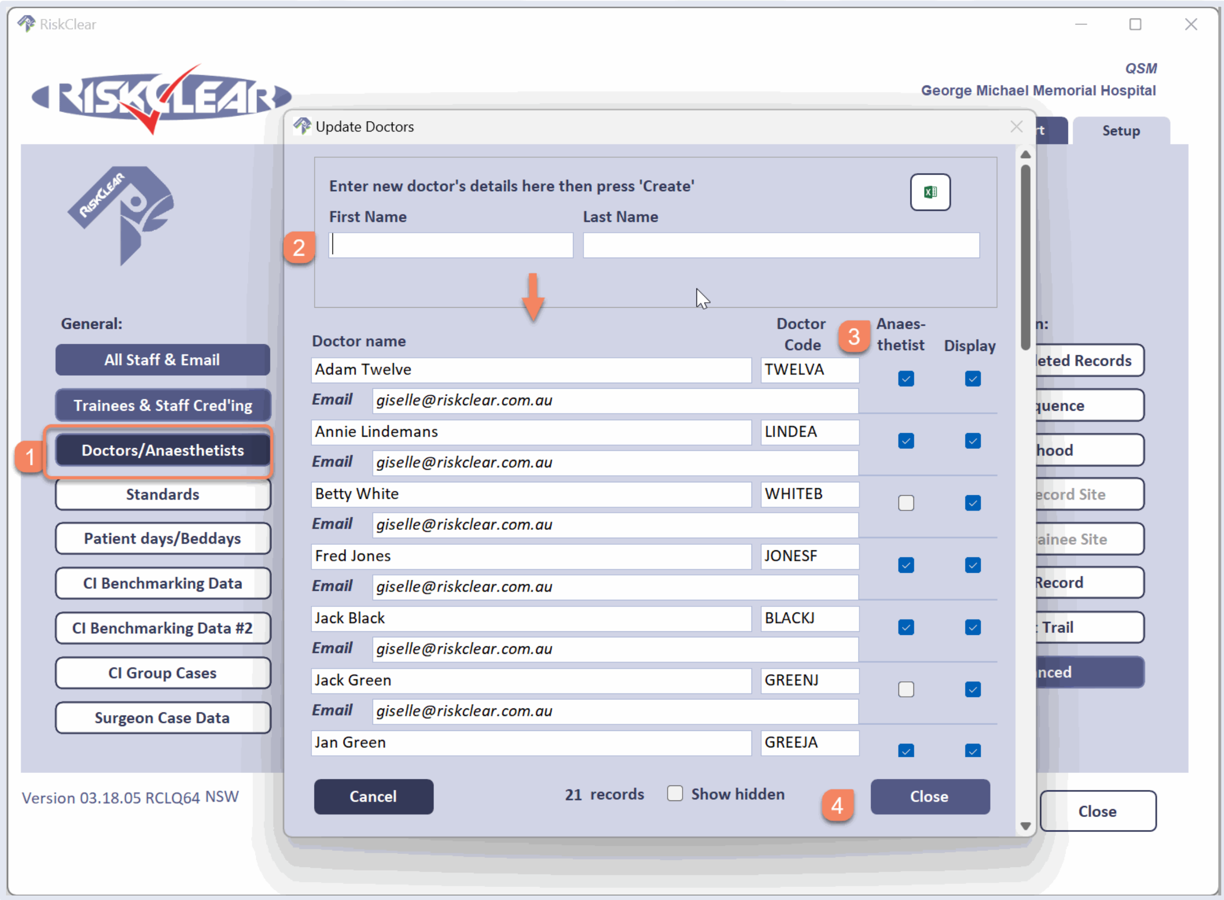
DOCTORS

This is where you enter your doctors' names so that they will appear in drop-down menus in RiskClear.

Step 1: Click on **''Doctors''**

Step 2: Enter the **Doctors first and last name** and then click **''Create''.** They will then appear in the list as shown, where you can **also add their email address**.

Step 3: Click ''**Close**''



STANDARDS

This is where you enter your **Standards** names so that they will appear in drop-down menus throughout RiskClear.

Step 1: Click on ''**Standards**''

Step 2: Enter the **Standard** title (e.g. NSQHS 1 Clinical Governance, ISO Standard, Aged Care...) and then click **''Add''.** These will then appear in the list as shown.

Step 3: Click the ***browse button*** (circled below) next to a Standard and navigate to the document relating to that Standard. The link to the document will then appear in the *Doc link field (see highlighted below)*. As with all links in RiskClear, you can press and hold the SHIFT key when clicking the browse button to add a folder rather than a single document. Repeat for each Standard.

Step 4: Click **Close**

ADD/CHANGE DROPDOWN MENU ITEMS

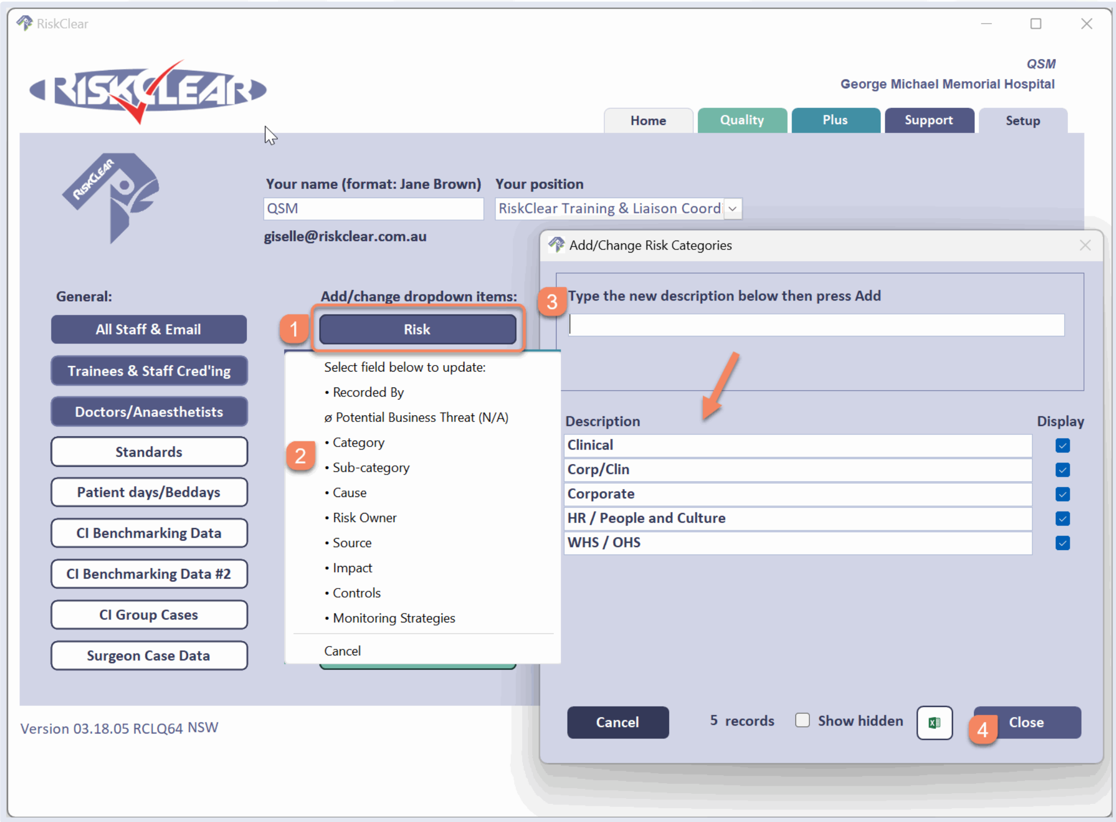
RISK

STEP ONE: Click **''Risk''** – this will open a window listing the various drop-down menus that appear in RiskClear.

STEP TWO: *For example, below*: **Category** has been selected

STEP THREE: The blue dialogue box has had four categories added being Clinical, Corp/Clin, Corporate, OHS.

STEP FOUR: Click ''**Close**''



***Repeat this process for each item listed in the window, completing the blue dialogue box with your personalised items and click close.**

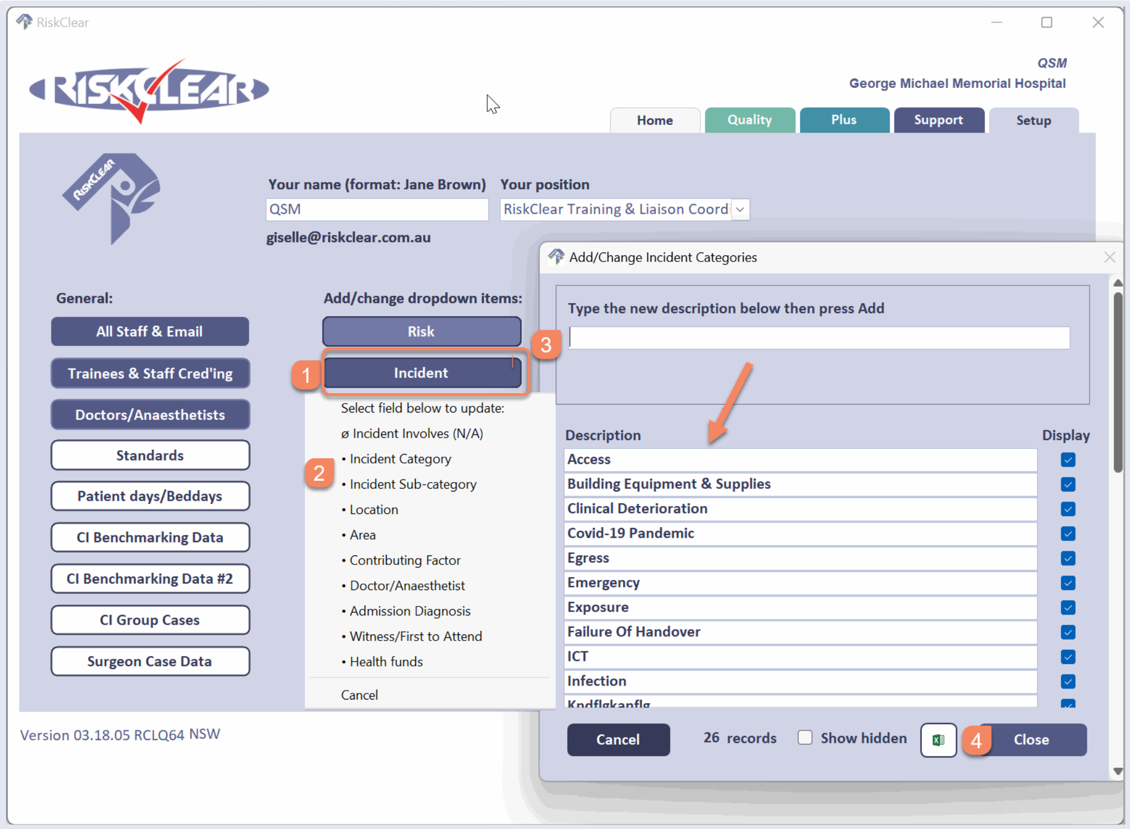
INCIDENT

STEP ONE: Click ''**Incident**'' – this will open a window listing the various drop-down menus that appear in RiskClear.

STEP TWO: *For example, below*: **Incident Category** has been selected

STEP THREE: The blue dialogue box has had numerous categories added e.g. Clinical Deterioration, Documentation, Environment etc.

STEP FOUR: Click ''**Close**''



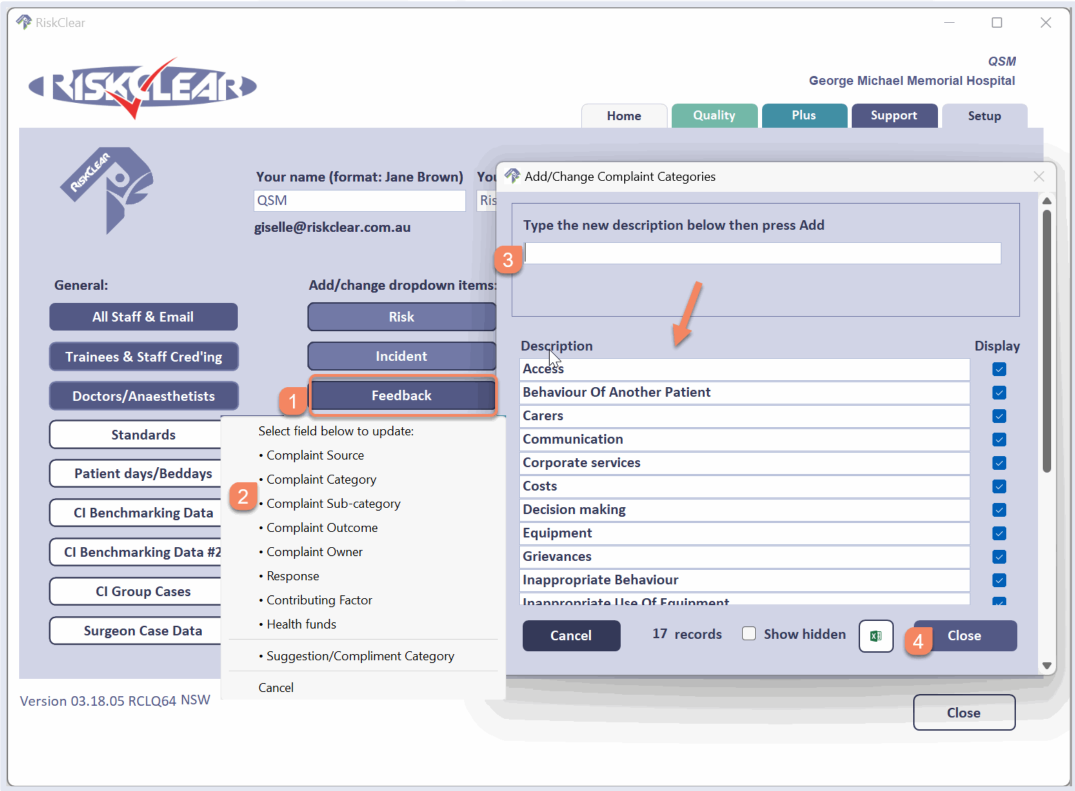
***Repeat this process for each item listed in the window, completing the blue dialogue box with your personalised items and click close.**

STEP ONE: Click **"Feedback"** – this will open a window listing the various drop-down menus that appear in RiskClear.

STEP TWO: *For example, below*: **Complaint Category** has been selected

STEP THREE: The blue dialogue box has had numerous categories added e.g. Wait Times, Inappropriate behaviour

STEP FOUR: Click "**Close**"



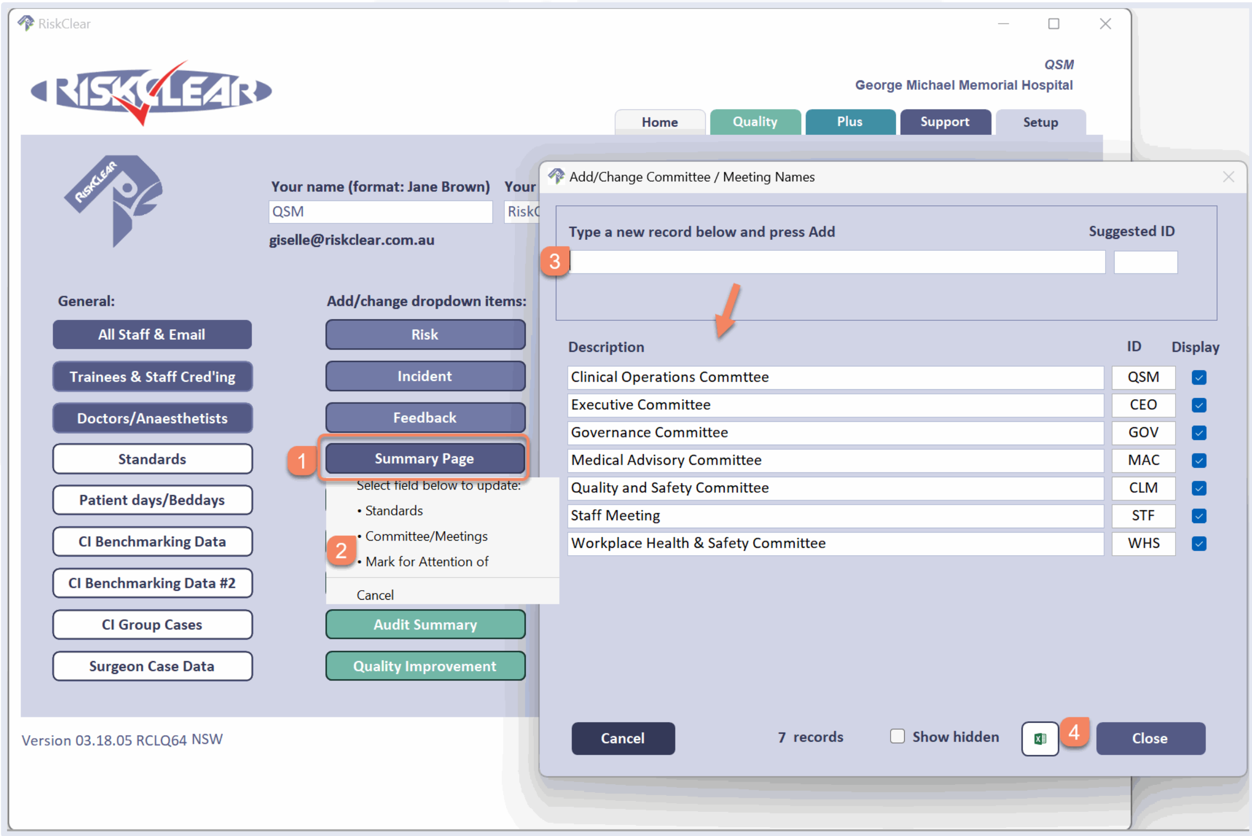
***Repeat this process for each item listed in the window, completing the blue dialogue box with your personalised items and click close.**

SUMMARY

When you click **Summary Page** the window listing shows **Standards** (already completed in the "Standards" section of this user guide), **Committees/Meetings** and **Mark for Attention of**.

This is where you can enter your **Committee/Meeting** names so that they will appear in drop-down menus throughout RiskClear

STEP ONE: Click on Summary Page
STEP TWO: Select "Committees/Meetings"
STEP THREE: Enter the **Committee or Meeting** (e.g. MAC, Staff) **title** and then click **"Add".** These will then appear in the list as shown.



STEP FOUR: Click "**Close**"

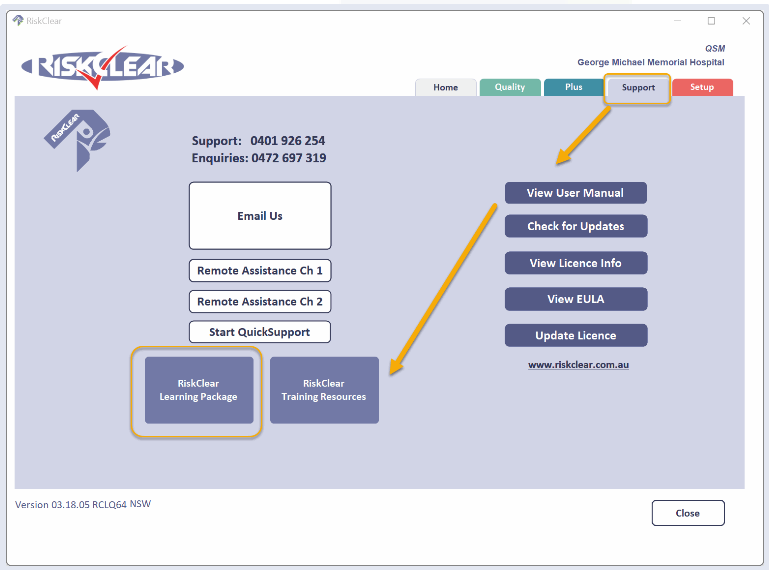
PLUS FUNCTIONS
(REFER TO TRAINING LIBRARY FOR ADDITIONAL RESOURCES)

Plus Functions included in RiskClear are:

- Audit Schedule

- Document Register
- Training Register
- Maintenance/Schedule
- Contractor Register
- Asset Register
- Repair Log
- VMO and Staff Credentialling

Please refer to the specific **Audit Schedule, Document Register, Training Register, Maintenance/Schedule, Contractor Register, VMO and Staff Credentialling Setup Guides** as per the Training Library Resources found on the **Support Tab** in RiskClear.



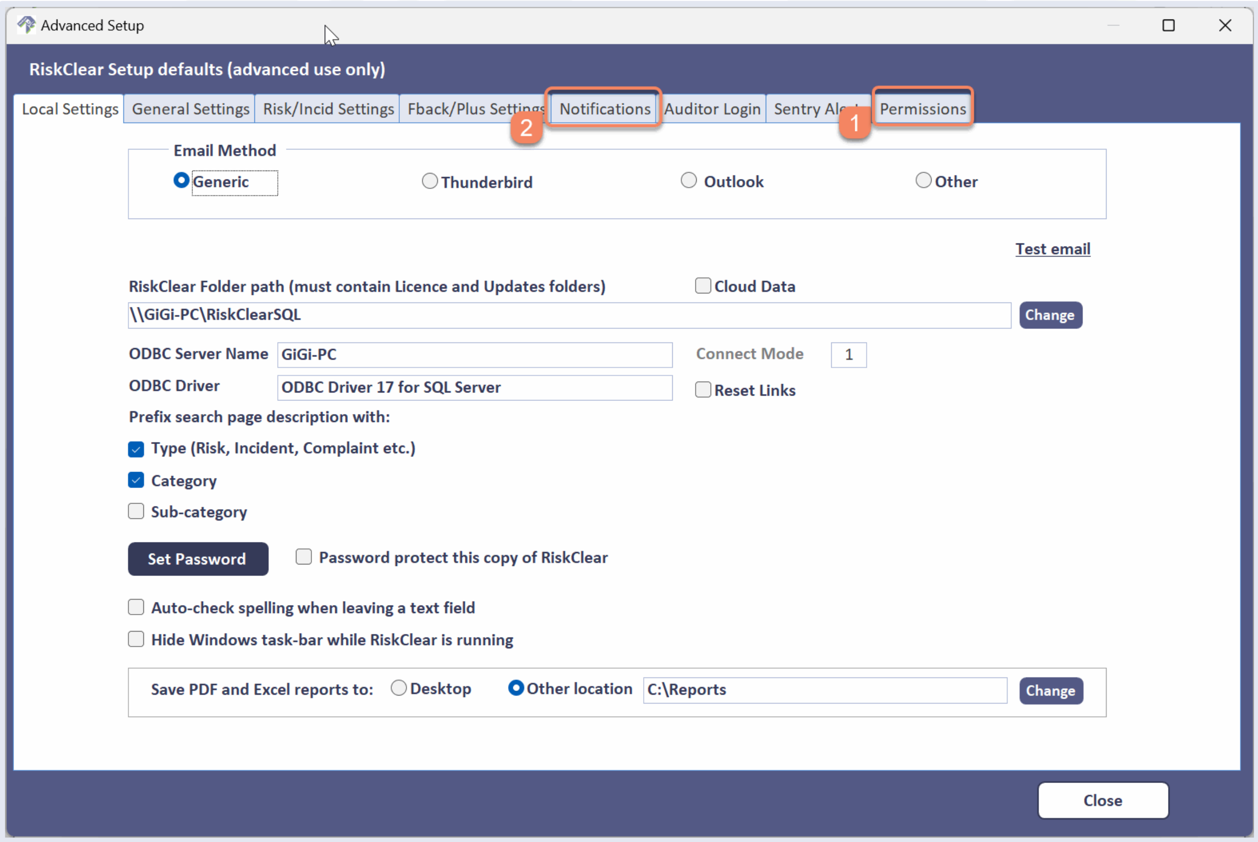
ADVANCED

(REFER ALSO TO THE RISKCLEAR MANUAL)

Click the (red) **''Advanced''** button

The Advanced Setup panel contains several tabs depending upon your access level. All users have access to the Local Settings tab. Global Admin permissions, allows access to the **Gen/Risk Settings**, **Incid/Fback Settings** and **Notifications** tabs. To have access to the **Permission** tab you must have Permission access.

In this Guide we will focus on **Permissions** (1) and **Notifications** (2)

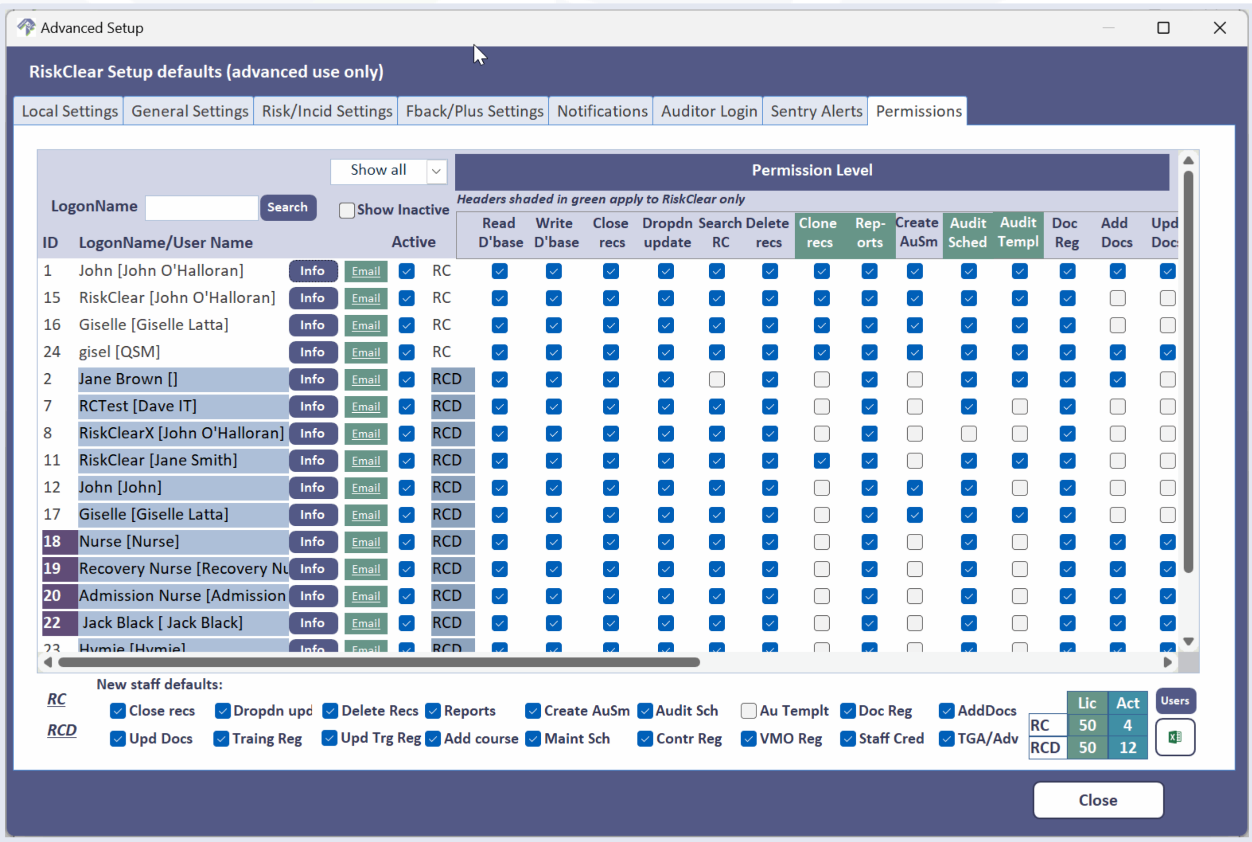


PERMISSIONS TAB

RiskClear staff will usually setup one user with access to the '**Permissions**' tab when installing RiskClear for the first time. **From here, permissions can be set for all users**. **It is important your permissions align with your governance accountabilities.** Active users will be shown on this page after they log into RiskClear or RiskClear Direct for the first time. Separate login entries will be shown for RiskClear and RiskClear Direct, with the latter appearing in a darker shade and having the letters RCD appended to their login name.

To view or change a RiskClear/RiskClear Direct staff member's email address, click the **Email** button.

If a staff member leaves, they can be deactivated from RiskClear by removing the tick in the **Active** box alongside their name. RiskClear only counts Active users when determining user numbers against the number allowed under the licence. To view inactive users, tick the **Show Inactive** box near the top of the page.



PERMISSIONS LEVELS:

READ D'BASE	All new users receive this by default. If you wish to disallow any users' login to RiskClear or RiskClear Direct, remove this tick. If the user attempts to login, they will receive the message "You do not have permission to access RiskClear".
WRITE D'BASE	All new users receive this by default. If this is removed, the user will open RiskClear in "Read-only" mode. This means that existing records can be updated however new records cannot be created.
CLOSE RECORDS	Tick to allow access to close risk, incident, and complaint records.
SETUPACCESS: ALL OTHERS	Tick to allow users to update remaining setup fields such as standards, locations, areas etc.
CLONE RECORD	Tick to allow access to the Clone Record function in Setup.
DELETE RECS	Tick to allow the user to delete records.
REPORTS	Tick to allow access to the reports section.
SEARCH RC	Remove to disable the Search RiskClear button and Search RiskClear Direct button. This is enabled by default.
AUDIT SCHED	Tick to allow access to the Audit Schedule.
AUDIT TEMPL	Tick to allow add/change audit template
DOC REG	Tick to allow access to the Document Register.
ADD DOCS	Tick to allow staff to add new documents to the Document Register.
UPD DOCS	Tick to allow staff to update documents.
TRAING REG	Tick to allow access to the Training Register.
ADD COURSE	Tick to allow staff to add new courses to the training register.
MAINT SCHED	Tick to allow access to the Maintenance Register.
CONTR REG	Tick to allow access to the Contractor Register.
ASSET REG	Tick to allow access to the Asset Register.
REPAIR LOG	Tick to allow access to the Repair Log.
ADD DOCS	Tick to allow staff to add new documents to the Document Register.
VMO REG	Tick to allow access to the VMO Credentialing Register.
STAFF REG	Tick to allow access to the Staff Credentialing Register.
TGA/ADVIS	Tick to allow access to the TGA/Advisory Alerts function.
REMV AUDITS	This will give the staff member the ability to remove audits from the audit schedule. It is not possible to remove an audit that has a completed locked audit attached.
SUPERVISOR	This gives permission to all tabs in Setup except the Auditor Login and Permissions tabs.
SET PERMISS'NS	This gives access to this Permissions and Auditor Login tabs

ALL SITES	This applies where multiple hospitals are connected to the single RiskClear database. Allows the user to view, create, update and report on records for any/all sites

New staff access: ☑ Close recs ☑ Dropdn upd ☑ Delete Recs ☑ Reports ☑ Audit Sch ☑ Doc Reg ☑ AddDocs ☑ Upd Docs ☑ Traing Reg ☑ Add course ☑ Maint Sch ☑ Contr Reg

The User Table is situated the lower right-hand side of the Permissions screen. This shows the number of licenced users in the green column for RiskClear (RC) and RiskClear Direct (RCD) and the number of Active users in the blue column. These numbers are live and will update as you tick or un-tick the Active box alongside each user.

	Lic	Act
RC	50	4
RCD	50	12

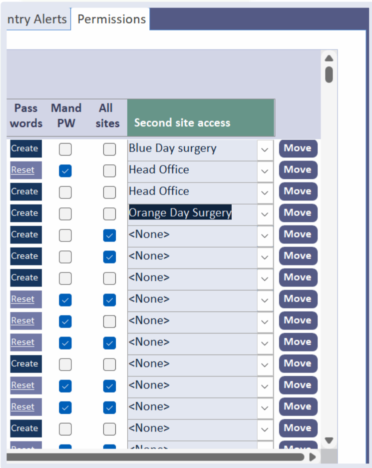
Users

Who is logged in? – Clicking this will display a list of users currently logged into RiskClear or RiskClear Direct.

Click the **Excel** logo to export the permissions list into an Excel spreadsheet.

MULTIPLE SITE MODE

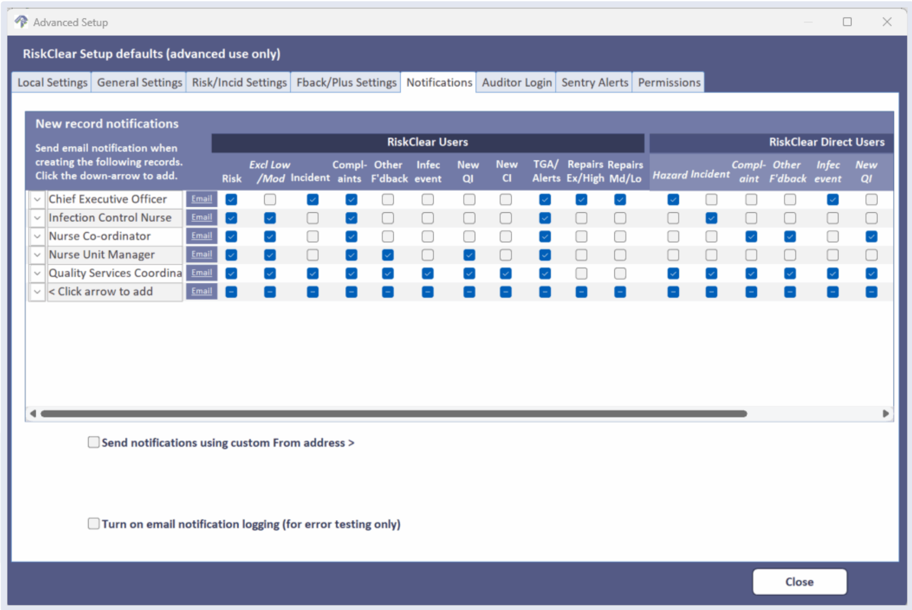
Where more than one hospital is linked to a central RiskClear database, two distinct levels of access exist. Standard access enables users in each site to view and report on only their own records. Users with "All sites" access will have access to all records. The Home, Search, Snapshot, Reports, Plus Home Page and Plus Search pages will have an additional drop-down box where either an individual site, or all sites can be selected. Where a Corporate site exists, any doctor or staff member allocated to this site will appear as a selection in all sites records.



NOTIFICATIONS

Notifications can be configured so that specific positions receive emails at the time a new record is created in RiskClear and RiskClear Direct. Reminders can also be automatically sent.

An unlimited number of notification entries can be entered here. Select the recipient's position in the drop-down box. If the position does not have an email address attached, it will prompt for one. Alongside each position is an **Email** button. Click this to view, change or add the position's email address. If no email address is recorded, the Email button will be red in colour.



REMINDERS

The reminders system (as opposed to the notifications above) is handled by RiskClear Sentry. This software is installed on the hospital's server and wakes up each night at an appointed time to send reminders to relevant staff. To enable reminders, place a tick in the Enable Reminders box and enter an email address into the Fallback email box. This email address will be used when a recipient's email address is blank. (Refer to the RiskClear Manual for further information regarding frequency).