

Holding Point Locations (HPL)

Functions:

[Search](#)

[View a HPL](#)

[Create a HPL](#)

[Update a HPL](#)

Business Context

A Holding Point Location (HPL) is a location that can hold inventory products, and where inventory will be managed and tracked, e.g., a refrigerator. The Bio Depot and the Public Health Offices will have HPLs in Panorama that contain operational product, product under cold chain quarantine, product for general and school clinics, and product for return to the Bio Depot.

IMPORTANT: Creating new HPLs should be a Public Health Office or Bio Depot business decision.

Triggers


- A user needs to view the inventory documented in a HPL.
- A new HPL must be created for a new program or a new storage site, e.g., a new refrigerator (operational HPL).
- Information about a HPL must be updated.

Business Roles

Holding Point Location is a Panorama setup function. The Holding Point Location functionality will be performed most frequently by the Zone Biological Coordinators, the Bio Depot Biological Coordinator, and the Admin support staff.

Panorama Role

The Holding Point Location functionality may be performed by both the Inventory Zone and the Inventory Provincial roles.

	<p>Holding Point Locations (HPLs)</p> <p>While inventory is documented in different HPLs, the inventory is not always physically moved from one HPL to another. It is documented in different HPLs in Panorama to track inventory movement.</p> <p>Five types of Panorama HPLs have been created for Nova Scotia.</p> <p>Operational: The Operational HPL contains the inventory that is available for daily use and requisitions. Currently, each Public Health Office has one Operational HPL, and the Bio Depot has two Operational HPLs.</p>
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	<p>Clinics: The Clinic HPL represents the inventory used for clinics. It may or may not be physically moved into a cooler prior to a clinic. Each Public Health Office has one Clinic HPL.</p> <p>Cold Chain Quarantine: Inventory that is not available for immediate use due to a cold chain investigation is moved into the Cold Chain Quarantine HPL. The Bio Depot and the Public Health Offices each have one Cold Chain Quarantine HPL.</p> <p>Returns: Inventory no longer available for use, and designated for returned to the Bio Depot or a Supplier is moved to the Returns HPL. This inventory is for disposal.</p> <p>School Clinic: The School Clinic HPL represents inventory specifically designated for school clinics. Not all public health offices will use a school clinic HPL.</p> <p>Holding Point Location (HPL) Naming Convention</p> <p>The following naming convention is used for all HPLs in Panorama. Antigonish is used as an example.</p> <ul style="list-style-type: none"> • Antig-HPL1-Op (Operations) • Antig-HPL2-Clinic (Clinics) • Antig-HPL3-CCQuar (Cold Chain Quarantine) • Antig-HPL4-Return (for disposal) • Antig-HPL5-SC <p>If creating a second HPL, follow the naming convention and add one number. Examples are listed below.</p> <p>Operations: Antig-HPL2-Op</p> <p>Clinics: Antig-HPL3-Clinic</p> <p>Cold Chain Quarantine: Antig-HPL4-CCQuar</p> <p>Returns: Antig-HPL5-Return</p> <p>School Clinics: Antig-HPL6-SC</p>
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Steps: Search

Overview Steps: Inventory Setup>Holding Point Location>Search for Holding Point> Add criteria> Search

1. Click **Inventory Set-up** on the Left-Hand Navigation Menu.
2. Click **Holding Point Location**.
3. The **Holding Point Location Search** screen displays. The user's public health office displays in the **Organization** field.

Holding Point Location Search Hide Holding Point Location 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 > Northern Zone > [Truro Public Health Office] Find

Close

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

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

Holding Point Type:

- Community Pharmacy
- Community Provider
- Community Travel Clinic
- Community[more...]
- Community Walk-in Clinic
- Correctional Facility
- First Nations
- Hospital
- Jurisdictional Depot
- Long-Term Care Facility
- Other Organization
- Physician/Health[more...]
- Public Health Office
- Public Health Travel Clinic
- School
- Transit Point
- University/College[more...]

Holding Point: Search

Cold Chain Capable:

- Freezer
- None
- Refrigerated

HPL Type:

HPL Code:

Parent Holding Point Location:

Override Holding Point Security

4. Add the Holding Point in the **Holding Point** field. The type-ahead functionality generates options for selection. Select the **Holding Point**.
5. If searching for a holding point that is outside of your organization, ensure the “**Override Holding Point Security**” box is checked off.

6. Click **Search**.

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:

City, Province: -

Hierarchy Type: Jurisdictional

Status: Active

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]

Holding Point Type:

- Community Pharmacy
- Community Provider
- Community Travel Clinic
- Community[more...]
- Community Walk-in Clinic
- Correctional Facility
- First Nations
- Hospital
- Jurisdictional Depot
- Long-Term Care Facility
- Other Organization
- Physician/Health[more...]
- Public Health Office
- Public Health Travel Clinic
- School
- Transit Point
- University/College[more...]

Holding Point:

Cold Chain Capable:

HPL Type:
HPL Code:
Parent Holding Point Location:

Override Holding Point Security

7. The search results display in the **Search Results** section.

Search Results ^ Hide					
Your search criteria returned (4) result(s).					
Row Actions: <input type="button" value="Update HPL"/>					<input type="button" value="Cre"/>
	Holding Point ▲	HPL Code ▼	HPL Type ▼	HPL Description ▼	Cold Chain Capable ▼
<input type="checkbox"/>	Truro PHO-HP - Truro PHO	Truro-HPL1-Op	Operational	-	Refrigerated
<input type="checkbox"/>	Truro PHO-HP - Truro PHO	Truro-HPL2-Clinic	Operational	-	Refrigerated
<input type="checkbox"/>	Truro PHO-HP - Truro PHO	Truro-HPL3-CCQuar	CC Quarantined	-	Refrigerated
<input type="checkbox"/>	Truro PHO-HP - Truro PHO	Truro-HPL4-Return	For Return	-	None

★	Only Internal Holding Points, i.e., for the Bio Depot and the Public Health Offices, are assigned HPLs in Panorama.
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8. A search may be completed by Holding Point Location Type.
9. The **Cold Chain Capable** Box selection may be used to search for HPLs that require refrigeration and those that do not.
10. To search for all HPLs in the province, complete an open search. Do not add a specific Holding Point to the Holding Point field.

Steps: View a HPL

Overview Steps: Search>Select HPL>click **Update HPL**>Make updates>Save>Cancel

1. To view the details about a specific HPL, check the box next to the name of the Holding Point.
2. Click the **Update HPL** button.

Search Results ↑ Hide S					
Your search criteria returned (4) result(s).					
Row Actions: Update HPL					Creat
<input type="checkbox"/>	Holding Point	HPL Code	HPL Type	HPL Description	Cold Chain Capable
<input checked="" type="checkbox"/>	Bridgewater PHO-HP - Bridgewater PHO	Bridgew-HPL4-Return	For Return	-	None

3. The **Maintain Holding Point Location Information** screen displays. The following information may be viewed.
 - Holding Point
 - Holding Point Type, e.g., Operational
 - Cold Chain Capable, e.g., refrigerated
 - ASC suspended will be checked off if the HPL has been impacted by an adverse storage condition.

Maintain Holding Point Location Information
Hide HPL Fields


* Required field

<p>* Holding Point: <input type="text" value="Bridgewater PHO-HP - Bridgewater"/> Search</p> <p>* Holding Point Location Code: <input type="text" value="Bridgew-HPL1-Op"/></p> <p>Walk-order Sequence Number: <input type="text"/></p> <p>Priority Pick Code: <input type="text"/></p> <p>Reserved: <input type="checkbox"/></p>	<p>Parent Holding Point Location: <input type="text"/></p> <p>Holding Point Location Description: <input type="text"/></p> <p>* Cold Chain Capable: <input type="text" value="Refrigerated"/></p> <p>Storage Method: <input type="text"/></p> <p>Reservation Comment: <input style="width: 100%; height: 40px;" type="text"/></p>	<p>* Holding Point Location Type: <input type="text" value="Operational"/></p> <p>Holding Point Location Number: 30</p> <p>Capacity: <input type="text"/></p> <p>Monitored: <input type="checkbox"/></p> <p>Alarmed: <input type="checkbox"/></p> <p>Uninterruptible Power: <input type="checkbox"/></p> <p>Biologicals only: <input type="checkbox"/></p> <p>Lockable: <input type="checkbox"/></p> <p>ASC Suspended: <input type="checkbox"/></p> <p>Mobile: <input type="checkbox"/></p> <p>Protected From Light: <input type="checkbox"/></p> <p>Comment: <input style="width: 100%; height: 40px;" type="text"/></p> <p>Active From: <input type="text" value="2017"/> / <input type="text" value="01"/> / <input type="text" value="01"/> <input type="button" value="📅"/></p> <p>Active To: <input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="📅"/></p> <p>Inactive: <input type="checkbox"/></p>
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4. After viewing the HPL, click the **Cancel** button.

Steps: Create a HPL

Overview Steps: Search>Click **Create New HPL**>Add HPL information>Save

	<p>Five types of Panorama HPLs have been created for Nova Scotia.</p> <p>Operational: The Operational HPL contains the inventory that is available for daily use and requisitions. Currently, each Public Health Office has one Operational HPL, and the Bio Depot has two Operational HPLs.</p> <p>Clinics: The Clinic HPL represents the inventory used for clinics. It may or may not be physically moved into a cooler prior to a clinic. Each Public Health Office has one Clinic HPL.</p> <p>Cold Chain Quarantine: Inventory that is not available for immediate use due to a cold chain investigation is moved into the Cold Chain Quarantine HPL. The Bio Depot and the Public Health Offices each have one Cold Chain</p>
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Quarantine HPL. The Bio Depot has one extra HPL called **Quarantine for review (QR)**.

Returns: Inventory no longer available for use, and designated for returned to the Bio Depot or a Supplier is moved to the **Returns** HPL. This inventory is for disposal.

School Clinic: The School Clinic HPL represents inventory specifically designated for school clinics. Not all public health offices will use a school clinic HPL.

Holding Point Location (HPL) Naming Convention

The following naming convention is used for all HPLs in Panorama. Antigonish is used as an example.

- Antig-HPL1-Op (Operations)
- Antig-HPL2-Clinic (Clinics)
- Antig-HPL3-CCQuar (Cold Chain Quarantine)
- Antig-HPL4-Return (for disposal)
- Antig-HPL5-SC

If creating a second HPL, follow the naming convention and add one number. Examples are listed below.

Operations: Antig-HPL2-Op

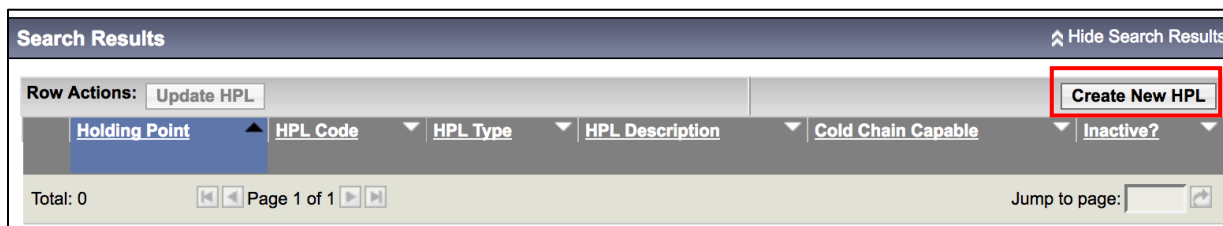
Clinics: Antig-HPL3-Clinic

Cold Chain Quarantine: Antig-HPL4-CCQuar

Returns: Antig-HPL5-Return

School Clinics: Antig-HPL6-SC

1. Complete a HPL search to ensure the HPL has not been created.
2. Click the **Create New HPL** button.



3. The **Maintain Holding Point Location Information** screen displays. (The screen has been populated with information).

Maintain Holding Point Location Information			Hide HPL Fields
* Required field			
* Holding Point: Bridgewater PHO-HP - Bridgewater Search	Parent Holding Point Location: [Dropdown]	* Holding Point Location Type: Operational [Dropdown]	
* Holding Point Location Code: Bridgew-HPL1-Op	Holding Point Location Description: [Text Box]	Holding Point Location Number: 30	
Walk-order Sequence Number: [Text Box]	* Cold Chain Capable: Refrigerated [Dropdown]	Capacity: [Text Box]	
Priority Pick Code: [Text Box]	Storage Method: [Dropdown]		
Reserved: <input type="checkbox"/>	Reservation Comment: [Text Area]		
Monitored: <input type="checkbox"/>	Alarmed: <input type="checkbox"/>	Uninterruptible Power: <input type="checkbox"/>	Biologicals only: <input type="checkbox"/>
Lockable: <input type="checkbox"/>	ASC Suspended: <input type="checkbox"/>	Mobile: <input type="checkbox"/>	Protected From Light: <input type="checkbox"/>
Comment: [Text Area]			
Active From: 2017 / 01 / 01 yyyy mm dd	Active To: [] / [] / [] yyyy mm dd	Inactive: <input type="checkbox"/>	

4. Record the following HPL information.

- Holding Point: Use type-ahead functionality to add the Holding Point.
- Holding Point Location Type – select from the dropdown. If creating an Operational HPL, select HPL1-Op, etc.
- Holding Point Location Code: Add code, following the naming convention listed at the beginning of this section.
- Cold Chain Capable – select from drop-down. Select Refrigerated for HPLs that will store refrigerated vaccines.
- Active From: Populates with today’s date – change if desired.
- **Note:** ASC suspended will be checked off by the system if a ASC is recorded for the HPL. You may uncheck it.
- **Optional Information**
 - While not all fields must be completed for business or system reason, there are extra fields NS may wish to complete for a more comprehensive record.
 - Comments

Monitored: <input type="checkbox"/>	Alarmed: <input type="checkbox"/>	Uninterruptible Power: <input type="checkbox"/>	Biologicals only: <input type="checkbox"/>
Lockable: <input type="checkbox"/>	ASC Suspended: <input type="checkbox"/>	Mobile: <input type="checkbox"/>	Protected From Light: <input type="checkbox"/>

Not required

- Walk-order Sequence Number
- Holding Point Location Description

- Priority Pick Code
- Click the **Save** button located at the bottom of the screen.

- Confirmation message displays.

Steps: Update a HPL

Overview Steps: Search>Click **Update HPL**>Make updates>Save>Cancel

- Follow the HPL search process.
- Check the box next to the name of the HPL.
- Click the **Update HPL** button.

Search Results ⤴ Hide S					
Your search criteria returned (4) result(s).					
Row Actions: <input type="button" value="Update HPL"/>					<input type="button" value="Creat"/>
	Holding Point	HPL Code	HPL Type	HPL Description	Cold Chain Capable
<input checked="" type="checkbox"/>	Bridgewater PHO-HP - Bridgewater PHO	Bridgew-HPL4-Return	For Return	-	None

- The **Maintain Holding Point Location Information** screen displays.

Maintain Holding Point Location Information
⤴ Hide HPL Fields

*** Required field**

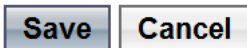
<p>* Holding Point: <input type="text" value="Bridgewater PHO-HP - Bridgewater"/> Search</p> <p>* Holding Point Location Code: <input type="text" value="Bridgew-HPL1-Op"/></p> <p>Walk-order Sequence Number: <input type="text"/></p> <p>Priority Pick Code: <input type="text"/></p> <p>Reserved: <input type="checkbox"/> Reservation Comment: <input style="width: 100%; height: 40px;" type="text"/></p>	<p>Parent Holding Point Location: <input type="text"/></p> <p>Holding Point Location Description: <input type="text"/></p> <p>* Cold Chain Capable: <input type="text" value="Refrigerated"/></p> <p>Storage Method: <input type="text"/></p>	<p>* Holding Point Location Type: <input type="text" value="Operational"/></p> <p>Holding Point Location Number: 30</p> <p>Capacity: <input type="text"/></p>
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Monitored: <input type="checkbox"/>	Alarmed: <input type="checkbox"/>	Uninterruptible Power: <input type="checkbox"/>	Biologicals only: <input type="checkbox"/>
Lockable: <input type="checkbox"/>	ASC Suspended: <input type="checkbox"/>	Mobile: <input type="checkbox"/>	Protected From Light: <input type="checkbox"/>

Comment:

Active From: <input type="text" value="2017"/> / <input type="text" value="01"/> / <input type="text" value="01"/> <small>yyyy mm dd</small>	Active To: <input type="text"/> / <input type="text"/> / <input type="text"/> <small>yyyy mm dd</small>	Inactive: <input type="checkbox"/>
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5. Make updates, and click the **Save** button.



6. Click the **Cancel** button to return to the search screen.