Holding Point Profile

Function:
Search
View Holding Point Profile
Create Holding Point Profile
Create a Transit Point Holding Point Profile
Update Holding Point Profile

Business context
When a new provider, e.g., a physician, wishes to order vaccines, a Holding Point (HP) must be set up in Panorama. This is done through the creation of a Holding Point Profile. The Holding Point Profile lists the products the HP is eligible to order, the HP addresses, and the HP contact information. It is only when a Holding Point Profile is set up that requisitions can be processed through Panorama.

Pre-requisite: A Service Delivery Location (SDL) is set up in Panorama prior to the creation of a Holding Point Profile (HPP).

Triggers
- A user would like to view information contained in a holding point profile.
- A request for a new Holding Point has been received. A holding point profile must be created.
- An update must be made to a holding point profile.

Business Roles
- The Holding Point Profile (HPP) functionality will be performed most frequently by the Zone Biological Coordinators and the Admin support staff. The Bio Depot Biological Coordinator and Admin support staff may also complete this functionality.

Panorama Role
- Both the Inventory Zone and the Inventory Provincial roles have permissions to complete the Holding Point Profile functionality.
**Holding Point Reference Information**

**Nova Scotia Jurisdictional Organization Hierarchy**

Panorama is built on a hierarchy, as illustrated in the table below. The Bio Depot and PH Offices are Organizations. They are also Service Delivery Locations (SDLs).

<table>
<thead>
<tr>
<th>3 ORGANIZATIONAL MODEL</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Organization Hierarchy Diagram" /></td>
</tr>
</tbody>
</table>

**Holding Points**

A Holding Point (HP) is a facility or healthcare provider that holds inventory. Each Holding Point is associated with both an Owner Organization and a Service Delivery Location (SDL) in Panorama.

HPs are classified in Panorama as either internal or external depending on whether their inventory is managed in Panorama.

**Holding Points, External**

Holding points external to Public Health Offices and the Bio Depot, for example hospitals or physicians, will be set up as external holding points. Staff members at the external holding point do not have access to Panorama, so all required inventory processes will be performed on their behalf by the main public health office. While orders will be entered into Panorama and external returns received into Panorama, there are no other transactions for external HPs. Panorama will not track vaccine usage for external Holding Points. External HPs are associated with the Main Public Health Office Organization that supplies them with vaccine.

- Each External HP is also a Service Delivery Location (SDL) and is linked to the Owner Organization.
**Holding Points, Internal**
Public health offices and the Bio Depot will be set up as internal holding points so that all transactions, including inventory movements and adjustments, physical count data, and quantity of product in inventory will be tracked in Panorama. Bio Coordinators will be performing all inventory processes in Panorama.

Each Internal Holding Point contains Holding Point Locations (HPLs) where inventory is both physically stored (e.g., in a fridge) and conceptually stored, e.g., when inventory is moved to a cooler for a clinic. See the Holding Point Location Profile User Guide for further information.

**Holding Point Naming Conventions**
Each holding point is assigned a code and a name. In Nova Scotia, the naming convention is as follows:

<table>
<thead>
<tr>
<th>HOLDING POINT EXAMPLES</th>
<th>NAMING CONVENTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Holding Point Name</td>
<td>• Amherst PHO</td>
</tr>
<tr>
<td>• Name of public health office</td>
<td>• Bio Depot</td>
</tr>
<tr>
<td>Internal Holding Point Code</td>
<td>• Amherst PHO-HP</td>
</tr>
<tr>
<td>• Name of public health office</td>
<td>• Bio Depot - HP</td>
</tr>
<tr>
<td>plus HP</td>
<td></td>
</tr>
<tr>
<td>External Holding Point Name</td>
<td>• Aberdeen Hospital – General</td>
</tr>
<tr>
<td>• Name of Provider</td>
<td>• Dr. James Joyce</td>
</tr>
<tr>
<td></td>
<td>• Drs. Elen Garcia Del Busto and David</td>
</tr>
<tr>
<td></td>
<td>Heughan</td>
</tr>
<tr>
<td>External Holding Point Code</td>
<td>• Name of the provider plus HP, e.g.,</td>
</tr>
<tr>
<td>• Name of Provider plus HP</td>
<td>Aberdeen Hospital – General – HP</td>
</tr>
<tr>
<td></td>
<td>• Dr. James Joyce-HP</td>
</tr>
<tr>
<td></td>
<td>• Drs. Elen Garcia Del Busto and David</td>
</tr>
<tr>
<td></td>
<td>Heughan-HP</td>
</tr>
</tbody>
</table>

**Steps: Search**

**Overview Steps:** Inventory Setup> Holding Point Profile> Search criteria> Search

1. From the Left-Hand Navigation Menu, click **Inventory Setup**, then **Holding Point Profile**.
2. The Holding Point Profile Search screen displays.
3. If searching for a holding point that is outside of your organization, ensure the “Override Holding Point Security” box is checked off.
4. To search for a specific holding point, begin typing the name in the Holding Point field. The Type Ahead functionality will generate options.
5. A search may also be generated by Holding Point Type, e.g., by Long Term Care Facility.

6. Select the HP from the dropdown list and click Search.
7. The results display in the **Holding Point Profile Results** section.

![Holding Point Profile Results](image)

**Steps: View**

**Overview Steps:** Search->Select Holding Point->Click Update->View HP Profile->Cancel

1. To view the details of a **Holding Point Profile**, select the Holding Point. The **Update** button becomes enabled.

![Update Button](image)

2. Click the **Update** button and view the **Holding Point Profile** information.
   - Organization
   - Service Delivery Location
   - Holding Point Code and Holding Point Name
   - Status
   - Effective Status Begin Date
   - Default Replenishment Source: The Holding Point that provides vaccine for the Holding Point displayed
   - System Inventory Control: Select None for external Holding Points and Perpetual for internal Holding Points
3. The Holding Point Profile also includes the three addresses and contacts.
4. Click the **Cancel** button at the bottom of the screen to return to the **Holding Point Profile Search** screen.

**Steps: Create a Holding Point Profile**

- A Service Delivery Location (SDL) is created in Panorama prior to creating a Holding Point Location. Refer to the SDL User Guide.

**Overview Steps:** Search> Click **Create** button> Add Holding Point Profile information> Add Addresses> Add Contacts> Save

1. Search for the Holding Point following the Search process.
2. From the **Holding Point Profile Search** screen, in the **Holding Point Profile Results** section, click the **Create** button.
3. The **Holding Point Profile** screen displays. If creating a new external holding point, it must be associated with the public health office’s **Organization** and the new provider’s **Service Delivery Location**.

4. Click **Find** to select the **Organization**. Using the Type Ahead functionality enter the Organizational Name, e.g., Halifax Public Health Office. When the correct organization, displays, click the **Select** button.

5. Click **Find** to select the **Service Delivery Location** (SDL). Use the type ahead functionality, and select the new **Service Delivery Location**. When the name displays, click on it and click **Select**. The name will populate the field.

**NOTE:** The **Service Delivery Location** will be added to Panorama prior to creating the Holding Point Profile.

- Refer to the **SDL QRS**.

6. The **Organization** and the **Service Delivery Location** will display in the header.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holding Point Code:</td>
<td>Shoppers2Bedford-HP</td>
</tr>
<tr>
<td>Holding Point Type:</td>
<td>Community Pharmacy</td>
</tr>
<tr>
<td>Holding Point Name:</td>
<td>Shoppers2Bedford</td>
</tr>
<tr>
<td>Replenishment Centre:</td>
<td></td>
</tr>
<tr>
<td>Auto approval Mode:</td>
<td></td>
</tr>
<tr>
<td>Auto Decrement:</td>
<td></td>
</tr>
<tr>
<td>Holding Point Status:</td>
<td>Draft</td>
</tr>
<tr>
<td>Status Comment:</td>
<td></td>
</tr>
<tr>
<td>Effective Status Begin Date:</td>
<td>2017/09/03</td>
</tr>
<tr>
<td>Effective Status End Date:</td>
<td>yyyy/mm/dd</td>
</tr>
<tr>
<td>Status Last Updated Date:</td>
<td>yyyy/mm/dd</td>
</tr>
<tr>
<td>Status Last Updated By:</td>
<td></td>
</tr>
<tr>
<td>Last Inspection Date:</td>
<td>yyyy/mm/dd</td>
</tr>
<tr>
<td>Inspection Status:</td>
<td></td>
</tr>
<tr>
<td>Holding Point Eligibility Group:</td>
<td></td>
</tr>
<tr>
<td>Accounting Code:</td>
<td></td>
</tr>
<tr>
<td>Reporting Method:</td>
<td></td>
</tr>
<tr>
<td>PST Exempt:</td>
<td></td>
</tr>
<tr>
<td>GST Exempt:</td>
<td></td>
</tr>
<tr>
<td>HST Exempt:</td>
<td></td>
</tr>
<tr>
<td>Default Replenishment Source:</td>
<td>Halifax PHO-HP</td>
</tr>
<tr>
<td>Default Replenishment Frequency:</td>
<td></td>
</tr>
<tr>
<td>Default Incoming Delivery Frequency:</td>
<td>Daily</td>
</tr>
<tr>
<td>Next Default Incoming Delivery Frequency Date:</td>
<td>2017/09/03</td>
</tr>
<tr>
<td>Default Outgoing Return Frequency:</td>
<td></td>
</tr>
<tr>
<td>Next Default Outgoing Return Frequency Date:</td>
<td>yyyy/mm/dd</td>
</tr>
<tr>
<td>Default Physical Count Frequency:</td>
<td></td>
</tr>
<tr>
<td>Preferred Delivery Method:</td>
<td>Courier</td>
</tr>
<tr>
<td>Special Delivery Instructions:</td>
<td></td>
</tr>
<tr>
<td>Health Service Capacity:</td>
<td></td>
</tr>
<tr>
<td>Transit Point:</td>
<td></td>
</tr>
<tr>
<td>Inventory Insurance Coverage:</td>
<td></td>
</tr>
<tr>
<td>Last Ship-to Date:</td>
<td></td>
</tr>
<tr>
<td>Insurer:</td>
<td></td>
</tr>
<tr>
<td>* System Inventory Control:</td>
<td>None</td>
</tr>
<tr>
<td>None</td>
<td></td>
</tr>
<tr>
<td>Periodic</td>
<td></td>
</tr>
<tr>
<td>Perpetual</td>
<td></td>
</tr>
</tbody>
</table>

View Status History

Chart Of Accounts
7. Select the **Holding Point Type**, e.g., Community Pharmacy.
   - Note that some Holding Point Types, e.g., Community Provider, still need to be defined by Nova Scotia.

8. Enter the new **Holding Point Code**, based on the naming convention, e.g., Shoppers #125-BedfordHwy-HP.

9. Enter the **Holding Point Name**, based on the naming convention, e.g., Shoppers #125-BedfordHwy.
   - Note that the **Holding Point Name** field has multiple lines.
     - Line 1 is the Holding Point name.
     - Line 2 appears as the **Secondary HP Name**, if there is a secondary name, in the search results.
     - Lines 3 and 4 can be used to store more information, but can only be viewed when updating the Holding Point.

10. Enter the remaining required Holding Point Profile information.
    - Required
      - Leave the Holding Point Status as Draft until the profile products are added.
      - For **System Inventory Control**, select **None** for External Providers. Select **Perpetual** for new Internal Holding Points.
      - Effective Status Begin Date: Select date
      - Default Incoming Delivery Frequency – Daily
      - Next Default Incoming Delivery Frequency Date – The field will populate with today’s date. It may be changed.

    - Other
      - **Transit Point**: If the service provider will pick up its product at a location other than the holding point address, select the location from the **Transit Point** dropdown list. If the transit point is not found, you will need to **Create a Transit Point Holding Point Profile**
        - Add **Preferred Delivery Method**: In the future, this field will be populated with **Courier**, but may be changed.
        - The **Preferred Delivery Method** may be overwritten, e.g., a physician may wish to pick up instead of the product being delivered to a Transit Point. As well, a change may be made when creating, approving, and pick/pack/shipping a product requisition.

11. Scroll to the bottom of the screen and click **Save**.

12. A confirmation message displays “The Holding Point Profile was successfully saved.”
13. The Holding Point Status is **Draft**.
14. To add Product to the new Holding Point, the new Holding Point will need to be added to the Nova Scotia Order Set. This provides the new Holding Point with all the Nova Scotia catalogue items.

- **IMPORTANT NOTE**: The order set is not selected on the Holding Point Profile screen. This process takes place in the Order Set section.

15. Select **Order Set** under **Inventory Setup** on the Left Menu.

16. Select the Order Set on the **Order Set Name** dropdown menu.

17. Click **Search**.

18. Select the Order Set.

19. Click **Update Order Set**.

20. The **Order Set Details** screen displays.

21. Scroll to the **Holding Points** section and click **Add Holding Point**.

22. The **Holding Point Profile** screen displays. Search for the Holding Point that is currently being added.

- **Important Note**: Ensure the Holding Point status is set to **Draft**. The new Holding Point is not yet Active.

23. Under the **Holding Point Profile Results**, select the Holding Point and click **Add Holding Points**.

24. The new holding point will be added to the order set. The Order Set products will display on the new Holding Point Profile.

25. To complete the Holding Point Profile, click on **Holding Point Profile** on the Left Menu.

26. Search for the Holding Point. It will be in **Draft** status.

27. Select the Holding Point and click **Update**.
28. Click the **Add New Address** button in the **Holding Point Profile** section to add the addresses.

29. There are three **Address Types**, which can all be the same address.
   - Legal Address
   - Pay-to/Business Office
   - Ship From/Return-to

   - Note that the **Pay-to/Business Office** address does not impact contracts within Panorama.

30. Select **Legal Address** from the Drop-down menu.

31. Enter all Required address information, including Address Type, Country, Street Name, City, Province/Territory, Postal Code, and Effective Date From for each new address.

32. Click the **Default** checkbox. While there can be more than one address for each **Address Type**, one address must be selected as the Default.

33. Click the **Save Address** button after entering each address.

34. The Address now displays in the **Holding Point Address(es)** section.
Tip: If all three address types have the same address, use the **Copy Address** functionality to save time.

35. If the address is the same for another address type, add a checkmark beside the existing address, select the next Address Type from the dropdown menu, and click the **Copy Address** button.

36. The address for the second Address Type will display. Click **Save Address**.
   - Both addresses will now display.
37. To add the address for the third Address Type, select the address to copy in the Holding Point Address table.
38. Check the Default box.
39. Select the Address Type from the dropdown menu.
40. For the Ship From/Return to address, select the Delivery Zone. This is the only address type that requires this action.
41. Click Save Address. All addresses will display.
42. Contacts must be added for each address type. As for addresses, each Contact may be the same.
43. Add a checkmark for the Type of address contact that will be entered, e.g., Legal Address, and then click Add New Contact on the Holding Point Contact(s) section.

44. Check Default Contact, for each type of contact entered.
45. Record the required details for the contact.
   - **Required**
     - First and Last names of contact
     - Phone number
   - **Optional**
     - Mobile Phone
     - E-mail
     - Fax
46. Click **Save Contact** at the bottom of the screen.
47. To add a contact for another Address Type, select the address type under the **Holding Point Address(es)** section, and click **Add New Contact**.
48. If the contact is the same, select the contact in the Contact table.
49. Check the **Default Contact** box.
50. Click **Copy Contact**. This is the same process followed when copying addresses.
51. The new contact will be added to the **Holding Point Contact(s)** list.
52. Click **Save Contact** at the bottom of the screen.

53. Select the third address type in the address table, and click **Add New Contact** to add the third contact.
54. Select a contact. Follow the same process as for the first two contacts. If the contact is the same, click the **Copy Contact** button. If the contact is different, add the information.
55. Click **Save Contact** at the bottom of the screen.
56. The third contact will be added to the **Holding Point Contact(s)** table. Click **Save**.

57. A confirmation message displays.
58. Change the Holding Point Profile to **Active**.
59. **A HP Status** may be changed to **Monitored** if required, e.g., history of over-ordering, unreported ASCs, Temp logs needs to be reviewed.
- The Holding Point must have **HP Status = Active** in order to complete transaction.
- If a Holding Point (Service Provider) has **HP Status = Monitored**, a confirmation message to proceed will display when creating a product requisition.

60. Click **Save**.

**Steps: Create a Transit Point Holding Point Profile**

**TIP:** When creating a Transit Point HP for a HP that already exists in Panorama, the original HP may be copied and updated with Transit Point content.

**Transit Point Naming Convention**

- **Internal Holding Point Code:** Add ForPickUp after PHO, e.g., Halifax PHO-ForPickUp-HP
- **Internal Holding Point Name:** HP Name followed by ForPickUp, e.g., Halifax PHO-ForPickUp
- **External Holding Point Code:** Name of Provider, followed by ForPickUp-HP, e.g., Chester Pharmasave-ForPickUp-HP
- **External Holding Point Name:** Name of Provider, followed by ForPickUp

**Scenario 1:** The facility is not documented in Panorama as a HP.

**Overview Steps:** Search> Click **Create** on the Holding Point Profile screen> Add Transit Point details> Save as Draft status> Add Addresses> Add Contacts> Change to Active Status> Save

1. Search for the Transit Point HP on the Holding Point Profile screen.
2. If this is a new Transit Point HP, and the HP does not exist in Panorama (note that many HPs function as both regular HPs and Transit Points), initiate the process by following the steps for creating a Holding Point Profile.
3. Follow the Transit Point Naming Convention as described above.
4. In the Holding Point Type, select Transit Point.
5. Click **Save**. The Transit Point is in Draft status.
6. **Do not** add the Transit Point HP to the Order Set. Product is not required for a Transit Point HP.
7. Add the three transit point addresses.
8. Add transit point contacts for each address type.
9. Change the status to Active.
10. Click the **Save** button.

**Scenario 2:** The facility is already a HP in Panorama. To save time, the original HP may be copied and updated with Transit Point information.

**Overview Steps:** Search> Select HP to copy> click **Copy** button> Change Holding Point Type to Transit Point> Complete Name and Code fields> Save> Delete Product> Check Addresses and Contacts> Ensure Active Status> Save

1. Search for the HP on the **Holding Point Profile Search** screen.
2. Under the **Holding Point Profile Results** section, select the Holding Point.
3. Click the **Copy** button.
4. The **Holding Point Profile** screen displays with the fields populated with the Holding Point information.
5. Change the **Holding Point Type** to Transit Point.
6. Refer to the Transit Point Naming Convention to complete the **Holding Point Name** and **Holding Point Code**.
7. Click **Save**.
8. Product is not added to a Transit Point HP. When using the **Copy** function, the product will be listed. It must be deleted from the Transit Point Holding Point Profile.
9. Ensure the Addresses and Contacts are unchanged.
10. Ensure the Holding Point Status is Active.
11. Click **Save**.
Steps: Update Holding Point Profile

Overview Steps: Search>Select Holding Point> Click Update> Make changes>Save

1. Follow the **Holding Point Profile** search process.
2. Click the checkbox next to the selected Holding Point and click the **Update** button.

3. Update the required fields.
4. A **HP Status** may be changed to Monitored, if the Replenishing HP is monitoring a service provider, e.g., for cold chain infractions.
   - If this occurs, the Product Requisition may still be approved, but a warning message will display.

5. After making updates, click the **Save** button.
6. A confirmation message displays.