

**Duke**Medicine

**Pediatric Blood and Marrow Transplant**  
**Adult Blood and Marrow Transplant**  
**Stem Cell Laboratory**

**DOCUMENT NUMBER:** COMM-PAS-021 JA1**DOCUMENT TITLE:**

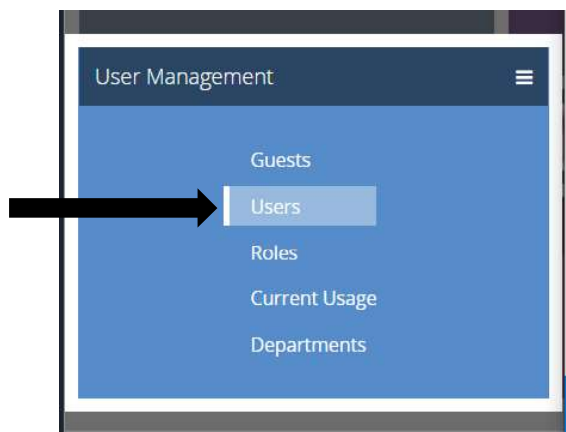
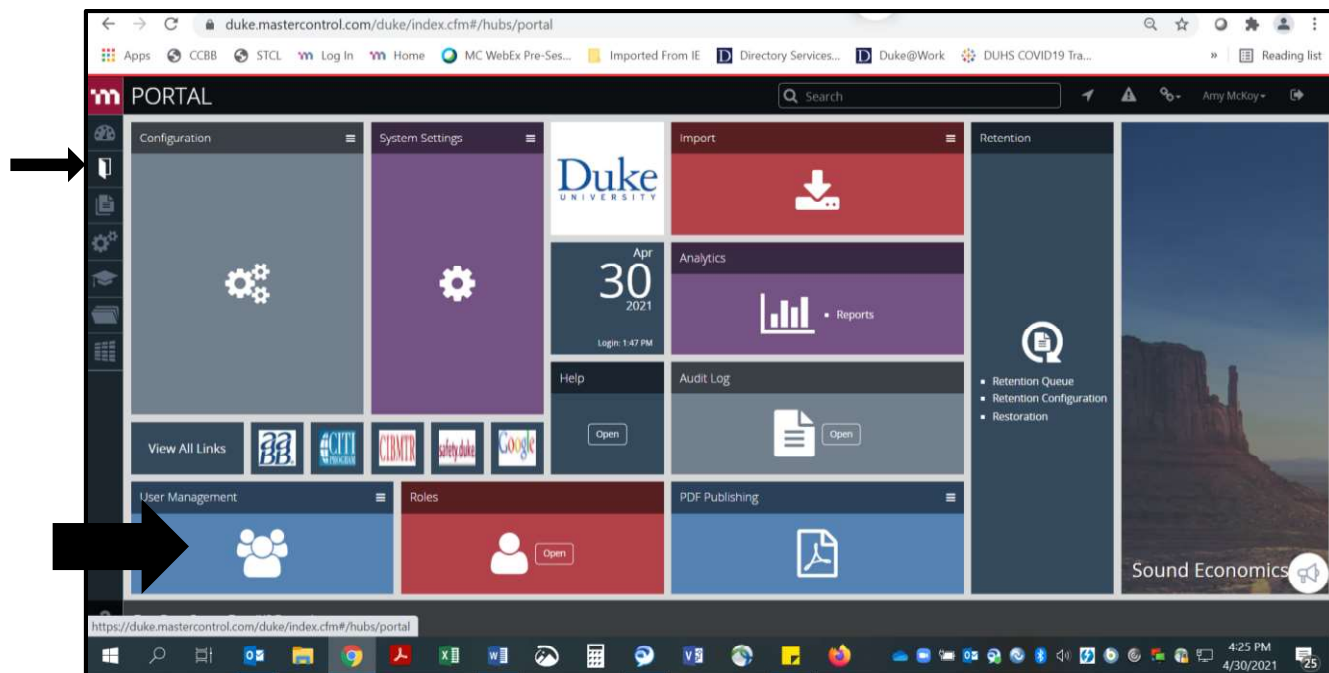
Disable a User Account in MasterControl

**DOCUMENT NOTES:****Document Information****Revision:** 01**Vault:** COMM-PAS-rel**Status:** Release**Document Type:** COMM-PAS**Date Information****Creation Date:** 20 Jun 2025**Release Date:** 01 Jul 2025**Effective Date:** 01 Jul 2025**Expiration Date:****Control Information****Author:** MC363**Owner:** MC363**Previous Number:** None**Change Number:** PAS-CCR-043

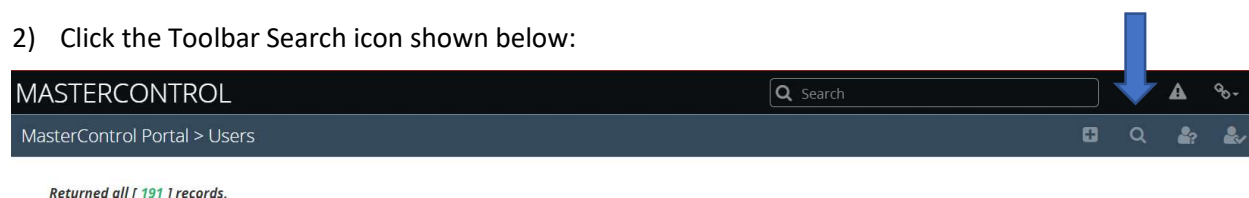
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### Disable a User's Account in MasterControl

- 1) Search for the user account via Portal > User Management > Users



- 2) Click the Toolbar Search icon shown below:



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### Disable a User's Account in MasterControl

3) Type the user name into the Simple Search field:

**Search**

Simple Basic Advanced

Search For:

John Smith

Open Save Search Clear

MasterControl Portal > Users > Edit User

Account Status: Enabled Authentication Provider: Okta

Account Information Personal Information

Title Suffix Address 1

Email: alicia.burgess@duke.edu Remove address Address 2

Phone City State

Fax Zip Code Country

Company

4) Go to the Personal Information tab and remove the email address.

5) Go to the Account Information tab (see screenshot below).

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The screenshot shows the MasterControl portal interface for editing a user. The 'Account Information' tab is selected. The 'Account Status' is 'Enabled'. The 'Authentication Provider' is 'Oltta'. The 'First Name' is 'Alicia' and the 'Last Name' is 'Burgess'. The 'User Name' is 'AAB49' and the 'Supervisor' is 'Erin Arbuckle (EP49)'. The 'Login Password' and 'Confirm Login Password' fields are empty. The 'Change password on next login' option is set to 'No'. The 'Account Locked' option is set to 'No'. The 'Employee Number' field is empty. The 'Job Title' field is empty. The 'Electronic Signature' and 'Confirm Electronic Signature' fields are empty. The 'Change electronic signature on next login' option is set to 'No'. The 'Account Locked' option is set to 'No'. The 'Department' is 'Thymus Donor Screening Project'. The 'Active Directory Username' and 'Active Directory' fields are empty. The 'Available Roles' list includes: AAA TEST ROLE, All Company-PWR, All Company-VO, and BARCODE COLL ADMIN SUPP. The 'Selected Roles' list includes: GRP-EVENT MGMT USERS, GRP-GMP VAULTS, and THYMUS DONOR SCREEN-PWR. A 'Copy' button is next to the 'Selected Roles' list.

- Select the radio button to the right of "Account Locked" under the Login Password and Electronic Signature.
- Print screen the Selected Roles field as shown below and paste into a Word file. The name of the file should be "User Name Roles and Job Codes". Enter a heading at the top of the document: "User Name – Roles and Job Codes Date."

The screenshot shows the 'Selected Roles' field with a list of roles: GRP-EVENT MGMT USERS, GRP-GMP VAULTS, and THYMUS DONOR SCREEN-PWR.

**Note:** Do not remove role(s) from the user account at this point.

- Save and enter the reason: "Preparing to disable account."

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### Disable a User's Account in MasterControl

- 6) Go to the Portal Search and enter the username (in order to find the user Trainee InfoCard).
- a) Click Training > Trainees folder and click the View InfoCard icon under the Actions column for the Released revision.

MasterControl Portal > InfoCards

Documents

Training > Trainees

NAME	TRAINEE NUMBER	REVISION	VAULT	DEPARTMENT	ACTIONS
Alicia Burgess (DFB17)	Trainee-0344	1	Trainee Release	Atrium Health	
<input type="checkbox"/> Alicia Burgess (AAB49)	Trainee-0261	2	Trainee Release	Thymus Donor Screening Project	
<input type="checkbox"/> Alicia Burgess (AAB49)	Trainee-0261	1	Trainee Archive	Thymus Donor Screening Project	
<input type="checkbox"/> Alicia Pena (AMP69)	Trainee-0198	1	Trainee Release	CCBB Administration	

- b) InfoCard opens to the Trainee Tab (navigation tabs are on the right-hand side of the InfoCard).

- \*Information
- \*Trainee**
- Training Gates
- Controlled Copies
- Attachments & Links
- Custom Fields
- History
- Status
- Versions

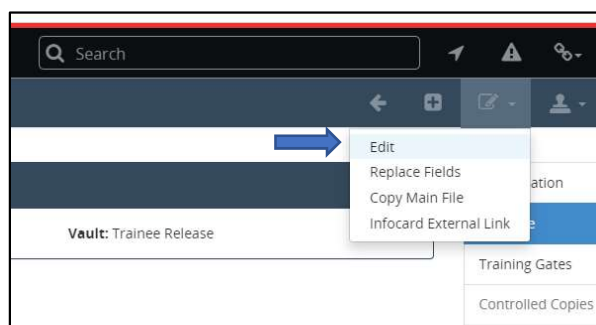
- c) Print screen the Released Job Codes. Paste the print screen capture into the same Word file created in step 5b. Save the Word file as a PDF.

InfoCard Information	
<b>Trainee Number:</b> Trainee-0261	<b>Revision:</b> 2
<b>Version:</b> 0	<b>Vault:</b> Trainee Release
<div> <div> <b>Trainee Name (User ID)</b>  Alicia Burgess (AAB49) </div> <div> Assigned Job Codes </div> </div>	
<b>Hire Date</b> 01 Jul 2014	<b>Released</b> DIRECTED DONATION MC ALL-PWR THYMUS DONOR SCREENING - PWR
<b>Termination Date</b> 	
<b>Degree</b> None	
<b>Supervisor</b> Erin Arbuckle (EPA9)	

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### Disable a User's Account in MasterControl

7) Edit the Trainee InfoCard.



- Enter Termination Date
- Remove Selected Job Codes. See screenshot below.

A screenshot of the 'InfoCard Information' form. The form displays fields for Trainee Name (Alicia Burgess (AAR49)), Degree (None), Supervisor (Erin Arbuckle (EPA9)), Hire Date (01 Jul 2014), and Termination Date. The 'Job Codes' section shows 'Available Job Codes' and 'Selected Job Codes'. A blue arrow points from a 'Remove Job Codes' button to the 'Selected Job Codes' list. An 'Enter' button is shown with an arrow pointing to the 'Termination Date' field.

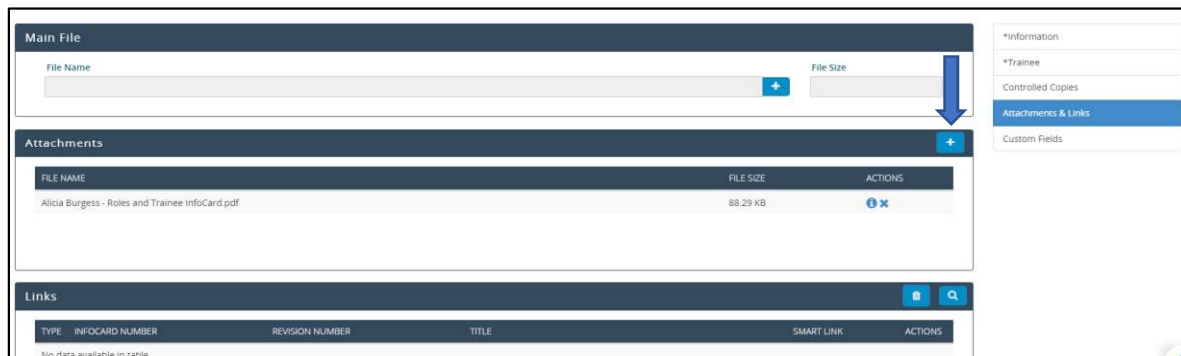
c) Add note to Information Tab similar to the one below.

A screenshot of the 'Version Information' form. The form displays fields for Trainee Number (Trainee-0261), Revision (2), Version (0), Lifecycle (Training Trainee), Vault (Trainee Release), Trainee InfoCard Type (Default), and Subtype (None). The 'Notes' field contains a note: 'See file on the Attachments & Links tab for Alicia Burgess' Roles and Job Codes. bj42 04/04/18. A blue arrow points from an 'Enter note' box to the 'Notes' field. On the right, a sidebar shows the 'Information' tab selected, with a blue arrow pointing to it from a 'Select Information Tab' box.

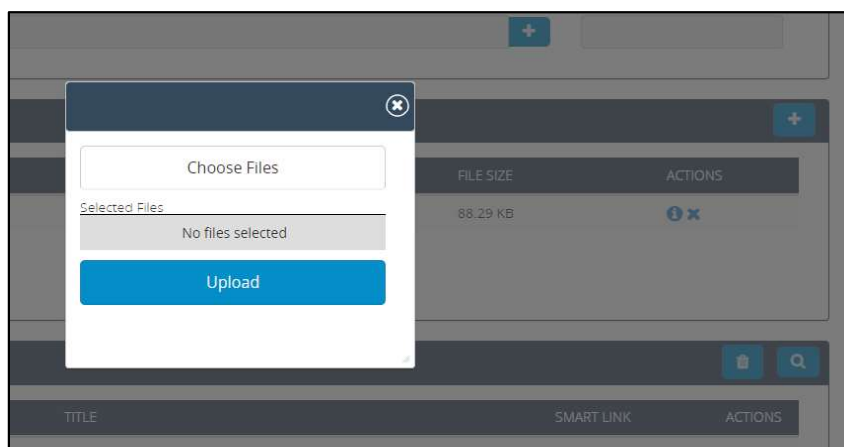
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d) Go to the Attachments & Links Tab; select the plus icon on the Attachments bar.

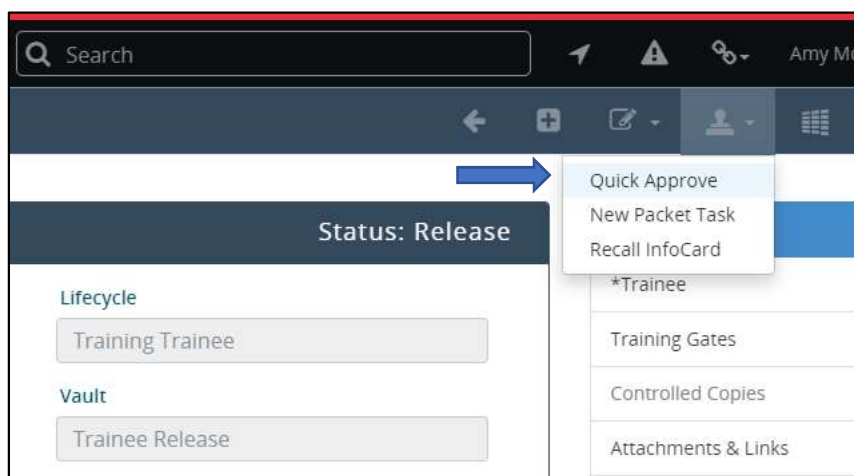


e) Select the PDF file containing the Roles and Job Codes and click Upload.



f) Save the InfoCard (button is at bottom right).

8) **Quick Approve** the InfoCard by selecting the Stamp icon drop-down menu at top-right corner and clicking Quick Approve.



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### Disable a User's Account in MasterControl

- 9) In the Quick Approval window that populates, enter "Archiving Trainee InfoCard." Click "Show Dates" and enter today's date. Then click the **Submit** button.

- 10) Return to the User Account as in step 1 by selecting Portal > User Management > Users.
- Remove the Selected Roles
  - Toggle the Account Status switch at the top-left corner to **Disabled**.

#### MasterControl Portal > Users > Edit User

- Save. Reason is "Disabled user account. Initials and date."



**Signature Manifest****Document Number:** COMM-PAS-021 JA1**Revision:** 01**Title:** Disable a User Account in MasterControl**Effective Date:** 01 Jul 2025

All dates and times are in Eastern Time.

**COMM-PAS-019 FRM3 -- COMM-PAS-021 JA3****Author**

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**Document Release**

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Amy McKoy (ACM93)	Document Control Specialist	30 Jun 2025, 05:47:22 PM	Approved