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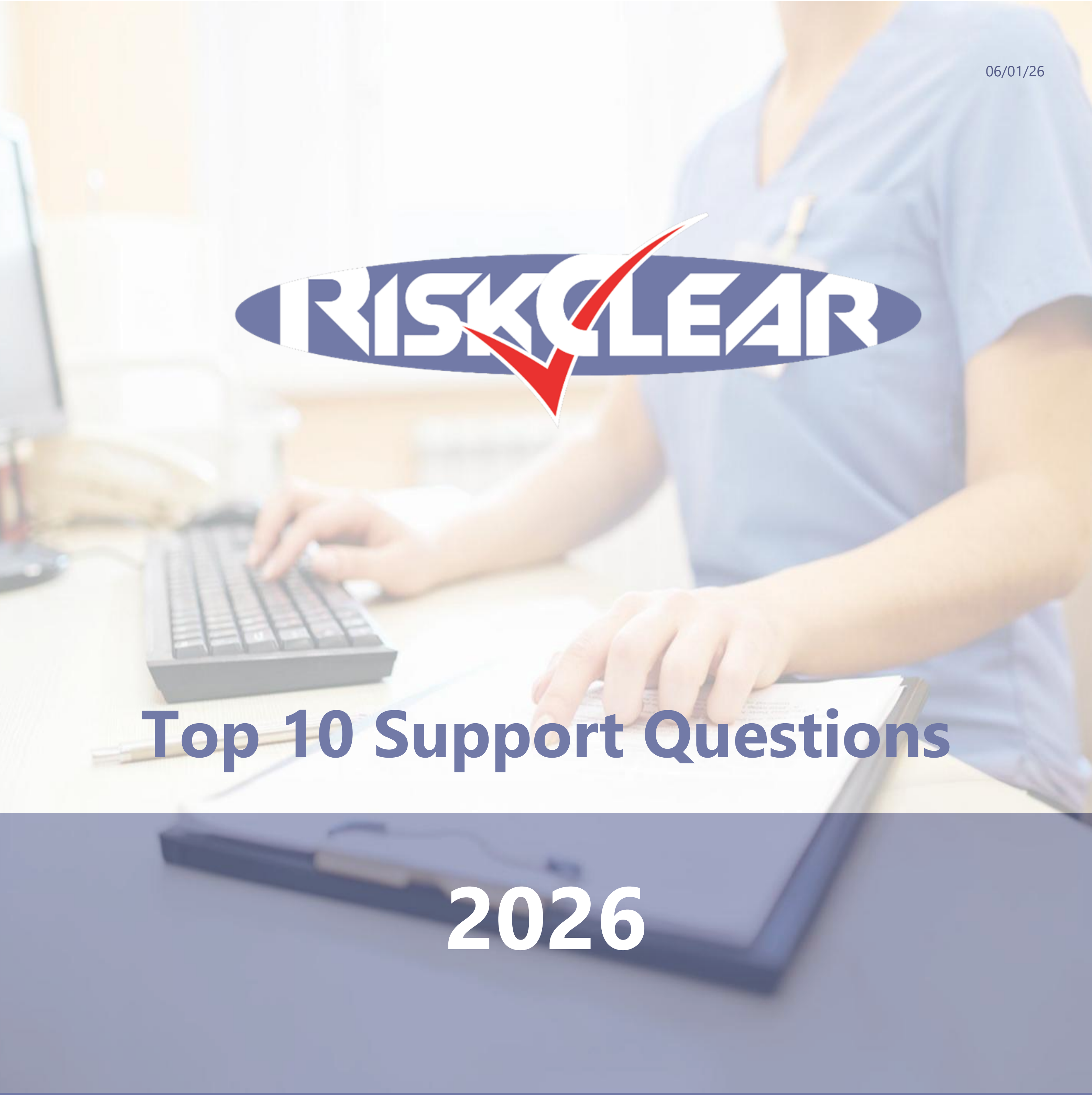

Top 10 Support Questions

2026

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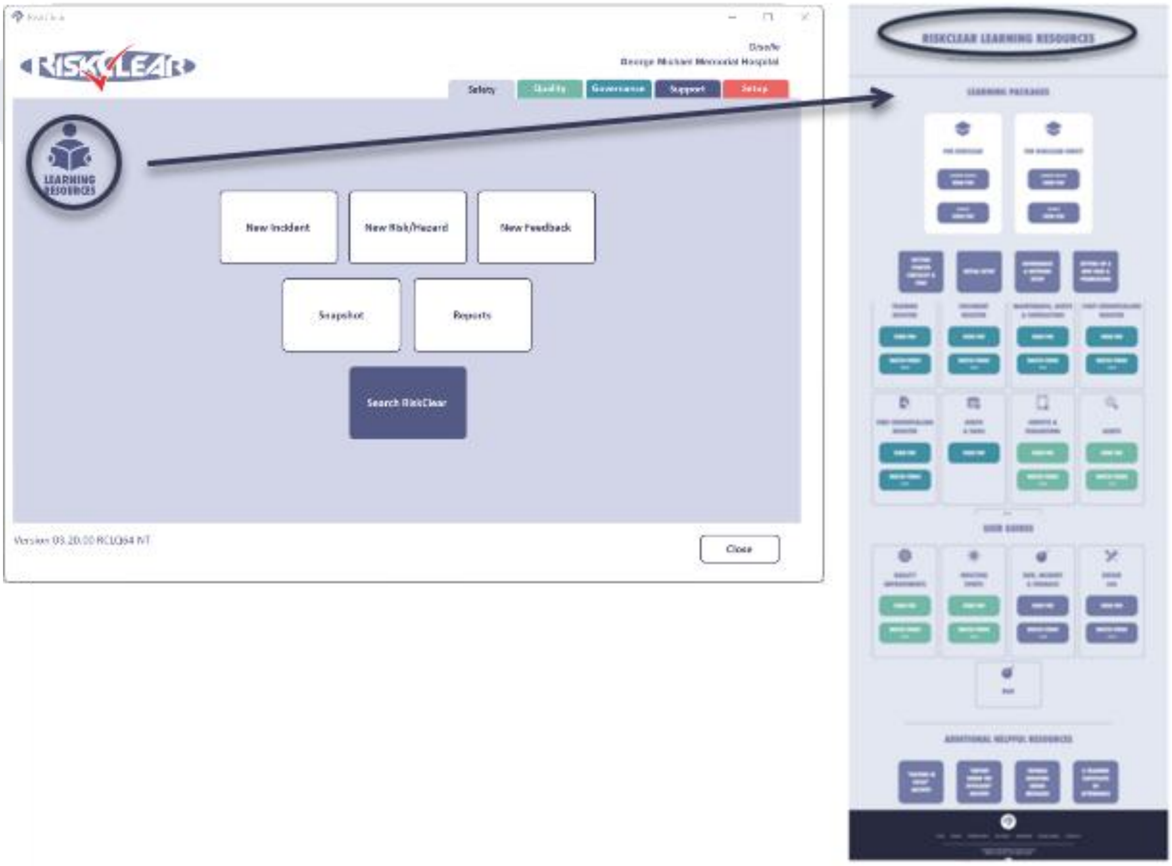
CONTENTS

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.

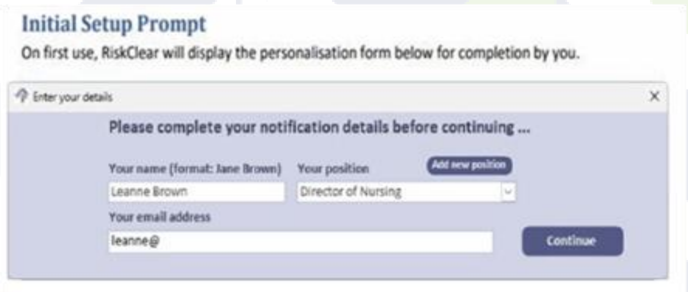
For further details or information please refer to our Learning Resources > User Guides.



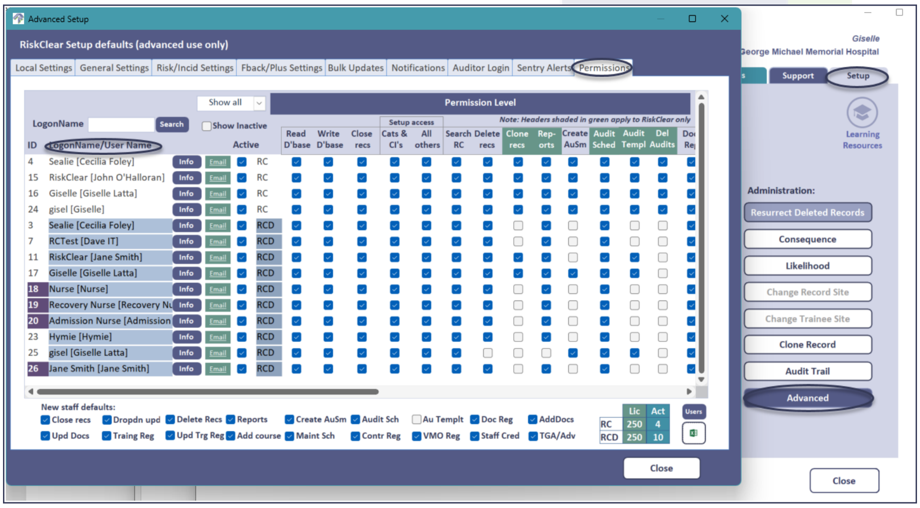
HOW DO I SETUP A NEW USER?

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.



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.

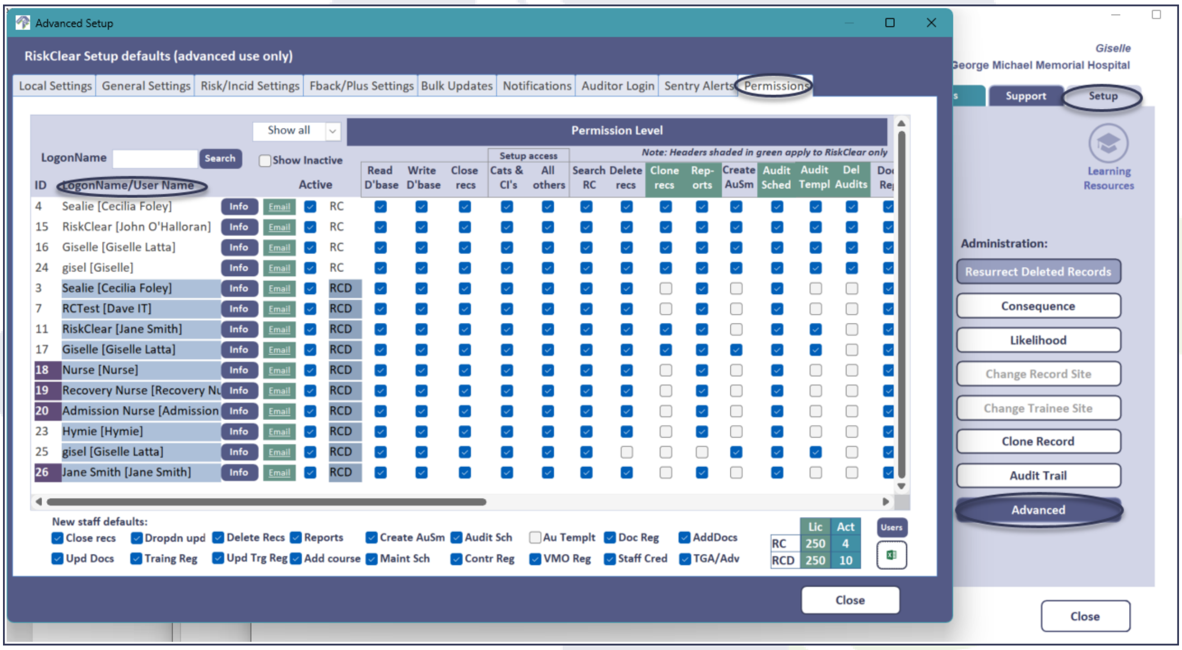


Please refer also to the **New User & Permissions Guide** available via our 

2. HOW DO I DEACTIVATE A USER?

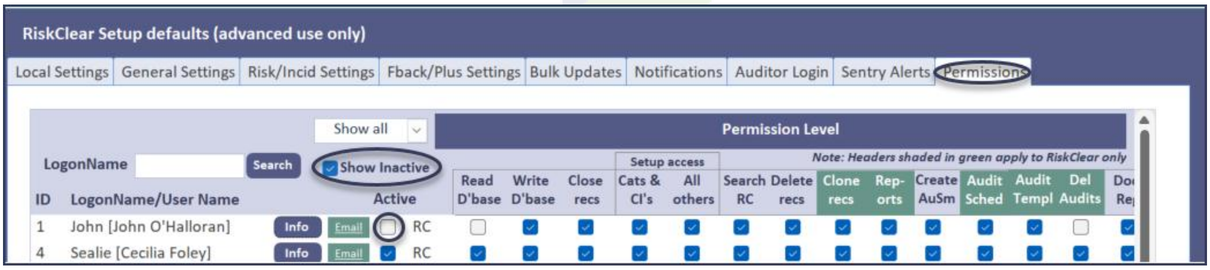
Step 1: The DON/Quality Manager (or senior staff member that has access to Permissions) needs to go to the **Setup Tab > Advanced > Permission** and find the user in the list.

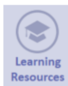
Step 2: Untick the active button alongside the users name.



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.

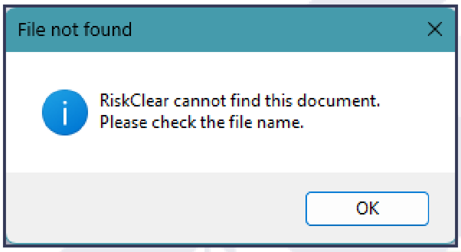


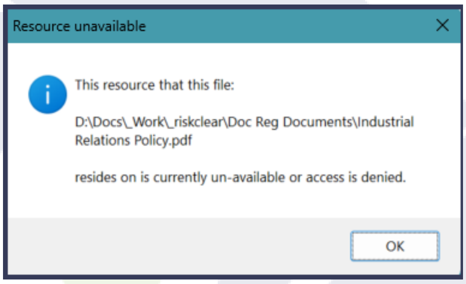
Please refer also to the **New User & Permissions Guide** available via our 

3. HOW DO I FIX A BROKEN LINK?

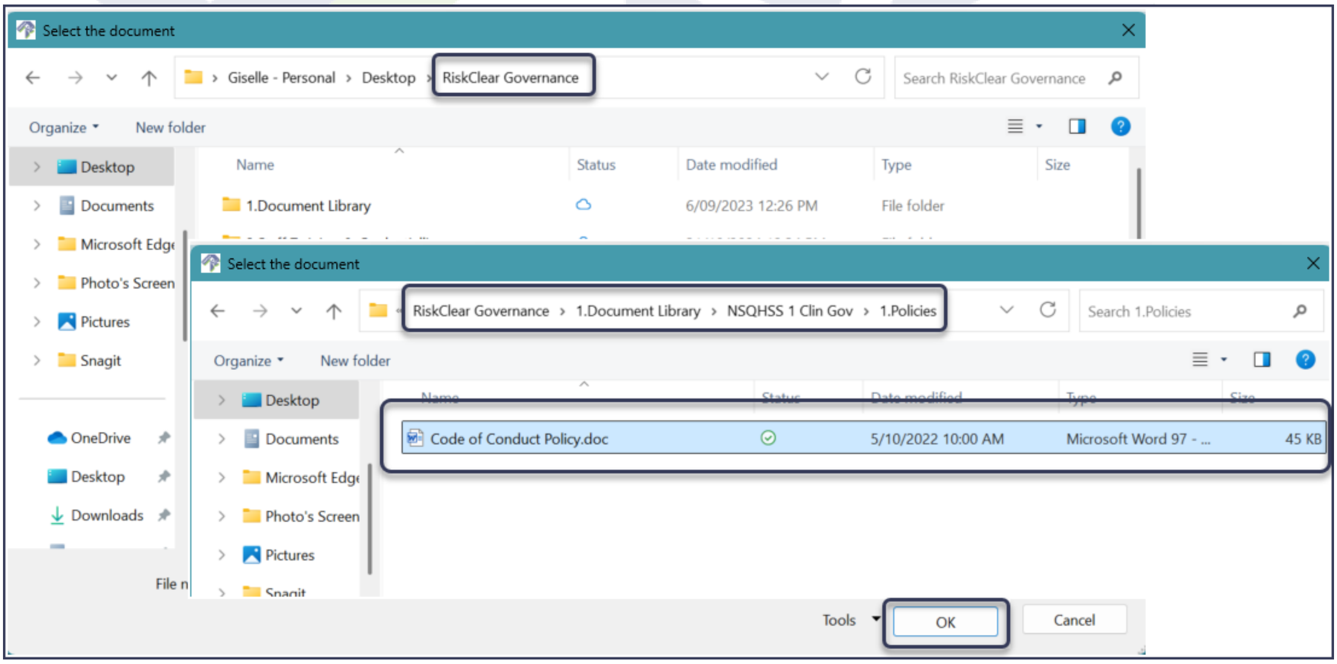
If you receive either of these messages when trying to access a document/file/resource in RiskClear >

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.*

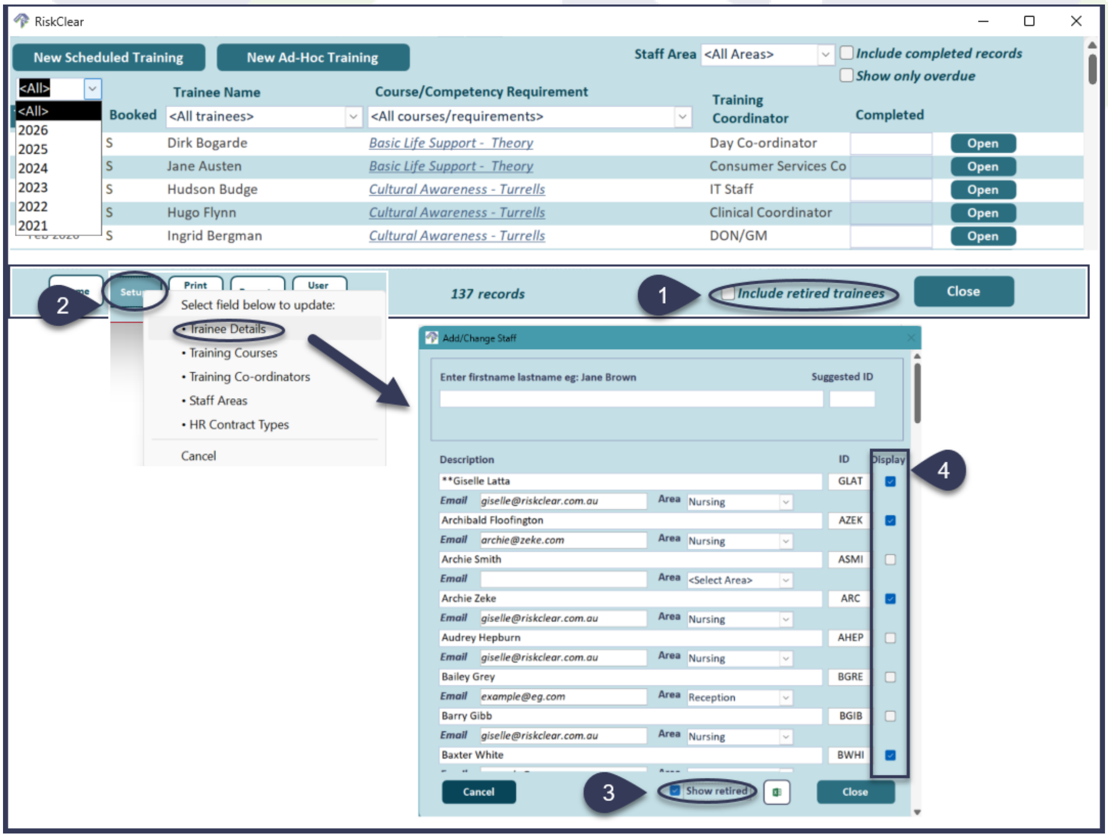
If you are trying to find a trainee/record that are currently not showing in the **Trainee Name** dropdown or Register check the following to problem solve >

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

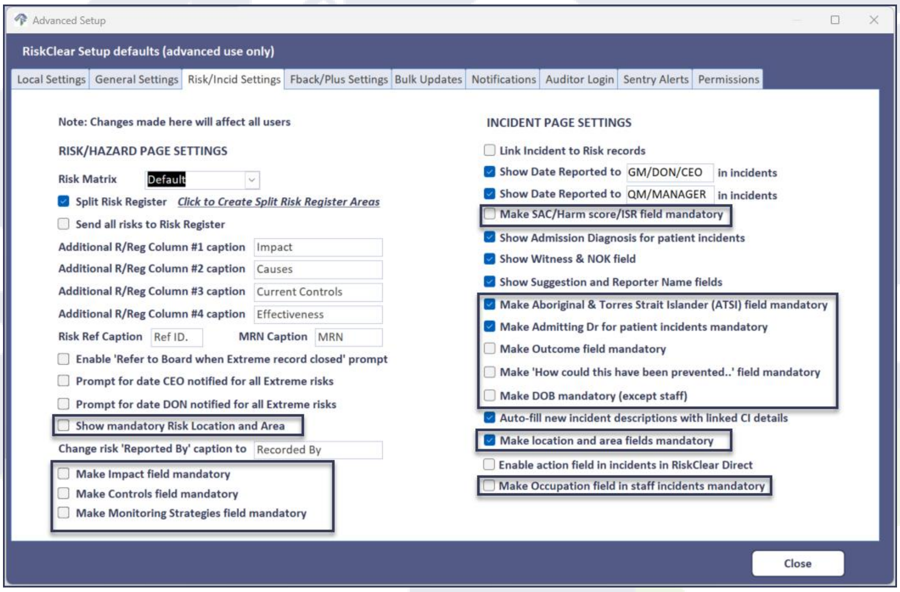


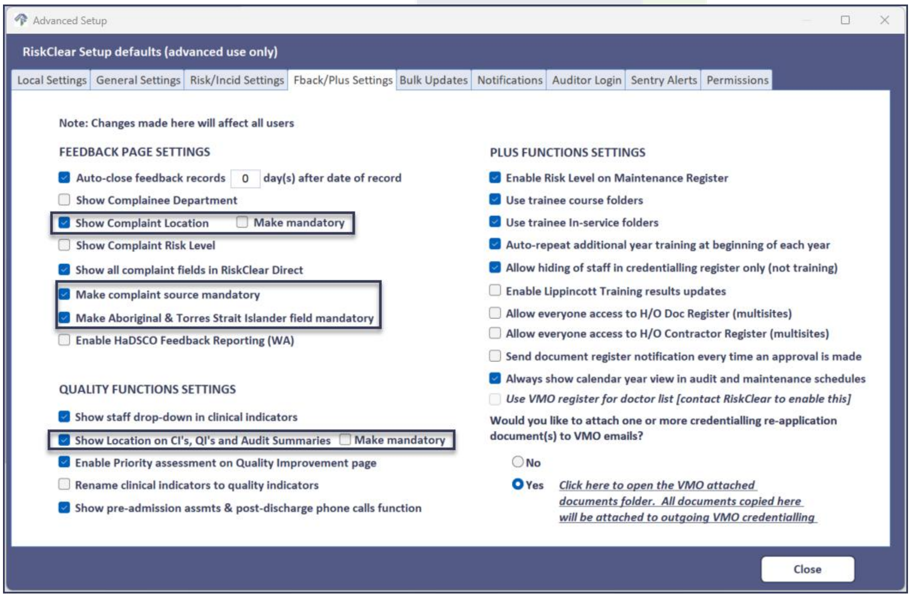
5. HOW DO I MAKE A FIELD MANDATORY?

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.

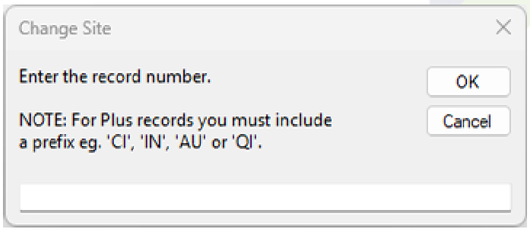




6. HOW DO I CHANGE A RECORD TO A DIFFERENT SITE?

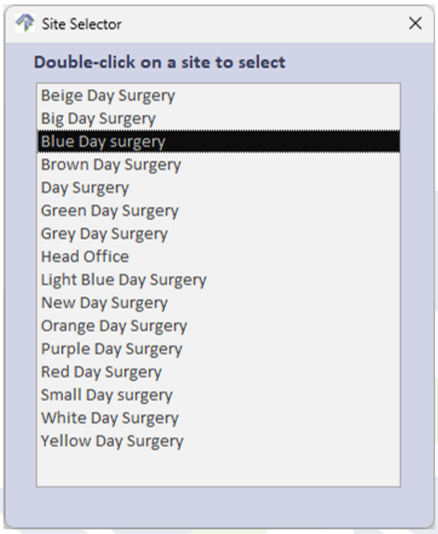
Step 1: Multiple site clients with Supervisor access can correct a record which has been created under the wrong site. This includes Plus records.

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



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.

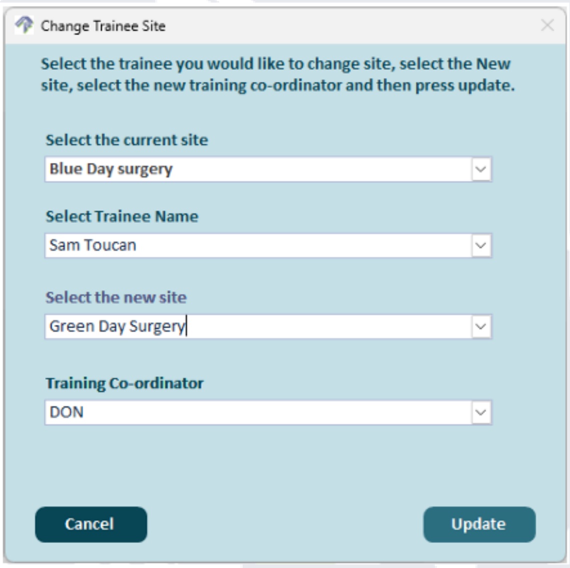
Step 3: The ***Site Selector*** will appear > double click the site you wish to *move the record* to.



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

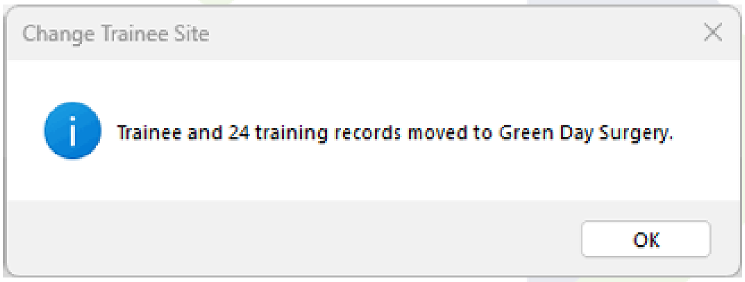
7. HOW DO I CHANGE A TRAINEE TO A DIFFERENT SITE?

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



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.***

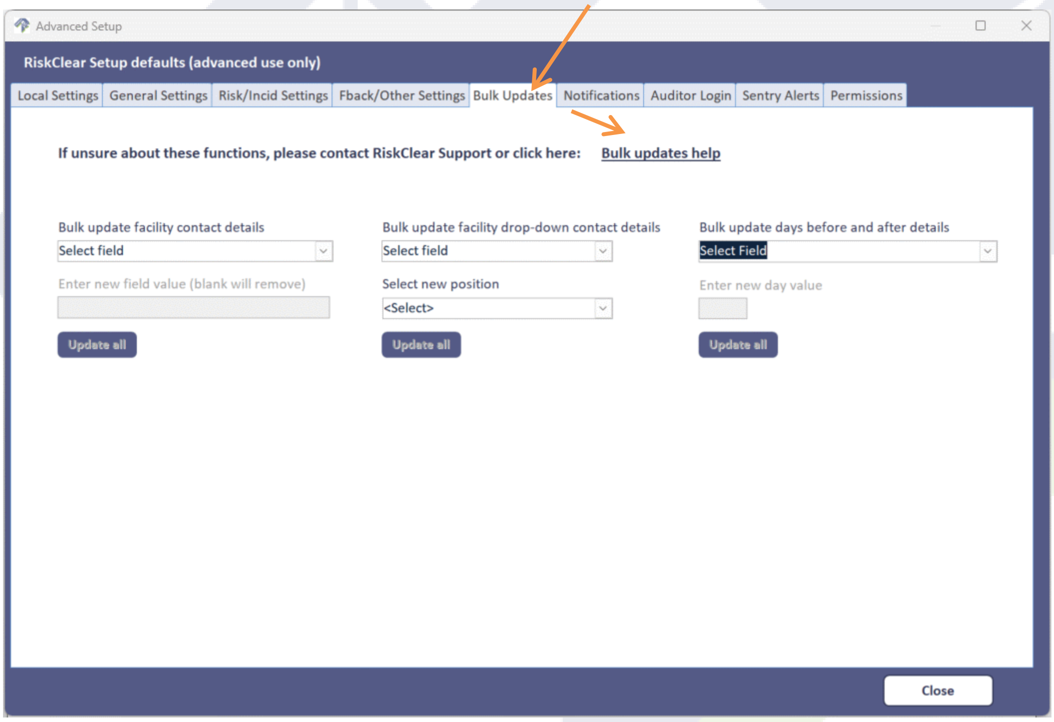
>The following confirmation will appear indicating how many individual training records were successfully move for the trainee.



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)



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 >

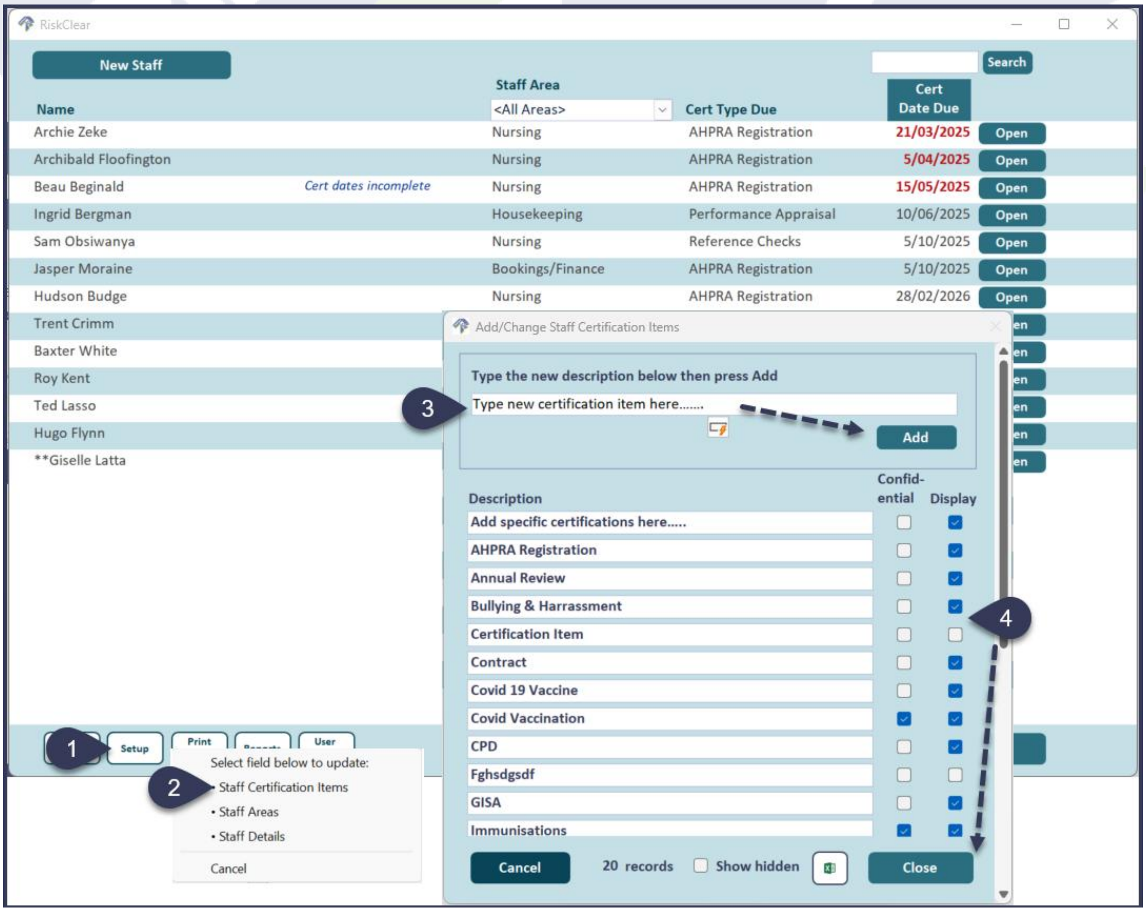
Step 1: Click ***Setup*** and a field update window appears

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.***



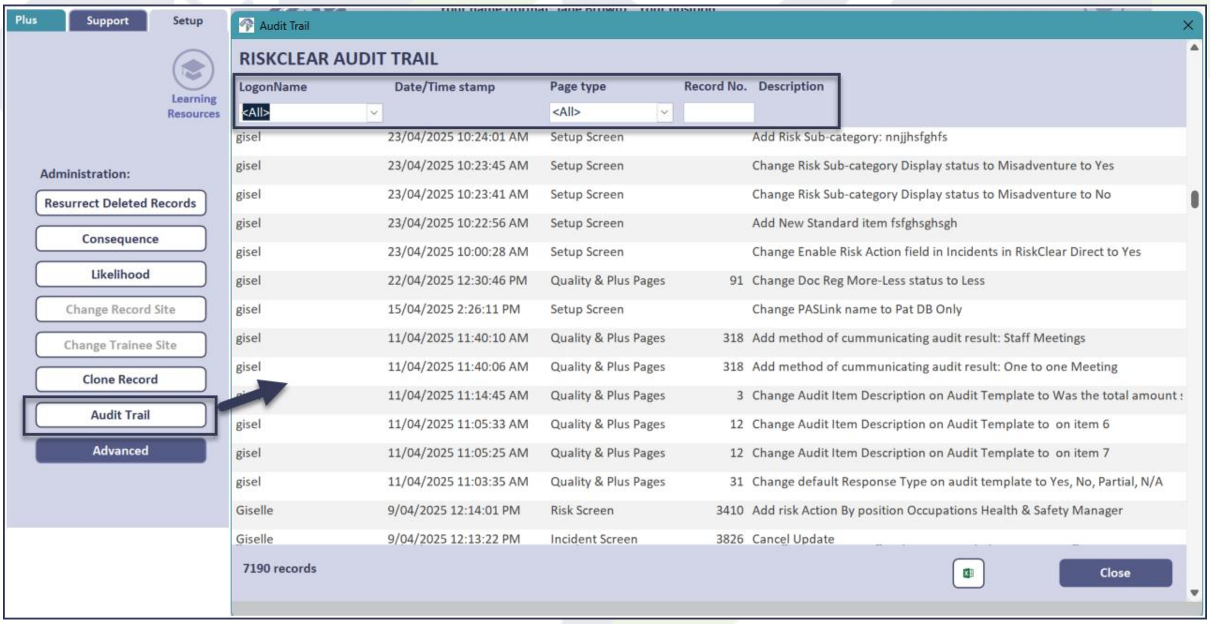
10. IS THERE AN AUDIT TRAIL?

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