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Kaiser Permanente Medical Care Program California Division – South	SCPMG Laboratory Systems Quality Management Procedure

MasterControl User Management

Purpose

This procedure provides instructions for MasterControl User Management.

Scope

All personnel trained in performing and implementing any of the activities described in this procedure.

Responsibility

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

Action	Responsible Party
Review and Approval	Laboratory/Medical Director or designee
Oversight, Maintenance and Training	Quality Assurance
Implementation of the activities described in this procedure	All trained personnel performing any of the tasks in this procedure

Definitions

National User ID (NUID)	Unique identifier for Kaiser Permanente employees
Infocard	Records within the MasterControl application, such as documents, trainers, and trainees
Task	A document or training activity requiring disposition
Job Code	A record that details training requirements for an employee
SYSADMIN	System Administrator account for the application
Sub administrators	Access level in MasterControl that grants administrator rights in the system for their location
Creator Reviser	Access level in MasterControl that grants the ability to create and revise documents
Reader	Access level in MasterControl that grants the ability to approve documents but not the ability to generate new or revised documents
View Only	Access level in MasterControl that grants view only access to documents
LA	Los Angeles location
RRL	Regional Reference Laboratories location
SD	San Diego Location
SCPMG	Southern California Permanente Medical Group region wide document including Donor Center and Transfusion Service locations

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Creating a New User Account	Follow the steps below to create a new MasterControl user account. Refer to the site specific MasterControl User Management form when creating a new user account.

Step	Action
1	In the Portal section, go to **User Management > Users.** Click the **New** button.
2	Enter the **NUID** in the **User ID** field and the **Employee Number** field.
3	Enter the **First Name, Last Name, Supervisor, E-mail Address,** and **Title** for the employee.
4	Enter the assigned location (e.g., North Hollywood, Electronics Place, or Downey) in the **Department** field.
5	Enter a unique temporary logon password in the **Login Password** and **Confirm Login Password** fields. For the **Change Pwd on Next** Login button, select **Yes.**
6	Enter a different, unique temporary logon password in the **Electronic Signature** and **Confirm Electronic Signature** fields. For the **Change Pwd on Next** Login button, keep as **No.** *Note: A separate electronic signature is not utilized by the application when signing off tasks, but a new user account requires that the password is created.*
7	In the **Assigned Roles** section, the user will need to be assigned security role(s) based on their location and access level requested by the department. All employees should be assigned a SCPMG role, in addition to any other applicable Location role. <table><tr><th>Location</th><th>View Only</th><th>Reader</th><th>Creator Reviser</th></tr><tr><td>LA</td><td>SEC-LA-vo</td><td>SEC-LA-rdr</td><td>SEC-LA-cr</td></tr><tr><td>RRL</td><td>SEC-RRL-vo</td><td>SEC-RRL-rdr</td><td>SEC-RRL-cr</td></tr><tr><td>SCPMG</td><td>SEC-SCPMG-vo</td><td>SEC-SCPMG-rdr</td><td>SEC-SCPMG-cr</td></tr><tr><td>SD</td><td>SEC-SD-vo</td><td>SEC-SD-rdr</td><td>SEC-SD-cr</td></tr></table>
8	In addition for the Assigned Roles section, the user should be assigned their position role. For example, a CLS for the Bacteriology department in the Regional Reference Laboratory would be assigned the **RRL BAC CLS** role.
9	Click the **Save** button. Enter the **Change Reason**, and click **Save.**

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Resetting Passwords

Follow the steps below to reset a password for a MasterControl user account. Two user accounts with Certify Password rights are required to complete this task.

Step	Action
1	In the Portal section, go to **User Management > Users.** Search for the user account, and click the Edit button ✎.
2	Enter a new temporary logon password in the **Login Password** and **Confirm Login Password** fields. For the **Change Pwd on Next Login** button, select **Yes.**
3	Click the **Save** button. Enter the **Change Reason**, and click **Save.**
4	Enter the **Electronic Signature** password of the administrator resetting the password.
5	Enter a second administrator's **USER ID** and **electronic signature** to confirm the password change.
6	Click the **Save** button.

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Where Used Report for Account Disabling

Follow the steps below to review in-process items in the **Where Used** report for an employee's account that is to be disabled.

Step	Action
1	Go to **Portal** > **User Management** > **Users.** Search for the termed user account.
2	Click the checkbox next to the user account, and click the **Where Used** button to retrieve the report.
3	Review the items where the user has records on the report.
4	Users of all access levels should have records in the following sections of the report: • In-Process Training Task Step • Job Code • Trainee • Role Go to **Disable User Account** and **Archive Trainee Infocard** sections for instructions on how to update those items.
5	For users with additional access above View Only, go to the **Employee Updates for Disabled Account** section for instructions on how to update the other record types.

Disable User Account

Follow the steps below to disable a MasterControl user account.

Step	Action
1	Go to the employee's user account (click **Return** if currently in the Where Used Report), and click the **Edit** button 🖊.
2	Remove all **Assigned Roles,** and click **Save.** Enter the **Change Reason**, and click **Save.**
3	Click the **Disable Account** button ⊘. Click **OK** on the popup. Enter the **Change Reason**, and click **Save.**

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Archive Trainee Infocard

Follow the steps below to archive the trainee infocard to remove training tasks in the system for the disabled employee's account.

Step	Action
1	Go to **Training> Trainees**, and go to the trainee infocard for the employee.
2	From the menu, click **Edit > Edit**.
3	Remove all job codes from the **Selected Job Codes** field, and click the **Save** button. Enter the **Change Reason**, and click **Save**.
4	Click **Sign off > Quick Approve**.
5	Enter **Comments** and **Sign Off** information. Enter the current date as the **Expiration Date**, and click **Submit**. The trainee infocard is archived, and any **In-Process Training Task Steps** are automatically removed.

Employee Updates for Disabled Account

Follow the steps below to update additional MasterControl records that are assigned to the disabled employee's account. Coordinate with the department to determine the appropriate delegate for the records.

Where Used Section	User Role	Update Needed
Document Route	Creator Revisers or Readers	If the route has the employee assigned via the role, it will automatically be removed when the role is removed from the user account. If the route has the employee assigned by the user account, update the route (ensuring to re-enable after updates) to the appropriate delegate for the department.
Forms Route	Creator Revisers or Readers	If the route has the employee assigned via the role, it will automatically be removed when the role is removed from the user account. If the route has the employee assigned by the user account, update the route (ensuring to re-enable after updates) to the appropriate delegate for the department.

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Employee Updates for Disabled Account (continued)

Where Used Section	User Role	Update Needed
Route Owner	Sub administrators	Reassign to the appropriate sub administrator.
In-Process Document Task Step	Creator Revisers or Readers	Update each open task step as appropriate to the delegate per the department. If the delegate is already assigned to the open packet, then each packet will have to update manually using an administrator account.
In-Process Forms Task Step	Creator Revisers or Readers	Update each open task step as appropriate to the delegate per the department. If the delegate is already assigned to the open packet, then each packet will have to update manually using an administrator account.
In-Process Training Task Step	All Employees	In-process training task steps should be removed automatically upon removal of the job codes and archival of the trainee infocard.
Job Code	All Employees	Remove employees from assigned job codes prior to archiving the trainee infocard.
Course Verifier	Creator Revisers or Readers	Reassign to the appropriate delegate for each course per the department
Trainer	Creator Revisers or Readers	Archive the trainer infocard (separate from trainee infocard). Ensure course updates are made prior to archival.
Assigned Trainer	Creator Revisers or Readers	Reassign to the appropriate delegate for each course per the department.
Trainee	All Employees	All employees will have a separate trainee infocard (in addition to their user account) that will need to be archived. Assigned job codes should be removed prior to archival. If re-hired, archived trainee infocards can be revised to reinstate.
Course Manager	Creator Revisers or Readers	Reassign to the appropriate delegate for each course per the department.

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Employee Updates for Disabled Account (continued)

Where Used Section	User Role	Update Needed
Role	All Employees	All employees should have a role assigned. The role will need to be removed from the user account prior to disabling it. For roles assigned to routes, there needs to be at least one additional employee assigned prior to removing it.
Supervisor	Creator Revisers or Readers	Direct report user accounts will need to be updated to the new or temporary supervisor.
Infocard Owner	Creator Revisers or Readers	Reassign to the appropriate delegate for each document per the department.
Infocard Author	Creator Revisers or Readers	Reassign to the appropriate delegate for each document per the department.
Virtual Folder Creator	Sub administrators	Used in creating subfolders in organizers, if the owner of the Virtual Folder is gone, the SYSADMIN account may need to be used for future management.

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.

Procedure
General Use of MasterControl

Form
MasterControl User Management

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