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AUTHOR: K082273	PREVIOUS NUMBER:
OWNER: K083442	CHANGE NUMBER: SCPMG-CR-0221

Kaiser Permanente
Medical Care Program
California Division – South

SCPMG Laboratory Systems
Quality Management
Procedure

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
- NavigationAccessing and Searching for document info cards
- 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 a 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 has not been approved for use or does not bear the appropriate document control markings as an approved current document.
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 #, Title, Author, Owner, Vault, Released Date, Retired Date, Notes, 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., **G837569**)
- First-time login Password: Your **NUID + 1** (e.g., **G8375691**)
- 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 **MasterControl Login** page by entering https://kpscalv11.mastercontrol.com/mastercontrol/login/ in the address field, or by clicking the appropriate bookmark in the Favorites menu or in LabNet. *Note:* Once the MasterControl Login page is open, you may create a shortcut on your desktop by clicking File, Send, and then Shortcut to Desktop.
3	In the **User ID** field, type in your NUID.
4	Type in your login password in the **Login Password** field.
5	Click Login.

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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 **My MasterControl** section on the left of the screen, place cursor over **My Settings**, and click on **Security Questions**.
2	Answer at least three of the eight questions.
3	Click **Submit**.

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 90 days

Step	Action
	Initial Login Password Change
1	In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.
2	Initial Login Password Change: • Click on **Change Passwords**. • Under **Change Login Password**, enter your *Current Login Password*. • Enter your *New Login Password*. • Re-enter new login password for confirmation. • Click Save.

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Managing passwords (continued)

Step	Action
	Forgotten Password
1	From the login screen, click on *Forgot your password?*
2	Enter your User ID and E-mail address when asked by the system, and click Submit.
3	Answer one of the security questions you defined for identity verification. *Notes:* • You will be e-mailed a new one-time use password. • You will be prompted to change your password after login.

Accessing documents

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

Note:

The quickest way to access your documents is through **My Organizers**.

Step	Action
1	In the **My MasterControl** section on the left of the screen, click on **My Organizers**.
2	Click on the name of the organizer you would like to expand.
3	Continue to expand each sub-folder until you find the document you would like to view.
4	Click on the document name to view the document. *Notes:* • The copy expiration date and time will appear as header on each document. • 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.
5	If you wish to print the document, click on the printer icon when the coversheet of the document appears on the screen.
6	Select the printer and the page(s) you wish to print, and click OK. *Note:* The expiration date, time and the NUID of the person who printed the document will appear as footer on the printed copy of each document.

General Use of MasterControl, Continued

**Document
InfoCard
search options**

Follow the steps below to use simple, basic and 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 **MasterControl Home Page**, place cursor over the **Documents** folder on the left and click. The MasterControl Documents screen will appear.
2	To make the search screen appear you can: - Click the Search for Documents on the MasterControl Documents screen, or - Click **Documents** in the drop-down menu on the left. A list of document InfoCards will appear on the **MasterControl Documents** > Document InfoCard screen. Click on the Search 🔎 icon located under the **MasterControl Documents** > Document InfoCard heading.
3	Choose one of the following methods to execute your search: - Simple – The Simple Search allows you to query for a value that might appear anywhere on the document InfoCard. - 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. - 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.
4	Enter or select a value (or values) in the appropriate search field(s) and click on Submit Search. NOTE: The use of the wild card character (*) may be placed in the beginning or ending of a search term in fields that a user can specify a search (i.e. "*Dilution")

General Use of MasterControl, Continued

Logout

To properly exit out of MasterControl, click on the Log Out link that appears in the upper right hand corner of the screen next to your user logged in name.

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

Note:
In order to free up all possible user licenses, the application will automatically log you out after 15 minutes of inactivity.

Non-Controlled Documents

The following non-controlled documents support this procedure.

- MasterControl Suite Online Help
- MasterControl Manual

Controlled Documents

The following controlled documents support this procedure.

Reference
Quick Start Guide for View Only Level Access

Author

Emeline Santos, SCPMG Quality Assurance Coordinator
Matthew Jones, SCPMG Systems Consultant