



KAISER PERMANENTE®

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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 . <i>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.</i>																				
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 border="1" data-bbox="537 1392 1427 1619"> <thead> <tr> <th>Location</th> <th>View Only</th> <th>Reader</th> <th>Creator Reviser</th> </tr> </thead> <tbody> <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> </tbody> </table>	Location	View Only	Reader	Creator Reviser	LA	SEC-LA-vo	SEC-LA-rdr	SEC-LA-cr	RRL	SEC-RRL-vo	SEC-RRL-rdr	SEC-RRL-cr	SCPMG	SEC-SCPMG-vo	SEC-SCPMG-rdr	SEC-SCPMG-cr	SD	SEC-SD-vo	SEC-SD-rdr	SEC-SD-cr
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SD	SEC-SD-vo	SEC-SD-rdr	SEC-SD-cr																		
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 .																				

MasterControl User Management, Continued

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: <ul style="list-style-type: none"> • In-Process Training Task Step • Job Code • Trainee • Role <p>Go to Disable User Account and Archive Trainee Infocard sections for instructions on how to update those items.</p>
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

Author Matthew Jones, Systems Consultant

Signature Manifest

Document Number: SCPMG-PPP-0116

Revision: 01

Title: MasterControl User Management

All dates and times are in Pacific Standard Time.

New MasterControl User Management

Initial Approval

Name/Signature	Title	Date	Meaning/Reason
Maureen Ahler (K083442)	Quality Systems Leader	15 Apr 2016, 10:19:45 AM	Approved
Fred Ung (K057175)	SCPMG LABORATORY QCD	15 Apr 2016, 11:27:14 AM	Approved

Final Approval

Name/Signature	Title	Date	Meaning/Reason
Darryl Palmer-Toy (T188420)	SCPMG Laboratory Sys Med Dir	19 Apr 2016, 06:32:46 PM	Approved
Gary Gochman (P091953)	SCPMG Laboratories AP Dir	06 Jun 2016, 09:15:54 AM	Approved

Set Effective Date

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Maureen Ahler (K083442)	Quality Systems Leader	06 Jun 2016, 09:52:53 AM	Approved