

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.

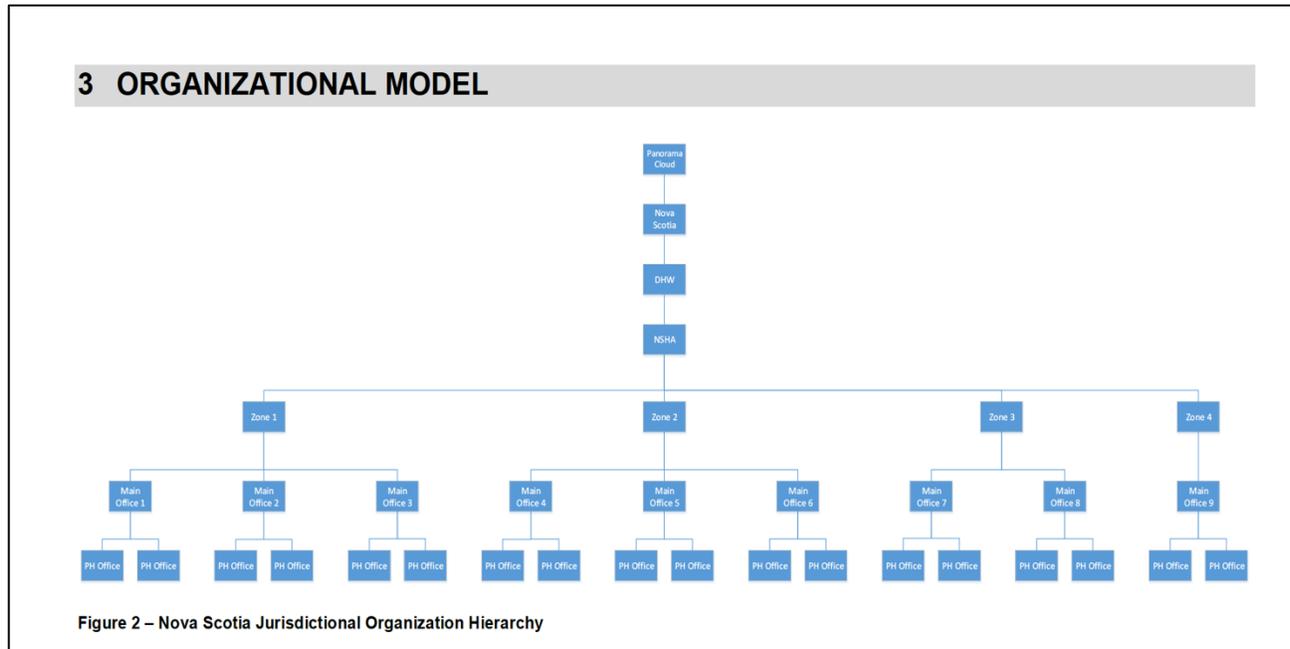
Panorama Role

- 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).



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:

HOLDING POINT EXAMPLES	NAMING CONVENTION
<i>Internal Holding Point Name</i> <ul style="list-style-type: none"> Name of public health office 	<ul style="list-style-type: none"> Amherst PHO Bio Depot
<i>Internal Holding Point Code</i> <ul style="list-style-type: none"> Name of public health office plus HP 	<ul style="list-style-type: none"> Amherst PHO-HP Bio Depot - HP
<i>External Holding Point Name</i> <ul style="list-style-type: none"> Name of Provider 	<ul style="list-style-type: none"> Aberdeen Hospital – General Dr. James Joyce Drs. Elen Garcia Del Busto and David Heughan
<i>External Holding Point Code</i> <ul style="list-style-type: none"> Name of Provider plus HP 	<ul style="list-style-type: none"> Name of the provider plus HP, e.g., Aberdeen Hospital – General – HP Dr. James Joyce-HP Drs. Elen Garcia Del Busto and David Heughan-HP

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**.

Recent Work

- Inventory Replenishment
- Inventory Maintenance
- Inventory Setup**
 - Product Lot
 - Contract
 - Supplier Purchase Requisitions
 - Supplier
 - Catalogue Item
 - Order Set
 - Program
 - Holding Point Profile**

Holding Point Profile

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] Find

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:

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

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] Find

Type Search Close

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

Organization Name: Antigonish Public Health Office, - Show Info

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: anti

Holding Point Eligibility Group: Default Replenishment Source: Antigonish Medical Associates-HP - Antigonish Medical Associates

HP Status: Active

License Number: Antigonish PHO-ForPickUp-HP - Antigonish PHO-ForPickUp

Delivery Zone: Holding Point Address: Antigonish PHO - Antigonish PHO

Contact Name: Postal Code (A9A 9A9): Atlantic Medical Clinic-HP - Atlantic Medical Clinic

Override Holding Point Security

Contact Phone (555-555-5555): Atlantic Offshore Medical Services-HP - Atlantic Offshore Medical Services

MacKinnon's Pharmasave-Antigonish-HP - MacKinnon's Pharmasave-Antigonish

Professional Centre Atlantic ADHD Centre-HP - Professional Centre Atlantic ADHD Centre

Coa Search Section Show Coa Search Section

Search Retrieve Clear

- 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 Hide Holding Point Profile Results					
Your search criteria returned (1) result(s).					
<input type="button" value="Select All"/> <input type="button" value="Deselect All"/>					
Row Actions: <input type="button" value="Copy"/> <input type="button" value="Update"/>					<input type="button" value="Create"/>
<input type="button" value="Change Parameters for Multiple Holding Points"/>					
Holding Point	Secondary HP Name	HP Status	Ship from/return to	HP Type	
<input type="checkbox"/> Antigonish PHO-HP - Antigonish PHO	-	Active	#2N - 23 Bay Street Antigonish B2G2G7	Public Health Office	

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.

Holding Point Profile Results Hide Holding Point Profile Results					
Your search criteria returned (636) result(s).					
<input type="button" value="Select All"/> <input type="button" value="Deselect All"/>					
Row Actions: <input type="button" value="Copy"/> <input type="button" value="Update"/>					<input type="button" value="Create"/>
<input type="button" value="Change Parameters for Multiple Holding Points"/>					
Holding Point	Secondary HP Name	HP Status	Ship from/return to	HP Type	
<input checked="" type="checkbox"/> Aberdeen Hospital-General-HP - Aberdeen Hospital-G...	-	Active	835 East River Road New Glasgow B2H3S6	Hospital	

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

Holding Point Profile
[Hide Holding Point Profile](#)

*** 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 > Northern Zone > **[Pictou Public Health Office]** [Find](#)

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: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Northern Zone > Pictou Public Health Office > **[Aberdeen Hospital-General]** [Find](#)

*** Holding Point Code:** Aberdeen Hospital-General-HP **Holding Point Type:** Hospital *** Holding Point Name:** Aberdeen Hospital-General

Replenishment Centre Auto approval Mode Auto Decrement:

*** Holding Point Status:** Active **Status Comment:**

*** Effective Status Begin Date:** 2017 / 01 / 01 **Effective Status End Date:** [View Status History](#)

Status Last Updated Date: **Status Last Updated By:** **Previous Status:**

Last Inspection Date: **Inspection Status:**

License Number: **Holding Point Eligibility Group:** [Chart Of Accounts](#)

*** Default Replenishment Source:** Pictou PHO-HP *** Default Incoming Delivery Frequency:** Daily *** Next Default Incoming Delivery Frequency Date:** 2017 / 1 / 1

Default Outgoing Return Frequency: **Next Default Outgoing Return Frequency Date:** **Default Physical Count Frequency:**

Preferred Delivery Method: **Special Delivery Instructions:**

Health Service Capacity: **Fridge Type:**

Transit Point: **Last Ship-to Date:** *** System Inventory Control:** None

Inventory Insurance Coverage: **Insurer:** **Insurer Expiry Date:**

Stock Control 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](#)

3. The Holding Point Profile also includes the three addresses and contacts.

Holding Point Address(es) Hide Holding Point Address(es)

Row Actions:

	Address Id	Type	Street	City	Province	Default Address
<input type="checkbox"/>	446	Legal Address	835 East River Road	New Glasgow	Nova Scotia	✓
<input type="checkbox"/>	1045	Pay-to/business office	835 East River Road	New Glasgow	Nova Scotia	✓
<input type="checkbox"/>	1644	Ship-from/return-to	835 East River Road	New Glasgow	Nova Scotia	✓

Total: Jump to page:

Holding Point Contact(s) Hide Holding Point Contact(s)

Row Actions:

	Address Id	Address Type	Title	Name	Phone Number	Fax Number	Default Contact
<input type="checkbox"/>	446	Legal Address	-	HP Contact	9027527600		✓
<input type="checkbox"/>	1045	Pay-to/business office	-	HP Contact	9027527600		✓
<input type="checkbox"/>	1644	Ship-from/return-to	-	HP Contact	9027527600		✓

Total: Jump to page:

- 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

- Search for the Holding Point following the Search process.
- From the **Holding Point Profile Search** screen, in the **Holding Point Profile Results** section, click the **Create** button.

Holding Point Profile Results Hide Holding Point Profile Results

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

Row Actions:

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.

Holding Point Profile

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Holding Point Profile
⤴ Hide Holding Point Profile

* 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: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] Find 🔍

Type
Search
Close X

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

Organization Name: Halifax Public Health Office, - Show Info

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: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Shoppers #125-BedfordHwy] Find 🔍

Type
Search
Close X

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

SDL Name: Shoppers #125-BedfordHwy, Bedfor Show Info

City, Province: Bedford, Nova Scotia Status: Active

Select

* Holding Point Code: Shoppers#2Bedford-HP	Holding Point Type: Community Pharmacy	* Holding Point Name: Shoppers#2Bedford
<input type="checkbox"/> Replenishment Centre	<input type="checkbox"/> Auto approval Mode	<input type="checkbox"/> Auto Decrement:
* Holding Point Status: Draft	Status Comment:	
* Effective Status Begin Date: 2017 / 09 / 03	Effective Status End Date:	View Status History
Status Last Updated Date:	Status Last Updated By:	Previous Status:
Last Inspection Date:	Inspection Status:	
License Number:	Holding Point Eligibility Group:	Chart Of Accounts
Accounting Code:	Reporting Method:	
<input type="checkbox"/> PST Exempt:	<input type="checkbox"/> GST Exempt:	<input type="checkbox"/> HST Exempt:
Default Replenishment Source: Halifax PHO-HP	* Default Incoming Delivery Frequency: Daily	* Next Default Incoming Delivery Frequency Date: 2017 / 09 / 03
Default Outgoing Return Frequency:	Next Default Outgoing Return Frequency Date:	Default Physical Count Frequency:

Default Replenishment Source: Halifax PHO-HP	* Default Incoming Delivery Frequency: Daily	* Next Default Incoming Delivery Frequency Date: 2017 / 09 / 03
Default Outgoing Return Frequency:	Next Default Outgoing Return Frequency Date:	Default Physical Count Frequency:
Preferred Delivery Method: Courier	Special Delivery Instructions:	
Health Service Capacity:	Fridge Type:	
Transit Point:	Last Ship-to Date:	* System Inventory Control: None Periodic Perpetual
Inventory Insurance Coverage:	Insurer:	

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.

	<p>Next Default Incoming Delivery Frequency Date: The next date that a normal incoming delivery will occur. This is used as the starting point for indicating what day the frequency uses if the user indicates that it is a weekly frequency. The date is automatically updated by the system according to the frequency, e.g., every week on Tuesday if the Frequency is weekly and the last default date was a Tuesday.</p>
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- 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.

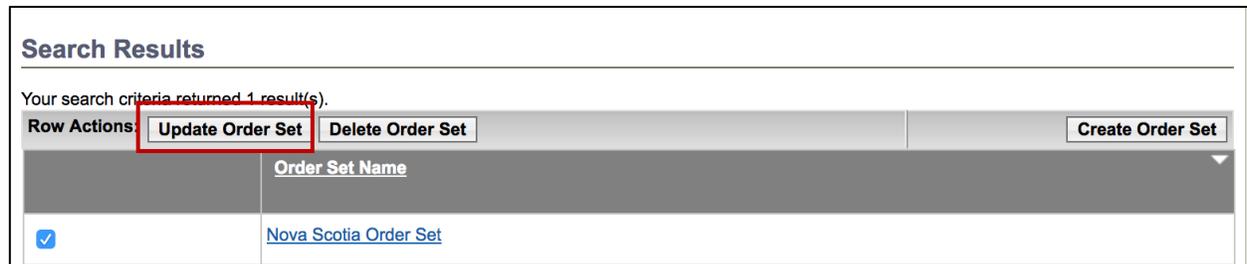


The screenshot shows the 'Order Sets' search interface. At the top, there is a header 'Order Sets' with a help icon and a list icon. Below this is a section titled 'Order Set Search' with a dark blue background. The search criteria include:

- Order Set Name:** A dropdown menu currently showing 'Nova Scotia Order Set'.
- Order Set Status:** An empty dropdown menu.
- Replenishment Source:** An empty dropdown menu.
- Holding Point Code:** A text input field with a link to 'Holding Point Search'.
- Catalogue Item Code:** A text input field with a link to 'Search Catalogue'.

 At the bottom right of the search area, there are three buttons: 'Search', 'Retrieve', and 'Clear'.

17. Click **Search**.
18. Select the Order Set.
19. Click **Update Order Set**.

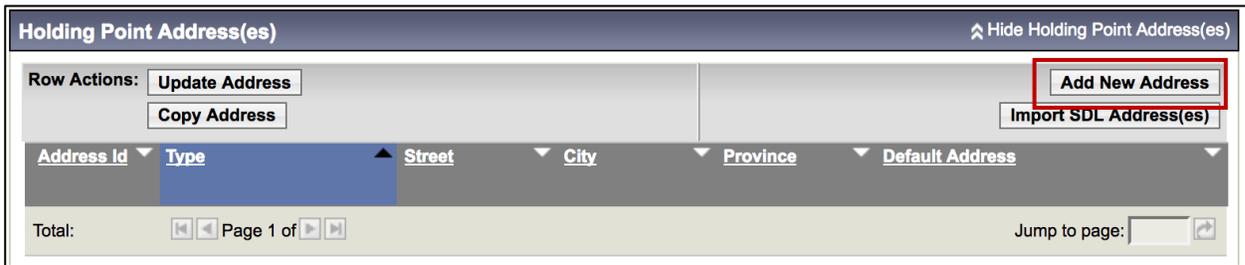


The screenshot shows the 'Search Results' section. It indicates that the search criteria returned 1 result(s). The results are displayed in a table with the following structure:

Row Actions	Order Set Name
<input checked="" type="checkbox"/> Update Order Set Delete Order Set Create Order Set	Nova Scotia 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.



The screenshot shows the 'Holding Point Address(es)' interface. At the top right, there is a 'Hide Holding Point Address(es)' link. Below this, there are three buttons: 'Update Address', 'Copy Address', and 'Add New Address'. The 'Add New Address' button is highlighted with a red box. To the right of these buttons is an 'Import SDL Address(es)' button. Below the buttons is a table header with columns: 'Address Id', 'Type', 'Street', 'City', 'Province', and 'Default Address'. At the bottom, there is a 'Total:' label, a 'Page 1 of' indicator, and a 'Jump to page:' field.

29. There are three **Address Types**, which can all be the same address.

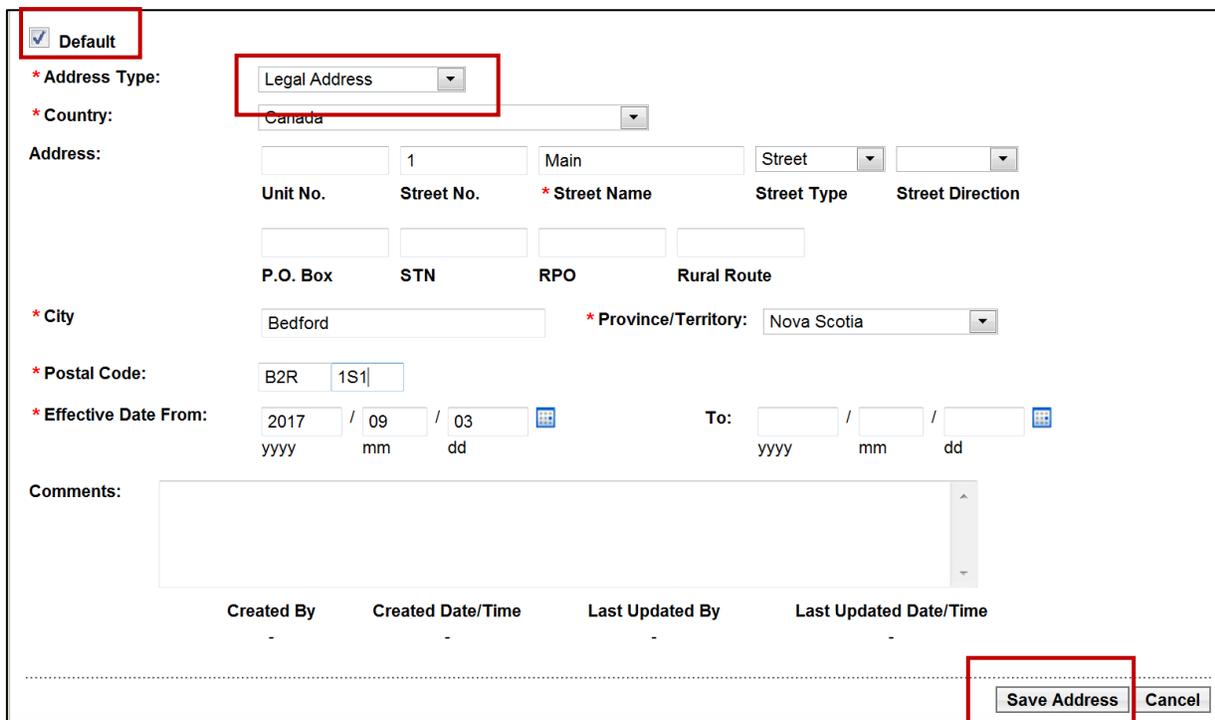
- Legal Address
- Pay-to/Business Office
- Ship From/Return-to".
 - Note that the **Pay-to/Business Office** address does not impact contracts within Panorama.

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



The screenshot shows the address entry form. At the top left, there is a 'Default' checkbox which is checked and highlighted with a red box. Below it, the '* Address Type:' dropdown menu is set to 'Legal Address' and is also highlighted with a red box. The '* Country:' dropdown is set to 'Canada'. The 'Address:' section includes fields for 'Unit No.' (1), 'Street No.' (Main), '* Street Name', 'Street Type', and 'Street Direction'. Below this are fields for 'P.O. Box', 'STN', 'RPO', and 'Rural Route'. The '* City' field is set to 'Bedford' and the '* Province/Territory:' dropdown is set to 'Nova Scotia'. The '* Postal Code:' field is set to 'B2R 1S1'. The '* Effective Date From:' field is set to '2017 / 09 / 03' and the 'To:' field is empty. At the bottom right, the 'Save Address' button is highlighted with a red box. Below the form, there are columns for 'Created By', 'Created Date/Time', 'Last Updated By', and 'Last Updated Date/Time'.

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.

Holding Point Address(es) ^ Hide Holding Point Address(es)

Row Actions:

	Address Id	Type	Street	City	Province	Default Address
<input checked="" type="checkbox"/>		Legal Address	1 Main Street	Bedford	Nova Scotia	<input checked="" type="checkbox"/>

Total: Jump to page:

Default

* Address Type:

* Country:

Address:

Unit No. Street No. * Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

* City * Province/Territory:

* Postal Code:

* Effective Date From: / / To: / /

36. The address for the second Address Type will display. Click **Save Address**.

- Both addresses will now display.

Holding Point Address(es)
Hide Holding Point Address(es)

Row Actions: Update Address

Copy Address

Add New Address

Import SDL Address(es)

	Address Id	Type	Street	City	Province	Default Address
<input type="checkbox"/>	-	Legal Address	1 Main Street	Bedford	Nova Scotia	✓
<input checked="" type="checkbox"/>	-	Pay-to/business office	1 Main Street	Bedford	Nova Scotia	✓

Total: Page 1 of Jump to page:

Default

* Address Type: Ship-from/return-to

* Country: Canada

Address:

Unit No.	Street No.	* Street Name	Street Type	Street Direction
P.O. Box	STN	RPO	Rural Route	

* City: * Province/Territory:

* Postal Code:

* Effective Date From: 2017 / 09 / 03 yyyy mm dd To: / / yyyy mm dd

Comments:

Created By	Created Date/Time	Last Updated By	Last Updated Date/Time
-	-	-	-

Delivery Zone: Bio Depot del wk 1

Bio Depot del wk 1
Bio Depot del wk 2
Bio Depot del wk 3
Bio Depot del wk 4

Save Address Cancel

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.

Holding Point Address(es) Hide Holding Point Address(es)

Row Actions:

	Address Id	Type	Street	City	Province	Default Address
<input type="checkbox"/>	-	Legal Address	1 Main Street	Bedford	Nova Scotia	✓
<input type="checkbox"/>	-	Pay-to/business office	1 Main Street	Bedford	Nova Scotia	✓
<input type="checkbox"/>	-	Ship-from/return-to	1 Main Street	Bedford	Nova Scotia	✓

Total: Page 1 of Jump to page:

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.

Holding Point Address(es) Hide Holding Point Address(es)

Row Actions:

	Address Id	Type	Street	City	Province	Default Address
<input checked="" type="checkbox"/>	-	Legal Address	1 Main Street	Bedford	Nova Scotia	✓
<input type="checkbox"/>	-	Pay-to/business office	1 Main Street	Bedford	Nova Scotia	✓
<input type="checkbox"/>	-	Ship-from/return-to	1 Main Street	Bedford	Nova Scotia	✓

Total: Page 1 of Jump to page:

Holding Point Contact(s) Hide Holding Point Contact(s)

Row Actions:

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

Holding Point Contact(s)
Hide Holding Point Contact(s)

Row Actions: Update Contact Delete Contact Copy Contact
Add New Contact

Address Id	Address Type	Title	Name	Phone Number	Fax Number	Default Contact
Total: Page 1 of Jump to page:						

Default Contact:

Prefix: * First Name: * Last Name:

Suffix: Contact Title: E-mail:

* Phone: () ext. Mobile Phone: () Fax: ()

Save Contact Cancel

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.

Holding Point Address(es) ↑ Hide Holding Point Address(es)

Row Actions:

	Address Id	Type	Street	City	Province	Default Address
<input type="checkbox"/>	-	Legal Address	1 Main Street	Bedford	Nova Scotia	✓
<input checked="" type="checkbox"/>	-	Pay-to/business office	1 Main Street	Bedford	Nova Scotia	✓
<input type="checkbox"/>	-	Ship-from/return-to	1 Main Street	Bedford	Nova Scotia	✓

Total: Page 1 of
Jump to page:

Holding Point Contact(s) ↑ Hide Holding Point Contact(s)

Row Actions:

	Address Id	Address Type	Title	Name	Phone Number	Fax Number	Default Contact
<input checked="" type="checkbox"/>	-	Legal Address	-	Bob Smith	902-333-3333		✓

Total: Page 1 of
Jump to page:

Default Contact:

Prefix:

* First Name:

* Last Name:

Suffix:

Contact Title:

E-mail:

* Phone: () ext.

Mobile Phone: ()

Fax: ()

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.

Holding Point Contact(s) ↑ Hide Holding Point Contact(s)

Row Actions:

	Address Id	Address Type	Title	Name	Phone Number	Fax Number	Default Contact
<input type="checkbox"/>	-	Legal Address	-	Bob Smith	902-333-3333		✓
<input type="checkbox"/>	-	Pay-to/business office	-	Bob Smith	902-333-3333		✓

Total: Page 1 of
Jump to page:

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.

<input type="checkbox"/>	-	Legal Address	1 Main Street	Bedford	Nova Scotia	✓
<input type="checkbox"/>	-	Pay-to/business office	1 Main Street	Bedford	Nova Scotia	✓
<input checked="" type="checkbox"/>	-	Ship-from/return-to	1 Main Street	Bedford	Nova Scotia	✓

Total: Page 1 of Jump to page:

Holding Point Contact(s) Hide Holding Point Contact(s)

Row Actions:

Address Id	Address Type	Title	Name	Phone Number	Fax Number	Default Contact
-	Legal Address	-	Bob Smith	902-333-3333		✓
-	Pay-to/business office	-	Bob Smith	902-333-3333		✓

Total: Page 1 of Jump to page:

Default Contact:

Prefix: * First Name: * Last Name:

Suffix: Contact Title: E-mail:

* Phone: () ext. Mobile Phone: () Fax: ()

Comments:

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**.

Holding Point Contact(s) Hide Holding Point Contact(s)

Row Actions:

Address Id	Address Type	Title	Name	Phone Number	Fax Number	Default Contact
-	Legal Address	-	Bob Smith	902-333-3333		✓
-	Pay-to/business office	-	Bob Smith	902-333-3333		✓
-	Ship-from/return-to	-	Bob Smith	902-333-3333		✓

Total: Page 1 of Jump to page:

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.

★	<ul style="list-style-type: none"> • 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.
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60. Click **Save**.

Steps: Create a Transit Point Holding Point Profile

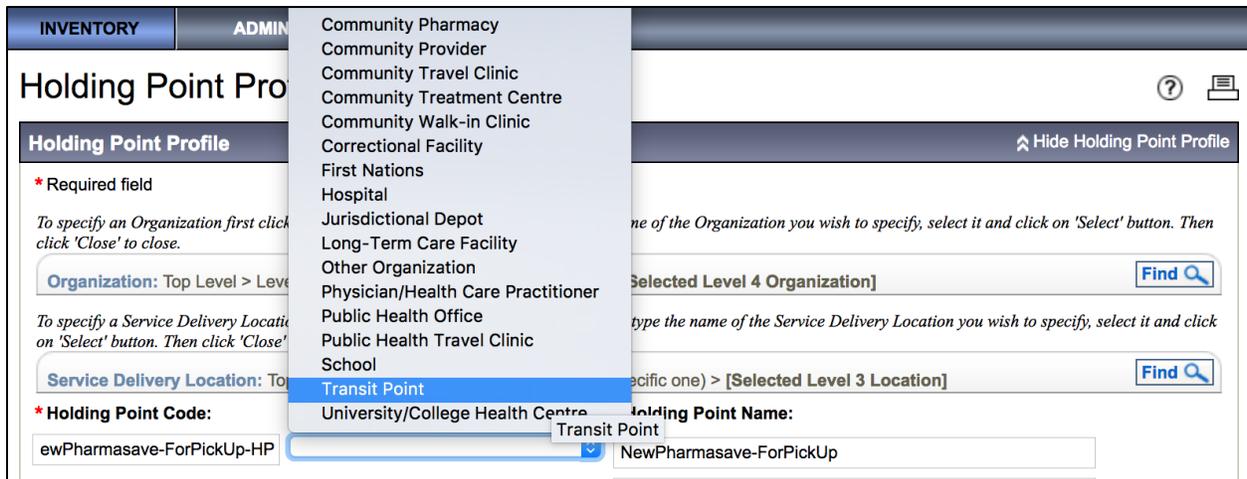
★	<p>TIP: When creating a Transit Point HP for a HP that already exists in Panorama, the original HP may be copied and updated with Transit Point content.</p>
---	---

★	<p><i>Transit Point Naming Convention</i></p> <p>Internal Holding Point Code: Add ForPickUp after PHO, e.g., Halifax PHO-ForPickUp-HP</p> <p>Internal Holding Point Name: HP Name followed by ForPickUp, e.g., Halifax PHO-ForPickUp</p> <p>External Holding Point Code: Name of Provider, followed by ForPickUp-HP, e.g., Chester Pharmasave-ForPickUp-HP</p> <p>External Holding Point Name: Name of Provider, followed by ForPickUp</p>
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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.



The screenshot shows the 'Holding Point Profile' form. The 'Organization' dropdown menu is open, listing various facility types. 'Transit Point' is selected. The form includes fields for 'Organization', 'Service Delivery Location', 'Holding Point Code', and 'Holding Point Name'. The 'Holding Point Code' field contains 'ewPharmasave-ForPickUp-HP' and the 'Holding Point Name' field contains 'NewPharmasave-ForPickUp'.

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**.

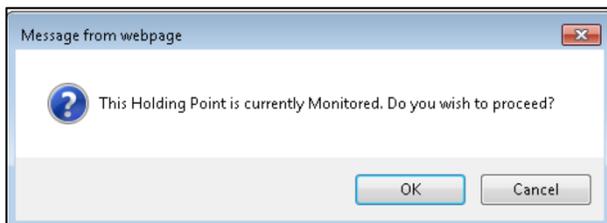
Steps: Update Holding Point Profile

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.

Holding Point Profile Results Hide Holding Point Profile Results					
Your search criteria returned (636) result(s).					
<input type="button" value="Select All"/> <input type="button" value="Deselect All"/>					
Row Actions: <input type="button" value="Copy"/> <input type="button" value="Update"/> <input type="button" value="Create"/>					
<input type="button" value="Change Parameters for Multiple Holding Points"/>					
Holding Point	Secondary HP Name	HP Status	Ship from/return to	HP Type	
<input checked="" type="checkbox"/> Aberdeen Hospital-General-HP - Aberdeen Hospital-G...	-	Active	835 East River Road New Glasgow B2H3S6	Hospital	

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.