



SETTING UP A NEW USER & PERMISSIONS | User Guide

2026

Written by Giselle Latta (RN)



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3 STEPS

TO SET UP A NEW RISKCLEAR OR RISKCLEAR DIRECT USER

STEP ONE: When you have determined a new staff member needs access to **RiskClear** (usually Managers/Senior Staff) or **RiskClear Direct** (usually general nursing and admin staff) - let **your IT provider know**, and if not already installed, have **RiskClear or RiskClear Direct** installed for these new staff.



or



Once installed they will then be able to see the RiskClear Icon or RiskClear Direct Icon on their computer desktop.

STEP TWO: Now the new user can click on the **RiskClear or RiskClear Direct** Icon on their desktop. Once they do, a prompt will appear asking them to **enter their name, position, and email** (once off process)

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@hospital.com.au

Continue

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 **eg.** Jane Brown.

Select your position from the drop-down box, enter your email address then click the "Continue ..." button to open RiskClear.

If your position is not in the list, click the "Add new position" button and enter your position (role) in the box that appears and press "OK".

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.

On first use, RiskClear Direct will display the personalisation form below for completion by the individual staff member:

Enter your details

Please complete your notification details before continuing ...

Your name (format: Jane Brown) Your position Add new position

Leanne Brown Nursing

Your email address

leanne@hospital.com.au

Continue

These fields will be used to identify you so that the person who completes your record in RiskClear can contact you to give feedback or ask for information relating to the record.

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

Select your position from the drop-down box, enter your email address then click the "Continue ..." button to open RiskClear Direct.

If your position is not in the list, click the "Add new position" button and enter your position (role) in the box that appears and then press "OK".

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.

STEP THREE: They will now be a **registered RiskClear or RiskClear Direct user**, and the **System Admin (usually DON/GM/Quality Coordinator)** can go to **Setup>Advanced > Permissions** and see the new staff member listed – where upon they can assign permissions/access for this person based on their roles and responsibilities. **Please refer to Pages 2 & 3 for further details on Permission access and Permission types.**

Checking whether an EXISTING Staff Member has had prior RiskClear or RiskClear Direct Access / Deactivated user error

There may be instances where a staff member had access to RiskClear or RiskClear Direct and no longer does but needs to have it reactivated. To check if this is the case follow the 4 steps as shown also on the diagram below (and or refer to the **How do activate and deactivate users?** [Link circled below](#))

STEP ONE: Go to Setup Tab > Advanced > **Permissions**

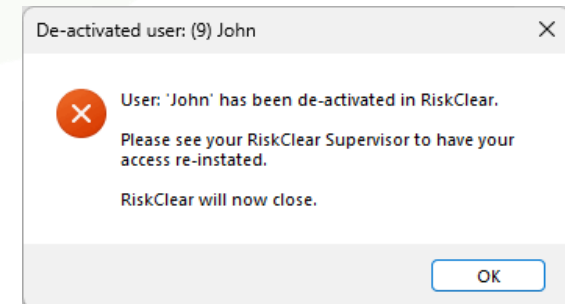
STEP TWO: Tick the **Show Inactive** box (circled)

***STEP THREE:** Type the staff members name into the **search** field

STEP FOUR If the staff members name appears, tick the **Active** box

If this **error message** (below) appears it would indicate the user has once had access but has been deactivated. To make them active again follow **Steps 1-4 also**.

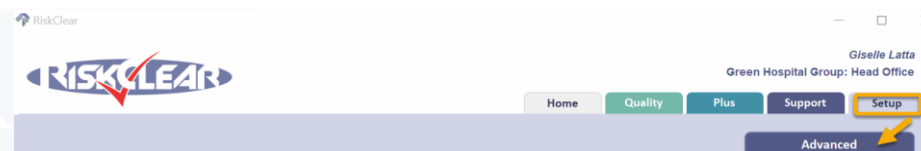
*If you experience trouble locating the name in the permissions list, use the ID column (click to sort) instead and match it with the number appearing in the error dialogue box)





To access **Permissions** – go to the **Setup Tab** and click on **Advanced** >

Click on the **Permissions Tab** to display the screen below (see page 3 for details pertaining to this diagram):



Advanced Setup

RiskClear Setup defaults (advanced use only)

Local Settings General Settings Risk/Incident Settings Fback/Plus Settings Notifications Auditor Login Sentry Alerts Permissions

LogonName Search ☐ Show Inactive

Permission Level

Note: Headers shaded in green apply to RiskClear only

ID	LogonName/User Name	Active	Read D/base	Write D/base	Close Recs	Cats & CI's	All others	Search RC	Delete Recs	Clone Recs	Reports	Create AuSm	Audit Sched	Audit Templ	Del Audits	Doc Reg	Add Docs	Upd Docs	Trg Reg	Upd Trg	Add course	Maint Sched	Asset Reg	Repair Log	Contr Reg	VMO Cred	Staff Cred	TGA/Advis.	HR Access	Remv Audits	Super-visor	Alloc Access	Confid Recs	Security miss'ns	Pass-words	Mand PW
1	John [John O'Halloran]	Info Email	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
16	Giselle [Giselle Latta]	Info Email	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
21	Hymie [Hymie]	Info Email	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
24	gisel [QSM]	Info Email	RC	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
2	Jane Brown []	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
7	RCTest [Dave IT]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Reset	☒
8	RiskClearX [John O'Halloran]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
11	RiskClear [Jane Smith]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
12	John [John]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Create	☒
17	Giselle [Giselle Latta]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Reset	☒
18	Nurse [Nurse]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Reset	☒
19	Recovery Nurse [Recovery N]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Reset	☒
20	Admission Nurse [Admission N]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Reset	☒
22	Jack Black [Jack Black]	Info Email	RCD	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Reset	☒

New staff defaults:

☒ Close Recs ☒ Dropdn Upd ☒ Delete Recs ☒ Reports ☒ Create AuSm ☒ Audit Sch ☐ Au Templ ☒ Doc Reg ☒ Add Docs

☐ Upd Docs ☒ Traing Reg ☐ Upd Trg Reg ☒ Add course ☒ Maint Sch ☒ Contr Reg ☒ VMO Reg ☒ Staff Cred ☒ TGA/Adv

How do I activate and deactivate users?

User Table displays licenced users in green and active users in teal for RiskClear (RC) and RiskClear Direct (RCD)

Multi-site clients can manage single, second and all site access here and also move staff

Is where RiskClear & RiskClear Direct Users are listed and assigned permissions (access) based on their roles and responsibilities

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RiskClear staff will usually set up one user with access to the '**Permissions**' tab when installing RiskClear for the first time. From here, *permissions can be set for all users*.

Refer to Numbers on Permissions Diagram provided (above):

(1) 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 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.

(2) Search users here and view inactive users, tick the **(3) Show Inactive** box near the top of the page.

(4) Passwords - Staff can create and change their password in RiskClear/RCD. The default 'newpassword' password can also be setup here by clicking the **"Create"** button. This button will show the caption **"Reset"** where a password has already been set. If staff forget their password, it can be reset to 'newpassword' by clicking this button and selecting **"Reset password"** from the popup menu. The user will then need to change their password when they next open RiskClear/RCD. If you would like to remove the password, click the **"Reset"** button and select **"Clear password"** from the pop-up menu.

The **(5) New Staff defaults**, can be ticked as default settings for new RiskClear (RC) and RiskClear Direct (RCD) users to automatically receive when they first open RiskClear/RiskClear Direct.

Staff who have their own Windows login will appear on this list immediately they log into RiskClear/RCD for the first time



Click the **(6) Excel logo** to export the permissions list into an Excel spreadsheet.

(7) Multi-site Clients can manage single, second and all site access here and move staff between sites.

Note > the **How do activate and deactivate users?** [Link](#) > which takes you to a guide to step you through this.

**PERMISSION TYPES:**

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
SETUP ACCESS: CATs & CIs	Tick to allow users to update risk, incident and complaint categories/subcategories, clinical indicators and clinical indicator groups
SETUP ACCESS: 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
TRAINING 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
VMO REG	Tick to allow access to the VMO Credentialing Register (NA in Aged Care)
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

EXAMPLES (ONLY) OF PERMISSION SETTINGS BASED ON ROLE:

Depending on the size and scope of your hospital/site and the governance/role structure, permissions will vary.

Director of Nursing: all permissions > tick every box (except *all sites unless applicable)

Senior Management: > tick every box except Add Course, Remv Audits, Supervisor, All Sites

Quality Coordinator: all permissions > tick every box (except *all sites unless applicable)

General Staff: > tick every box except Dropdn update, Clone record, Delete Records, Add Docs, Add Course, Remv Audits, Supervisor, Set Permiss'ns, All sites