


DukeMedicine


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

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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.



MPACT-QA-0013 CAPA

Sign Off: Document Release

Comments

Make effective 24May2021, per document author.

***Electronic Signature**

.....

[Forgot Password?](#)

***Status**

Approved

***Effective Date**

Calendar View

Expiration Date

Calendar View

[Back](#) [Cancel](#) [Sign Off](#)

- 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):

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MasterControl Portal > InfoCards

Documents

Training > Courses

- 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

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- 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.

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- 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.

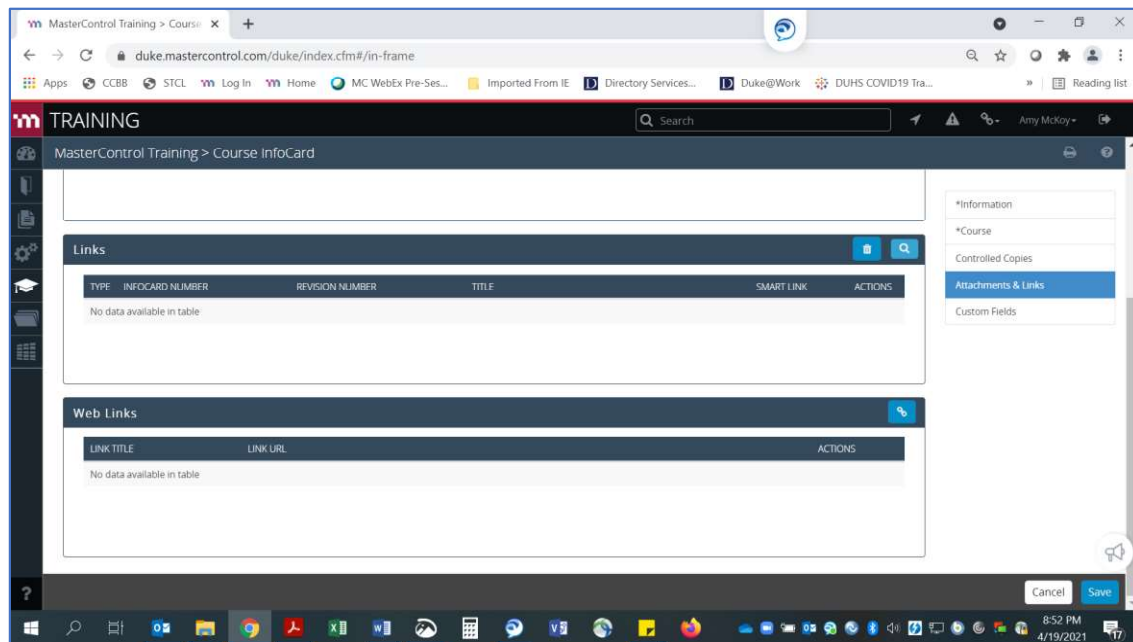
The screenshot displays the 'Available Job Codes' and 'Available Exams' sections. The 'Available Job Codes' section has a 'Released' list with names like 'ABMT - MARY BETH CHRISTEN' and a 'Selected Job Codes' section with a 'Released' list containing 'Draft'. The 'Available Exams' section has a 'Released' list with exam titles like 'Barcode Collection Administrative Support Exam-0118 rev 01' and a 'Selected Exams' section with a 'Released' list containing 'Draft'. A sidebar on the right shows tabs for '*Information', '*Course', 'Controlled Copies', 'Attachments & Links', and 'Custom Fields'. The '*Course' tab is selected.

- 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.

The screenshot shows the 'Launch Training when this Course is Released' section with three radio button options: 'Launch Training when this Course is Released' (selected), 'Disable all training', and 'Enable training only for scheduled re-training and new trainees'. Below these are checkboxes for 'Training Task Verifier required' (checked), 'Allow trainees to electively take course' (unchecked), and 'Require supervisor approval' (unchecked). The 'Require trainee to view linked documents before signing off' checkbox is checked. On the right, the 'Launch Training when Linked InfoCard is Approved:' section has two radio button options: 'After Manually Re-approving this Course' (selected) and 'Immediately (automatic Course re-approval)' (unchecked).

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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.

Search

Simple

Basic

Advanced

FIELD	OPERATOR	VALUE	LOGIC
InfoCard Number	Contains	COMM-QA-002	

Open

Save Search

Clear

Submit Search

- 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.

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Links

	TYPE	INFOCARD NUMBER	REVISION NUMBER	TITLE	SMART LINK	ACTIONS
<input type="checkbox"/>		COMM-QA-002	11	Supplier Qualifications	<input type="checkbox"/>	

Web Links

LINK TITLE	LINK URL	ACTIONS
No data available in table		

Cancel

Save

- 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**

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Name/Signature	Title	Date	Meaning/Reason
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Name/Signature	Title	Date	Meaning/Reason
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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