



# KAISER PERMANENTE®

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## General Use of MasterControl

**Purpose** This procedure provides instructions for the following functions using the MasterControl software:

- Logging In
- Logging Out
- Password and electronic signature management
- Navigating, Accessing, and Searching for document InfoCards
- Viewing and printing documents

**Responsibilities** The table below lists the actions and responsible parties for this procedure.

Action	Responsible Party
Review and Approval	Laboratory CLIA Director
Oversight, Maintenance, Training	Sub-administrators
Implementation of the activities described in this document	All trained personnel performing any of the tasks in this document

### Definitions

Authorized Person	Person(s) within each department or location who has the authority, as granted by the process owners, to generate a Controlled Copy of a document maintained in MasterControl.
Approved Document	A document maintained in MasterControl which has been approved with an electronic signature by the appropriate CLIA Director, or designee, and which has been assigned an effective date. Approved documents are housed in the Released Vault within MasterControl.
Copy – Controlled	A paper or electronic document that is managed by the document control process.
Copy – Uncontrolled	A paper or electronic document that does not bear the appropriate document control markings assigned by MasterControl.
Effective Date	The date entered on an InfoCard that is intended to be the date the related document becomes effective or implemented.
Electronic Signature	A unique password associated with a specific user, in place of the traditional written signature.

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## General Use of MasterControl, Continued

### Definitions (continued)

InfoCard	InfoCards contain information about a specific document. Examples of this information include: InfoCard Number, Title, Author, Owner, Vault, Released Date, Retired Date, Notes, Attachments, or any other information pertinent to that document. Each document within MasterControl must be associated with an InfoCard in order to be filed, searched, and/or sorted.
MasterControl	Automated, electronic software application for document control, forms management, and training records management.

### Login

Follow the steps below to login.

#### Notes:

- User ID is your **NUID** (e.g., **A123456**)
- First-time login Password: Your **NUID + 1** (e.g., **A1234561**)
- Your login password is the same as your electronic signature.
- Passwords are case sensitive.
- Your User ID and passwords must be kept confidential at all times.

Step	Action
1	Open an Internet browser.
2	Open the <b>MasterControl Login</b> page by entering <a href="https://kpscal.mastercontrol.com/mastercontrol/">https://kpscal.mastercontrol.com/mastercontrol/</a> in the address field, or by clicking the appropriate bookmark in the Favorites menu or on LabNet.  <i>Note:</i> Once the MasterControl Login page is open, you may create a shortcut on your desktop. Copy the login page URL, right click on your desktop, then New > Shortcut, paste the URL to the field, and click Next. The shortcut will appear on your desktop.
3	In the <b>User ID</b> field, type in your <b>NUID</b> .
4	Type in your login password in the <b>Password</b> field.
5	Click <b>Sign In</b> .

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## General Use of MasterControl, Continued

### Setting up Security Questions

Follow the steps below to set up your security questions.

**Note:**

MasterControl will prompt you to setup your security questions upon initial login.

Step	Action
1	In the <b>My MasterControl</b> main page, click the drop-down arrow beside your user logged in name, and click on <b>Security Questions</b> .
2	Answer at least three of the eight questions.
3	Click <b>Submit</b> .

### Managing Passwords

Follow the steps below to manage passwords.

**Notes:**

- Each user will be prompted to change their default password after their first login to MasterControl.
- Password and Electronic Signature requirements:
  - Be at least 4 characters in length
  - Contain at least 1 number
  - Contain at least 1 letter
  - Not have been used in the past
  - Be changed every 365 days

Step	Action
	<b>Initial Login Password Change</b>
1	In the <b>My MasterControl</b> main page, click the drop-down arrow beside your user logged in name, and click on <b>Change Passwords</b> .
2	Initial Login Password Change: <ul style="list-style-type: none"> <li>• Click on <b>Change Passwords</b>.</li> <li>• Under <b>Current Login Password</b>, enter your <i>Current Login Password</i>.</li> <li>• Enter your <i>New Login Password</i>.</li> <li>• Re-enter new login password for confirmation.</li> <li>• Click <b>Save</b>.</li> </ul>

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## General Use of MasterControl, Continued

### Managing Passwords (continued)

Step	Action
<b>Forgotten Password</b>	
1	From the login screen, click on <i>Forgot your password?</i>
2	Enter your User ID and E-mail address when asked by the system and click Continue.
3	Answer one of the security questions you defined for identity verification. <i>Notes:</i> <ul style="list-style-type: none"> <li>• You will be e-mailed a new one-time use password.</li> <li>• You will be prompted to change your password after login.</li> </ul>

### Accessing Documents

Follow the steps below to access, view, and/or print documents.

Step	Action
1	In the <b>Explorer</b> section on the <b>Documents</b> screen, click the <b>Open</b> button.
2	Click on the name of the organizer you would like to view.
3	Continue to click into each sub-folder until you find the document you would like to view.
4	Click on the document name to view the document.
5	If you wish to print the document, click on the Download PDF or Native from the internal viewer. After the file is downloaded, click the printer icon when the coversheet of the document appears on the screen. <i>Notes:</i> <ul style="list-style-type: none"> <li>• The copy expiration date and time will appear as a header on each document.</li> <li>• If a document is downloaded outside of the MasterControl application, it will automatically expire after 24 hours of the download, making it no longer viewable</li> </ul>
6	Select the printer and the page(s) you wish to print and click OK. <i>Note:</i> The expiration date, time, and NUID of the person who printed the document will appear as footer on the printed copy of each document.

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## General Use of MasterControl, Continued

### Document InfoCard Search Options

Follow the steps below to use simple, basic, or advanced search options to search for, or retrieve a document InfoCard.

**Note:**

The document InfoCard search option is **not** available to View Only Level Access.


Step	Action
1	On the <b>MasterControl Home Page</b> , place cursor over the <b>Documents</b> folder on the left and click. The MasterControl Documents screen will appear.
2	To make the search screen appear you can: <div style="text-align: center;">  </div> <ul style="list-style-type: none"> <li>Click the <b>Search</b> link on the <b>Documents</b> section of the screen.</li> </ul>
3	Choose one of the following methods to execute your search: <ul style="list-style-type: none"> <li>Simple – The Simple Search allows you to query for a value that might appear anywhere on the document InfoCard.</li> <li>Basic – The Basic Search provides dropdown menus of specific fields contained on the document InfoCard. These fields can be searched together to provide a more tailored results list.</li> <li>Advanced – The Advanced Search provides a drop-down which contains each field on the InfoCard. Advanced Searches can be performed on multiple data fields from the InfoCard.</li> </ul>
4	Enter or select a value (or values) in the appropriate search field(s) and click on <b>Submit Search</b> . NOTE: The use of the wild card character (*) may be placed at the beginning of a search term in fields that a user can specify a search (i.e. “*Dilution”)
5	Click the link to the document to view it.

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## General Use of MasterControl, Continued

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### Logout

To properly exit out of MasterControl, click on the Log Out icon  that appears in the upper right-hand corner of the screen next to your user logged in name or the Log Out when you click the drop-down arrow beside your user logged in name.

The message ‘You have been logged out’ will appear on a successful log out.

**Note:**

To free up all possible user licenses, the application will automatically log you out after 15 minutes of inactivity.

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### Non-Controlled Documents

The following Non-Controlled Documents support this procedure.

- MasterControl Suite Online Help
  - MasterControl Manual
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### Controlled Documents

The following Controlled Documents support this procedure.

Regional Parent Document Reference Number: SCPMG QMS – 0007 - 07

Reference
Quick Start Guide for View Only Level Access

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## Signature Manifest

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All dates and times are in Pacific Standard Time.

### MasterControl PPPs 2019.4 Upgrade

#### Initial Approval

Name/Signature	Title	Date	Meaning/Reason
Qiyamaa Portillo (K237031)	Assistant Director Operations	20 Mar 2020, 10:36:16 AM	Approved

#### Operations Director Approval

Name/Signature	Title	Date	Meaning/Reason
Janice Wolf (K119893)	Director Operations Area Lab	03 Apr 2020, 12:15:08 PM	Approved

#### Medical Director Approval

Name/Signature	Title	Date	Meaning/Reason
Sony Wirio (A478893)	Pathologist, Medical Director	07 Apr 2020, 10:35:04 AM	Approved