

Product Lot

Functions:

- [Search](#)
- [View a Product Lot](#)
- [Add a Product Lot](#)
- [Update a Product Lot](#)
- [Create Cold Chain Sublot](#)
- [Cold Chain Sublot Adjustment Process](#)

Business context

Vaccine manufacturers assign product lot numbers to all products. Product Lot information, which includes the lot number and the expiry date of the product, is associated with each lot controlled catalogue item (i.e., all vaccines). While completing requisitions, users may need to search for and view Product Lots. When adding product to the Catalogue, new Product Lots may need to be added, or information updated.

- Product Lot information, which includes the lot number and the expiry date of the product, is associated with each Panorama lot controlled catalogue item (i.e., all vaccines)
- Lot information is used in inventory management processes to support product distribution, track products, manage product that has been exposed to an adverse storage condition (ASC), and manage product recalls

Triggers

- A user needs to verify if a specific product lot is in Panorama.
- A user needs to view detailed information about a product lot.
- A new product lot is available and must be added to the catalogue.
- A product lot must be updated.
- The Bio Depot needs to create a cold chain sublot for product that can be used following an Adverse Storage Condition (ASC) event.

Business Roles

- The Product Lot Search process will be performed by the Zone Biological Coordinators, the Bio Depot Biological Coordinator, and the Admin staff.
- The Add Product Lot and Update Product Lot processes will be completed by the Bio Depot Biological Coordinator or the Admin staff at the Bio Depot.

Panorama Role

- The Search and View Product Lot functions require either the Inventory Zone or Inventory Provincial role.
- Permissions for Adding and Updating Product Lots are restricted to users with the Inventory Provincial role.

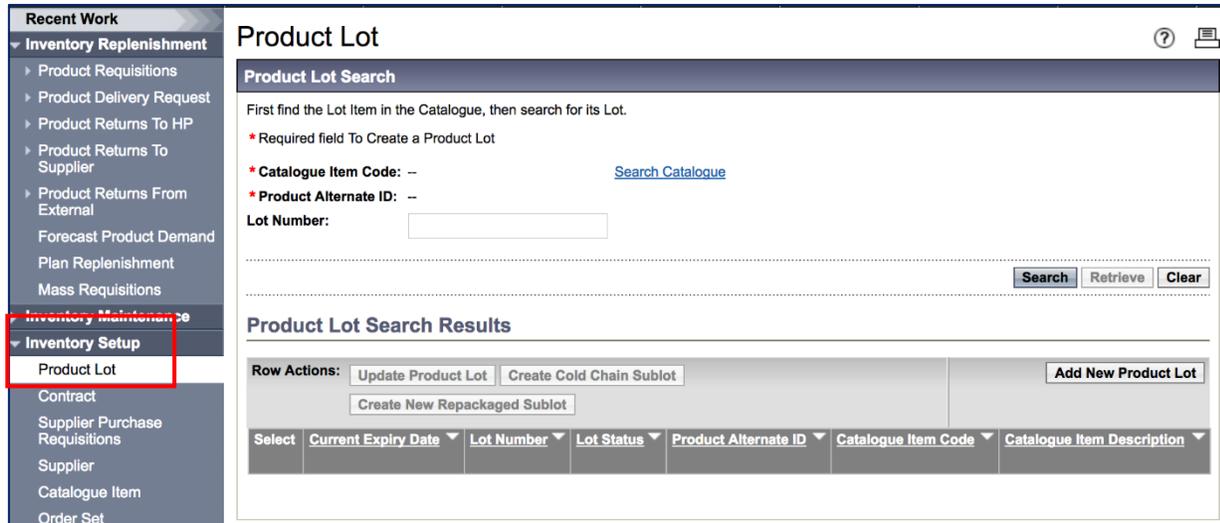
Product Lot Status	Definition
Active	<ul style="list-style-type: none"> Lot is in use and available for all inventory transactions. 'Active' is a status that can be selected when creating/updating a lot.
Inactive	<ul style="list-style-type: none"> Lot is not in use. No inventory replenishment transactions allowed. In other jurisdictions, 'Inactive' is used for lots that have been created in error, duplicates, etc. 'Inactive' is a status that can be selected when creating/updating a lot.
Expired	<ul style="list-style-type: none"> Panorama will automatically change the Lot Status to 'Expired' at 00:01 on the day following the expiry date. Expired lots are not available for inventory transactions unless a user has permission to Assign Expired Lots. Both Inventory roles have this permission.
Recalled	<ul style="list-style-type: none"> When a product is recalled via the Recall function, the system will change the Lot Status to 'Recalled'. The system will display "RCL" appended to the [Lot Number] / [Expiry Date] whenever the lot is displayed.
Shortened	<ul style="list-style-type: none"> When the manufacturer shortens the date of a product lot, a user can update the Current Expiry Date. When the Current Expiry Date is updated to be a date that is between the current date and a date that is less than or equal to current date + the number of days in the Short Date Period, the system will automatically change the Lot Status to 'Shortened'. The System will display "SHR" appended to the Expiry Date whenever the lot is displayed (view on screen, or printed on form or list, or equivalent).
Extended	<ul style="list-style-type: none"> When the manufacturer extends the date of the product lot, a user can update the Current Expiry Date. When the Current Expiry Date is updated to be a date beyond the Original Expiry Date, the System will change the Lot Status to 'Extended'. The System will display "EXT" appended to the [Expiry Date] whenever the Lot is displayed (view on screen, or printed on form or list or equivalent).

Steps: Search

	<ul style="list-style-type: none"> Complete a Product Lot search to avoid creating a duplicate record. Search can be done by searching for a known Product Lot Number or by searching the catalogue for the product.
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Overview Steps: Click **Product Lot** on Left Menu>Enter Search criteria>Click Search

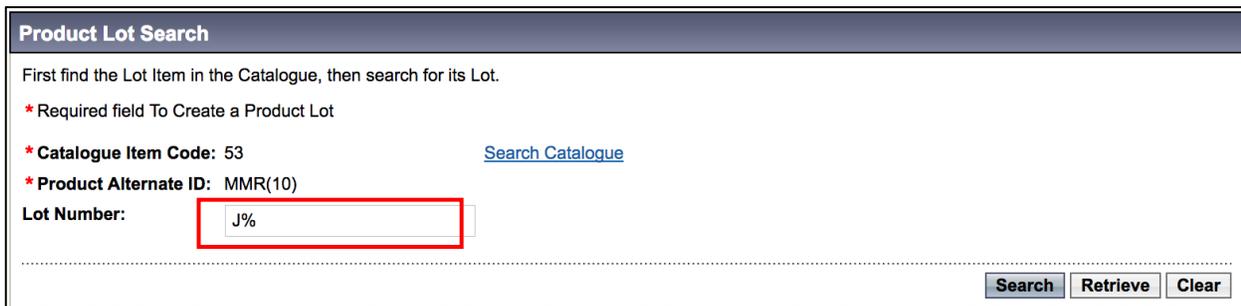
1. Select **Inventory Setup** from the Left Menu, then select **Product Lot**.



2. The **Product Lot Search** screen displays.
3. Search without criteria to generate a list of all product lots in Panorama.
4. If the product Lot Number is known, it may be added to the Lot Number field.



- Wildcard characters % may be used to generate Lot Numbers. For example, add a wildcard after J to generate a list of lots that start with the letter J. Add the wildcard characters in the **Lot Number** field. Click Search.



5. To search for product lot(s) for a specific catalogue item, click the **Search Catalogue** hyperlink.

Product Lot

Product Lot Search

First find the Lot Item in the Catalogue, then search for its Lot.

* Required field To Create a Product Lot

* Catalogue Item Code: -- [Search Catalogue](#)

* Product Alternate ID: --

Lot Number:

Product Lot Search Results

Your search criteria returned (273) result(s).

Row Actions:

- The **Catalogue Item Search** screen displays. Enter the **Product Alternate ID**, a term in the Find Search String (e.g., Hepatitis), or select values in the Level 1 to Level 6 drop lists to focus the search. Note that the **Product Alternate ID** field has type-ahead functionality built in.

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:

- Results display in the **Search Results Returned** table. Select the item next to the **Catalogue Item Code** and click the **Add Catalogue Item(s)** button.

Search Results Returned

Your search criteria returned 2 result(s).

Select All Deselect All

	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
<input checked="" type="checkbox"/>	53	MMR(10)	MMR [®] II(10 x 0.5mL)MF	Measles; Mumps; Rubella	6	Active
<input type="checkbox"/>	54	MMR(10)	Priorix [™] (10 x 0.5mL)GSK	Measles; Mumps; Rubella	6	Active

Add Catalogue Item(s) Return

8. The **Product Lot Search** screen displays with the Catalogue Item Code and Product Alternate ID fields populated. Click the **Search** button to generate a list of Product Lots.

Product Lot

Product Lot Search

First find the Lot Item in the Catalogue, then search for its Lot.

* Required field To Create a Product Lot

* Catalogue Item Code: 53 [Search Catalogue](#)

* Product Alternate ID: MMR(10)

Lot Number:

Search Retrieve Clear

Product Lot Search Results

9. The results display under **Product Lot Search Results**. Each set of product lots display in ascending year order, depending on Lot Status, e.g., Active or Expired.
10. Click on **Lot Status** to change the order from Active to Expired, or vice versa.

Product Lot Search Results

Your search criteria returned (273) result(s).

Row Actions: **Update Product Lot** **Create Cold Chain Sublot** **Add New Product Lot**

Create New Repackaged Sublot

Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
<input type="checkbox"/>	2021 Jan 29	0154Y	Active	MMR(10)	53	Measles; Mumps; Rubella
<input type="checkbox"/>	2016 Mar 31	145001A	Expired	Men-B(1)	47	Meningococcal B
<input type="checkbox"/>	2017 Feb 28	152001B	Expired	Men-B(1)	47	Meningococcal B
<input type="checkbox"/>	2017 Jun 30	154901C	Expired	Men-B(1)	47	Meningococcal B

Steps: View a Product Lot

Overview Steps: Search>Click **Lot Number** hyperlink>View the lot number information

1. Search for a Product Lot, following the search process.
2. Click on the **Lot Number** hyperlink.

Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
<input checked="" type="checkbox"/>	2021 Jan 29	0154Y	Active	MMR(10)	48	Measles; Mumps; Rubella

3. The **View Product Lot Details** screen displays. View the information.

Maintain Product Lot

View Product Lot Details

Lot Type:	New-Lot	Product Trade Name:	MMR [®] II
Lot Number:	0154Y	Product Alternate ID:	MMR(10)
Original Expiry Date:	2021 Jan 29	Catalogue Item Name:	MMR [®] II(10 x 0.5mL)MF
Current Expiry Date:	2021 Jan 29	Catalogue Item Code:	48
Lot Status:	Active	Manufacturer Code:	Merck Frosst
		GTIN:	-
		DIN:	-

Comment: (4000 characters remaining)

Date	Comments	Recorded By

4. To print the Product Lot details, click the **Print Lot Details** Button.
5. Click the **Close** button.

Steps: Add a Product Lot

Overview Steps: Search > Click Add New Product Lot > Add Product Lot information> Save> Cancel

1. Follow the Product Lot search steps to confirm the product lot is not in the system.
2. Search the Catalogue and select a Catalogue item for the new Product Lot.
3. Click the **Add Catalogue Item(s)** button.

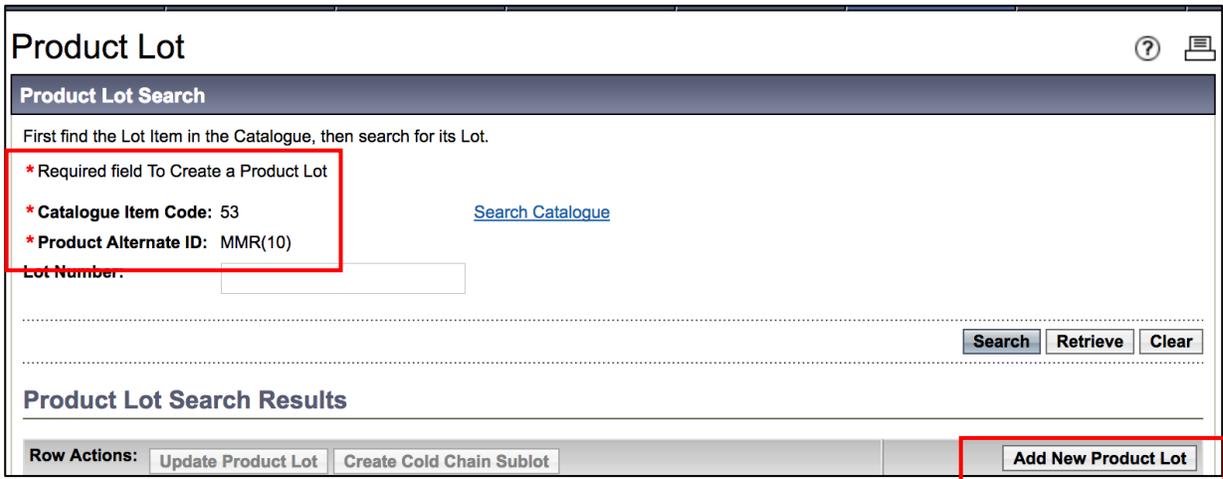
Search Results Returned

Your search criteria returned 2 result(s).

Select All

	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
<input checked="" type="checkbox"/>	53	MMR(10)	MMR [®] II(10 x 0.5mL)MF	Measles; Mumps; Rubella	6	Active
<input type="checkbox"/>	54	MMR(10)	Priorix [®] (10 x 0.5mL)GSK	Measles; Mumps; Rubella	6	Active

4. The Product Lot search screen populates with the catalogue item.

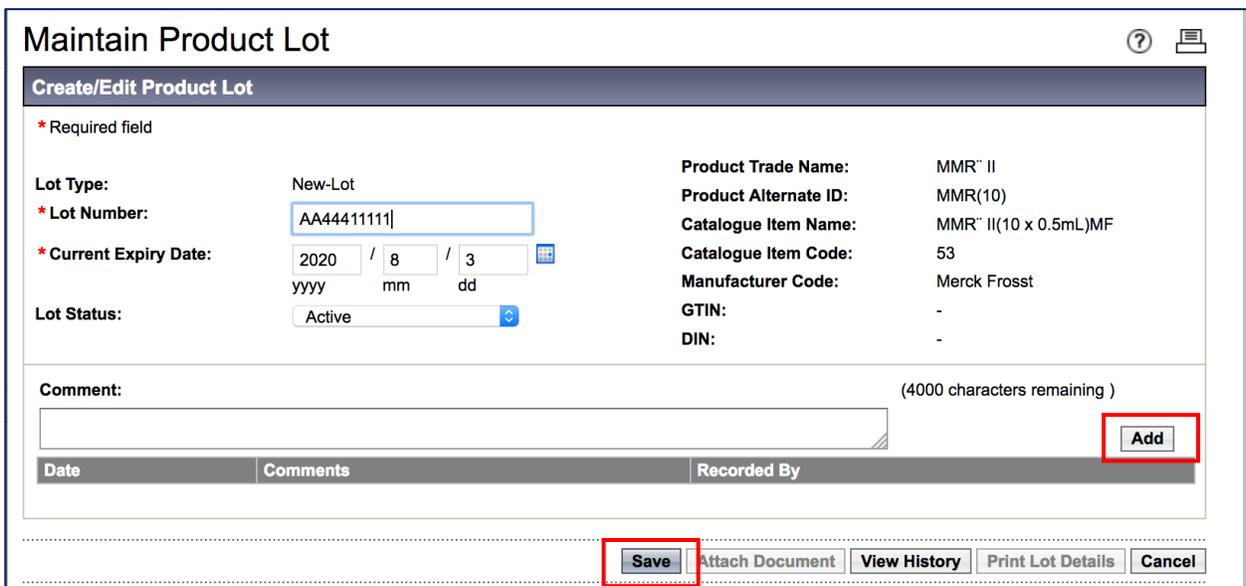


5. Click the **Add New Product Lot** button.

6. **The Maintain Product Lot – Create/Edit Product Lot** screen displays.

7. Enter the Product Lot information.

- Mandatory Information (red asterisk)
 - Lot number – add
 - Current Expiry Date – add
- Non-Mandatory
 - Lot Status - Active
 - Comments – Optional
 - Click the **Add** button after adding a comment. Comments will not be added without this step.
 - A comment may be added before saving the Product Lot.



8. Click the **Save** button. A confirmation message will display.

Steps: Create Cold-Chain Sublots

Overview Steps: Search>Select Product Lot>Click Create Cold Chain Sublot>Save

	<ul style="list-style-type: none"> When an adverse storage condition (ASC) event occurs at the Bio Depot and a lot controlled product experiences a cold chain break, a cold chain sub-lot must be created in Panorama and assigned to the affected product. For ASCs at public health offices, the public health office will follow its own internal processes (outside of Panorama). Zone level permissions do not cover creating cold chain sub-lots.
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- Search for and select the Product Lot for which you want to create a **Cold Chain Sublot**.
- Click the **Create Cold Chain Sublot** button.

Product Lot Search Results

Your search criteria returned (282) result(s).

Row Actions: Update Product Lot Create Cold Chain Sublot Add New Product Lot

Create New Repackaged Sublot

Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
<input checked="" type="checkbox"/>	2021 Jan 29	0154Y	Active	MMR(10)	48	Measles; Mumps; Rubella

- The **Maintain Product Lot – Create/Edit Product Lot** screen displays with the **Lot Type** defaulted to Cold Chain. The Lot # field is populated with a system generated lot number consisting of the selected lot # from the search results and the suffix with the next incremental cold chain subplot suffix for the specified lot.

Maintain Product Lot ? 🖨

Create/Edit Product Lot

* Required field

<p>Lot Type: Cold-Chain</p> <p>* Lot Number: <input type="text" value="0154Y-CC01"/></p> <p>* Current Expiry Date: <input type="text" value="2021"/> / <input type="text" value="01"/> / <input type="text" value="29"/> <input type="button" value="📅"/></p> <p>Lot Status:</p> <div style="border: 1px solid #ccc; padding: 2px; width: fit-content;"> <input checked="" type="checkbox"/> Active <input type="checkbox"/> Inactive </div>	<p>Product Trade Name: MMR[®] II</p> <p>Product Alternate ID: MMR(10)</p> <p>Catalogue Item Name: MMR[®] II(10 x 0.5mL)MF</p> <p>Catalogue Item Code: 48</p> <p>Manufacturer Code: Merck Frosst</p> <p>GTIN: -</p> <p>DIN: -</p>
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Comment: (4000 characters remaining)

Date	Comments	Recorded By

- In the **Current Expiry Date** field, enter the date for the new lot if necessary.
- From the Lot Status drop-down list, select the status. Choose **Active**.

6. Click the **Save** button. Note the number of the Cold Chain Sublot.
7. To assign product to the **Cold Chain Sublot**, the Adjust Inventory process will be followed.

Steps: Cold Chain Sub-Lot Adjustment

	<ul style="list-style-type: none"> • After creating a Cold Chain Sublot, the impacted inventory must be accounted for in Panorama. • The new Cold Chain Sublot will be added using the Add Product adjustment process because the Cold Chain Sublot is new in Panorama. The new product will be assigned to the Cold Chain Quarantine (HPL3-CCQuar) HPL. • The impacted product will be adjusted out of the Operational HPL.
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Part 1 – Add Product

1. Click **Adjust Inventory** on the Left Menu.
2. Select **QOH Adjustment** as the adjustment reason.
3. Add the Holding Point (Bio Depot).
4. Add the Product Alternate ID or Catalogue Item that will require the adjustment.
5. Click **New Adjust**.

Inventory Adjustments and Reconciliation ?

Inventory Item Search ↑ Hide Inventory Item Search

* Required field

* **Reconciliation Type:** 

* **Holding Point:** [Search](#) **HPL:**

Product Alternate ID: **Catalogue Item Name:**

* **Catalogue Item Code:** [Search Catalogue](#) **Adjustment Reason:** 

From: / /  **To:** / / 
yyyy mm dd

Override Holding Point Security

Search Results ↑ Hide Search Results

6. The **QOH Details Adjustment** screen displays.

Inventory Adjustments and Reconciliation



QOH Adjustment Details

* Required field

Product Alternate ID: HPV-4(10) Catalogue Item Name: HPV-4 0.5mL Vial (10/Box)
 Catalogue Item Code: 24 Weighted Average Cost: \$15.27

Row Actions:

		Lot Number	Original Expiry Date	Current Expiry Date	Holding Point Location	ASC Suspended	HPL Type	Current QOH	Unit of Measure	Current Value	
<input type="checkbox"/>	<input type="checkbox"/>	M006158	2018 Nov 3	2018 Nov 3	BioDepotHPL5-Op	No	Operational	982.0	Doses	\$1,499.81	Add Attachment
<input type="checkbox"/>	<input type="checkbox"/>	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL5-Return	No	For Disposal	3.0	Doses	\$4.58	Add Attachment
<input type="checkbox"/>	<input type="checkbox"/>	M006158-CC02	2018 Nov 3	2018 Nov 3	BioDepot-HPL4-CCRev	No	Quarantined for Review	50.0	Doses	\$76.36	Add Attachment
<input type="checkbox"/>	<input type="checkbox"/>	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL4-CCRev	No	Quarantined for Review	10.0	Doses	\$15.27	Add Attachment
<input type="checkbox"/>	<input type="checkbox"/>	M006158-CC02	2018 Nov 3	2018 Nov 3	BioDepot-HPL3-CCQuar	No	CC Quarantined	50.0	Doses	\$76.36	Add Attachment
<input type="checkbox"/>	<input type="checkbox"/>	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL2-Op	No	Operational	10.0	Doses	\$15.27	Add Attachment
<input type="checkbox"/>	<input type="checkbox"/>	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL1-Op	No	Operational	7,355.0	Doses	\$11,233.28	Add Attachment

7. Click **Add Product**.
8. The **Add Product** screen displays.
9. Select the line item for adjustment.
10. Select the **CC Lot Number** under the **Lot Number** drop-down menu.
11. Select the **HPL3-CCQuar HPL** from the **Holding Point Location** dropdown menu.
12. Add the amount to be assigned to the **CC Lot Number** in the **Qty to HPL** field.

Inventory Adjustments and Reconciliation ? 🖨

Add Product

Product Alternate Id	HPV-4(10)	Catalogue Item Name	HPV-4 0.5mL Vial (10/Box)
Holding Point Code:	Bio Depot-HP - Bio Depot	Catalogue Item Code:	24

Catalogue Item(s) ⤴ Hide Catalogue Item(s)

Add Product

	Product Alternate Id	Catalogue Item Name	Catalogue Item Code	Lot Number	Holding Point Location	Current Expiry Date	Original Expiry Date	Qty to HPL	Cold Chain Quarantine
<input checked="" type="checkbox"/>	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	27	M006158-CC	BioDepot-HPL	2018 Nov 3	2018 Nov 3	50.0	<input type="checkbox"/>

Confirm
Cancel

13. Click **Confirm**. A confirmation message will display.

Inventory Adjustments and Reconciliation ? 🖨

Product Added Successfully.

Part 2 – Adjust

1. The amount of product assigned to the new CC Product Lot must be adjusted out of the Operational HPL.
2. Click **Adjust Inventory** on the Left Menu.
3. Add the adjustment criteria and click **New Adjust**.

QOH Adjustment Details

* Required field

Product Alternate ID: HPV-4(10) **Catalogue Item Name:** HPV-4 0.5mL Vial (10/Box)
Catalogue Item Code: 24 **Weighted Average Cost:** \$15.27

Row Actions: **Adjust**

		Lot Number	Original Expiry Date	Current Expiry Date	Holding Point Location	ASC Suspended	HPL Type	Current QOH	Unit of Measure	Current Value	
<input type="checkbox"/>	+	M006158	2018 Nov 3	2018 Nov 3	BioDepotHPL5-Op	No	Operational	982.0	Doses	\$1,499.81	Add Attachment
<input type="checkbox"/>	+	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL5-Return	No	For Disposal	3.0	Doses	\$4.58	Add Attachment
<input type="checkbox"/>	+	M006158-CC02	2018 Nov 3	2018 Nov 3	BioDepot-HPL4-CCRRev	No	Quarantined for Review	50.0	Doses	\$76.36	Add Attachment
<input type="checkbox"/>	+	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL4-CCRRev	No	Quarantined for Review	10.0	Doses	\$15.27	Add Attachment
<input type="checkbox"/>	+	M006158-CC02	2018 Nov 3	2018 Nov 3	BioDepot-HPL3-CCQuar	No	CC Quarantined	50.0	Doses	\$76.36	Add Attachment
<input type="checkbox"/>	+	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL2-Op	No	Operational	10.0	Doses	\$15.27	Add Attachment
<input checked="" type="checkbox"/>	-	M006158	2018 Nov 3	2018 Nov 3	BioDepot-HPL1-Op	No	Operational	7,405.0	Doses	\$11,309.65	Add Attachment

* Adjusted QOH: 7355.0 Adjusted Value: \$11,233.28
 Deviation Quantity: -50.0 Deviation Value: -\$76.36
 * Adjustment Reason: Cold chain adjustment Comment:

Add Product **Cancel**

6. Click the **Adjust** button.
7. The **Post-Adjustment** screen displays.
8. Review the adjustment information.
9. Click **Confirm**.
10. A confirmation message displays.

Inventory Adjustments and Reconciliation ? 🖨

Transaction successfully confirmed.

- The **Create New Repackaged Sublot** process will not be used at present.

Steps: Update a Product Lot

Overview Process: Search > Select Product Lot> Click **Update Product Lot** button > Add Content> Save> Cancel

1. Follow the Product Lot search steps.

2. Select the Product Lot.
3. Click the **Update Product Lot** button.

Product Lot Search Results						
Your search criteria returned (18) result(s).						
Row Actions:			<input type="button" value="Update Product Lot"/> <input type="button" value="Create Cold Chain Sublot"/>		<input type="button" value="Add New Product Lot"/>	
<input type="button" value="Create New Repackaged Sublot"/>						
Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
<input checked="" type="checkbox"/>	2021 Jan 29	0154Y	Active	MMR(10)	53	Measles; Mumps; Rubella

4. The **Maintain Product Lot - Create/Edit Product Lot** screen displays.
5. Modify the Product Lot information.
 - Comments – Optional
 - Click the **Add** button after adding a comment. Comments will not be added without this step.
 - A comment may be added before saving the Product Lot.



- If the supplier extends or reduces the expiry date, the Bio Depot will make this change to the **Current Expiry Date** fields.

Maintain Product Lot

Create/Edit Product Lot

* Required field

<p>Lot Type: New-Lot</p> <p>* Lot Number: <input type="text" value="0154Y"/></p> <p>* Original Expiry Date: <input type="text" value="2021"/> / <input type="text" value="01"/> / <input type="text" value="29"/> <input type="button" value="Calendar"/></p> <p><small>yyyy mm dd</small></p> <p>* Current Expiry Date: <input type="text" value="2021"/> / <input type="text" value="01"/> / <input type="text" value="29"/> <input type="button" value="Calendar"/></p> <p><small>yyyy mm dd</small></p> <p>Lot Status: <input type="text" value="Active"/> <input type="button" value="Dropdown"/></p>	<p>Product Trade Name: MMR[®] II</p> <p>Product Alternate ID: MMR(10)</p> <p>Catalogue Item Name: MMR[®] II(10 x 0.5mL)MF</p> <p>Catalogue Item Code: 53</p> <p>Manufacturer Code: Merck Frosst</p> <p>GTIN: -</p> <p>DIN: -</p>
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Comment: (4000 characters remaining)

Date	Comments	Recorded By

6. Click the **Save** button. A confirmation message will display.
7. Click **Cancel** to return to the search screen.