



# TRAINING REGISTER | User Guide

**2026**

Written by Giselle Latta (RN)



[www.riskclear.com.au](http://www.riskclear.com.au)

© RiskClear 2014-2026

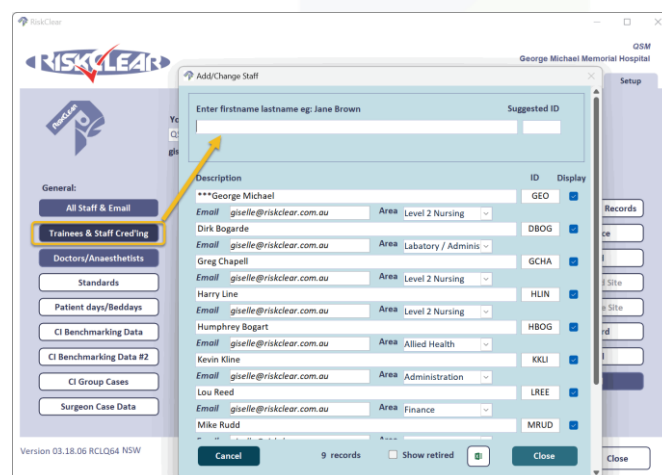
# INTRODUCTION

Staff Training (mandatory and other) can be administered from the **Training Register**. The Training Register and Staff Credentialling Register both use staff records, so any staff members entered into the Staff Credentialling Register will also appear in the Training Register. *Feel free to skip to the QUICK GUIDE if you'd prefer.*

The **Training Register** is found on the **Governance Tab** of Risk Clear.



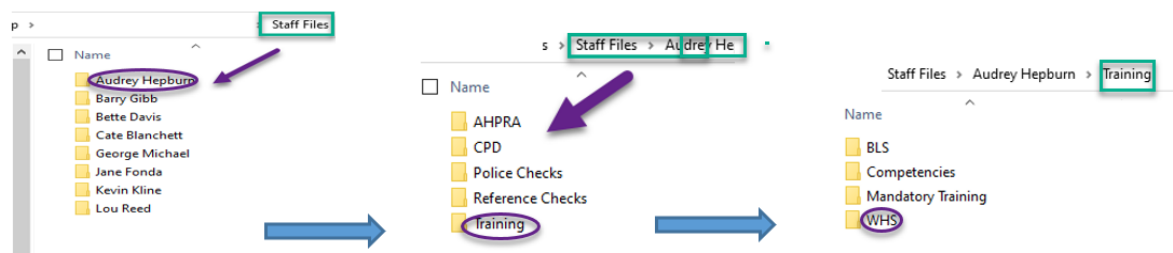
Unlike other functions in RiskClear, the training register utilises trainee people names rather than positions. These can be **registered as you create new training** entries. **Alternatively**, you can also go to the Setup Tab, click on **Trainees & Staff Cred'ing** and add your staff here (see below).



## SETTING UP TRAINING FOLDERS ON YOUR NETWORK

You will need to determine where **on your secure network** your Staff Training Folders will be situated. This location will be where you can save your staff members training evidence (e.g. certificates, completed competencies etc). Below is an example set up of staff training folders and subfolders on your network:

**Staff Training Folders on a secure network: (S)/Staff Training/Staff Files/Audrey Hepburn/WHS**



Once you have your Training Folders (and subfolders) for each staff member set up you can then start to link these folders to RiskClear for ease of access.

## UTILISING THE TRAINING REGISTER ON RISK CLEAR

### FEATURES

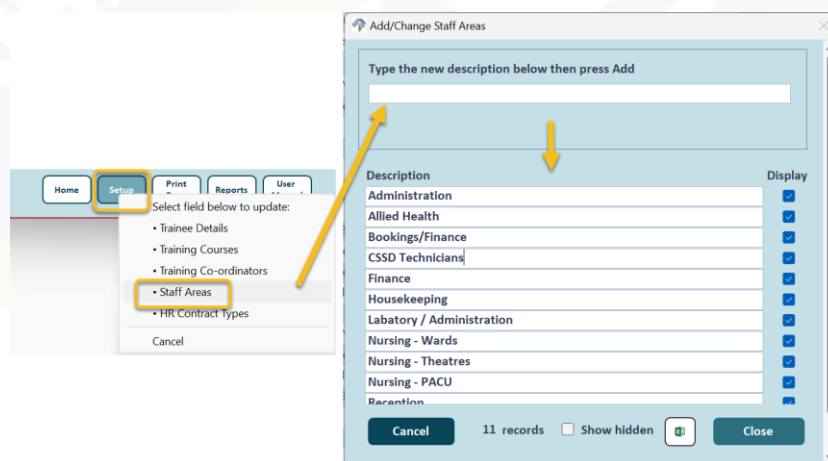
To open the register, click on the **Training Register** button on the Governance menu to display the following panel. Please note, you will not see staff listed here until they are allocated to courses. Staff are registered as you create training entries – see page 5.

| New Scheduled Training |               | New Ad-Hoc Training |                | Staff Area                         | <All Areas>            | <input type="checkbox"/> Include completed records | <input type="checkbox"/> Show only overdue |
|------------------------|---------------|---------------------|----------------|------------------------------------|------------------------|----------------------------------------------------|--------------------------------------------|
| <All>                  | Training Date | Booked              | Trainee Name   | Course/Competency Requirement      | Training Coordinator   | Completed                                          |                                            |
|                        | Nov 2027      | S                   | Sam Obsiwanya  | Basic Life Support - Theory        | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Ted Lasso      | Basic Life Support - Theory        | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Trent Crimm    | Basic Life Support - Theory        | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Baxter White   | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Beau Beginald  | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Aug 2026      | S                   | Callie Torres  | Cultural Awareness - Turrells      | Clinical Health Team   |                                                    | Open                                       |
|                        | Nov 2025      | S                   | Gypsy Rose     | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Gypsy Rose     | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Hudson Budge   | Cultural Awareness - Turrells      | IT Staff               |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Hugo Flynn     | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Jasper Moraine | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Roy Kent       | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Sam Obsiwanya  | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2025      | S                   | Sam Obsiwanya  | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Ted Lasso      | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2025      | S                   | Trent Crimm    | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Nov 2027      | S                   | Trent Crimm    | Cultural Awareness - Turrells      | Clinical Coordinator   |                                                    | Open                                       |
|                        | Feb 2027      | S                   | Baxter White   | Donning & Doffing - PPE Competency | Clinical Coordinator   |                                                    | Open                                       |
|                        | Feb 2026      | S                   | Baxter White   | Donning & Doffing - PPE Competency | Clinical Coordinator   |                                                    | Open                                       |
|                        | Feb 2027      | S                   | Beau Beginald  | Donning & Doffing - PPE Competency | Clinical Coordinator   |                                                    | Open                                       |
|                        | Feb 2026      | S                   | Beau Beginald  | Donning & Doffing - PPE Competency | Clinical Coordinator   |                                                    | Open                                       |
|                        | Feb 2026      | S                   | Darcy Blue     | Donning & Doffing - PPE Competency | Clinical Coordinator   |                                                    | Open                                       |
|                        | Feb 2027      | S                   | Darcy Blue     | Donning & Doffing - PPE Competency | Clinical Coordinator   |                                                    | Open                                       |
|                        | Mar 2026      | S                   | Ginger Rogers  | Donning & Doffing - PPE Competency | Infection Control Nurs |                                                    | Open                                       |

The training list shows all **staff** and all their **training courses** sorted by the **training date**, earliest first. The list can be filtered by the **trainee's name and course/training requirement**. You can also look at "All" or Training by Year. You can also filter by **Staff Areas** such as a group or Cohort of staff types. Completed and retired records can also be shown by placing a tick in the boxes above and below the list, respectively. The '**S**' next to the date indicates that the training entry is a '**Scheduled**' entry which repeats on a schedule as opposed to a once-off training entry. The training date will either appear as a month/year if it has been allocated to a month, or a specific date if it has been booked. The training date will be shown in **red if overdue**. You can also filter by ticking '**Active Trainee**'.

If you wish, you can group your trainees into areas of the hospital. This will enable you to filter the training main list by using the "Hospital Areas" drop-down at the top of the page. A similar filter also exists on the reports page to use when running reports.

To **add Staff Areas**, click the Setup button at the bottom of the page and select "Staff Areas" and add the various staff areas/cohorts that exist in your health service. For example, Nursing Wards, Nursing Theatres, Administration, Allied Health, Finance etc.



To allocate staff to these areas, press the Setup button again, select "Trainee Details" and select from the "Area" dropdown for each staff member

If you have access, click the "**Setup**" button to add new trainees, training co-ordinators or course names.

You can **Print, Preview, Email, Save as PDF to desktop**, or **Save as Excel to desktop** by clicking the "**Print Page**" button and selecting the relevant option.

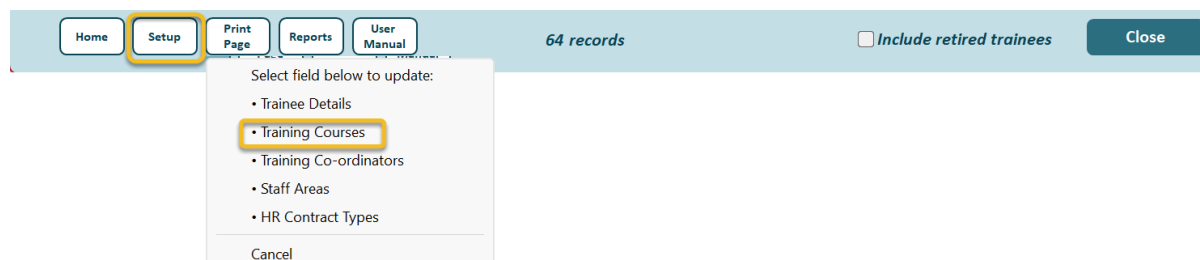
Clicking the "**Reports**" button will take you to the RiskClear Reports section. When finished with reports, you will be taken back to the Training Register page.

To mark the record as completed, you can enter the date directly on the list. Double-click to insert today's date.

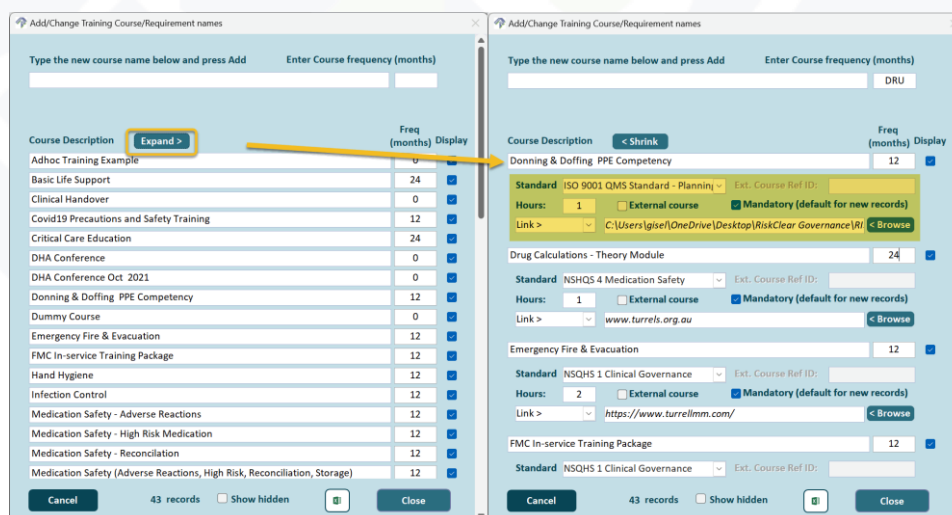
Training can be entered either on a recurring schedule or as a once-off.

## ADDING TRAINING COURSES

To add a new training course, **click the Setup** button at the bottom of the Training Main List/Screen and select **"Training Courses"**.



The following dialog window will be displayed – click on **expand** which will show more **specific details about the course** and any **links** (website/documents can be setup here).



To add the new course, enter the course name in the blank box at the top and then click the **"Add"** button.

Your new course will be added to the list. Scroll to find your new course and note the fields below the entry when you click on **Expand**:

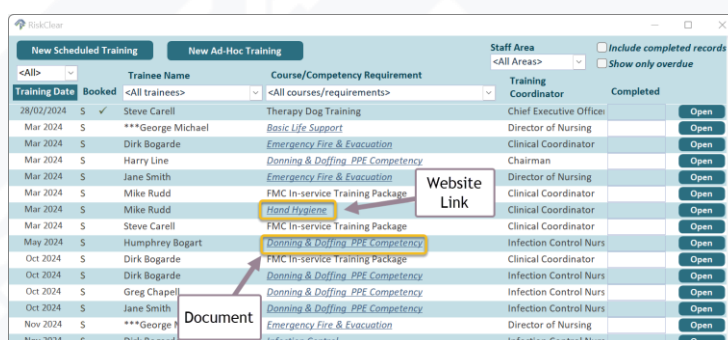
**Standard:** Select the NSQHS standard which applies.

**Tick** whether it's a **mandatory course**. Most health service organisations will have a suite of mandatory courses that all staff need to complete and then additional training that is orientated around the individual staff members role and responsibilities.

**External course:** If the course is an external course, then tick this box. Various reports can be run on external courses only by using a filter for that report.

**Hours:** Enter the time in hours that this course takes. Half hour or quarter hour periods can be entered by using .50 or .25, respectively. Reports can then be run showing number of hours each trainee has completed, or the time spent on each course.

**Link:** Use the “**Browse**” button or directly enter the link to an internet resource (**e.g. highlighted in diagram above**), internal software, or other resources such as Competencies/Learning Packages (**highlighted in diagram above**) on the hospital network. This will enable that resource to be opened by **clicking the course name on the main list**. **This link will also be included in the notification email for the staff member to access/complete.**



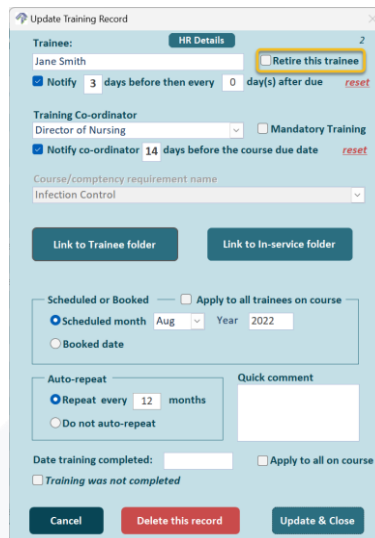
| Training Date | Booked | Trainee Name      | Course/Competency Requirement    | Training Coordinator    | Completed |
|---------------|--------|-------------------|----------------------------------|-------------------------|-----------|
| 28/02/2024    | S      | Steve Carell      | Therapy Dog Training             | Chief Executive Officer | Open      |
| Mar 2024      | S      | ***George Michael | Basic Life Support               | Director of Nursing     | Open      |
| Mar 2024      | S      | Dirk Bogarde      | Emergency Fire & Evacuation      | Clinical Coordinator    | Open      |
| Mar 2024      | S      | Harry Line        | Donning & Doffing PPE Competency | Chairman                | Open      |
| Mar 2024      | S      | Jane Smith        | Emergency Fire & Evacuation      | Director of Nursing     | Open      |
| Mar 2024      | S      | Mike Rudd         | FMC In-service Training Package  | Clinical Coordinator    | Open      |
| Mar 2024      | S      | Mike Rudd         | Hand Hygiene                     | Clinical Coordinator    | Open      |
| Mar 2024      | S      | Steve Carell      | FMC In-service Training Package  | Clinical Coordinator    | Open      |
| May 2024      | S      | Humphrey Bogart   | Donning & Doffing PPE Competency | Infection Control Nurs  | Open      |
| Oct 2024      | S      | Dirk Bogarde      | FMC In-service Training Package  | Clinical Coordinator    | Open      |
| Oct 2024      | S      | Dirk Bogarde      | Donning & Doffing PPE Competency | Infection Control Nurs  | Open      |
| Oct 2024      | S      | Greg Chapel       | Donning & Doffing PPE Competency | Infection Control Nurs  | Open      |
| Oct 2024      | S      | Jane Smith        | Donning & Doffing PPE Competency | Infection Control Nurs  | Open      |
| Nov 2024      | S      | ***George         | Emergency Fire & Evacuation      | Director of Nursing     | Open      |
| Nov 2024      | S      | Dirk Bogarde      | Infection Control                | Infection Control Nurs  | Open      |

If you wish to have the resource document attached to the notification email for use by the trainee, enter the network path to the document and change the **Link** drop-down to **Doc Attach**. This will only work for documents of 2 Megabytes in size or less which are situated on your hospital’s network. The “Doc Attach” link cannot be an internet link.

**Show hidden:** Place a tick in this box to include discontinued courses in the list.

To export this list to an **Excel** file, click the Excel icon to the right of the Show hidden field.

You can also **de-activate staff** by removing the tick from the “**Active**” box at the bottom of the screen. As the training and staff credentialing registers are linked, this will also retire the staff member from the training register, and vice-versa.



**Update Training Record**

Trainee: Jane Smith Retire this trainee

☒ Notify 3 days before then every 0 day(s) after due reset

Training Co-ordinator: Director of Nursing Mandatory Training

☒ Notify co-ordinator: 14 days before the course due date reset

Course/competency requirement name: Infection Control

Link to Trainee folder Link to In-service folder

Scheduled or Booked ☐ Apply to all trainees on course

☒ Scheduled month: Aug Year: 2022

☐ Booked date

Auto-repeat: ☒ Repeat every 12 months ☐ Do not auto-repeat

Quick comment

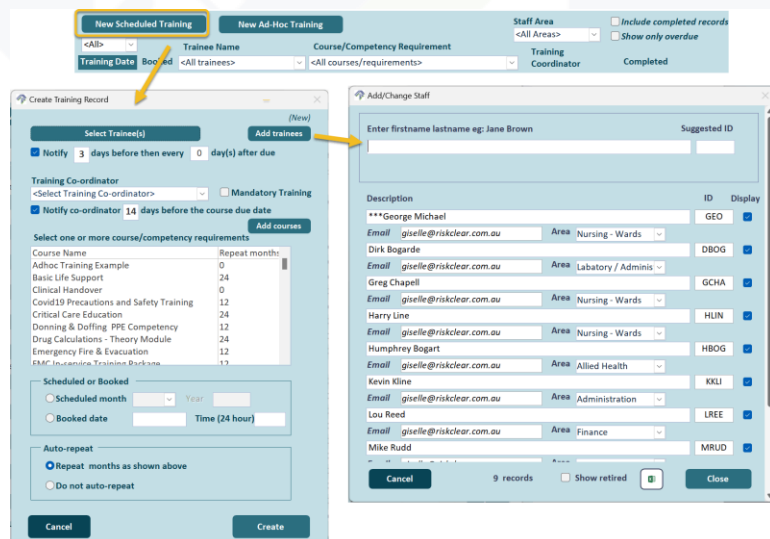
Date training completed:  ☐ Apply to all on course

☐ Training was not completed

Cancel Delete this record Update & Close

## CREATING A NEW RECURRING TRAINING RECORD

To create a new recurring training record, click the **"New Scheduled Training"** button above the list. The following dialog will appear (below left). You can click on Select Trainees to see a list of staff/trainees or



**Create Training Record**

New Scheduled Training New Ad-Hoc Training

Staff Area: <All Areas> Include completed records

Training Date: Booked Trainee Name: <All trainees> Course/Competency Requirement: <All courses/requirements> Training Coordinator: Completed Show only overdue

Select Trainee(s) Add trainees

☒ Notify 3 days before then every 0 day(s) after due

Training Co-ordinator: <Select Training Co-ordinator> Mandatory Training

☒ Notify co-ordinator: 14 days before the course due date Add courses

Select one or more course/competency requirements

| Course Name                             | Repeat months |
|-----------------------------------------|---------------|
| Adhoc Training Example                  | 0             |
| Basic Life Support                      | 24            |
| Clinical Handover                       | 0             |
| Covid19 Precautions and Safety Training | 12            |
| Critical Care Education                 | 24            |
| Donning & Doffing PPE Competency        | 12            |
| Drug Calculations - Theory Module       | 24            |
| Emergency Fire & Evacuation             | 12            |
| EMC In-situ Training Backbone           | 12            |

Scheduled or Booked

☐ Scheduled month: Year: Time (24 hour)

☐ Booked date

Auto-repeat: ☒ Repeat months as shown above ☐ Do not auto-repeat

Cancel Create

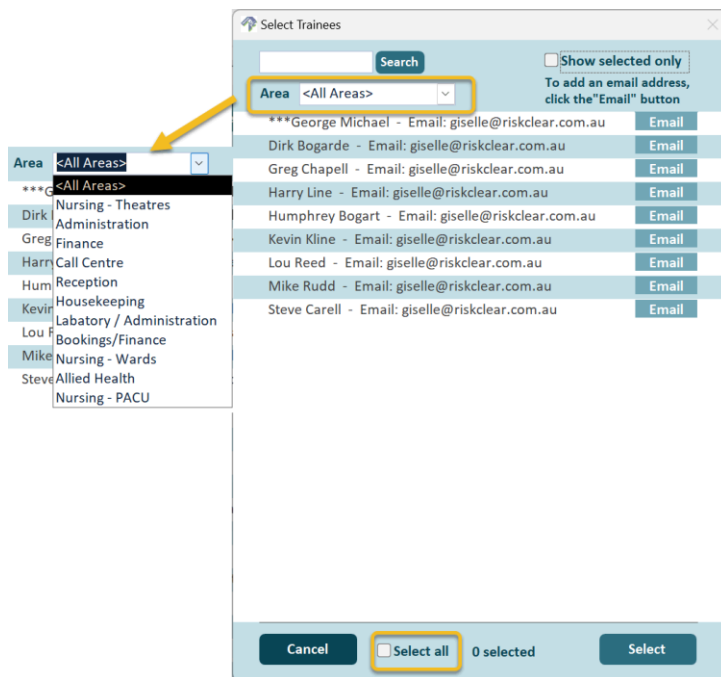
**Add/Change Staff**

Enter first name lastname eg: Jane Brown Suggested ID

| Description       | ID   | Display                             |
|-------------------|------|-------------------------------------|
| ***George Michael | GEO  | <input checked="" type="checkbox"/> |
| Dirk Bogarde      | DBOG | <input checked="" type="checkbox"/> |
| Greg Chapel       | GCHA | <input checked="" type="checkbox"/> |
| Harry Line        | HLIN | <input checked="" type="checkbox"/> |
| Humphrey Bogart   | HBOG | <input checked="" type="checkbox"/> |
| Kevin Kline       | KKLI | <input checked="" type="checkbox"/> |
| Lou Reed          | LREE | <input checked="" type="checkbox"/> |
| Mike Rudd         | MRUD | <input checked="" type="checkbox"/> |

Cancel 9 records ☐ Show retired Close

Click the **Select Trainee(s)** button and the following trainee selector will appear below:



The 'Select Trainees' dialog box is shown. It has a search bar at the top. Below the search bar is a dropdown menu for 'Area' with a list of departments: <All Areas>, Nursing - Theatres, Administration, Finance, Call Centre, Reception, Housekeeping, Laboratory / Administration, Bookings/Finance, Nursing - Wards, Allied Health, and Nursing - PACU. The 'Select all' checkbox is highlighted. The 'Email' button is highlighted for each trainee.

| Name            | Email                    | Action |
|-----------------|--------------------------|--------|
| George Michael  | giselle@riskclear.com.au | Email  |
| Dirk Bogarde    | giselle@riskclear.com.au | Email  |
| Greg Chapell    | giselle@riskclear.com.au | Email  |
| Harry Line      | giselle@riskclear.com.au | Email  |
| Humphrey Bogart | giselle@riskclear.com.au | Email  |
| Kevin Kline     | giselle@riskclear.com.au | Email  |
| Lou Reed        | giselle@riskclear.com.au | Email  |
| Mike Rudd       | giselle@riskclear.com.au | Email  |
| Steve Carell    | giselle@riskclear.com.au | Email  |

At the bottom of the dialog box, there are buttons for 'Cancel', 'Select all', '0 selected', and 'Select'.

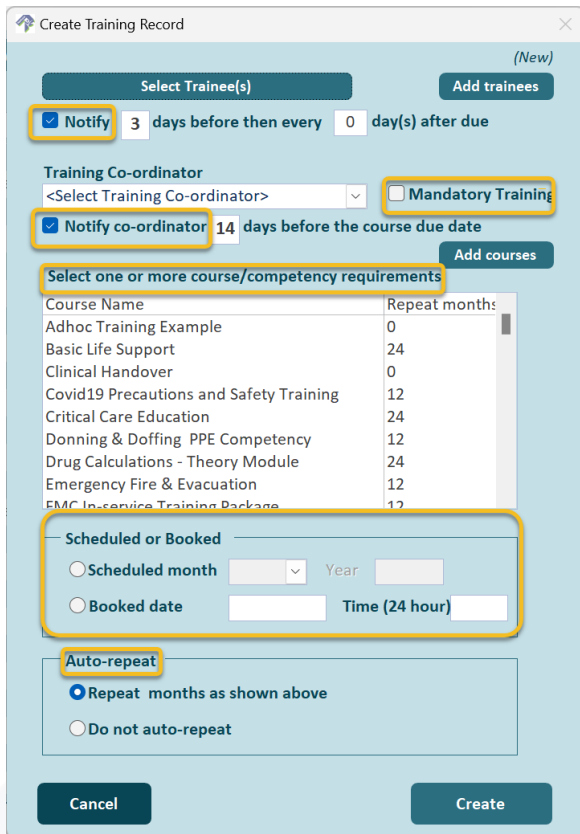
Select one or more trainees. To enter a new email address or to change an existing one, click the "Email" button. The email button appears red for trainees without email addresses. You can filter the list by using the search box without it affecting your existing selections. You can also filter by "Area".

Place a tick in the **"Select all"** box to select all trainees. Remove the tick to clear all selections.

The number of selections you have

made is displayed to the left of the Select button. now show the number of selections you have made.

Click the **"Select"** button when you have completed your selection(s) to close the Select Trainees box.



The screenshot shows the 'Create Training Record' form with the following highlighted sections:

- Notify:** A checkbox labeled 'Notify' is checked, followed by '3 days before then every 0 day(s) after due'.
- Training Co-ordinator:** A dropdown menu showing '<Select Training Co-ordinator>' and a checkbox labeled 'Mandatory Training'.
- Notify co-ordinator:** A checkbox labeled 'Notify co-ordinator' is checked, followed by '14 days before the course due date'.
- Select one or more course/competency requirements:** A table listing various courses and their repeat months.
- Scheduled or Booked:** Two radio buttons, 'Scheduled month' and 'Booked date', with input fields for month, year, and time.
- Auto-repeat:** Two radio buttons, 'Repeat months as shown above' (selected) and 'Do not auto-repeat'.

If you do not wish the trainee to be notified by email of the course, remove the tick from the **"Notify trainee"** box. Otherwise enter the number of days before the booked date you would like the reminder to be sent. The default is 3.

Select the **"Training Co-ordinator"** and the notification details underneath.

Place a tick in the **"Mandatory Training"** box if this course/trainee are mandatory.

You can select one or more courses from the course list providing they all start on the same date.

If the course date is unknown or the training can be completed by a staff member in a selected month, then choose the **"Scheduled month"** option and enter the month and year

of the training.

This can be changed later to the "booked" course date once the date is known where necessary. Trainees will receive reminders for both scheduled and booked training requirements.

If the actual course date is known (e.g. a workshop, education day) choose the **"Booked date"** option and enter the date in the box that appears.

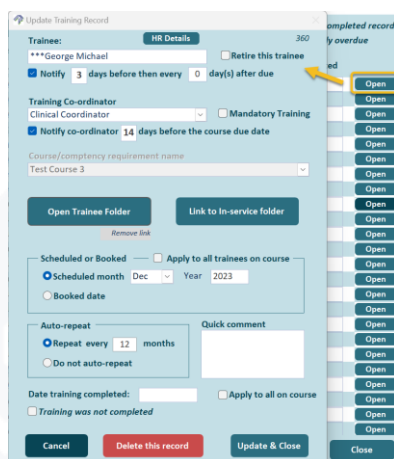
RiskClear will automatically repeat courses for the **"Repeat months"** period shown until that trainee is retired. If you do not want the system to automatically repeat the course dates, choose the "Do not auto-repeat" option.

Click the "Update" button. If any entries are duplicates, they will be displayed in a warning dialog box and they will be automatically excluded from the update. Pressing "Cancel" to lose all changes.

At the beginning of each year the training register generates another year of training data for the following year. If you do not wish for this to occur, you can turn off yearly updating by going to **Setup, Advanced, Fback/Governance Settings** and remove the tick from the 'auto-repeat additional year training at beginning of each year' box.

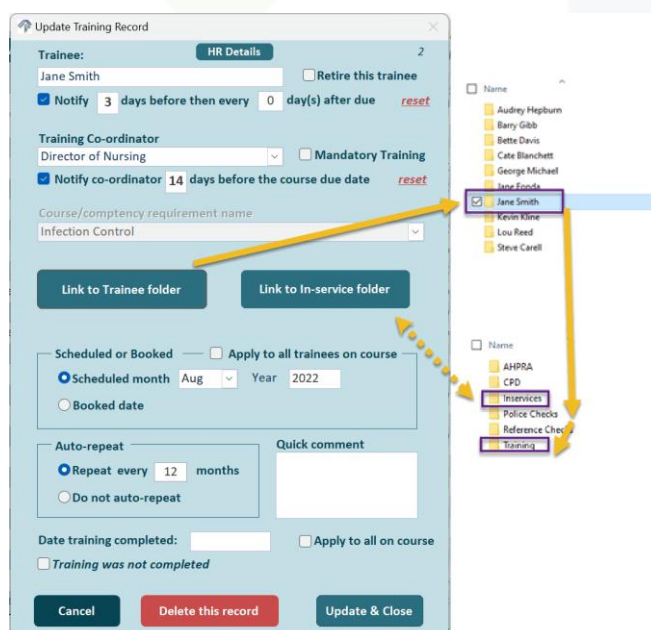
## UPDATING EXISTING RECORDS

To **update a trainee's existing course settings**, click the **"Open"** button from the list alongside the entry you wish to change.



The dialog below will display. This is identical to the **"Create New"** dialog with the addition of a **"Retire this trainee"** box, a **"Date training completed"** box and a **"Delete this record"** button. You can also mark applicable training records as **'Mandatory Training'** by ticking the box. You can also **"reset"** notifications.

You can change the **booking details** here. If you would like your booking changes (changes to Booked Date) to also apply to all other trainees on this course, then tick the "Apply to all trainees on course" box.



You can also attach any documentation here such as training certificates. If you wish to link each staff member's training record and/or in-service records directly to their individual folder on your network (rather than linking each training document individually), go to **Setup, Advanced, Fback/Governance Settings** and place a tick in the *'use trainee course folders'* and *'use trainee in-service folder'* boxes. **Once you link one or both folders to a staff member training record it will show in all their training records.** Ticking the **"Retire**

**this trainee"** box will set all that trainee's courses to 'retired' status and will remove any auto-repeated future courses for this trainee. The trainee will disappear from the list. You

can also retire a trainee by clicking the Setup button, selecting **“Trainees Details”** and removing the tick from the ‘Display’ box alongside that staff member’s entry.

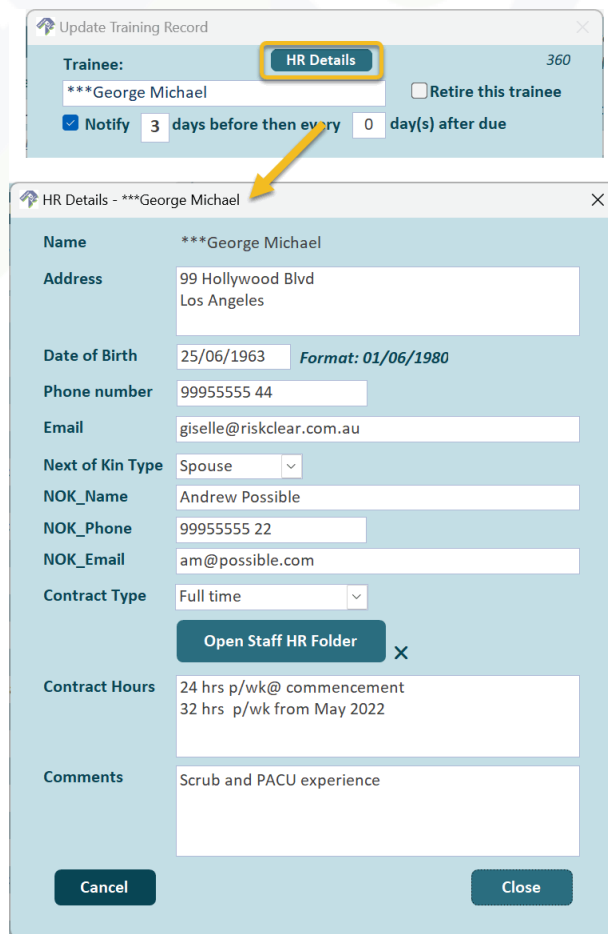
The date the course was completed can be keyed here as well as on the main list. You can also tick the “training not completed” button which will prompt you to type in a reason. The **“Delete this record”** button will remove this training record however is recoverable using the “Resurrect Deleted Records”

Retired trainees’ courses can be viewed from the main list by ticking the **“Include retired trainees”** box on the lower part of the screen.

## HR DETAILS

If enabled, you will also see a **“HR Details”** button at the top of the training update panel as shown below:

Click this to display the HR Details panel as below.



The image shows two overlapping windows from the RiskClear Training Register. The top window, titled 'Update Training Record', displays a list of trainees. A yellow box highlights the 'HR Details' button next to the entry for '\*\*\*George Michael'. The bottom window, titled 'HR Details - \*\*\*George Michael', provides a detailed view of the trainee's information. It includes fields for Name, Address, Date of Birth, Phone number, Email, Next of Kin Type, NOK Name, NOK Phone, NOK Email, Contract Type, Contract Hours, and Comments. A yellow arrow points from the 'HR Details' button in the top window to the 'HR Details' window below.

**Update Training Record**

Trainee: **HR Details** 360

\*\*\*George Michael

☐ Retire this trainee

☒ Notify 3 days before then every 0 day(s) after due

**HR Details - \*\*\*George Michael**

Name: \*\*\*George Michael

Address: 99 Hollywood Blvd  
Los Angeles

Date of Birth: 25/06/1963 Format: 01/06/1980

Phone number: 99955555 44

Email: giselle@riskclear.com.au

Next of Kin Type: Spouse

NOK\_Name: Andrew Possible

NOK\_Phone: 99955555 22

NOK\_Email: am@possible.com

Contract Type: Full time

Open Staff HR Folder

Contract Hours: 24 hrs p/wk@ commencement  
32 hrs p/wk from May 2022

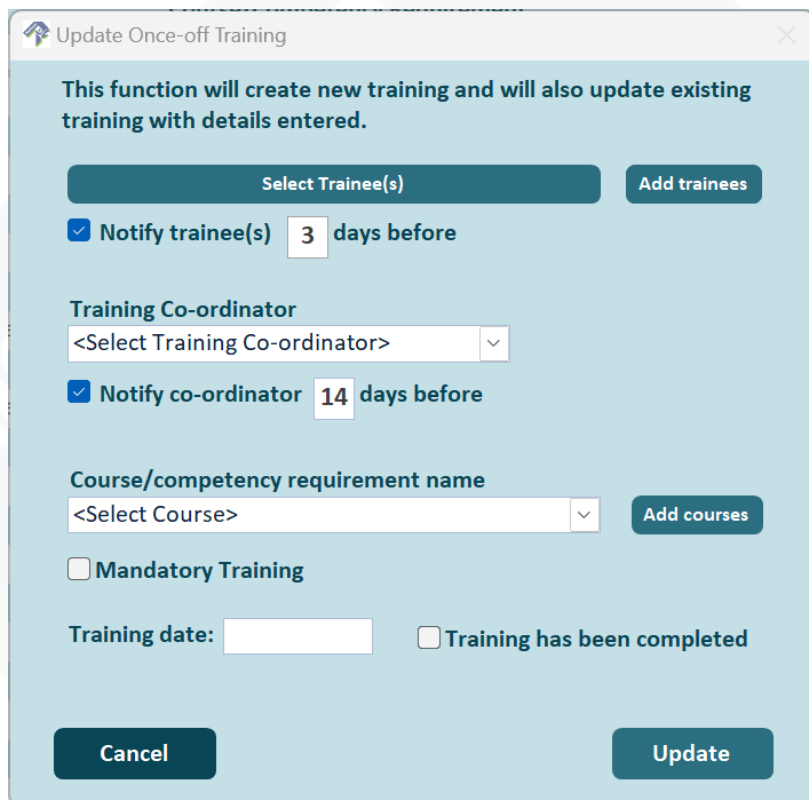
Comments: Scrub and PACU experience

Cancel Close

To give or remove access to this function supervisors can go to **Setup, Advanced, Permissions** and then place a **tick in the 'HR Access'** box alongside the relevant staff member. There is also a comment box and folder link to this staff 'HR' panel.

## AD-HOC TRAINING

To create once-off training, press the **"New Ad-hoc Training"** button and the following dialog will appear:



The dialog box is titled "Update Once-off Training" and contains the following fields and buttons:

- Select Trainee(s)** button and **Add trainees** button.
- ☒ **Notify trainee(s)**  **days before**
- Training Co-ordinator** dropdown menu with "<Select Training Co-ordinator>" and a downward arrow.
- ☒ **Notify co-ordinator**  **days before**
- Course/competency requirement name** dropdown menu with "<Select Course>" and a downward arrow, and an **Add courses** button.
- ☐ **Mandatory Training**
- Training date:**  ☐ **Training has been completed**
- Cancel** and **Update** buttons at the bottom.

Select one or more trainees as described above. Select the training co-ordinator and course and enter the training date. If the course has already completed then tick the **"Training has been completed"** box, then press the **"Update"** button.

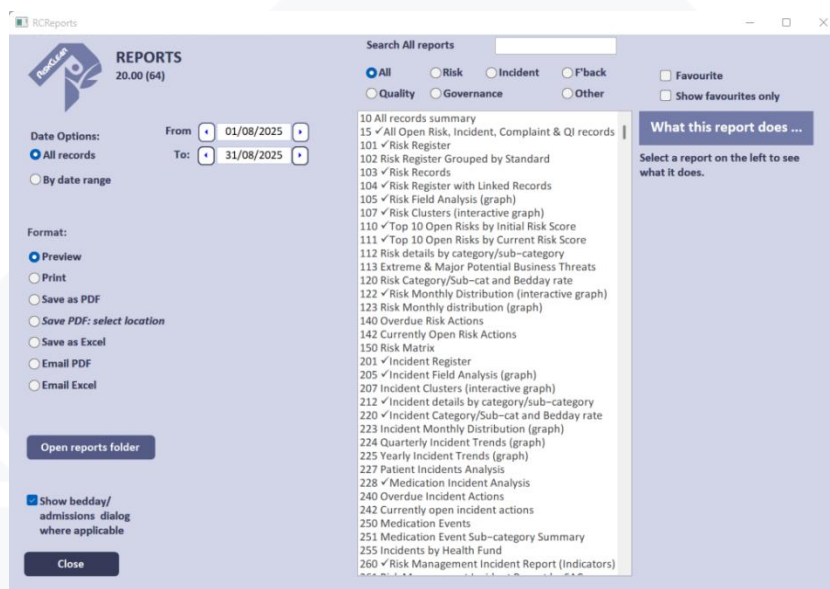
This function has the additional capability of being able to change existing course details for multiple records. **For example, if you would like to mark multiple staff as having completed a course, select them here, complete all fields including the Training date and tick the "Training has been completed" box.** Note that it will also update the Training Co-ordinator and notification details to those entered.

The once-off function can update courses on an auto-repeat schedule but will not create new auto-repeat dates. The "New Scheduled Training" button should be used to do this.

If a trainee is re-sent to the same course outside of their training schedule, this function can be used to enter the second course.

## TRAINING REGISTER REPORTS

There are various reports (table below) that can be generated in RiskClear on the Training Register. You can filter by **date** range, **mandatory** or all training, by **Standard** and by **Training Area**. You can also mark any frequently used or **favourite** reports by selecting the report you wish to run and ticking the favourite box.



### TRAINING REPORT TYPES AND DESCRIPTION

|     |                                         |                                                                                           |
|-----|-----------------------------------------|-------------------------------------------------------------------------------------------|
| 520 | <b>TRAINING CALENDAR</b>                | Training in calendar format for 12-month period                                           |
| 522 | <b>TRAINING LIST</b>                    | Shows details of staff who were/are on a selected course                                  |
| 523 | <b>TRAINEE COMPLIANCE RATE</b>          | Compliance rates for staff selected or all staff by course for the date range entered     |
| 524 | <b>TRAINEE COMPLIANCE RATES (GRAPH)</b> | Compliance rate % for courses by date range and standard                                  |
| 526 | <b>TOTAL TRAINING HOURS BY TRAINEE</b>  | Lists all completed training hours for each staff member for the site and period selected |
| 528 | <b>TOTAL TRAINING HOURS BY COURSE</b>   | Lists trainee's total hours by course based on a time period                              |
| 530 | <b>OVERDUE COURSES BY TRAINEE</b>       | Reports all trainees with overdue courses                                                 |

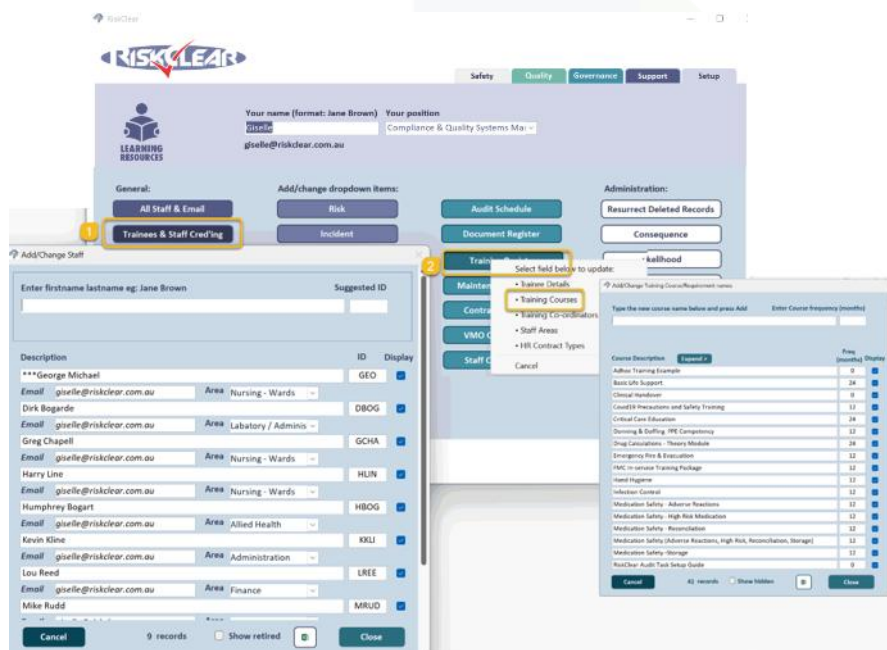
|     |                                                  |                                                                                                                            |
|-----|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| 532 | <b>NEXT SCHEDULED COURSES BY TRAINEE</b>         | List of all due courses by trainee                                                                                         |
| 534 | <b>NEXT SCHEDULED COURSES WITH TRAINEE COUNT</b> | List of all due courses including number of trainees on each                                                               |
| 536 | <b>UPCOMING TRAINING CALENDAR</b>                | Displays all courses calendar style marking course months and the number of courses attendees by month                     |
| 538 | <b>YEARLY TRAINING MATRIX</b>                    | Exports to an excel spreadsheet showing all trainees, completion dates or booked date if not completed for 12-month period |

You can now give "update" permission over the training register. By default, everyone who has access to the training register has been given permission to update the register. Removing "Update" access will mean that the staff member can still access the training register, but the "Update" button will be disabled so individual training details cannot be changed by them. To do this go to Setup > Advanced > Permissions and remove the tick from the "Upd Trg" box. Note that this also affects RiskClear Direct users.

## QUICK GUIDE STEPS:

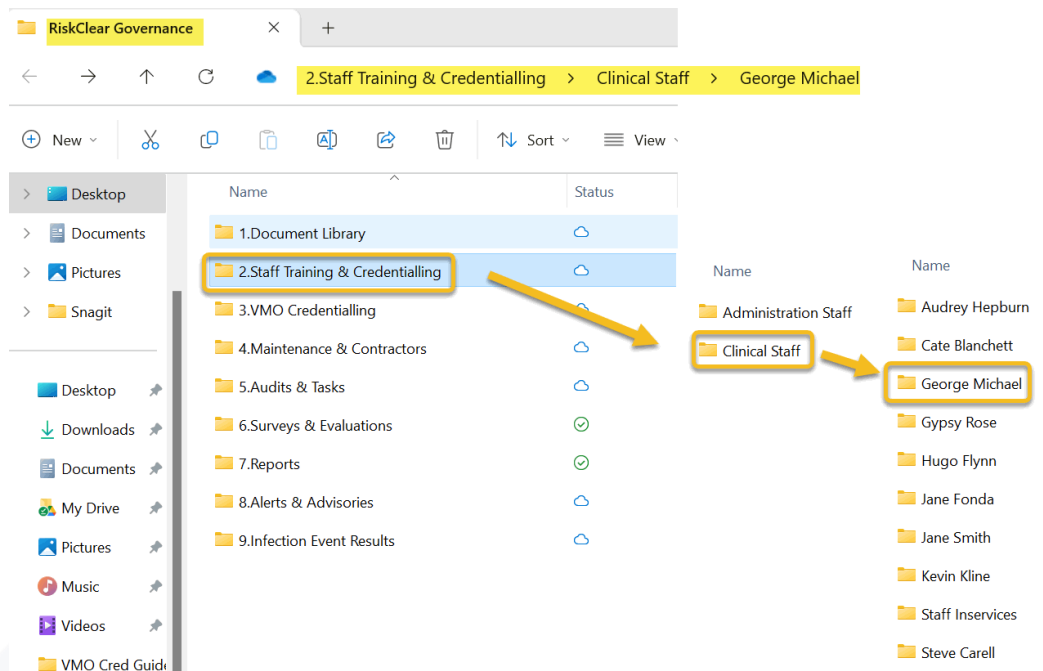
**STEP ONE:** Go to **Setup Tab** and **Add Trainees**

**STEP TWO:** On the **Setup Tab** click **Training Register** – select **Add Courses**. Add courses remembering to click **Expand** to enter any links to documents or websites



The screenshot displays the RiskClear Training Register interface. The top navigation bar includes tabs for Safety, Quality, Governance, Support, and Setup. The main content area shows a list of staff members with columns for Description, ID, and Display. A modal window titled 'Add Change Staff' is open, showing a form to add or update staff details. Another modal window titled 'Add Change Training Courses/Response' is also open, showing a list of training courses with columns for Course Description, Expected, and Frequency. The 'Add Change Staff' window has a 'Trainers & Staff Cred'ing' button highlighted. The 'Add Change Training Courses/Response' window has a 'Training Courses' button highlighted.

**STEP THREE:** Set up **individual folders** for your **Staff Members** on a **Shared secure drive** on your **Network** (e.g. L drive, S drive)



**STEP FOUR:** Go to **Governance Tab** and click on **Training Register**

**STEP FIVE:** Click **New Scheduled Training**

**STEP SIX:** Select **Trainees**

**STEP SEVEN:** Select **Training Coordinator** and tick **notification** boxes

**STEP EIGHT:** Select **Courses**

**STEP NINE:** Enter **Scheduled Month or Booked Date**

**STEP TEN:** Click **Create**

## Helpful Tips:

- ✓ As you receive evidence of courses completed from your staff members save them into their folder on your Shared Drive (see Step 3).
- ✓ Link your staff members record on RiskClear Training Register to their Staff Folder on your Network and to the Inservice Folder on your Network.