

Product Returns from External

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Product Returns from External - Manage

Business context

Product Returns from External is a Panorama inventory replenishment function. A return is the movement of product from a Holding Point (HP) back to its replenishment source, and is initiated by a recall, expiry, wastage or other factor. A return from External refers to returns from external providers such as physicians, pharmacies, and hospitals. Returns from external providers are not returns of reusable product.

Trigger

- A public health office receives a product return from a service provider.

Standard Operating Procedures (SOPs)

- Vaccine Returns

Business Roles

The Zone Biological Coordinators and admin staff will complete this process.

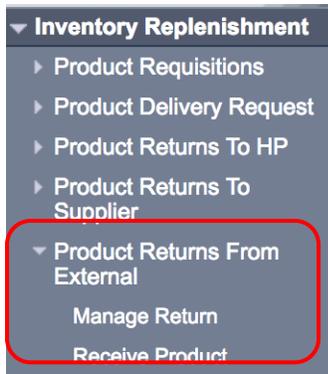
Panorama Role

Both the Inventory Zone and Inventory Provincial roles have permissions for the Product Returns from External functionality.

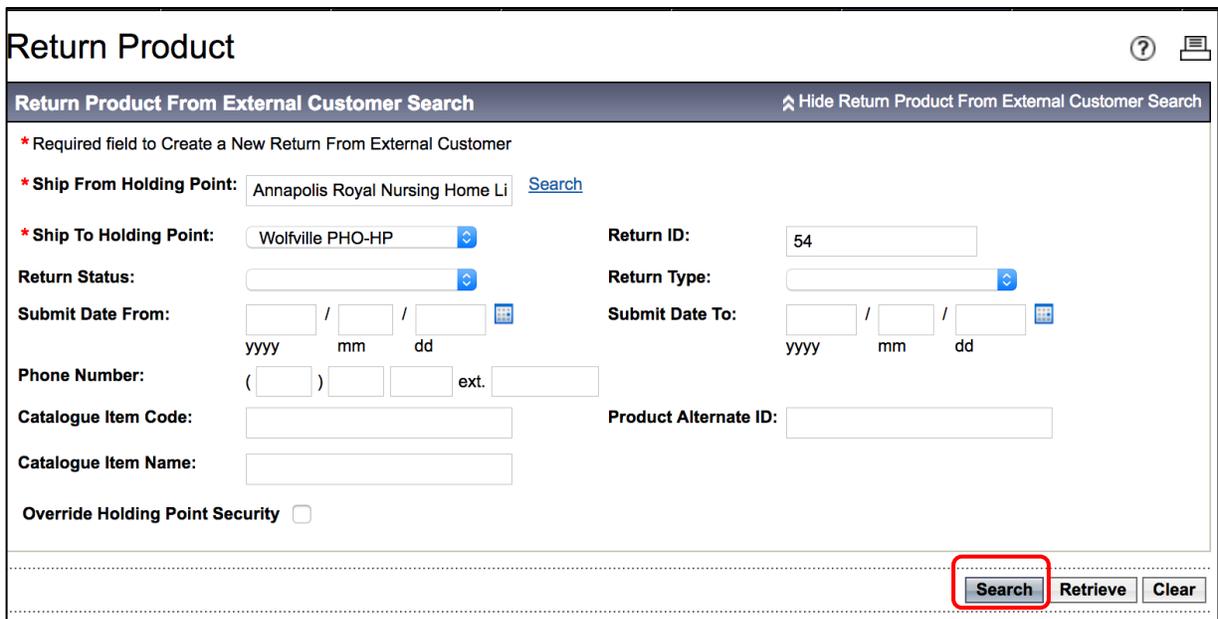
Steps: Search

Overview Steps: Inventory Replenishment>Product Returns from External>Manage Return>Add search criteria>Click Search

1. Select **Inventory Replenishment** from the Left-Hand Navigation Menu, then **Product Returns from External**, then **Manage Return**.



- The **Return Product From External Customer Search** screen displays.
- Recommended search criteria includes the Return ID, Return Status, Ship **From Holding Point**, and **Ship To Holding Point**. An open search without criteria may also be completed.
 - Use the type ahead feature to add the **Ship From Holding Point**.
 - Select the Ship to Holding Point from the **Ship To Holding Point** dropdown menu.
- Click **Search**.



Return Product ? 📄

Return Product From External Customer Search ⤴ Hide Return Product From External Customer Search

* Required field to Create a New Return From External Customer

* **Ship From Holding Point:** Annapolis Royal Nursing Home Li [Search](#)

* **Ship To Holding Point:** Wolfville PHO-HP

Return ID: 54

Return Status: **Return Type:**

Submit Date From: / / **Submit Date To:** / /

yyyy mm dd yyyy mm dd

Phone Number: () ext.

Catalogue Item Code: **Product Alternate ID:**

Catalogue Item Name:

Override Holding Point Security

Search

- The System displays the search results in the **Return Product From External Customer Search Results** section.

Return Product From External Customer Search Results						Hide Return Product From External Customer Search Results
Your search criteria returned 1 result(s).						
						Create New Return From External Customer
Return ID	Ship From Holding Point	Return Status	Return Type	Requested Delivery Date	Ship To Holding Point	
28	Dr.Krista Piek-HP - Dr. Krista Piek	Draft	Return waste for disposal	2017 Sep 14	Truro PHO-HP	
Total: 1		Page 1 of 1	Jump to page: <input type="text"/>			

Steps: View Return

Overview Steps: Search> Select return> Click **Return ID** > View return> Cancel

1. Complete a return from external search.
2. Click the **Return ID** link to view the details.
3. The **Return Product From External Customer** screen displays. Information about the returned product is documented lower on the screen.

Return Product

Return Product From External Customer

* Required field

Return ID: 20
Return Status: Received

*** From Holding Point:** Dr. Richard Kydd-HP - Dr. Richard Kydd
*** To Holding Point:** Bridgewater PHO-HP - Bridgewater PHO
Delivery Zone:

*** Return Type:** Return waste for disposal
*** Requested Return Date:** 2017 Sep 14

*** Ship From Holding Point Address:** #Suite 202 - 42 Glen Allan Drive, Bridgewater NS B4V3N2, Canada

Contact Name: HP Contact
Contact Phone Number:

Use Ad Hoc Address

Ad Hoc Ship From Address: -

*** Ship To Holding Point Address:** #Suite 200 - 215 Dominion Street, Bridgewater NS B4V2K7, Canada

Return Details From External Customer

Cold Chain Required

Row Actions: <input type="button" value="Cancel Line Item"/> <input type="button" value="Reset Invoice Status"/> <input type="button" value="Duplicate Line Item"/> <input type="button" value="Save Line Item"/> <input type="button" value="Add Catalogue Item"/>						
	Return Line Item Status	Catalogue Item Name	Lot Number	*Approved Return Quantity	*Reason for Return	Cold Chain Required
<input checked="" type="checkbox"/>	Receive	Pneumovax®23(10 x 0.5mL)MF	M034698	9	Adverse storage condition	<input type="checkbox"/>

4. A return contains the **Return Status**, the **From** and **To Holding Points**, the **Requested Return Date**, and **Return Type**.
5. After viewing, click the **Cancel** button to return to the search screen.

Steps: Create External Return

Overview Steps: Search> Click **Create New Return From External Customer**> Complete screen fields> Add catalogue item(s) for return> Save as Draft> Submit Return

1. Complete a search for the return.
2. If the return is not found, click the **Create New Return From External Customer** button.

Return Product
?

Return Product From External Customer Search
↑ Hide Return Product From External Customer Search

* Required field to Create a New Return From External Customer

* **Ship From Holding Point:** [Search](#)

* **Ship To Holding Point:**

Return Status:

Return ID:

Return Type:

Submit Date From: / /

Submit Date To: / /

Phone Number: () ext.

Catalogue Item Code:

Product Alternate ID:

Catalogue Item Name:

Override Holding Point Security

Return Product From External Customer Search Results
↑ Hide Return Product From External Customer Search Results

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

3. The **Return Product From External Customer** screen displays.
4. Complete the required fields.
 - From Holding Point: Populates with the **From Holding Point** used in the search.
 - To Holding Point: Populates based on the replenishment source for the **From Holding Point**, i.e., the holding point that would have filled the original requisition
 - Return Type: Select from dropdown menu
 - Requested Return Date: Populates with current date; change if needed
 - The **Ship From Holding Point Address** and **Ship To Holding Point Address** auto-populate based on the holding points selected.



There are two Return types:

- Return Reusable Product
- Return Waste for Disposal
- External returns are for Disposal due to the difficulty in confirming the cold chain status of product stored at external holding points.

Return Product

Return Product From External Customer

* Required field

Return ID:
0

*** From Holding Point:**
Annapolis Royal Nursing Home Limited-HP - Annapolis Royal Nursing Home Limited

*** Return Type:**
Return waste for disposal

*** Ship From Holding Point Address:**
9745 St. George Street, Lequille NS B0S1A0, Canada

Contact Name:
HP Contact

Use Ad Hoc Address [Generate Ad Hoc Address](#)

Ad Hoc Ship From Address:
-

*** Ship To Holding Point Address:**
23 Earnsccliffe Avenue, Wolfville NS B4P1X4, Canada

Use Ad Hoc Address [Generate Ad Hoc Address](#)

Ad Hoc Ship To Address:
-

Return Comment:
Three products were damaged at the site.

Return Status:
NA

*** To Holding Point:**
Wolfville PHO-HP - Wolfville PHO

*** Requested Return Date:**
2017 / 08 / 16
yyyy mm dd

Delivery Zone:

Contact Phone Number:
(902) 222 2222 ext.

Cold Chain Required:

5. Click the **Add Catalogue Item** button, located in the lower screen.
6. The **Catalogue Item Search** screen displays. Enter search criteria for the product being returned. Click **Search**.

Search Results Returned

Your search criteria returned 1 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"/>	15	HAHB-regular(1)	Twinrix® Adult(1 x 1mL)GSK	Hepatitis A; Hepatitis B Adult	6	Active

Add Catalogue Item(s) Return

7. Select the return item from the search results, and click **Add Catalogue Item(s)**.
8. The **Return Details from External Customer** screen displays.

9. Select the item for return; enter the **Lot Number**, **Approved Return Quantity**, and **Reason for Return**. The **Cold Chain Required** checkbox must be deselected if the return reason is **Return Waste for Disposal**, as is the case for most returns.
10. Click the + symbol. Select the Originating Requisition from the dropdown menu if available.
11. Add a **Return Reference Number** if one has been provided.
12. Click **Save as Draft**.

Return Details From External Customer

Cold Chain Required Apply Updates

Row Actions: Cancel Line Item Reset Invoice Status Duplicate Line Item Add Catalogue Item

Select All Deselect All

	Return Line Item Status	Catalogue Item Name	Lot Number	*Approved Return Quantity	*Reason for Return	Cold Chain Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Draft Twinrix® Adult(1 x 1mL)GSK	BHABB333AA	3	Adverse storage condition	<input type="checkbox"/>

Return Reference Number:

Originating Requisition(s):

Product Alternate ID: HAHB-regular(1)

Return Line Item Number: 32

Expiry Date: 2017 Oct 31

Credit Wastage Return:

QTY Shipped to Date: 0.0

Catalogue Item Code: 15

Product Trade Name: Twinrix® Adult

Invoice Status: NA

Unit of Measure: Doses

13. Confirmation message displays – Click OK.
14. Confirmation message displays, stating that that Product Return has been saved/updated.
15. If the same product is returned for multiple reasons and the **Return Type** is Wastage Return For Disposal, Panorama allows a combination of lot numbers/products/reasons to be entered.
 - First, enter each product and click **Save as Draft**.
 - Next, click **Duplicate Line Items** and select different reasons for the same lot number/product.
 - Click **Save as Draft** after each Duplicate Line Item.

Row Actions: Cancel Line Item Reset Invoice Status Duplicate Line Item Add Catalogue Item						
Select All <input type="checkbox"/> Deselect All <input type="checkbox"/>						
	Return Line Item Status	Catalogue Item Name	Lot Number	*Approved Return Quantity	*Reason for Return	Cold Chain Required
<input checked="" type="checkbox"/>	Draft	Twinrix® Adult(1 x 1mL)GSK	BHABB333AA	3	Adverse storage condition	<input type="checkbox"/>
Return Reference Number: 44 QTY Shipped to Date: 0.0 Originating Requisition(s): <input type="text"/> Catalogue Item Code: 15 Product Alternate ID: HAHB-regular(1) Product Trade Name: Twinrix® Adult Return Line Item Number: 32 Invoice Status: NA Expiry Date: 2017 Oct 31 Unit of Measure: Doses Credit Wastage Return: <input type="checkbox"/>						
<input checked="" type="checkbox"/>	NA	Twinrix® Adult(1 x 1mL)GSK	AHABB327AC	1	Expired product	<input type="checkbox"/>
Return Reference Number: 45 QTY Shipped to Date: 0.0 Originating Requisition(s): <input type="text"/> Catalogue Item Code: 15 Product Alternate ID: HAHB-regular(1) Product Trade Name: Twinrix® Adult Return Line Item Number: Invoice Status: NA Expiry Date: 2017 May 31 Unit of Measure: Doses Credit Wastage Return: <input type="checkbox"/>						
Save as Draft Submit Return Cancel Return Cancel Print						

Return Product ?

Product Return has been saved/updated successfully.

Return Product From External Customer

16. Click **Submit Return**.
17. Confirmation message displays.
18. The Return Status updates to Pending Receipt. If the return contains short-dated products, this will be displayed in the message. Short-dated products will expire in 90 days or less.

Return Product ?

Return contains short-dated product(s):{0} 15
Product Return has been submitted successfully.

Return Product From External Customer

* Required field

Return ID: 52	Return Status: Pending Receipt
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Steps: Cancel a Line Item

Overview Steps: Search>Select return>Select return item to cancel>Click **Cancel Line Item**>OK

1. To cancel a line item on the return, select the return item and click **Cancel Line Item**.

Return Details From External Customer

Cold Chain Required [Apply Updates](#)

Row Actions: **Cancel Line Item** | [Reset Invoice Status](#) | [Duplicate Line Item](#) | [Save Line Item](#) | [Add Catalogue Item](#)

	Return Line Item Status	Catalogue Item Name	Lot Number	*Approved Return Quantity	*Reason for Return	Cold Chain Required
<input type="checkbox"/>	⊕ Pending Receipt	Twinrix® Adult(1 x 1mL)GSK	BHABB333AA	3	Adverse storage condition	<input type="checkbox"/>
<input checked="" type="checkbox"/>	⊕ Pending Receipt	Twinrix® Adult(1 x 1mL)GSK	AHABB327AD	1	Expired product	<input type="checkbox"/>

[Save as Draft](#) | [Submit Return](#) | [Cancel Return](#) | [Cancel](#) | [Print](#)

2. The system displays a message confirming to proceed – Click **OK**.
3. A confirmation message displays.

Return Product ? | [icon]

Product Return Line Item(s) cancelled successfully.

4. The line item is updated to Cancelled.

<input checked="" type="checkbox"/>	⊕ Cancelled	Twinrix® Adult(1 x 1mL)GSK	AHABB327AD	1	Expired product	<input type="checkbox"/>
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Steps: Cancel Return

1. To cancel an entire return, click **Cancel Return**.

[Save as Draft](#) | [Submit Return](#) | **Cancel Return** | [Cancel](#) | [Print](#)

2. The system displays a confirmation message – Click **OK**.
3. The Return status changes to Cancelled.

	Note: A return cannot be cancelled after it is received.
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Receive Product

Business context

The product returned from an external provider must be added back into the public health office inventory.

Triggers

- A public health office receives a return from a service provider.

Standard Operating Procedures (SOPs)

- Vaccine Returns

Business Roles

The Zone Biological Coordinators and admin staff will perform this functionality.

Panorama Role

Both the Inventory Zone and Inventory Provincial roles have permissions for the Product Returns from External functionality.

Steps: Receive Return

Overview Steps: Inventory Replenishment>Product Returns From External>Receive Product>Add criteria>Search

1. Select **Product Returns from External**, then **Receive Product**.



2. The **Search Receive Return** screen displays.
3. Add search criteria. Recommended criteria includes a **Return Status** of Pending Receipt or the Return ID (if known).
4. Click **Search**.

Receive Return

Search Receive Return Hide Search Receive Return

Ship From Holding Point: [Search](#)

Ship To Holding Point:

Return Status: Pending Receipt

Return ID: 52

Return Type:

Submit Date From: / /

Submit Date To: / /

Phone Number: () ext.

Catalogue Item Code:

Product Alternate ID:

Catalogue Item Name:

Manifest Number:

Override Holding Point Security

5. The results display under **Receive Return Search Results**.
6. Select the return.
7. Click the **Receive Return** button.

Receive Return Search Results

Hide Receive Return Search Results

Your search criteria returned 1 result(s).

Select All

Row Actions: **Receive Return** Cold Chain Quarantine *HPL

	Submit Date	Return ID	Ship From Holding Point	Return Status	Return Type	Ship To Holding Point
<input checked="" type="checkbox"/>	2017 Oct 7	52	Annapolis Royal Nursing Home Limited-HP ...	Pending Receipt	Return waste for disposal	Wolfville PHO-HP

8. The **Receive Shipment** screen displays.

Receive Return

Receive Shipment

* Required field

Return ID (Return From External): 52
Return Type: Return waste for disposal

Ship To Holding Point: Wolfville PHO-HP - Wolfville PHO
Requestor Document Reference Number:
Ship-to Address:

Bill-to Address:
Urgent Reason:

Required Delivery:
Requested Delivery/Pickup Date: **Delivery Zone:** NA **Delivery Method:** NA

Requestor Contact Name: HP Contact
Requestor Phone Number:
Ship-to Instructions: **Recipient:**

Ship From HP: Annapolis Royal Nursing Home Limited-HP - Annapolis Royal Nursing Home Limited
Return Header Comments: **Packing Slip Comments:**

Return Status: Pending Receipt
Receiving Comments: **Freight Indicator:** **Freight Comment:**

9. Enter **Received Qty**.
10. Select the **HPL** location that receive the return from the **HPL** drop-downs.
11. Click **Receiving Completed**.

Receive Shipment Details

Cold Chain Quarantine * HPL **Apply Updates**

Row Actions: **Duplicate Line Item** **Add Line Item**

	Line Item Status	Product Alternate ID	Catalogue Item Name	* Lot Number	Expiry Date	Requested Qty:	* Received Qty	Unit Of Measure	Cold Chain Quarantine	* HPL
<input type="checkbox"/>	<input checked="" type="radio"/> Pending Receipt	HAHB-regular(1)	Twinrix® Adult(1 x 1mL)GSK	BHABB333AA	2017 Oct 31	3.0	<input type="text" value="3.0"/>	NA	<input type="checkbox"/>	<input type="text" value="Wolfv-HPL4-R"/>

12. Confirmation message received. The **Line Item Status** changes to Received.