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

DOCUMENT NUMBER: COMM-PAS-026 JA1

DOCUMENT TITLE:
Approving/Releasing a Document Infocard and Creating a Course Infocard

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

COMM-PAS-026 JA1
Approving/Releasing a Document Infocard and Creating a Course Infocard

I. Approve Document InfoCard

1) The task appears in your Task List.
   a. First, look at the CCR to see if the author indicated a planned effective date for the document.
   b. If an effective date is provided, send an email to the author to verify that date; or request an effective date, suggesting 2 weeks out from the date the document was moved into the Doc Release step. The Doc Release step and the date you actually view the document for approval may or may not be the same date.
   c. Once the effective date is confirmed, assign the date to the InfoCard.

2) Look over the Course InfoCard before approving the Document InfoCard.
   a. To find the Course IC, enter the document number in the Portal Search at the top of the web page. (Don't go to the Advanced search):

COMM-PAS-026 JA1 Approving/Releasing a Document InfoCard and Creating a Course InfoCard
APBMT Clinical Quality Program (CQP), Duke Cancer Institute (DCI)
Durham, NC   Page 1 of 6
CONFIDENTIAL - Printed by: VLP18 on 03 Jul 2025 10:45:01 am

COMM-PAS-026 JA1
Approving/Releasing a Document Infocard and Creating a Course Infocard

b. Via the Training module, click Courses. Locate and open the desired Course IC (Course Released vault).
c. Ensure the Job Codes on the existing Course IC match what is on the CCR for the document.
d. If there are names or extra Job Codes that need to be added, edit the Course IC and save. Do not re-approve a RELEASED Course IC.
e. Check over the rest of the IC to make sure all is correct.
f. If there is NOT a Course IC, a new one will need to be created (see Section II).

3) Click the stamp icon beside the task listing that requires approval and enter the effective date (from the author). Enter your eSig. Save.
4) Check PDF Publishing and verify that the just-approved document is published.
5) Via Tracking, check to ensure training did, in fact, trigger by running a **BASIC** search. Example:

II. Create a new Course InfoCard for a new revision 01 document

COMM-PAS-026 JA1 Approving/Releasing a Document InfoCard and Creating a Course InfoCard
APBMT Clinical Quality Program (CQP), Duke Cancer Institute (DCI)
Durham, NC   Page 2 of 6
CONFIDENTIAL - Printed by: VLP18 on 03 Jul 2025 10:45:01 am

COMM-PAS-026 JA1
Approving/Releasing a Document Infocard and Creating a Course Infocard

1) Go to the Training module > Courses > New > Select *Default* as your InfoCard Type and click Continue.

2) Opens a blank Course IC. On the Information Tab:
   a. Course number populates automatically.
   b. Title field: Document IC number and title. Example: COMM-PAS-004 Change Control.
   c. Edited the Author/Owner fields – include person responsible for authoring the procedure.
   d. Copy the information in the Title field.
3) Course Tab
   a. Paste the copied Document IC number and title into the Course Name and Course Description fields.
   b. Select Category from the drop-down menu.
   c. Select Location from the drop-down menu ("On Computer" not "Computer").
   d. Course Instructions copy and paste from Word doc. example: Sign off on the training task to indicate that you have read and understand the linked document.
   e. Retraining
      i. PBMT, ABMT, or APBMT document set to 335 days
      ii. All other documents set to 351
      iii. Note: annual training triggers to a user 14 days prior to due date for all docs except "BMT", which will trigger 30 days prior to due date. Also, the due date is one year from the last sign off.
      iv. Due (days) field – set to 14
      v. Verification Due field – set to 7
   f. Course Manager – person responsible for creating the Course IC.

COMM-PAS-026 JA1
Approving/Releasing a Document Infocard and Creating a Course Infocard

    g.   Course Verifier – _normally_ select "Trainee's Supervisor." However, you can select a specific name for this field.

    h.   Trainees field – If there are names listed on the CCR, enter in this field.

   i.   Fill in the correct info for the Job Codes and Available Exams.

    j.   In the image below, the 3 options on the left are preset. The option on the right must be manually selected. Always select "Immediately (automatic Course re-approval)." This selection means that for future revisions when the Document IC is approved, the revision on the Link will automatically update to the next revision number before triggering.

COMM-PAS-026 JA1 Approving/Releasing a Document InfoCard and Creating a Course InfoCard
APBMT Clinical Quality Program (CQP), Duke Cancer Institute (DCI)
Durham, NC
Page 4 of 6
CONFIDENTIAL - Printed by: VLP18 on 03 Jul 2025 10:45:01 am

COMM-PAS-026 JA1
Approving/Releasing a Document Infocard and Creating a Course Infocard

4) Attachments and Links Tab
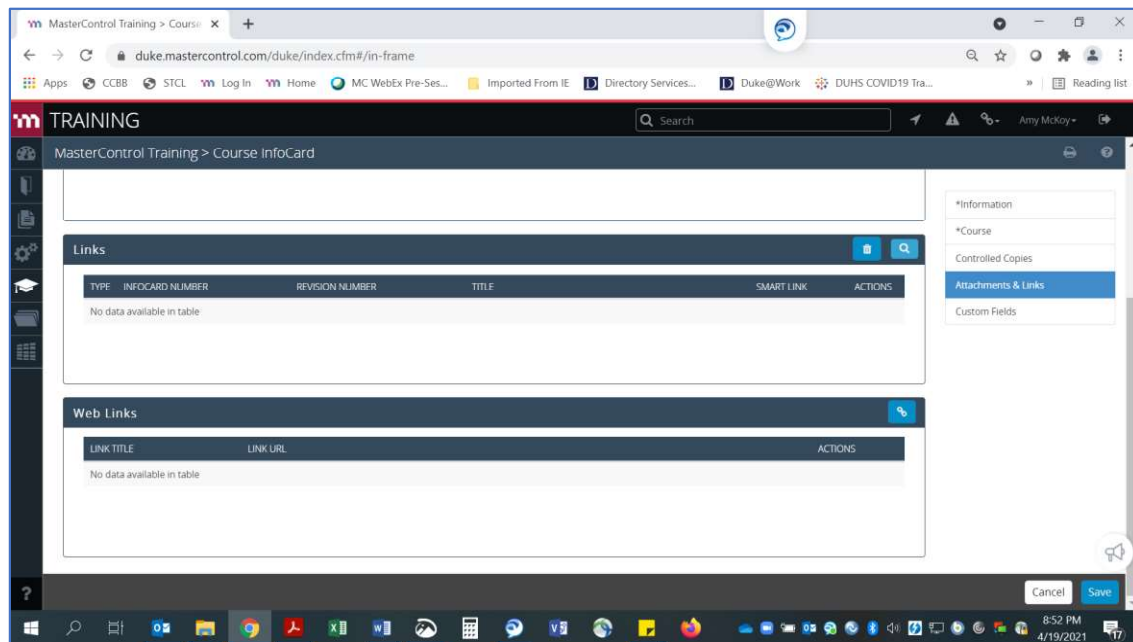
a. In the Links section (3rd section), select the search icon on the right corner. Enter the parameters as in the image below.

b. Click **Submit Search** and check the correct version of the document (could be Draft or Release). Click **Retrieve InfoCards** button. The document will be listed under Links. Do not select the Smart Link checkbox.

COMM-PAS-026 JA1 Approving/Releasing a Document InfoCard and Creating a Course InfoCard
APBMT Clinical Quality Program (CQP), Duke Cancer Institute (DCI)
Durham, NC   Page 5 of 6
CONFIDENTIAL - Printed by: VLP18 on 03 Jul 2025 10:45:01 am

COMM-PAS-026 JA1
Approving/Releasing a Document Infocard and Creating a Course Infocard

   c.   Check/recheck field information on the Course InfoCard.
   d.   Click the **Save** button at the bottom-right corner.

2) Perform a **Quick Approval** of the Course InfoCard.
   a.   This action will trigger the training to the Job Codes and/or Trainees listed.

Signature Manifest

Document Number: COMM-PAS-026 JA1   **Revision:** 01

Title: Approving/Releasing a Document Infocard and Creating a Course Infocard

Effective Date: 01 Jul 2025

All dates and times are in Eastern Time.

COMM-PAS-022 -- COMM-PAS-027 JA1

Author

Name/Signature	Title	Date	Meaning/Reason
Mary Beth Christen (MC363)		26 Jun 2025, 12:01:08 AM	Approved

Management

Name/Signature	Title	Date	Meaning/Reason
Kris Mahadeo (KM193)		26 Jun 2025, 10:34:13 AM	Approved

Medical Director

Name/Signature	Title	Date	Meaning/Reason
Kris Mahadeo (KM193)		26 Jun 2025, 10:34:28 AM	Approved

Quality

Name/Signature	Title	Date	Meaning/Reason
Mary Beth Christen (MC363)		26 Jun 2025, 05:14:55 PM	Approved

Document Release

Name/Signature	Title	Date	Meaning/Reason
Amy McKoy (ACM93)	Document Control Specialist	30 Jun 2025, 05:51:48 PM	Approved