



Top 10 Support Questions

2026



RiskClear Enquiries

Mail: PO Box 543 Scarborough WA 6922

Email: enquiries@riskclear.com.au

Website: www.riskclear.com.au

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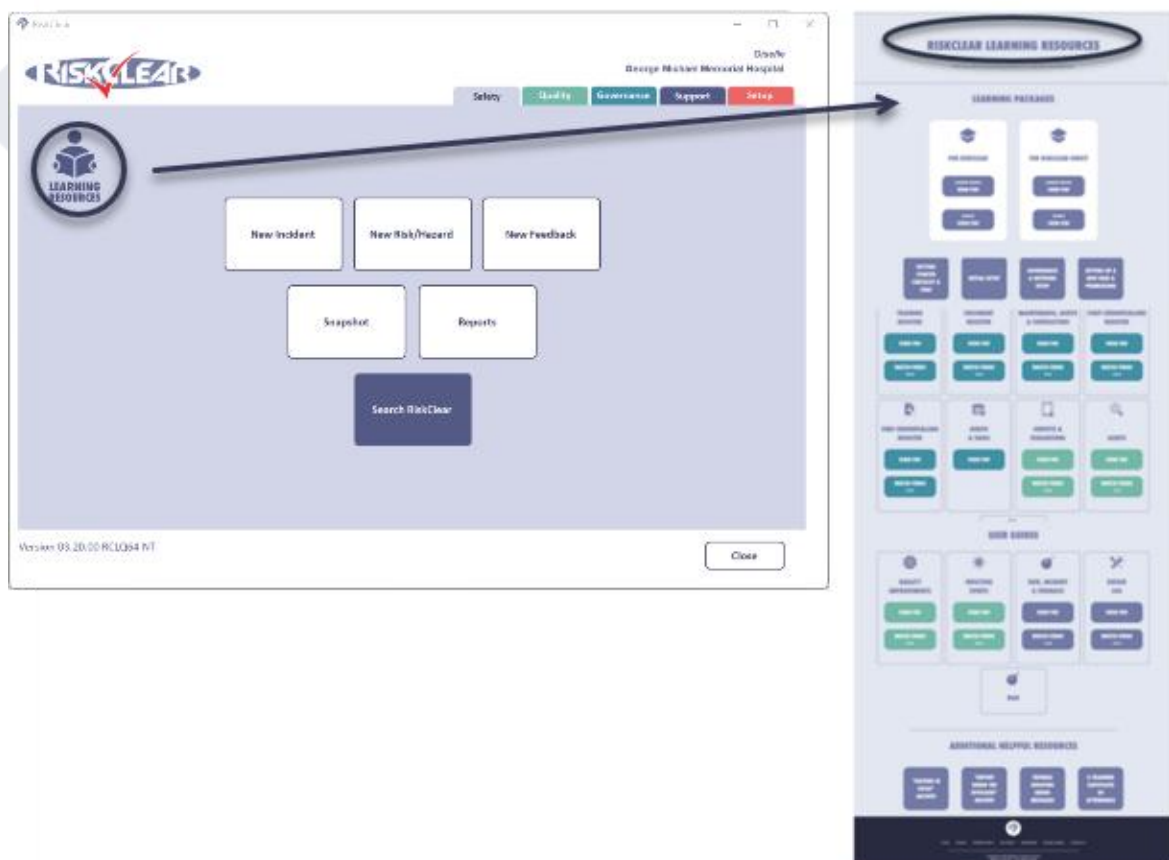


INTRODUCTION

To assist our clients in navigating the RiskClear Platform we have developed this **simple guide** to assist in problem solving those common questions presented to us by you.

Please use the **Contents Table** (above) to be directed to the appropriate question and its solution.

For further details or information please refer to our Learning Resources > User Guides.



HOW DO I SETUP A NEW USER?

Step 1 : Make sure your IT provider is aware of the new user and that they have the software (RiskClear or RiskClear Direct) available and/or installed. *(Usually the RiskClear SQL icon will appear on that users' desktop if this is already done.)*



Step 2: The new user can then click on the relevant desktop icon (>generally speaking RiskClear is used by Managers, senior staff and RiskClear Direct is used by general staff) and complete the initial setup prompt (once off). This will assign a RiskClear or RiskClear Direct licence to them.

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

Enter your details

Please complete your notification details before continuing ...

Your name (format: Jane Brown) Your position [Add new position](#)
 Leanne Brown Director of Nursing

Your email address
 leanne@

[Continue](#)

Step 3: The DON/Quality Manager (or senior staff member that has access to Permissions) can go to the **Setup Tab > Advanced > Permission** and see the new staff member listed as a licenced user and can assign permissions according to their role and responsibilities.

Advanced Setup
RiskClear Setup defaults (advanced use only)

Local Settings | General Settings | Risk/Incid Settings | Fback/Plus Settings | Bulk Updates | Notifications | Auditor Login | Sentry Alerts | **Permissions**

LogonName: Search ☐ Show Inactive ☐ Active

Permission Level

ID	LogonName/User Name	Info	Enail	RC	Read D'base	Write D'base	Close recs	Cats & CT's	All others	Search RC	Delete recs	Clone recs	Reports	Create AuSm	Audit Sch	Audit Templ	Del Audits	Do Re
4	Sealie (Cecilia Foley)	info	Enail	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
15	RiskClear (John O'Halloran)	info	Enail	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
16	Giselle (Giselle Latta)	info	Enail	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
24	gisel (Giselle)	info	Enail	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
3	Sealie (Cecilia Foley)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
7	RCTest (Dave IT)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
11	RiskClear (Jane Smith)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
17	Giselle (Giselle Latta)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
18	Nurse (Nurse)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
19	Recovery Nurse (Recovery N)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
20	Admission Nurse (Admission)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
23	Hymie (Hymie)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
25	gisel (Giselle Latta)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
26	Jane Smith (Jane Smith)	info	Enail	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒

New staff defaults:
☒ Close recs ☒ Dropdn upd ☒ Delete Recs ☒ Reports ☒ Create AuSm ☒ Audit Sch ☐ Au Temph ☒ Doc Reg ☒ AddDocs ☒ Upd Docs ☒ Traing Reg ☒ Upd Trg Reg ☒ Add course ☒ Maint Sch ☒ Contr Reg ☒ VMO Reg ☒ Staff Cred ☒ TGA/Adv

RC: 250 4 10
 RCD: 250 10 10

[Close](#)

Please refer also to the **New User & Permissions Guide** available via our



2. HOW DO I DEACTIVATE A USER?

Step 1: The DON/Quality Manager (or senior staff member that has access to Permissions) needs to go to the **Setup Tab > Advanced > Permission** and find the user in the list.

Step 2: Untick the active button alongside the users name.

The screenshot shows the 'Advanced Setup' window for RiskClear. The 'Permissions' tab is active. A table lists users with their LogonName, ID, and Active status. The 'Active' column has a checkbox for each user. The user 'Sealie [Cecilia Foley]' is highlighted. The 'Show Inactive' checkbox is checked. The 'Permissions' tab is selected, and the 'Show Inactive' checkbox is checked.

ID	LogonName/User Name	Active	Read D'base	Write D'base	Close recs	Setup access	Search RC	Delete recs	Clone recs	Rep-orts	Create AuSm	Audit Sched	Audit Templ	Del Audits	Doi Re
4	Sealie [Cecilia Foley]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
15	RiskClear [John O'Halloran]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
16	Giselle [Giselle Latta]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
24	gisel [Giselle]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
3	Sealie [Cecilia Foley]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
7	RCtest [Dave IT]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
11	RiskClear [Jane Smith]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
17	Giselle [Giselle Latta]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
18	Nurse [Nurse]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
19	Recovery Nurse [Recovery Nurse]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
20	Admission Nurse [Admission Nurse]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
23	Hymie [Hymie]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
25	gisel [Giselle Latta]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
26	Jane Smith [Jane Smith]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒

They will no longer be able to access RiskClear > if they try to access the software, they will receive an error message saying they are a deactivated user.

Helpful Tip > If a deactivated user needs to be made active again go to **Setup Tab > Advanced > Permissions** and tick the **Show Inactive** box. Find the user and **re-tick the Active box** to re-activate their access to RiskClear/RiskClear Direct.

The screenshot shows the 'Advanced Setup' window for RiskClear. The 'Permissions' tab is active. The 'Show Inactive' checkbox is checked. The user 'John [John O'Halloran]' is highlighted. The 'Active' column has a checkbox for each user.

ID	LogonName/User Name	Active	Read D'base	Write D'base	Close recs	Setup access	Search RC	Delete recs	Clone recs	Rep-orts	Create AuSm	Audit Sched	Audit Templ	Del Audits	Doi Re
1	John [John O'Halloran]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
4	Sealie [Cecilia Foley]	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒

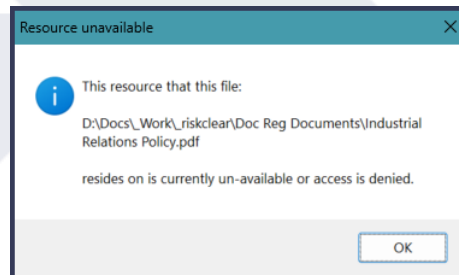
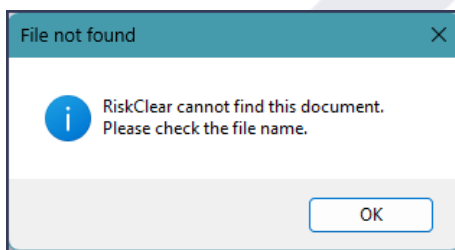
Please refer also to the **New User & Permissions Guide** available via our



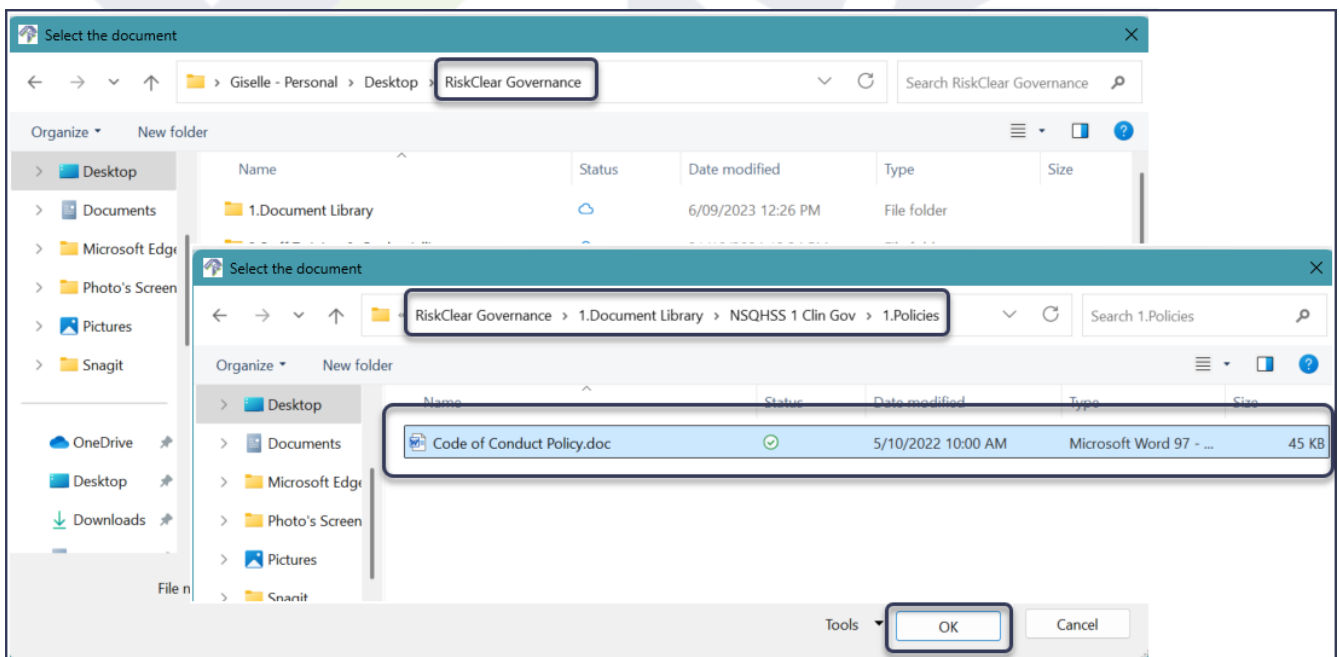
3. HOW DO I FIX A BROKEN LINK?

If you receive either of these messages when trying to access a document/file/resource in RiskClear >

Step 1: Click **OK**



Step 2: Windows explorer will open > if you have appropriate access to the shared drive you can **search** for the document, **select** it, and **click OK to re-link it** (see below):



4. HOW DO I FIND MISSING TRAINEE/S?

*Helpful Tip > Run **Report 520 Training Calendar** (date range set to all) and see if the “missing trainee” is showing up in the report. If so, their trainee data is definitely in RiskClear and is just “hidden” most likely because they’ve been retired. These steps below will assist in finding the ‘retired’ (or missing) trainee.*

If you are trying to find a trainee/record that are currently not showing in the **Trainee Name** dropdown or Register check the following to problem solve >

Step 1: Tick **include retired trainee’s** at the bottom of the screen

Step 2: Go to **Setup > Trainee Details** and the **Add/Change staff** window appears

Step 3: Tick **Show retired**

Step 4: Check the list of Staff Trainee names and **re-tick the display** box to have them appear again and resurrect their records

Table 1: Existing Staff/Trainees

Year	Booked	Trainee Name	Course/Competency Requirement	Training Coordinator	Completed
2026	S	Dirk Bogarde	Basic Life Support - Theory	Day Co-ordinator	Open
2025	S	Jane Austen	Basic Life Support - Theory	Consumer Services Co	Open
2024	S	Hudson Budge	Cultural Awareness - Turrells	IT Staff	Open
2023	S	Hugo Flynn	Cultural Awareness - Turrells	Clinical Coordinator	Open
2022	S	Ingrid Bergman	Cultural Awareness - Turrells	DON/GM	Open

Table 2: Add/Change Staff Form

Description	ID	Display
**Giselle Latta	GLAT	☒
Archibald Floofington	AZEK	☒
Archie @zeke.com	ASMI	☐
Archie Zeke	ARC	☒
Audrey Hepburn	AHEP	☐
Bailey Grey	BGRE	☐
Barry Gibb	BGIB	☐
Baxter White	BWHI	☒

5. HOW DO I MAKE A FIELD MANDATORY?

If you have the appropriate permission and need to make certain fields (circled below) on the **Risk, Incident, Feedback, Clinical Indicator, Quality Improvement or Audit Summary** screens mandatory or not, do the following >

Step 1: Go to the **Setup Tab** in RiskClear and click **Advanced**

Step 2: Click on the **Risk/Incid Tab and/or Fback/Other Settings** to **tick or untick those fields** (circled below) that you wish to make mandatory or not.

RiskClear Setup defaults (advanced use only)

Local Settings | General Settings | **Risk/Incid Settings** | Fback/Plus Settings | Bulk Updates | Notifications | Auditor Login | Sentry Alerts | Permissions

Note: Changes made here will affect all users

RISK/HAZARD PAGE SETTINGS

Risk Matrix: **Default**

☒ Split Risk Register [Click to Create Split Risk Register Areas](#)

☐ Send all risks to Risk Register

Additional R/Reg Column #1 caption: Impact

Additional R/Reg Column #2 caption: Causes

Additional R/Reg Column #3 caption: Current Controls

Additional R/Reg Column #4 caption: Effectiveness

Risk Ref Caption: Ref ID. MRN Caption: MRN

☐ Enable 'Refer to Board when Extreme record closed' prompt

☐ Prompt for date CEO notified for all Extreme risks

☐ Prompt for date DON notified for all Extreme risks

☐ Show mandatory Risk Location and Area

Change risk 'Reported By' caption to: Recorded By

☐ Make Impact field mandatory

☐ Make Controls field mandatory

☐ Make Monitoring Strategies field mandatory

INCIDENT PAGE SETTINGS

☐ Link Incident to Risk records

☒ Show Date Reported to GM/DON/CEO in incidents

☒ Show Date Reported to QM/MANAGER in incidents

☐ Make SAC/Harm score/ISR field mandatory

☒ Show Admission Diagnosis for patient incidents

☒ Show Witness & NOK field

☒ Show Suggestion and Reporter Name fields

☒ Make Aboriginal & Torres Strait Islander (ATSI) field mandatory

☒ Make Admitting Dr for patient incidents mandatory

☐ Make Outcome field mandatory

☐ Make 'How could this have been prevented..' field mandatory

☐ Make DOB mandatory (except staff)

☒ Auto-fill new incident descriptions with linked CI details

☒ Make location and area fields mandatory

☐ Enable action field in incidents in RiskClear Direct

☐ Make Occupation field in staff incidents mandatory

Close

RiskClear Setup defaults (advanced use only)

Local Settings | General Settings | Risk/Incid Settings | **Fback/Plus Settings** | Bulk Updates | Notifications | Auditor Login | Sentry Alerts | Permissions

Note: Changes made here will affect all users

FEEDBACK PAGE SETTINGS

☒ Auto-close feedback records: 0 day(s) after date of record

☐ Show Complainee Department

☒ Show Complaint Location ☐ Make mandatory

☐ Show Complaint Risk Level

☒ Show all complaint fields in RiskClear Direct

☒ Make complaint source mandatory

☒ Make Aboriginal & Torres Strait Islander field mandatory

☐ Enable HaDSO Feedback Reporting (WA)

QUALITY FUNCTIONS SETTINGS

☒ Show staff drop-down in clinical indicators

☒ Show Location on CI's, QI's and Audit Summaries ☐ Make mandatory

☒ Enable Priority assessment on Quality Improvement page

☐ Rename clinical indicators to quality indicators

☒ Show pre-admission asmts & post-discharge phone calls function

PLUS FUNCTIONS SETTINGS

☒ Enable Risk Level on Maintenance Register

☒ Use trainee course folders

☒ Use trainee in-service folders

☒ Auto-repeat additional year training at beginning of each year

☒ Allow hiding of staff in credentialling register only (not training)

☐ Enable Uppincott Training results updates

☐ Allow everyone access to H/O Doc Register (multisites)

☐ Allow everyone access to H/O Contractor Register (multisites)

☐ Send document register notification every time an approval is made

☒ Always show calendar year view in audit and maintenance schedules

☐ Use VMO register for doctor list [contact RiskClear to enable this]

Would you like to attach one or more credentialling re-application document(s) to VMO emails?

☐ No

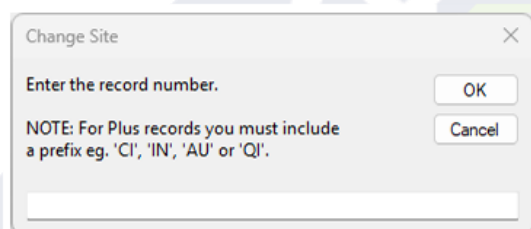
☒ Yes [Click here to open the VMO attached documents folder. All documents copied here will be attached to outgoing VMO credentialling.](#)

Close

6. HOW DO I CHANGE A RECORD TO A DIFFERENT SITE?

Step 1: Multiple site clients with Supervisor access can correct a record which has been created under the wrong site. This includes Plus records.

Go to **Setup Tab** > click the **Change Record site button** and the following dialog box appears



Change Site

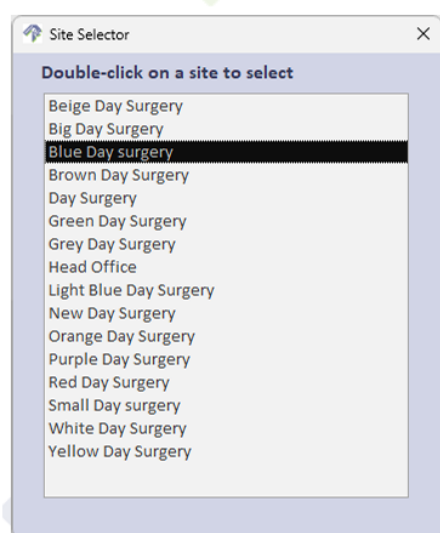
Enter the record number.

NOTE: For Plus records you must include a prefix eg. 'CI', 'IN', 'AU' or 'QI'.

OK Cancel

Step 2: Enter the risk, incident, or feedback record number in the dialog box. To adjust records from the Quality Tab, enter the prefix i.e CI, IN, AU or QI and the record number and click OK.

Step 3: The **Site Selector** will appear > double click the site you wish to *move the record* to.



Site Selector

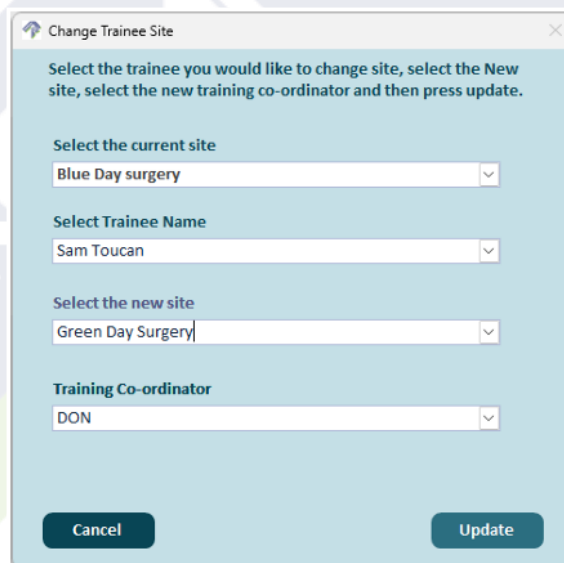
Double-click on a site to select

- Beige Day Surgery
- Big Day Surgery
- Blue Day surgery
- Brown Day Surgery
- Day Surgery
- Green Day Surgery
- Grey Day Surgery
- Head Office
- Light Blue Day Surgery
- New Day Surgery
- Orange Day Surgery
- Purple Day Surgery
- Red Day Surgery
- Small Day surgery
- White Day Surgery
- Yellow Day Surgery

A confirmation message will appear saying the move has been successful.

7. HOW DO I CHANGE A TRAINEE TO A DIFFERENT SITE?

Step 1: Go to the **Setup Tab** > click the **Change Trainee Site button** and the following panel will appear >



Change Trainee Site

Select the trainee you would like to change site, select the New site, select the new training co-ordinator and then press update.

Select the current site
Blue Day surgery

Select Trainee Name
Sam Toucan

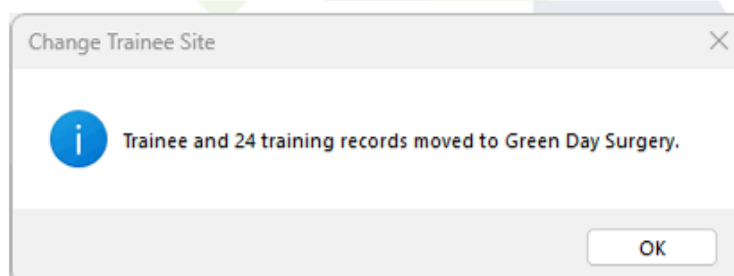
Select the new site
Green Day Surgery

Training Co-ordinator
DON

Cancel Update

Step 2: Select the **current** (incorrect) site, the **trainee's name**, the **site you'd like to move the trainee to**, and the **training coordinator** at the new site. Click **Update**.

>The following confirmation will appear indicating how many individual training records were successfully move for the trainee.



Change Trainee Site

i Trainee and 24 training records moved to Green Day Surgery.

OK

8. HOW DO I DO A BULK UPDATE?

When staff or contract details change you can bulk update the contact information and the notification lead time for all **VMO credentialing and certifications, staff certifications, contractor records and asset records**.

Step 1: If you have access, go to **Setup > Advanced > Bulk Updates** and the following screen will be displayed: (note the **Bulk updates help** link which takes you to help guide)

Advanced Setup

RiskClear Setup defaults (advanced use only)

Local Settings | General Settings | Risk/Incid Settings | Fback/Other Settings | **Bulk Updates** | Notifications | Auditor Login | Sentry Alerts | Permissions

If unsure about these functions, please contact RiskClear Support or click here: [Bulk updates help](#)

Bulk update facility contact details	Bulk update facility drop-down contact details	Bulk update days before and after details
Select field	Select field	Select Field
Enter new field value (blank will remove)	Select new position	Enter new day value
Update all	Update all	Update all

Close

Step 2: To update the **contact name** that appears in contractors and VMO scheduling, *select the relevant field from the first column and enter the name in the box below, click **Update all***

To update the **contact position** drop-down in the VMO, Staff Credentialling and Asset registers, *select the relevant field from the second column, select the new position from the drop-down box below and click **Update all***.

To update the **number of days** that notifications will be sent out before the due or expiry date, *select the relevant field from the drop-down in the third column, enter the new number of days before in the box below and click **Update All***.

Note > these functions will update all records and cannot be undone.

9. HOW DO I EDIT CREDENTIALLING CERTIFICATION ITEMS?

If you need to add/change staff certification items complete the following steps >

Step 1: Click **Setup** and a field update window appears

Step 2: Click **Staff Certification items**

Step 3: Type the new certification item **into the field** and click **Add**

Step 4: To remove any certification items that you no longer wish to have appear, simply **untick the display box alongside the item**.

Click **Close**.

The screenshot shows the RiskClear software interface. The main window is titled 'New Staff' and contains a table of staff members with their names, staff areas, certification types, and due dates. A 'Setup' button is located at the bottom left. A dropdown menu is open from the 'Setup' button, showing options: 'Staff Certification Items', 'Staff Areas', and 'Staff Details'. The 'Staff Certification Items' option is selected. A dialog box titled 'Add/Change Staff Certification Items' is open in the foreground. It has a text input field for a new description, an 'Add' button, and a list of existing certification items. Each item has two checkboxes: 'Confidential' and 'Display'. The 'Display' checkbox is currently unchecked for all items. A circled 3 points to the text input field, and a circled 4 points to the 'Display' checkbox for the 'Certification Item'.

Name	Staff Area	Cert Type Due	Cert Date Due	Open
Archie Zeke	Nursing	AHPRA Registration	21/03/2025	Open
Archibald Floofington	Nursing	AHPRA Registration	5/04/2025	Open
Beau Beginald	Nursing	AHPRA Registration	15/05/2025	Open
Ingrid Bergman	Housekeeping	Performance Appraisal	10/06/2025	Open
Sam Obsiwanya	Nursing	Reference Checks	5/10/2025	Open
Jasper Moraine	Bookings/Finance	AHPRA Registration	5/10/2025	Open
Hudson Budge	Nursing	AHPRA Registration	28/02/2026	Open
Trent Crimm				
Baxter White				
Roy Kent				
Ted Lasso				
Hugo Flynn				
**Giselle Latta				

Description	Confidential	Display
Add specific certifications here.....	☐	☒
AHPRA Registration	☐	☒
Annual Review	☐	☒
Bullying & Harrassment	☐	☒
Certification Item	☐	☐
Contract	☐	☒
Covid 19 Vaccine	☐	☒
Covid Vaccination	☒	☒
CPD	☐	☒
Fghsdgsdf	☐	☐
GISA	☐	☒
Immunisations	☒	☒

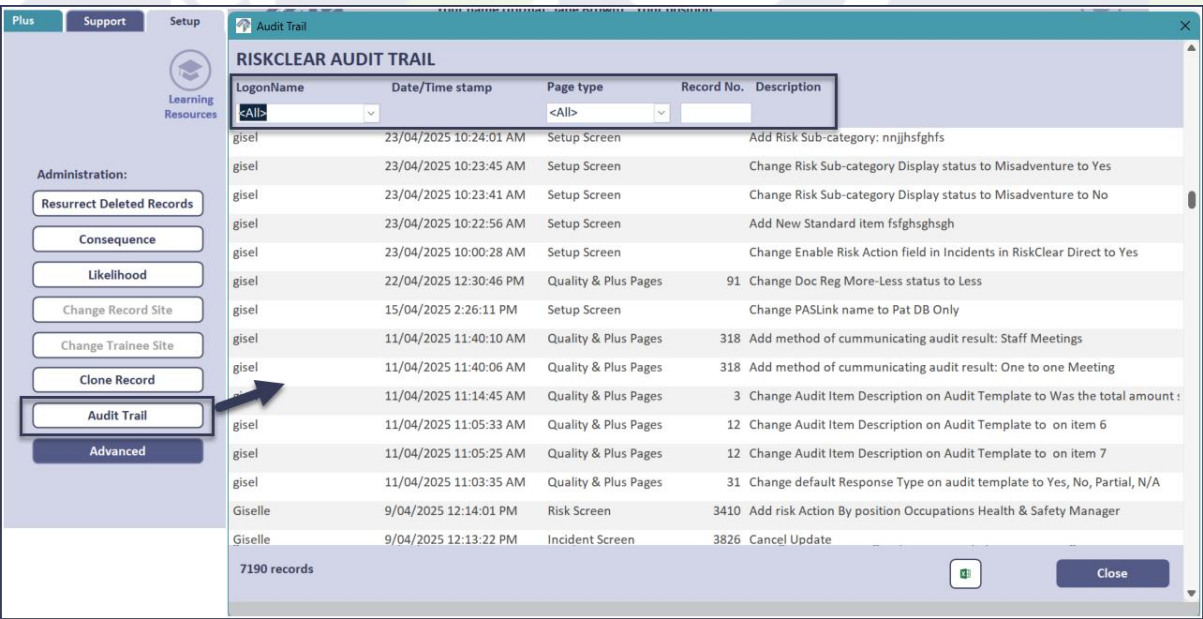
10. IS THERE AN AUDIT TRAIL?

Providing you have RiskClear administrator access, you can view all record entries by clicking **View Audit Trail** button. The Audit Trail displays details of all updates made by users of RiskClear. The listing can be filtered by Logon Identifier and/or page name. If you wish to view details for a specific record, this can be keyed in the Record No. box.

Step 1: Go to **Setup Tab**

Step 2: Click on **Audit Trail**

Step 3: Use **drop-downs** to filter information e.g., by login, page/record type



If you wish to export records to an Excel file, click the **Excel icon** at the bottom right-hand corner of the screen

