

Contracts

Functions:

- [Search](#)
- [View contract](#)
- [Add contract](#)
- [Land contract](#)
- [Amend contract](#)
- [Archive contract](#)

Business context

Allows authorized users to complete a range of contract-related processes in Panorama.

Pre-requisites: To add a contract in Panorama, a Supplier and the product in the Catalogue must be in the system.

Triggers

- A new contract has been established
- A contract renewal has occurred
- A new product must be added to a current contract
- Contract details have changed and must be updated
- A contract must be archived (end-dated)

Business Roles

Several business roles have responsibility for components of contract-related work. The vaccine catalogue is maintained exclusively by the NSHA Bio Depot. The Add and Update functions within the catalogue will be completed by staff at the Bio Depot. The DHW CDPC Consultants will add the contracts to Panorama and add products on the contracts. At the end of March every year, CDPC Consultants will add/amend contracts as necessary.

- DHW CDPC consultants
- DHW CDPC Administrative Support
- DHW Financial Advisor
- NSHA SSP Immunization Coordinator
- NSHA SSP Bio Depot Biological Coordinator
- NSHA SSP Bio Depot Pharmacy Practicing Assistant
- NSHA SSP Bio Depot Admin Assistant

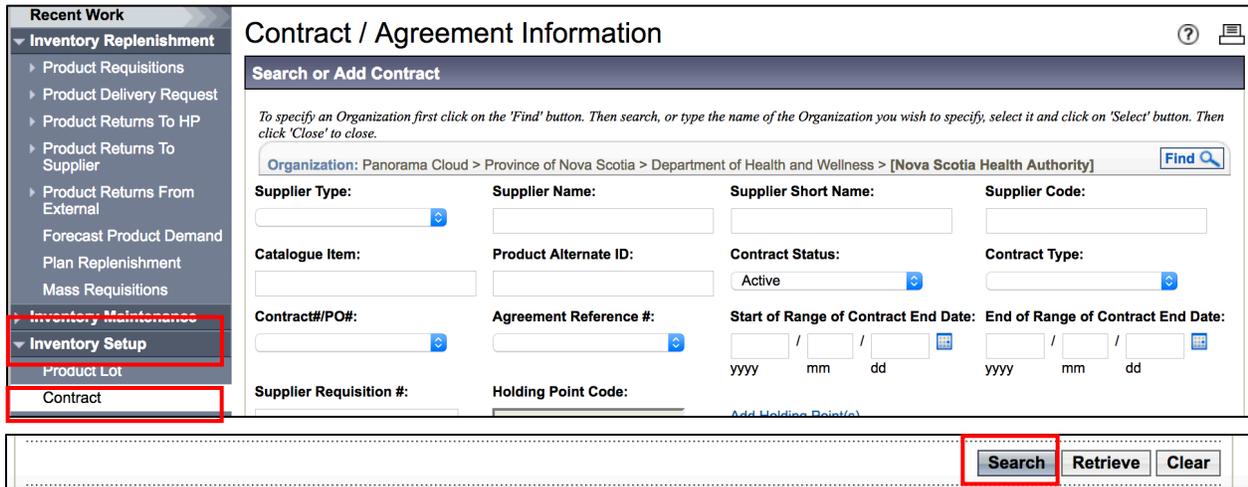
Panorama Role

Contract-related functionality is restricted to users with the Inventory Provincial role.

Steps: Search

Overview Steps: Select Contract from the Left-Hand Navigation Menu>Enter search criteria>Click Search

1. Contracts is a setup function. Select **Inventory Setup** from the Left-Hand Navigation Menu, then select **Contract**.



2. The **Search or Add Contract** screen displays. Enter the search criteria, then click the **Search** button. Common search criteria are as follows:
 - Contract/PO# - From formal contract
 - Supplier Name – Formal supplier name
 - Contract status – select **Active** for all active contracts

	Tip: Complete an open search to generate a list of all the contracts in Panorama.
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3. The search results display under the **Contract Search Results**.

Contract Search Results							
Your search criteria returned 10 result(s).							
Row Actions: <input type="button" value="Update"/>							<input type="button" value="Add Contract"/>
	Contract#/PO#:	Agreement Reference #:	Supplier Name:	Organization Code	Contract Type:	Contract Start Date	Contract End Date
<input type="checkbox"/>	Contract01		Sanofi Pasteur Ltd.	NSHA	Formal Contract	2017 Jul 17	2019 Jul 17
<input type="checkbox"/>	Contract02		GlaxoSmithKline	NSHA	Formal Contract	2017 Jul 17	2019 Jul 17

Steps: View Contract

Overview Steps: Search>Click Contract#/PO# hyperlink>Cancel

1. To view the contract details, click the blue hyperlink under **Contact/PO#**. The **Contract** screen displays. The contract details are listed on this screen.
2. Some fields are populated and others are not. Not all fields are system or business mandatory.
3. The **Contract / PO Version #** is system generated. It indicates how many versions of the contract exist.
4. The contract displays the holding point under the **Holding Points** section and the products on the contract under **Products**.

Contract			
* Required field			
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.			
Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority] Find			
Contract Status: Active	* Effective Start Date: 2017 / 09 / 14 yyyy mm dd	* Effective End Date: 2018 / 09 / 14 yyyy mm dd	Contract State: Landed
* Supplier Code: Pfizer - Pfizer Canada Inc	Supplier Name: Pfizer Canada Inc	Supplier Short Name:	Supplier Site Name: -
* Contract Type: Formal Contract	* Contract#/PO#: Contract10	Agreement Reference #:	
Workgroup Organization:			
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.			
Organization: Panorama Cloud > Province of Nova Scotia > [Department of Health and Wellness] Find			
Contract Management Workgroup:			
<input type="text"/>			
Renewal Option:	Authorized By:		
<input type="text"/>	<input type="text"/>		
Planning Renewal Lead Time:	Planning Renewal Lead Time Unit of Measure:	* Procurement Lead Time:	* Procurement Lead Time Unit of Measure:
<input type="text"/>	<input type="text"/>	7	Days
Tender #:	Quote #:	Supplier Purchase Requisition #:	Freight On Board:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address Queries To:	Telephone:	Freight Charges:	Miscellaneous Charges:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return Terms:	Amendment:	Contract Penalty:	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract/PO Version #:	Contract/PO Version Date:	Contract/PO Create Date:	Last IFIS Update Date:
1	2017 Sep 14 21:56 ADT	2017 Sep 14 22:01 ADT	-
Payment Terms:	Currency Code:	Total Value:	Total Received To Date:
	-	\$2,500.00	\$1,050.00
Comment: (4000 characters remaining)			
<input type="text"/>			
Date	Comments	Recorded By	

Holding Points

Row Actions: Remove from Contract		Add Holding Point(s)	
<input type="checkbox"/>	Organizational Unit: NSHA	Holding Point: Bio Depot-HP - Bio Depot	Service Delivery Location: Bio Depot
			Holding Point Type: Jurisdictional Depot

Products

Row Actions: Cancel Product					Add Product			
<input type="checkbox"/>	Product Alternate ID: Pneu-C-13(10)	Catalogue Item Name: Prevnar®13(10 x 0.5mL)PC	Catalogue Item: 52	Unit of Measure: Dose(s)	Total Contracted Quantity: 2,500.0	Qty Available to Order: 1,450.0	Unit Cost: \$1.00	Total Received To Date: 1,050.0

- After reviewing the contract information, click the **Cancel** button, located in the bottom right hand corner of the screen, to return to the contract search screen.
- Click OK.

Steps: Add Contract

	<ul style="list-style-type: none"> A Supplier and the products on the contract must exist in Panorama prior to creating a Contract.
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Overview Steps: Search > Click **Add Contract**> Add Contract information > Save

- Complete a contract search.
- If the Contract/PO# does not exist, click the **Add Contract** button.

Contract Search Results

Your search criteria returned 0 results, please modify your criteria and search again.

Row Actions:

Contract#/PO#:	Agreement Reference #:	Supplier Name:	Organization Code:	Contract Type:	Contract Start Date:	Contract End Date:
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3. The **Contract** screen displays.

Contract

** Required field*

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]

Contract Status: Active

*** Effective Start Date:** 2017 / 09 / 15 **B**

*** Effective End Date:** 2018 / 09 / 16 **C**

Contract State: Pending

*** Supplier Code:** GSK - Glaxo Smith Kline **A**

Supplier Name: Glaxo Smith Kline

Supplier Short Name:

Supplier Site Name: -

*** Contract Type:** Formal Contract **D**

*** Contract#/PO#:** Contract12 **E**

Agreement Reference #: 48 **F**

Workgroup Organization:

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > [Department of Health and Wellness]

Contract Management Workgroup: **G**

Renewal Option: 1 year term, optional 2 year renewal **H**

Authorized By: **I**

Planning Renewal Lead Time: **J**

Planning Renewal Lead Time Unit of Measure: **K**

*** Procurement Lead Time:** 7 **L**

*** Procurement Lead Time Unit of Measure:** Days **M**

Tender #: **N**

Quote #: **O**

Supplier Purchase Requisition #: **P**

Freight On Board: **Q**

Address Queries To: **R**

Telephone: **S**

Freight Charges: 0 **T**

Miscellaneous Charges: 0 **U**

Return Terms: **V**

Amendment: **W**

Contract Penalty: **X**

Contract/PO Version #: 3	Contract/PO Version Date: 2017 Sep 15 12:11 ADT	Contract/PO Create Date: 2017 Sep 15 12:12 ADT	Last IFIS Update Date: -
Payment Terms: <input type="button" value="Dropdown"/>	Currency Code: - <input type="button" value="Dropdown"/> Y	Total Value: \$253,750.00	Total Received To Date: \$13,340.00

Comment: **Z** (4000 characters remaining)

	<p>Non-Mandatory Fields</p> <ul style="list-style-type: none"> • Panorama lists many fields on the Contracts screen. Most fields are not system-required. Nova Scotia may wish to document information in non-mandatory fields, as per business requirements.
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Enter the contract information based on the required business information.

- Fields:
 - A. **Supplier Code Drop-down** – Formal Business Name
 - B. **Effective From date** (auto-populates with today’s date)
 - The date may be changed; the Calendar widget or add changes to each field.
 - C. **Effective End Date** – add
 - D. **Contract Type** drop-down – Select Formal Contract
 - When inventory is ordered for which there is not a formal contract (i.e. Tetanus Immune Globulin) – select Non-Contract.
 - E. **Contract#/PO#** - Add number from contract
 - Contract#PO# for Non-Contract is account number which is used for billing and shipping address to NSHA Public Health.
 - F. **Agreement Reference #**: Also known as Vendor Number. Agreement reference # is normally used to record the id of the actual contract which is detailed in the procurement system. This may be found within the Approval to Pay Vaccine Invoice SOP (Appendix A).
 - Do not use for Non-Contract.
 - G. **Contract Management Workgroup**: Do not use
 - H. **Renewal Option**: If a contract has options for renewal, e.g., for two years, an option can be selected from the Renewal Option drop-down.
 - **Add** comment to indicate current year of the contract. This will be indicated by naming comment: *Renewal Option: 2018-19 Year 3 FY* (as an example).
 - Do not use for Non-Contract.
 - I. **Authorized by**: Do not use.
 - J. **Planning Renewal Lead Time**: Do not use.
 - K. **Planning Renewal Lead Time Unit of Measure**: Do not use.
 - L. **Procurement Lead Time** – Procurement lead time is the interval between the initiation of the procurement process to when the product is received into inventory. Lead time is used by processes that manage approvals. This figure will vary for different contracts and should be confirmed prior to adding the contract into Panorama. A common lead time in Nova Scotia is seven business days.
 - M. **Procurement Lead Time Unit of Measure** drop-down – Days
 - N. **Tender #**: Do not use
 - O. **Quote #**: Do not use
 - P. **Supplier Purchase Requisition #**: Do not use
 - Q. **Freight on board**: Add temptale
 - R. **Address Queries To**: Do not use
 - S. **Telephone #**: Do not use

- T. **Freight charges:** Do not use
- U. **Miscellaneous charges:** Do not use
- V. **Return Terms:** Checked off if return terms exist. This has no impact on the system. Add comment to indicate where to find contract return information: *Return terms: pg. 9, section 17.4* (as an example).
- W. **Amendment:** May be checked off if an amendment exists. Optional and has no impact on the system.
- X. **Contract Penalty:** Do not use.
- Y. **Payment Terms and Currency Code:** Do not use.
- Z. **Comment** (up to 4000 characters)
 - o Begin each comment with "Title_". Title examples – *Return Terms*. After adding a comment, click the **Add** button. Saving alone will not add the comment. Comments cannot be deleted.

4. All contracts must be associated to the Bio Depot Holding Point. Click **Add Holding Point(s)** to assign the Bio Depot **Holding Point** to the contract.

Holding Points				
Row Actions:	Organizational Unit:	Holding Point:	Service Delivery Location:	Holding Point Type:
<input checked="" type="checkbox"/>	NSHA	Bio Depot-HP - Bio Depot	Bio Depot	Jurisdictional Depot

- 5. The **Holding Point Profile Search** screen displays. Enter the search criteria and click **Search**.
- 6. The **Organization Name** is Nova Scotia Health Authority.
- 7. Do not select a Holding Point Eligibility Group.

Holding Point Profile Search Hide Holding Point Profile Search

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority] Find

Close X

Type Search

Start typing the name of the Organization. Matches will begin to appear below. Select the match with the keyboard or mouse.

Organization Name: Show Info

City, Province: - Hierarchy Type: Jurisdictional Status: Active

Select

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location] Find

HP Type: Holding Point:

Holding Point Eligibility Group: Default Replenishment Source:

HP Status: License Number:

Delivery Zone: Holding Point Address Postal Code (A9A 9A9):

Contact Name: Contact Phone (555-555-5555): () ext.

Override Holding Point Security

Coa Search Section Show Coa Search Section

Search Retrieve Clear

8. Panorama displays the search results. Select Bio Depot - HP and click the **Add Holding Points** button. The Holding Point is added to the contract.

Holding Point Profile Results Hide Holding Point Profile Results

Your search criteria returned (1) result(s).

Select All Deselect All

Row Actions:

Change Parameters for Multiple Holding Points

	Holding Point	Secondary HP Name	HP Status	Ship from/return to	HP Type
<input checked="" type="checkbox"/>	Bio Depot-HP - Bio Depot	-	Active	#5 - 7 Mellor Avenue Burnside B3B0E8	Jurisdictional Depot

Total: 1 Page 1 of 1 Jump to page:

- The Contract page displays. Click the **Add Product** button to assign one or more product(s) to the contract. Please note that diluent must also be added to contract for those relevant products (i.e. MMR, MMRV, Varicella – for these products diluent is identified by manufacturer).

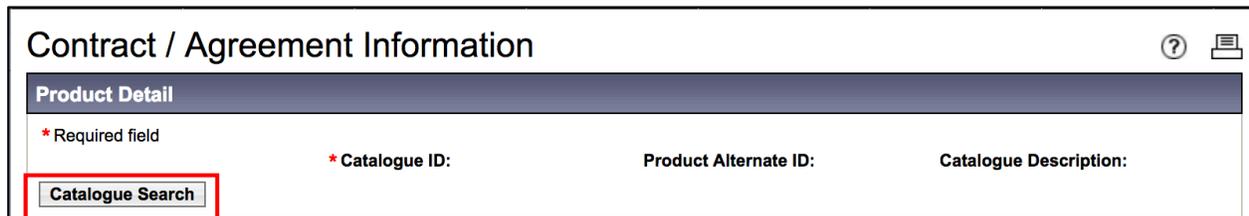


Products

Row Actions:

Product Alternate ID:	Catalogue Item Name:	Catalogue Item:	Unit of Measure:	Total Contracted Quantity:	Qty Available to Order:	Unit Cost:	Total Received To Date:
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- Panorama displays the **Product Detail** screen. Click the **Catalogue Search** button to search for the desired catalogue. The **Product Detail** screen displays. Click **Catalogue Search**.



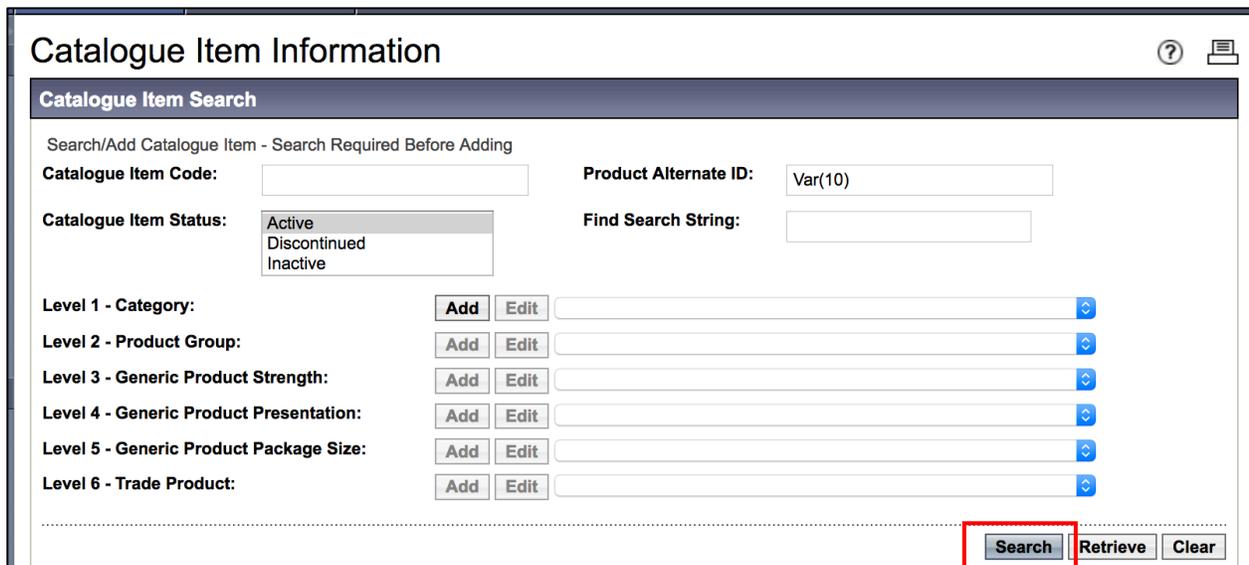
Contract / Agreement Information

Product Detail

* Required field

* Catalogue ID: _____ Product Alternate ID: _____ Catalogue Description: _____

- The system displays the **Catalogue Item Search** screen. Search using the Level 1- 6 dropdowns, by Alternate ID, or **Find Search String** fields. Click **Search**.



Catalogue Item Information

Catalogue Item Search

Search/Add Catalogue Item - Search Required Before Adding

Catalogue Item Code: Product Alternate ID:

Catalogue Item Status: Find Search String:

Level 1 - Category:

Level 2 - Product Group:

Level 3 - Generic Product Strength:

Level 4 - Generic Product Presentation:

Level 5 - Generic Product Package Size:

Level 6 - Trade Product:

12. The search results display. Select one or more catalogue items and click the **Add Catalogue Item(s)** button.

Search Results Returned

Your search criteria returned 2 result(s).

<input type="checkbox"/>	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
<input checked="" type="checkbox"/>	68	Var(10)	Varilrix@(10 x 0.5mL)GSK	Varicella	6	Active
<input type="checkbox"/>	69	Var(10)	Varivax@(10 x 0.5mL)MF	Varicella	6	Active

13. The system populates the **Product Detail** page with the Catalogue information, including the Catalogue ID.

Contract / Agreement Information

Product Detail

* Required field

Catalogue Search: <input type="text" value="68"/> A	Catalogue ID: 68 B	Product Alternate ID: Var(10) C	Catalogue Description: Varicella D
* Product Start Date: 2017 / 09 / 17 E	* Product End Date: 2018 / 09 / 17 F	* Total Contract Quantity: 50000 G	* Unit of Measure: Dose(s) D
* Unit Cost: 10.00 E	Discount (%): <input type="text"/> F	Current Landed Cost: 0.00 G	Landed Cost: \$0.00
Maximum Contract Quantity (%): 120 H	Minimum Contract Quantity (%): 90 I	Percent Returnable for Credit: <input type="text"/> J	Quantity Returned for Replacement: 0.0
Full-Carton Quantity: 1 L	Minimum Shelf Life: <input type="text"/> M	Percent Returnable for Replacement: <input type="text"/> K	Quantity Returned for Replacement: 0.0
Return Policy: <input type="checkbox"/> O	Product Specification: <input type="checkbox"/> P	Shelf Life Unit of Measure: <input type="text"/> N	* Threshold Alert Point: 90 N
Restocking Fee: <input type="text"/> Q	Replacement Unit Cost: <input type="text"/> R	Cost Type: <input type="text"/> U	
Quantity Received to Date: 0.0	Contract Quantity on Order: 0.0	Remaining Quantity to Receive: 0.0	Quantity Available to Order: 0.0
* Minimum Qty per PDR: 500 S	* Minimum Qty per PDR Unit of Measure: Dose(s) T	Quantity Recalled: 0.0	
Contract Product State: Pending	Product Cancel Reason: -	Account Code: <input type="text"/> U	
Supplier Requisition #:	Manufacturer Part #:	Contract/PO Line Item Reference #:	Acquisition Unit Price:

14. Fields:

- A. **Product Start Date** populates with today's date. This day should match the contract start date.
- B. **Product End Date**: End date of current contract.
- C. **Total Contract Quantity**: Add the contract quantity.
- D. **Unit of Measure**: Select from drop-down menu – select Dose.
 - Unit of Measure relates to the holding point product and quantity values. It is important to select the correct Unit of Measure because it will be used to define contract quantities, minimum, maximums, etc. (e.g., 10 SKU may be different than 10 doses).
- E. Add **Unit Cost** based on your contract or use blended price.
- F. **Discount %** - Do not use
- G. **Current Landed cost** – Do not use
- H. **Maximum Contract Quantity (%)**: This is the highest % of the contract amount that can be ordered, i.e., more than the contract amount may be ordered. In NS, add 120 to this field, with the exception of influenza products.
- I. **Minimum Contract Quantity (%)**: This is the lowest % of the contract amount that can be ordered, i.e., less than the contract amount may be ordered. In NS, add 90 to this field, unless identified otherwise in the contract.
- J. **Percent Returnable for Credit**: Do not use. Return terms are indicated against the contract page using a comment which refers to section within contract where this information is found.
- K. **Percent Returnable for Replacement** – Do not use.
- L. **Full-Carton Quantity** – Do not use. Pre-populates as 1.
- M. **Minimum Shelf Life**: Complete as per contract. It does not drive any other functionality.
- N. **Threshold Alert Point**: Refers to the % of the Total Contracted Quantity at which the System alerts the user that a PDR puts the quantity ordered-to-date past the threshold.
 - For Nova Scotia, add 100. 100 would mean that if PDRs had been created for 100% of the product contracted, then new PDRs would generate a warning message, but not a threshold notification.
- O. **Return policy**: indicates the existence of a return policy.
- P. **Product specification**: Do not use.
- Q. **Restocking fee** – Do not use.
- R. **Replacement Unit Cost** – Do not use.
- S. **Minimum Qty per PDR**: Select the quantity that each PDR must contain at a minimum, e.g., 500 doses.
- T. **Minimum Qty per PDR Unit of Measure**: doses
- U. **Account code** – Do not use.

15. Click **Add Product** at the bottom of the screen to add the product to the contract. A confirmation message displays.



16. Click **Save Contract**. The system displays a confirmation message. The contract is now in a Pending state. A contract must be Landed for PDRs to be processed against it.



Steps: Land Contract

Overview Steps: Search >Select Contract>Land Contract >Confirm Landed>Save

- ★
 - Contracts must be in status 'Active' and state 'Landed' to be eligible for use against a Product Delivery Request (PDR).
 - Each time a contract is amended, it must be Landed, then Saved.
 - A contract with a start date in the future has Contract Status 'Post-dated'.
 - A contract with Contract Status 'Posted-dated' can have Contract State 'Landed'.

1. Follow the Search Contract steps.
2. Click on the Contract#/PO# hyperlink.

Contract Search Results

Your search criteria returned 4 result(s).

Row Actions:

	Contract#/PO#:	Agreement Reference #:	Supplier Name:	Organization Code	Contract Type:	Contract Start Date	Contract End Date
<input type="checkbox"/>	Contract01	12	Merck Canada Inc.	NSHA	Formal Contract	2017 Sep 10	2018 Sep 14
<input type="checkbox"/>	Contract10		Pfizer Canada Inc	NSHA	Formal Contract	2017 Sep 14	2018 Sep 14
<input type="checkbox"/>	Contract11		Sanofi Pasteur Ltd.	NSHA	Formal Contract	2017 Sep 15	2018 Sep 13
<input type="checkbox"/>	Contract12	48	Glaxo Smith Kline	NSHA	Formal Contract	2017 Sep 15	2018 Sep 16

- The **Contract** page displays. Click the **Land Contract** button located at the bottom of the screen.



- A message will display, confirming the contract status change to Landed. Click OK.



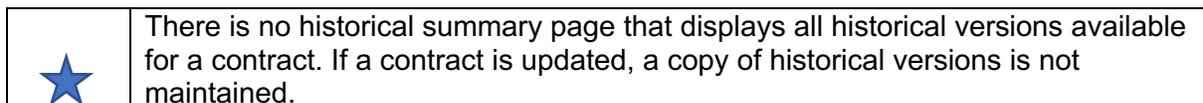
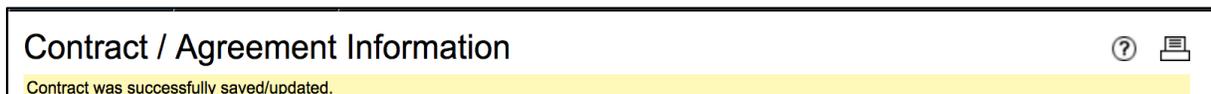
- The system displays the last historical version of the contract.

Contract/PO Version #:	Contract/PO Version Date:	Contract/PO Create Date:	Last IFIS Update Date:
1	2017 Sep 17 12:58 ADT	2017 Sep 17 13:33 ADT	-

- Click save contract.



- The system generates a “Contract was successfully saved/updated” message.



Steps: Amend Contract

	<ul style="list-style-type: none"> Amend contract functionality is used at the beginning of each fiscal year as contracts enter a new firm/option year. Contract #/PO# remains unchanged when entering new firm/option year. Once contract is amended with same contract #/PO#, previous contract information is lost. When amending a contract, need to change start date.
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Overview Steps: Search > Select Contract > Click **Update**> Click **Amend Contract**> Update Contract> Click **Land Contract**> Confirm>Click **Save Contract**

1. Search for the contract.
2. Select the checkbox beside the **Contract #PO#** in the results table and click **Update**.

Contract Search Results

Your search criteria returned 4 result(s).

Row Actions:								Add Contract
Contract#/PO#	Agreement Reference #	Supplier Name	Organization Code	Contract Type	Contract Start Date	Contract End Date		
<input type="checkbox"/> Contract01	12	Merck Canada Inc.	NSHA	Formal Contract	2017 Sep 10	2018 Sep 14		
<input type="checkbox"/> Contract10		Pfizer Canada Inc	NSHA	Formal Contract	2017 Sep 14	2018 Sep 14		
<input type="checkbox"/> Contract11		Sanofi Pasteur Ltd.	NSHA	Formal Contract	2017 Sep 15	2018 Sep 13		
<input checked="" type="checkbox"/> Contract12	48	Glaxo Smith Kline	NSHA	Formal Contract	2017 Sep 15	2018 Sep 16		

3. On the **Contract** screen, view the contract state. It should be Landed.

Contract

* Required field

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority] Find

Contract Status:	* Effective Start Date:	* Effective End Date:	Contract State:
Active	2017 / 09 / 15 	2018 / 09 / 16 	Landed
	yyyy mm dd	yyyy mm dd	

4. Click **Amend Contract**.

5. Select **OK** to the confirmation message.

Amending this Contract will create a new version, and prevent use of the existing Contract version. Do you wish to continue?

6. The contract state changes to Pending.

Contract

* Required field

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]

Contract Status: Active * Effective Start Date: 2017 / 09 / 15 * Effective End Date: 2018 / 09 / 16 **Contract State: Pending**

yyyy mm dd yyyy mm dd

7. Make the updates.

- Add the revised formal contract number as a comment.
- A holding point should not be added or deleted because only the Bio Depot should be selected as a holding point.
- **Amendment Dates:** Normally the amendment has its own dates separate from the contract. As well, each version of the contract will be date stamped.

8. To remove a product, check the box next to the Product Alternate ID and click the **Cancel Product** button.

Products								
Row Actions	Product Alternate ID:	Catalogue Item Name:	Catalogue Item:	Unit of Measure:	Total Contracted Quantity:	Qty Available to Order:	Unit Cost:	Total Received To Date:
<input type="checkbox"/>	Var(10)	Varilrix®(10 x 0.5mL)GSK	68	Dose(s)	55,000.0	55,000.0	\$10.50	0.0

 **Important Note:** If all products on a contract are cancelled, the contract will automatically expire. The only business reason to take this action is if a contract was created in error.

- To add a product, click the **Add Product** button.
- The **Add Product** process was outlined in the **Add Contract** section.

Products								
Row Actions:						Add Product		
	Product Alternate ID:	Catalogue Item Name:	Catalogue Item:	Unit of Measure:	Total Contracted Quantity:	Qty Available to Order:	Unit Cost:	Total Received To Date:
<input type="checkbox"/>	Var(10)	Varilrix®(10 x 0.5mL)GSK	68	Dose(s)	55,000.0	55,000.0	\$10.50	0.0

- The **Product Detail** screen displays. Click **Catalogue Search**.

Contract / Agreement Information

Product Detail

* Required field

* Catalogue ID: _____ Product Alternate ID: _____ Catalogue Description: _____

Catalogue Search

- The **Catalogue Item Search** screen will display and another Catalogue Item may be selected for the contract.
- To update a Product, click the product's **Catalogue Item** number hyperlink.

Products								
Row Actions:						Add Product		
	Product Alternate ID:	Catalogue Item Name:	Catalogue Item:	Unit of Measure:	Total Contracted Quantity:	Qty Available to Order:	Unit Cost:	Total Received To Date:
<input type="checkbox"/>	Var(10)	Varilrix®(10 x 0.5mL)GSK	68	Dose(s)	55,000.0	55,000.0	\$10.50	0.0

- The **Product Detail** screen displays. Make updates.

Product Detail

* Required field

Catalogue Search

* Catalogue ID: 68 Product Alternate ID: Var(10) Catalogue Description: Varicella

* Product Start Date: 2017 / 09 / 17 * Product End Date: 2018 / 09 / 17 * Total Contract Quantity: 55000.0 * Unit of Measure: Dose(s)

* Unit Cost: 10.50 Discount (%): _____ Current Landed Cost: 0.00 Landed Cost: \$10.00

Maximum Contract Quantity (%): 90 Minimum Contract Quantity (%): 120

Percent Returnable for Credit: _____ Quantity Returned for Credit: 0.0

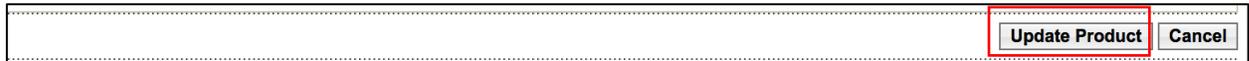
Percent Returnable for Replacement: _____ Quantity Returned for Replacement: 0.0

Full-Carton Quantity: 1 Minimum Shelf Life: _____ Shelf Life Unit of Measure: [dropdown] * Threshold Alert Point: 90

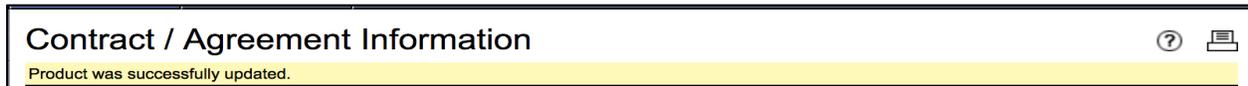
Return Policy: Product Specification:

Restocking Fee: _____ Replacement Unit Cost: _____ Cost Type: _____

15. Click the **Update Product** button at the bottom of the screen.



16. The **Contract** screen displays with a confirmation.



17. Click the **Save Contract** button at the bottom of the screen. A confirmation message displays.

18. The Contract/PO Version # has changed to a higher number.

Contract/PO Version #: 2	Contract/PO Version Date: 2017 Sep 17 13:58 ADT	Contract/PO Create Date: 2017 Sep 17 14:21 ADT	Last IFIS Update Date: -
Payment Terms: -	Currency Code: -	Total Value: \$577,500.00	Total Received To Date: \$0.00

19. Click the **Land Contract** button at the bottom of the screen.



20. A confirmation message displays – click **OK**.

21. The contract state changes to **Landed**.

Contract

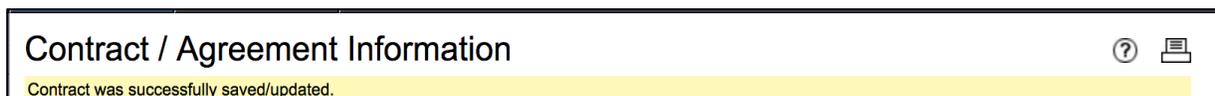
* Required field

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > [Department of Health and Wellness] Find 

Contract Status: Active	* Effective Start Date: 2017 / 09 / 17 <small>yyyy mm dd</small>	* Effective End Date: 2018 / 09 / 17 <small>yyyy mm dd</small>	Contract State: Landed
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22. Click **Save Contract**. A confirmation message displays.



23. Click **Cancel** to return to the Contract/PO search screen.

Steps: Archive Contract

	<p>Archiving a contract expires an active contract by setting a contract end date. It is important to note that archiving is not a Panorama term, and Panorama does not include an Archive button.</p>
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Overview Steps: Search > Select Contract > Click **Update**> Set contract Effective End Date> Click **Save Contract**> Set Product End Date> Click **Update Product** button

1. Search for the contract, following the Contract Search process.
2. Select the contract and click the **Update** button.

Contract Search Results							
Your search criteria returned 4 result(s).							
Row Actions	Contract#/PO#	Agreement Reference #	Supplier Name	Organization Code	Contract Type	Contract Start Date	Contract End Date
<input type="checkbox"/>	Contract01	12	Merck Canada Inc.	NSHA	Formal Contract	2017 Sep 10	2018 Sep 14
<input type="checkbox"/>	Contract10		Pfizer Canada Inc	NSHA	Formal Contract	2017 Sep 14	2018 Sep 14
<input type="checkbox"/>	Contract11		Sanofi Pasteur Ltd.	NSHA	Formal Contract	2017 Sep 15	2018 Sep 13
<input checked="" type="checkbox"/>	Contract12	48	Glaxo Smith Kline	NSHA	Formal Contract	2017 Sep 15	2018 Sep 16

3. The system displays the **Contract** screen.
4. Click the **Amend Contract** button at the bottom of the screen.

Amend Contract	View History	Suspend Contract	Land Contract
Add Attachments	Create Copy	Save Contract	Cancel

5. Set the contract **Effective End Date** to today's date, minus one day.

Contract Status: Active	* Effective Start Date: 2017 / 9 / 15 yyyy mm dd	* Effective End Date: 2017 / 9 / 16 yyyy mm dd	Contract State: Pending
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6. Click the **Save Contract** button.
7. The system displays a message stating "All date ranges of products must be within the contract date range".
8. Scroll down the screen to the **Products** section. Click the **Catalogue Item** blue hyperlink.

- On the **Product Detail** screen, change the **Product End Date(s)** to the same date as the revised contract end date.

* Product Start Date:	* Product End Date:	* Total Contract Quantity:	* Unit of Measure:
2017 / 9 / 15 yyyy mm dd	2017 / 9 / 16 yyyy mm dd	55000.0	Dose(s)

- Click the **Update Product** button, located at the bottom of the screen.
- The system displays the **Contract** screen.
- The contract status is now Expired.

Contract Status:	* Effective Start Date:	* Effective End Date:	Contract State:
Expired	2017 / 09 / 15 yyyy mm dd	2017 / 09 / 16 yyyy mm dd	Pending

	<ul style="list-style-type: none"> If a contract is expired in error it can be re-activated.
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- Click **Save Contract**.
- To re-activate an expired contract, search for the contract.
- Select the contract and click **Update**.
- Update the contract **Effective End Date** to a date in the future.
- Click **Save Contract**.
- The contract Status is now Active.
- The Product **Effective End Date** will be updated.
- Click **Land Contract**.
- Click **Save Contract**.

Other States

	<p>Nova Scotia will not use the Suspend Contract functionality. Note that the Suspend Contract button is located at the bottom of the Contract screen.</p>
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