



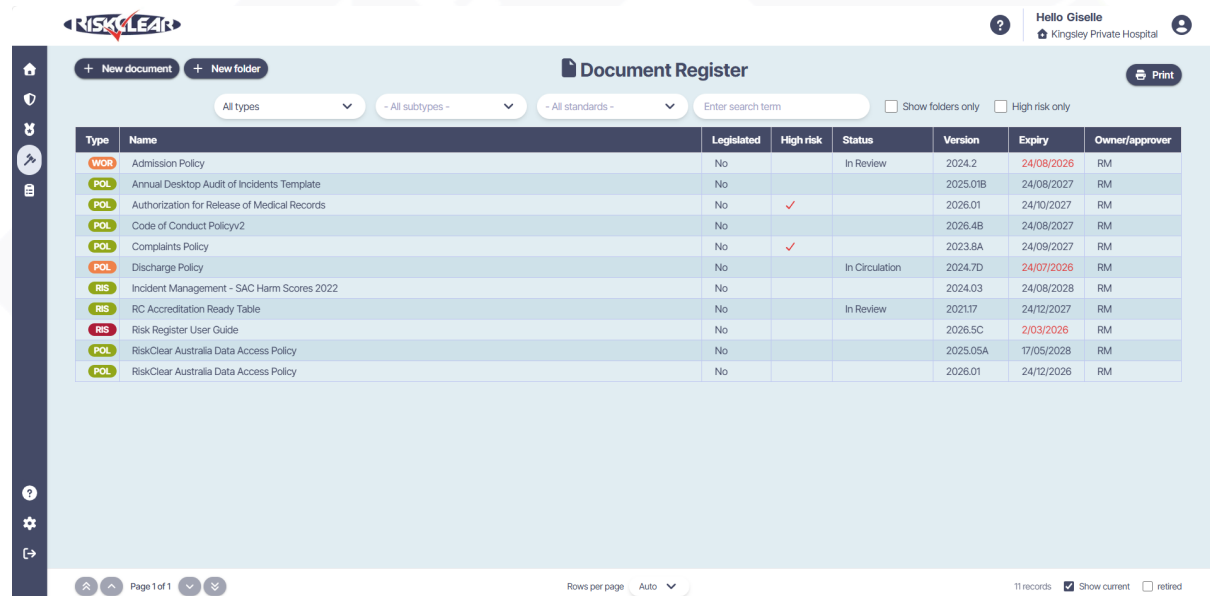
DOCUMENT REGISTER | User Guide

2026

INTRODUCTION

Document management is the process of creating, maintaining, reviewing and controlling organisational documents to ensure staff have access to current, accurate and approved information. It helps organisations manage policies, procedures, guidelines, forms and other important documents in a consistent and structured way, supporting quality, compliance, governance and effective business operations. Documents are typically subject to defined approval and review processes, with version control, review dates and document ownership helping to ensure information remains current and relevant.

Documents can be administered from the **Document Register in RiskClear**.

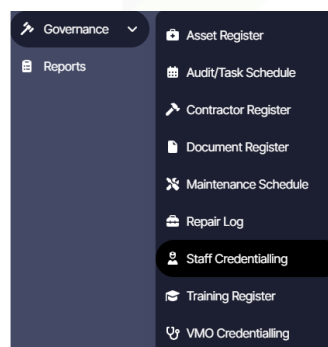


The screenshot shows the RiskClear Document Register interface. At the top, there's a header with the RiskClear logo, a user profile for 'Hello Giselle' from 'Kingsley Private Hospital', and a 'Print' button. Below the header, there's a navigation bar with 'New document' and 'New folder' buttons, followed by filters for 'All types', 'All subtypes', and 'All standards'. A search bar is also present. The main area displays a table of documents with columns: Type, Name, Legislated, High risk, Status, Version, Expiry, and Owner/approver. The table lists various documents like 'Admission Policy', 'Annual Desktop Audit of Incidents Template', etc. At the bottom, there's a pagination bar showing 'Page 1 of 1' and 'Rows per page: Auto'.

Type	Name	Legislated	High risk	Status	Version	Expiry	Owner/approver
WOR	Admission Policy	No		In Review	2024.2	24/08/2026	RM
POL	Annual Desktop Audit of Incidents Template	No			2025.01B	24/08/2027	RM
POL	Authorization for Release of Medical Records	No	✓		2026.01	24/10/2027	RM
POL	Code of Conduct Policyv2	No			2026.4B	24/08/2027	RM
POL	Complaints Policy	No	✓		2023.8A	24/09/2027	RM
POL	Discharge Policy	No		In Circulation	2024.7D	24/07/2026	RM
RS	Incident Management - SAC Harm Scores 2022	No			2024.03	24/08/2028	RM
RS	RC Accreditation Ready Table	No		In Review	2021.7	24/12/2027	RM
RS	Risk Register User Guide	No			2026.5C	2/03/2026	RM
POL	RiskClear Australia Data Access Policy	No			2025.05A	17/05/2028	RM
POL	RiskClear Australia Data Access Policy	No			2026.01	24/12/2026	RM

HELPFUL NAVIGATION TIPS

The **Document Register** is found via Side Navigation Panel > **Governance** > **Document Register** of Risk Clear.



Throughout RiskClear the **Floating Navigation Bar** provides quick access to common functions within that module including:

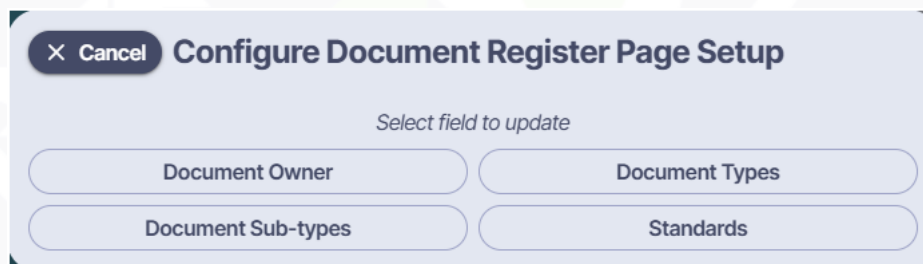


- Cancel
- Settings (where available)
- Update & Close

SETUP FUNCTIONS

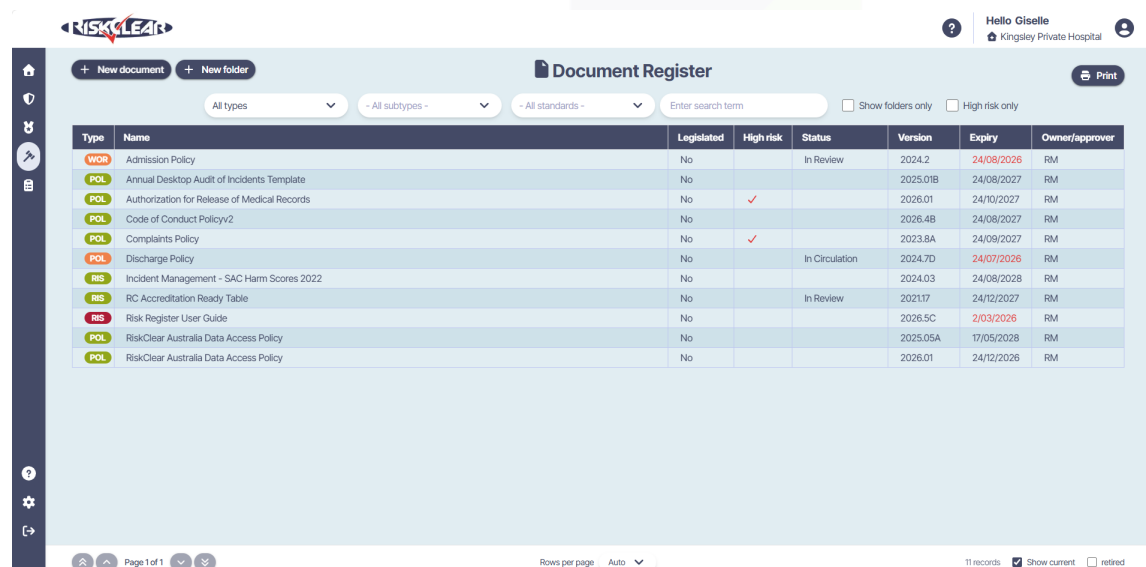
Setup can be completed via **Settings** in RiskClear via the **Side Navigation Panel** or from within the **Document Register** by clicking the **Settings symbol** > .

Document Owner, Document Sub-types, Document Types and **Standards** can be customised here.



NAVIGATING THE DOCUMENT REGISTER

The **Document Register** has various functions and filters to assist in navigating credentialling records and details.



Document Register

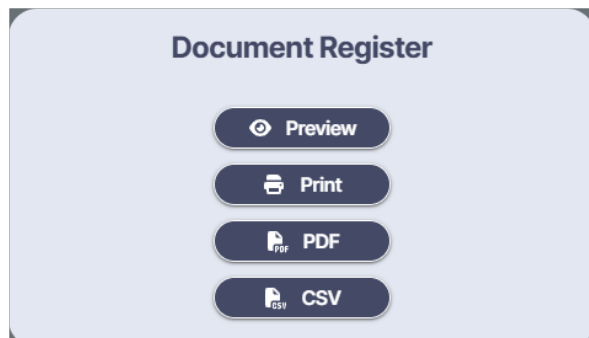
Filters: All types, All subtypes, All standards, Enter search term, Show folders only, High risk only

Type	Name	Legislated	High risk	Status	Version	Expiry	Owner/approver
WOR	Admission Policy	No		In Review	2024.2	24/08/2026	RM
POL	Annual Desktop Audit of Incidents Template	No			2025.01B	24/08/2027	RM
POL	Authorization for Release of Medical Records	No	✓		2026.01	24/10/2027	RM
POL	Code of Conduct Policyv2	No			2026.4B	24/08/2027	RM
POL	Complaints Policy	No	✓		2023.8A	24/09/2027	RM
POL	Discharge Policy	No		In Circulation	2024.7D	24/07/2026	RM
RES	Incident Management - SAC Harm Scores 2022	No			2024.03	24/08/2028	RM
RES	RC Accreditation Ready Table	No		In Review	2021.17	24/12/2027	RM
RES	Risk Register User Guide	No			2026.5C	2/03/2026	RM
POL	RiskClear Australia Data Access Policy	No			2025.05A	17/05/2028	RM
POL	RiskClear Australia Data Access Policy	No			2026.01	24/12/2026	RM

Page 1 of 1, Rows per page: Auto, 11 records, Show current, retired

Use the **+New document and + New Folder** button to add document or folder details (this is covered in detail on page 4 of this guide)

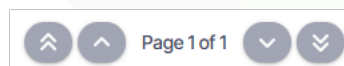
Use the **Print** button to choose from the following functions:



Use the **All Types, All subtypes, All Standards or enter Search item** to display and filter relevant information. The record count is displayed in the lower right corner of the screen.

The **Show folders only** and **High risk only** can be ticked to further filter data.

Use the **arrows** to navigate through the register page by page or to the end or beginning of the pages.



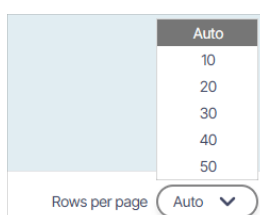
Clicking the **headers** across the top of the Document Register will sort data alpha or numerically depending on the nature of the data.

Name	Suburb/town	Specialty	Credentiailling cycle	Credentiailling due	Certificate due
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Click on the **document name** to view the document. *If you have Document Review responsibilities and administrative access clicking on the Owner Approver alongside the document opens the Document Details screen. Document Review is covered in detail on Page 6 of this User Guide.*

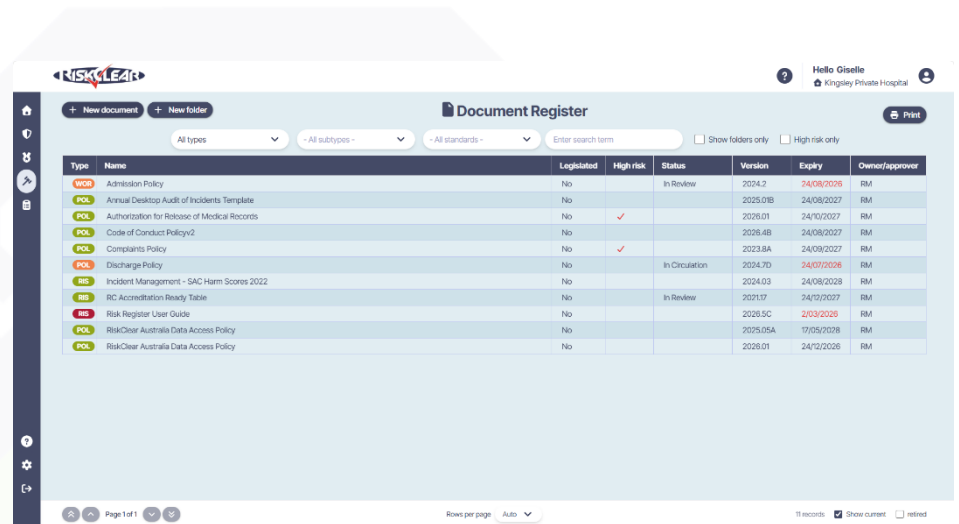
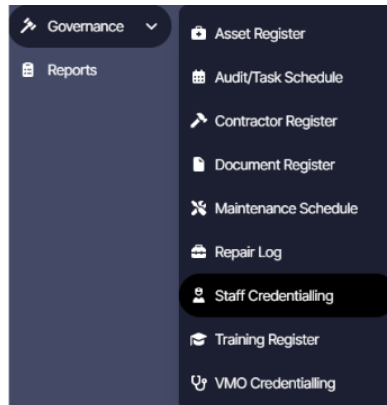
Name	Legislated	High risk	Status	Version	Expiry	Owner/approver
Admission Policy	No		In Review	2.2026	27/08/2029	RM

The Rows per page is set to 10, however can be adjusted to your preference.

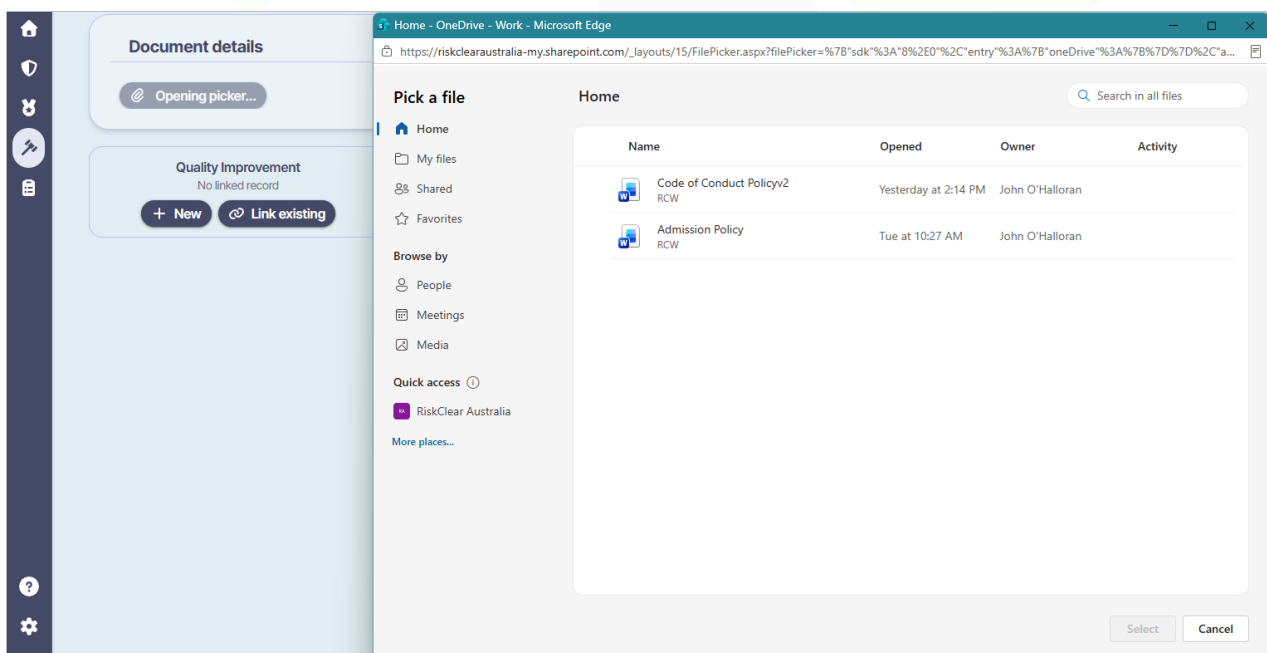


ADDING DOCUMENT DETAILS TO YOUR DOCUMENT REGISTER

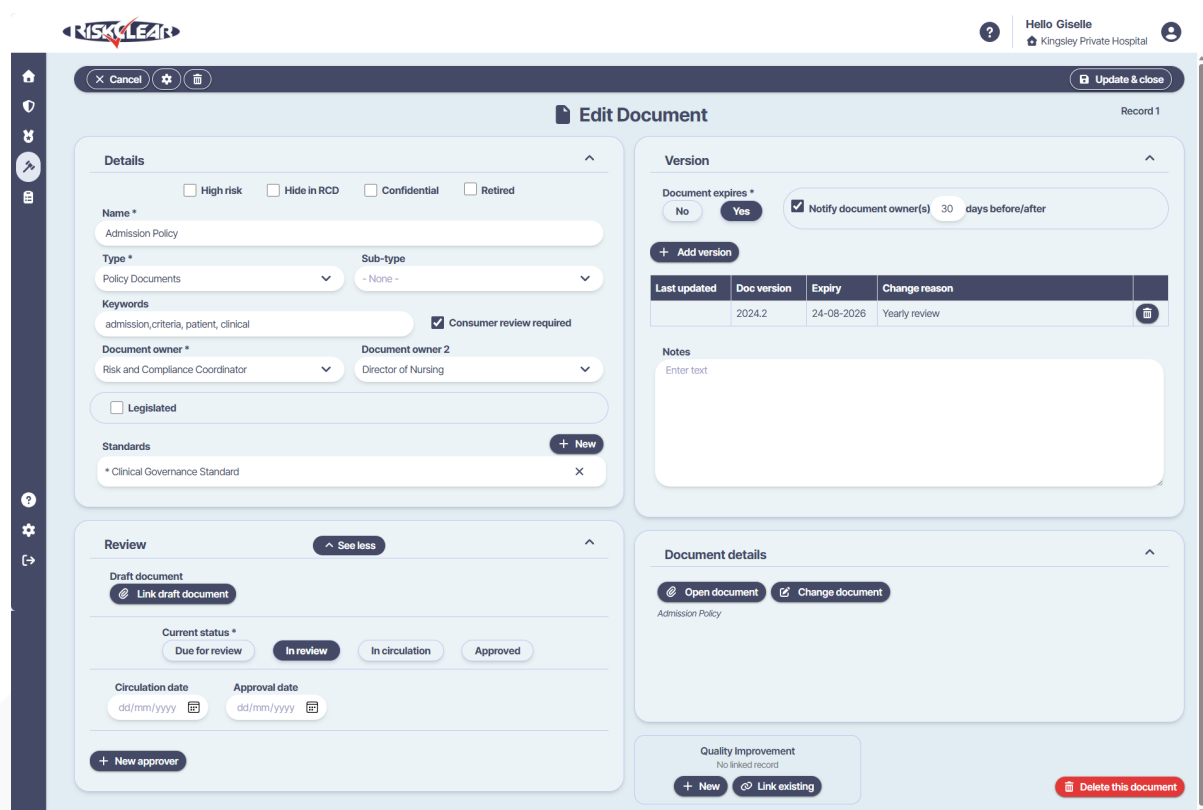
1. To open the register go to the **Side Navigation Panel** > click **Governance** > **Document Register**



2. Click **+New document** > the *document picker* will open > select the relevant document you wish to link to the **Document Register**.



3. Once the document is selected, the following screen (below) appears.



Edit Document Record 1

Details

☐ High risk ☐ Hide in RCD ☐ Confidential ☐ Retired

Name *
Admission Policy

Type *
Policy Documents

Sub-type
- None -

Keywords
admission, criteria, patient, clinical ☒ Consumer review required

Document owner *
Risk and Compliance Coordinator

Document owner 2
Director of Nursing

☐ Legislated

Standards
* Clinical Governance Standard

Version

Document expires *
No Yes ☒ Notify document owner(s) 30 days before/after

+ Add version

Last updated	Doc version	Expiry	Change reason
	2024.2	24-08-2026	Yearly review

Notes
Enter text

Review See less

Draft document
Link draft document

Current status *
Due for review In review In circulation Approved

Circulation date
dd/mm/yyyy

Approval date
dd/mm/yyyy

+ New approver

Document details

Open document Change document

Admission Policy

Quality Improvement
No linked record

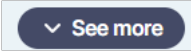
+ New Link existing

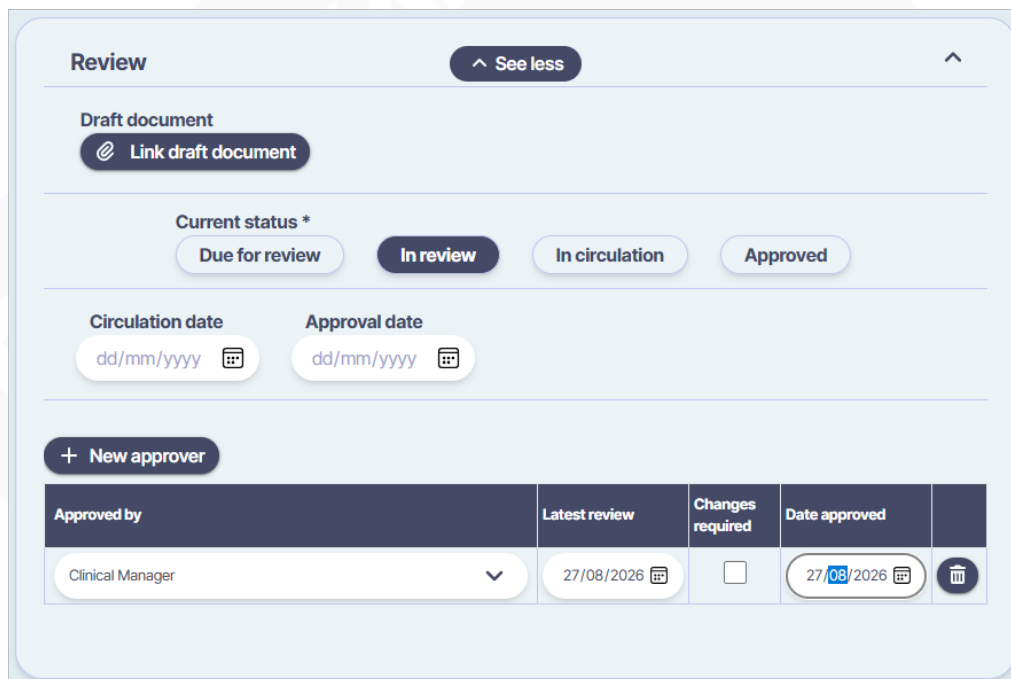
Delete this document

The screen is organised into **Cards** which group related information together (e.g., **Details, Version, Review, Document details**).

- Complete the **Details card** with the relevant including type and sub type (e.g. Policy > Clinical). Add **keywords** to improve the search function and determine the **Document Owner/s** and whether **Consumer review** is required. You can tick it if it legislated and also assign a **Standard** to it. You can also tick the **High Risk, Hide in RCD, Confidential** or **Retired boxes** where appropriate depending on the nature and desired document access you wish. E.g., If a document is **confidential**, tick that box and only those RiskClear (RC) users with confidential access will be able to view the document. If a document should only be visible to RiskClear (RC) users and not RiskClear Direct (RCD) users, then tick the **Hide in RCD** box.
- Complete the **Version Card** which includes the document expiry details including notification requirements. **+Add version** to add or update versions of the documents history. You can also enter any relevant **notes**.
- Document details** shows the document link and is where you can change the document link when updating versions of the document.

7. Click **+ New Quality Improvement** if you wish to initiate a Quality Improvement, or you can **Link existing**.

8. The Review Card is where you can click  to review existing documents that are now due for review. (e.g. documents that are due to expire, or documents needing updates between usual review cycles due to legislative, process or other changes.) You can **Link draft document**, set the **Current Status** (*Due for Review, In review, In circulation, Approved*) and enter the **circulation date** and **approval date**. Click **+New Approver** to include relevant document reviewers in the process.



The Review Card interface includes the following sections:

- Review Header:** Contains a "See less" button and an upward arrow.
- Draft document:** Includes a "Link draft document" button.
- Current status *:** A row of buttons: "Due for review", "In review" (selected), "In circulation", and "Approved".
- Circulation date:** A date input field with a calendar icon, showing "dd/mm/yyyy".
- Approval date:** A date input field with a calendar icon, showing "dd/mm/yyyy".
- + New approver:** A button to add new approvers.
- Table:**

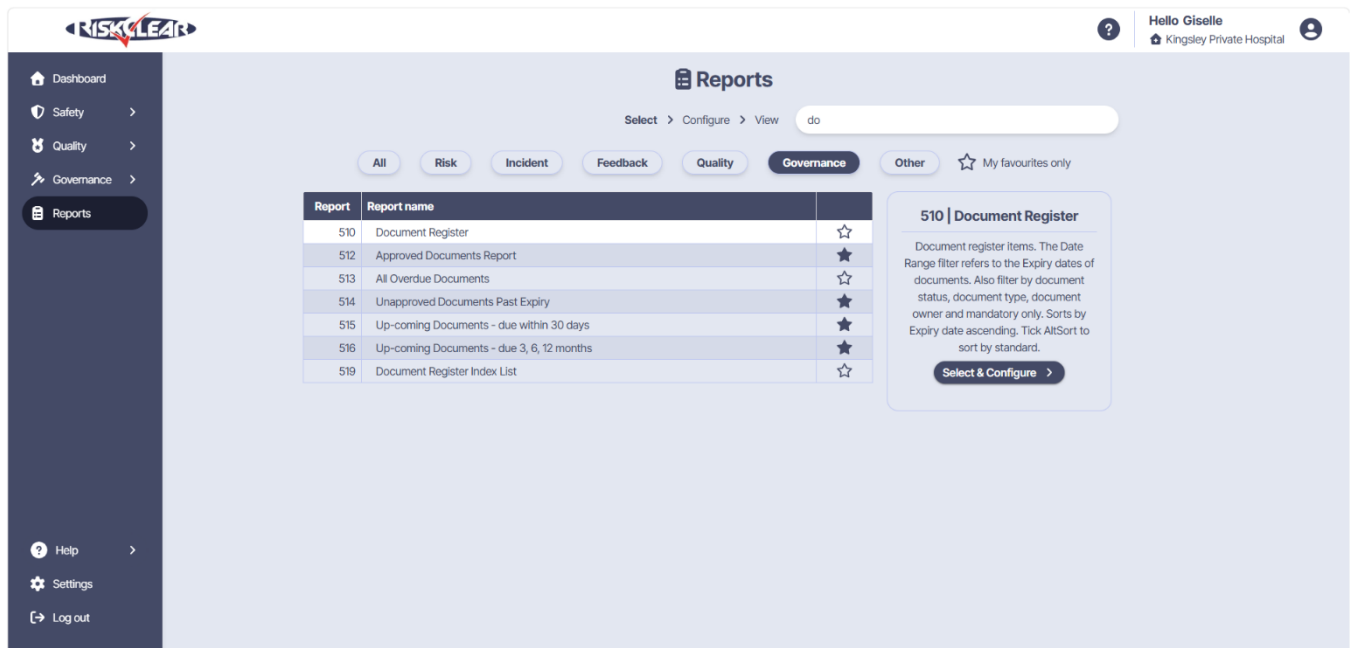
Approved by	Latest review	Changes required	Date approved	
Clinical Manager	27/08/2026	☐	27/08/2026	

Once the document has been approved by all approvers, it can then be saved in the **Document Details Card** by clicking **Change document** and selecting the new version using the document picker.

Click  on the **Floating Navigation bar** across the top of the screen to save your entry.

DOCUMENT REGISTER REPORTS

Reporting on the **Document Register** is available via the **Side Navigation Panel > Reports**.



The screenshot shows the RiskClear interface with the 'Reports' section selected in the side navigation panel. The main content area displays the 'Reports' page with a search bar and a list of reports. The 'Governance' tab is selected, showing a list of reports with their IDs and names. A detailed view for report 510, 'Document Register', is shown on the right, including a description and a 'Select & Configure' button.

Report	Report name	
510	Document Register	☆
512	Approved Documents Report	★
513	All Overdue Documents	☆
514	Unapproved Documents Past Expiry	★
515	Up-coming Documents - due within 30 days	★
516	Up-coming Documents - due 3, 6, 12 months	★
519	Document Register Index List	☆

510 | Document Register

Document register items. The Date Range filter refers to the Expiry dates of documents. Also filter by document status, document type, document owner and mandatory only. Sorts by Expiry date ascending. Tick AltSort to sort by standard.

[Select & Configure >](#)

Various **Document Register reports** can be configured in RiskClear.

Click **Governance**, use the **Search All reports** function, or the **search bar**. Each report provides a **description** of what it generates, and you can "star" any reports that you use frequently as a favourite also. You can also view **My favourites only**.