



# KAISER PERMANENTE®

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<b>DOCUMENT TITLE:</b>
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# SCPMG Laboratory Systems Electronic Document Management System

## QuickStart Guide for Reader Level Access

### PORTAL & DOCUMENTS

#### 1. How do I Log In and Log Out of MasterControl?

##### Logging In:

- Open Internet Explorer, then open **MasterControl Portal** login page by clicking the appropriate bookmark in the **Favorites** menu or in **LabNet**:  
<https://kpscal.mastercontrol.com/MasterControl/login/>

**First-time login:** User ID is **NUID** (e.g., **G837569**), and Password is **NUID + 1** (e.g., **G8375691**)

**Note:** Your Login Password is the same as your E-Signature


- In the **User ID** field, type in your **NUID**.
- Type in your login password in the **Login Password Field**, then click **Login** (remember: passwords are case-sensitive).

**Note:** If you have forgotten your password, click on **Forgot your password?** link. Security questions must be defined in MC prior to using this feature. See Item 2 for more information.

##### Logging Out:


- The **Log Out** link appears in the upper right hand corner of the screen next to your name.
- Click on the link to exit out of MasterControl.

#### 2. How do I Set up My Security Questions?

- In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.
- Click on **Security Questions**.
- Answer at least three of the eight questions.
- Click on **Save**. 

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

#### 3. How do I Change My Password or e-Signature?

- In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.
- Click on **Change Passwords**.
- Enter your **Current Login Password**.
- Enter your **New Login Password** (must be new, have at least 4 characters, 1 letter, and 1 number).
- Re-enter **New Login Password** for confirmation.
- Click on **Save**. 


#### 4. What do I do if I Forget My Password?

- From the login screen, click on **Forgot your password?**
- The system will ask you for your **User ID** and **E-mail Address** – enter them and click **Submit**.
- The system will then ask you to answer one of the security questions you defined for identity verification.
- You will be e-mailed a new one-time use password and when logging in using it, you will be prompted to change your password.

#### 5. What do I do if I Forget My Electronic Signature?

- In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**. Click on **Change Passwords**, then on **Forgot your electronic signature?**
- The system will ask you for your **User ID** and **E-mail Address** – enter them and click **Submit**.
- The system will then ask you to answer one of the security questions you defined for identity verification.
- You will be e-mailed a new one-time use password and when logging in using it, you will be prompted to change your password and electronic signature.

#### 6. How do I Set My Out of Office settings?

- In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.
- Click on **Out of Office**. In the **Out of Office Status** section, select **Out of the Office**.
- Select an **Alternate** user to receive your tasks .
- Under **Redirect these incoming tasks to Alternate** choose one of the following options:
  - All Tasks:** This will send all new tasks to your Alternate.
  - Selected Tasks:** This will open the window below to allow you to select specific tasks instead of all tasks.
- Click on **Save**. 

#### 7. How do I Find and View a Document?

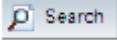


- In the **My MasterControl** section on the left of the screen, click on **My Organizers**.
- From the **My Organizers** window, click on the name of the **Organizer** you would like to expand.
- Continue to expand each sub-folder until you find the document you would like to view.
- Click on the document name to view the document.

# SCPMG Laboratory Systems Electronic Document Management System






## QuickStart Guide for Reader Level Access

### PORTAL & DOCUMENTS, continued







#### 8. Alternate Option for Finding a Document

- On the **MasterControl Portal Home Page**, place cursor over the **Documents** folder on the left.
- In the drop-down menu, click on **Documents**.
- Click on the **Search** icon  located under the **MasterControl Documents > Document InfoCard** heading.
- 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 dropdown which contains each field on the InfoCard. Advanced Searches can be performed on multiple data fields from the InfoCard.
  - **Load a Saved Search** – This option provides the ability to quickly search for a document by Department or by a specific section within a Department (e.g., **RRL IMM IFA**).
- Enter or select a value (or values) in the appropriate search field(s) and click on **Submit Search**.
- In the results window, click on  or  to view the document.

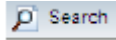
#### 9. How do I Approve a Document in MasterControl?

- In the **My MasterControl** section on the left of the **MasterControl Portal Home Page**, click on **My Tasks**.
- Click on the **Sign-Off** icon  of the **Task Name** (i.e., the packet that includes the documents) you need to review). The **View Task** screen will appear.
- Review the details of the packet, which include the task contents and any task options. Click on  or  to view each document needing review and approval.
- Click on the **Sign-Off** icon . The **Sign Off Task: Review** window will appear.
- Enter your **Electronic Signature**.
- Select the appropriate **Status** from the dropdown menu (Approve, Reject, Reviewed, etc.). If **Approved**, click on **Save**. If **Rejected**, enter your comments in the **Comments** field and click on **Save**. 

#### 10. How do I Perform Periodic Document Review?

- MasterControl will automatically launch a document review at a prescribed time from the last review date.
- Each user designated as a reviewer will be notified by e-mail, and will have the applicable task appear in their **My Tasks** inbox.
- In the **My MasterControl** section on the left of the **MasterControl Portal Home Page**, click on **My Tasks**.
- Click on the **Sign-Off** icon . The **Task Details: Review** window will appear.
- View any instructions, open and review the document by clicking on  or . **Note:** When a pdf is opened, a coversheet will always appear as the first page.
- Close the document after review.
- Click on the **Sign-Off** icon . The **Sign Off Task: Review** window will appear.
- Enter any **Comments** you would like to document, your **User ID**, and your **Electronic Signature**.
- Select the appropriate **Status** from the dropdown menu.
  - If **Reviewed** is selected, the document will be issued a new effective review date.
  - If **Needs Update** is selected, a collaboration task will auto-launch and will appear in the document author/owner's **My Tasks** inbox as a **Revision**  task.
- Click on **Save**. 

#### 11. How do I Track the Progress of a Task?

- In the **My MasterControl** section on the left of the screen, click on **Tracking**.
- Click on the **Search** button. 
- Enter your search criteria (e.g., **Simple**, **Basic**, **Advanced**, **Load a Saved Search**) and click on **Submit Search**.

#### Controlled Documents

- **Policies for MasterControl Documents**
- **Request for a Variance to a Policy, Process, or Procedure**
- **Collaborating in MasterControl**
- **Approving and Implementing Documents in MasterControl**
- **Revising a Document in MasterControl**

## Signature Manifest

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### QuickStart for Readers - Rev2

#### Initial Approval

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#### Final Approval

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#### Set Effective Date

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