

## Service Delivery Location (SDL)

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### Business context

When a new provider, e.g., a physician, a hospital, a pharmacy, wishes to order vaccines, a Service Delivery Location (SDL) is set up in Panorama, prior to the creation of a Holding Point Profile (HPP).

**Pre-Requisite:** A request to order vaccines is received from a new service provider.

### Triggers

- A new provider contacts the public health office to setup a new account for vaccine.
- Updates to the current SDL are needed.
- A provider is no longer active. The SDL must be inactivated.

### Standard Operating Procedures (SOPs)

- A process and form for submitting requests for new vaccine accounts is in progress.

### Business Roles

Creation of SDLs will be completed most frequently by Biological Coordinators and Admin Support staff at the zones. If a new public health office were to be opened, the Bio Depot would be responsible for creating the SDL for the new site.

### Panorama Role

Both the Inventory Zone and the Inventory Provincial roles have the permissions to create a SDL.

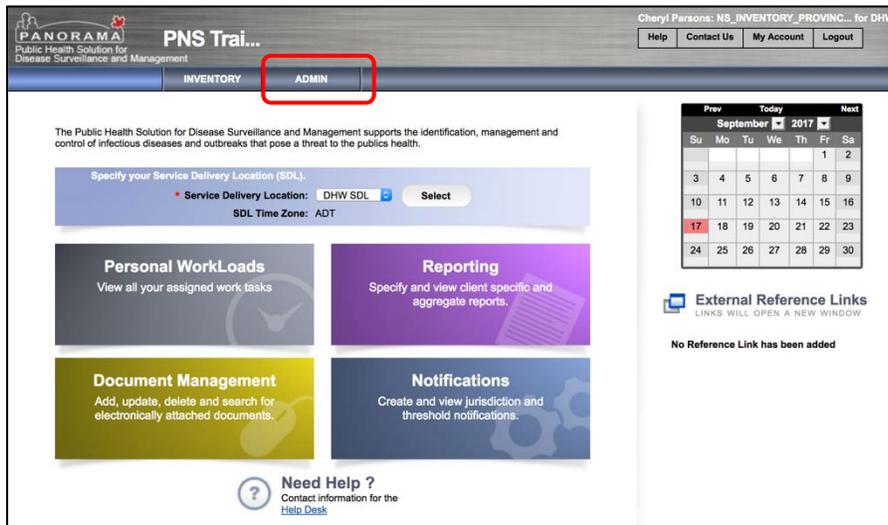
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### Steps: Search

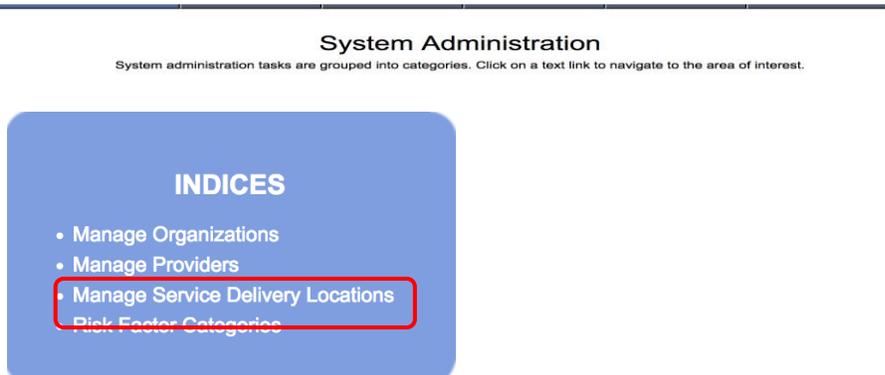
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**Overview Steps:** Admin Tab on Dashboard>Indices> Manage Service Delivery Locations>Select Organization>Search

1. Click the **ADMIN** tab at the top of the Panorama Dashboard.



2. The **System Administration** screen displays. Under **Indices**, select **Manage Service Delivery Locations**.



	<ul style="list-style-type: none"> <li>• A new SDL must be attached to an Owner Organization, e.g., Sydney Public Health Office.</li> </ul>
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3. The **Search Service Delivery Location (SDL)** screen displays.
4. Click the **Find** button and type in the name of the organization, using the Type Ahead feature, to identify the **Owner Organization**. When the name of the organization displays, select it and click the **Select** button.
5. If the name of the new SDL is known, add it to the SDL Name field.
  - An open search will generate all SDLs associated with the **Owner Organization**.
6. Use the Wildcard functionality to search. This allows for different spellings of the same SDL to generate, reducing the risk of duplicates.



2. The **Service Delivery Location Details** screen displays.

View Service Delivery Location (SDL)




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Service Delivery Location Details
Hide Service Delivery Location Details

<b>Service Delivery Location Id:</b>	860	<b>Inactive As Of:</b>	
<b>Effective From Date:</b>		<b>Owner Organization:</b>	Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office
<b>Time Zone:</b>	Atlantic Time	<b>License Number:</b>	
<b>Date Last Inspected:</b>		<b>Code:</b>	
		<b>Status:</b>	Active

**Names:**

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<b>Name:</b>	Albro Lake Medical Clinic
<b>Display Name:</b>	Albro Lake Medical Clinic

3. View the SDL details. **Name** and **Display Name** are the same for external SDLs.

- Name
- Display Name
- System generated Service Delivery Location ID
- Status: Active or Inactive
- Effective From Date: The date the SDL became active
- Address: Contains the postal address
- Contacts: Lists a telephone number and Contact Type

Addresses						Hide Addresses
Type	Address	Start Date	End Date	Preferred	Directions	
Postal address	6 Primrose Street, Dartmouth, Nova Scotia Canada B3R1A3			✓		

Contacts						Hide Contacts
Description	Contact Type	Address	Communication Details	Status	Preferred	
	After hours		Telephone (902) 465-4444	Active	✓	

The preferred of many or the only communication detail of a contact is shown in bold.

4. Click the **Cancel** button.

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### Steps: Create SDL

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**Overview Steps:** Search>**Create New SDL** button> Add SDL information>Add address>Add contact>Submit

	<ul style="list-style-type: none"> <li>When creating a SDL, the user must be logged in under the same Organization as the SDL being created.</li> </ul>
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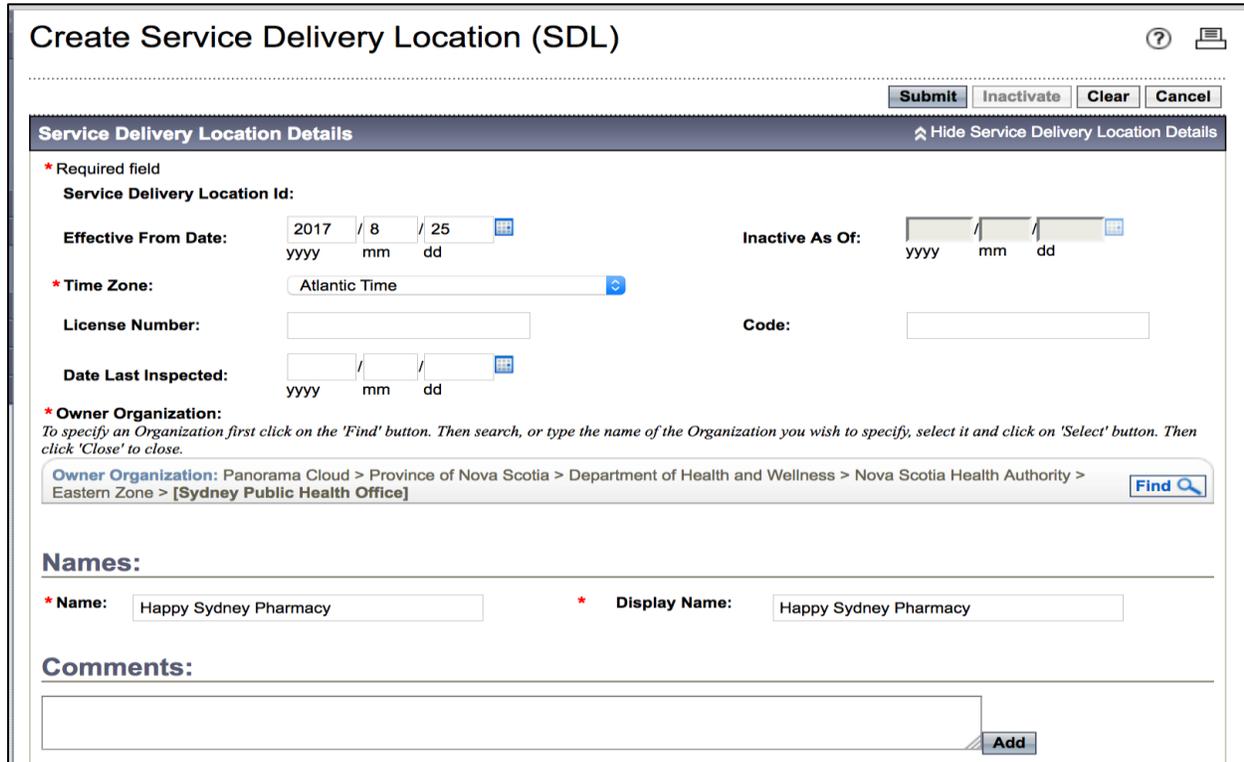
1. If the new SDL is not in the system, click the **Create New SDL** button.



The screenshot shows the 'SDL Search Results' interface. At the top right, there is a link to 'Hide SDL Search Results'. Below the header, it states '0 SDLs found' and provides a message: 'Please modify your search criteria and search again or create a new SDL.' At the bottom right, there are two buttons: 'New Search' and 'Create New SDL'.

2. The **Create Service Delivery Location (SDL) – Service Delivery Location Details** screen displays.

	<p><b>SDL Naming Convention</b></p> <ul style="list-style-type: none"> <li>The <b>Name</b> and <b>Display Name</b> are the same for external SDLs. Use the name of the provider, e.g., Happy Sydney Pharmacy.</li> <li>For new public health office SDLs, the naming convention is different.             <ul style="list-style-type: none"> <li><b>Name:</b> Full name of the public health office, e.g., Sydney Public Health Office.</li> <li><b>Display Name:</b> Sydney PHO</li> </ul> </li> </ul>
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The screenshot shows the 'Create Service Delivery Location (SDL)' form. At the top right, there are icons for help and print. Below the title, there are buttons for 'Submit', 'Inactivate', 'Clear', and 'Cancel'. The main section is titled 'Service Delivery Location Details' with a 'Hide Service Delivery Location Details' link. It contains several required fields:
 

- Service Delivery Location Id:** A text input field.
- Effective From Date:** A date picker set to 2017/8/25.
- Inactive As Of:** A date picker.
- Time Zone:** A dropdown menu set to 'Atlantic Time'.
- License Number:** A text input field.
- Code:** A text input field.
- Date Last Inspected:** A date picker.
- Owner Organization:** A dropdown menu showing a breadcrumb path: 'Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Eastern Zone > [Sydney Public Health Office]'. There is a 'Find' button next to it.

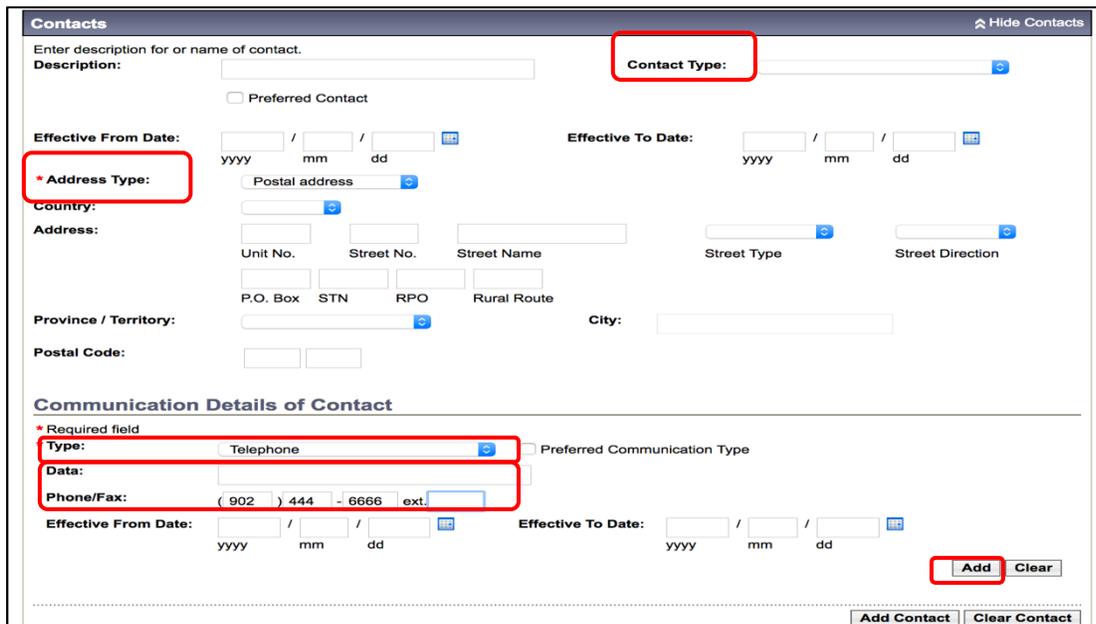
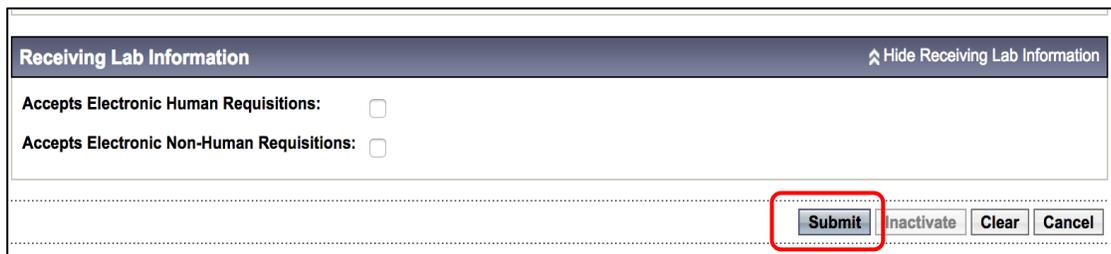
 Below these fields are sections for 'Names' and 'Comments'.
 

- Names:** Two text input fields, both containing 'Happy Sydney Pharmacy'. The first is labeled '\* Name:' and the second is labeled '\* Display Name:'.
- Comments:** A large text area with an 'Add' button at the bottom right.

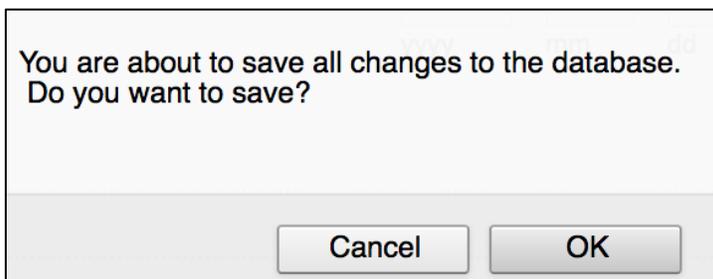
3. Required fields:



- **Contact Type** is optional, but recommended.
- Under **Communication Details of Contact**, select **Type** "Telephone".
  - Add the telephone number in the **Phone/Fax** Field.

- Click the **Add** button to add the contact information to the record.
- To add a second contact, click the **Add Contact** button.
- The Receiving Lab Information section does not need to be completed.
- Click the **Submit** button.
- A confirmation message displays. Click OK.



- A success message displays. The SDL has been added to the Panorama system.

### Update Service Delivery Location (SDL)

The Service Delivery Location was saved successfully

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## Steps: Update SDL

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**Overview Steps:** Search>Select SDL>Click **Update** button>Make updates>Click **Apply Update**>Submit

1. Complete a SDL search.
2. Select the SDL and click the **Update** button.

#### SDL Search Results ^ Hide SDL Search Results

1 SDLs found Click on SDL name to maintain.

Row Actions:

Name	Address	City	Phone
<a href="#">Albro Lake Medical Clinic</a>	6 Primrose Street	Dartmouth	(902) 465-4444

5. To update an address, select the address and click **Update**.
6. Select **Address Type**: Postal Address.
7. After updating the address, click **Apply Update**.

Type	Address	Start Date	End Date	Preferred
<input type="radio"/> Postal address	-	2017 Sep 15	2017 Sep 19	-
<input checked="" type="radio"/> Postal address	45 - 10 Main Street, New Glasgow, Nova Scotia			-

Total: 2 Page 1 of 1 Jump to page:

8. To update the Communication Details for a contact, select the contact **Type** and click **Update**.

**Communication Details of Contact**

\* Required field  
 \* Type:   Preferred Communication Type  
 Data:   
 Phone/Fax: (  )  -  ext.   
 Effective From Date:  /  /  Effective To Date:  /  /   
 yyyy mm dd yyyy mm dd

Type	Data	Preferred	Effective From Date	Effective To Date
Telephone	(902) 444-4455	✓	2017 Sep 15	

Total: 1 Page 1 of 1 Jump to page:

9. Once the changes have been completed, click **Apply Update**.

**Communication Details of Contact**

\* Required field  
 \* Type: Telephone  Preferred Communication Type  
 Data:   
 Phone/Fax: ( 902 ) 444 - 4456 ext.   
 Effective From Date: 2017 / 09 / 15 Effective To Date:  /  /   
 yyyy mm dd yyyy mm dd

10. Click **Submit**.

**Update Service Delivery Location (SDL)**

**Service Delivery Location Details**

11. A confirmation message will display.

**Update Service Delivery Location (SDL)**

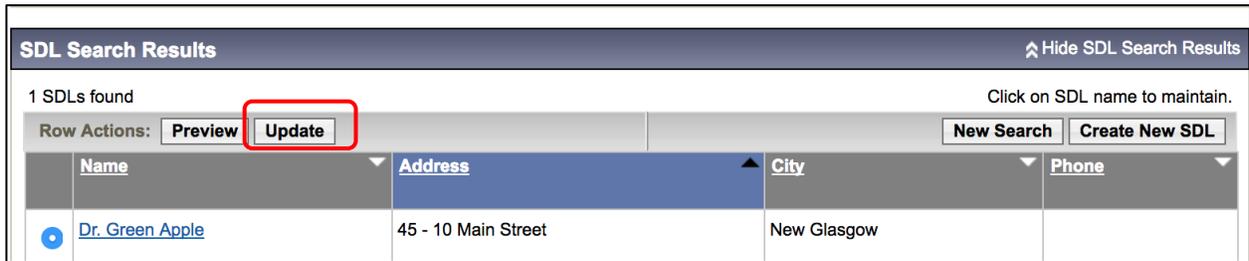
The Service Delivery Location was saved successfully

**Steps: Inactivate SDL**

★ If a SDL is no longer active, e.g., if a physician retires, the SDL is inactivated, not deleted.

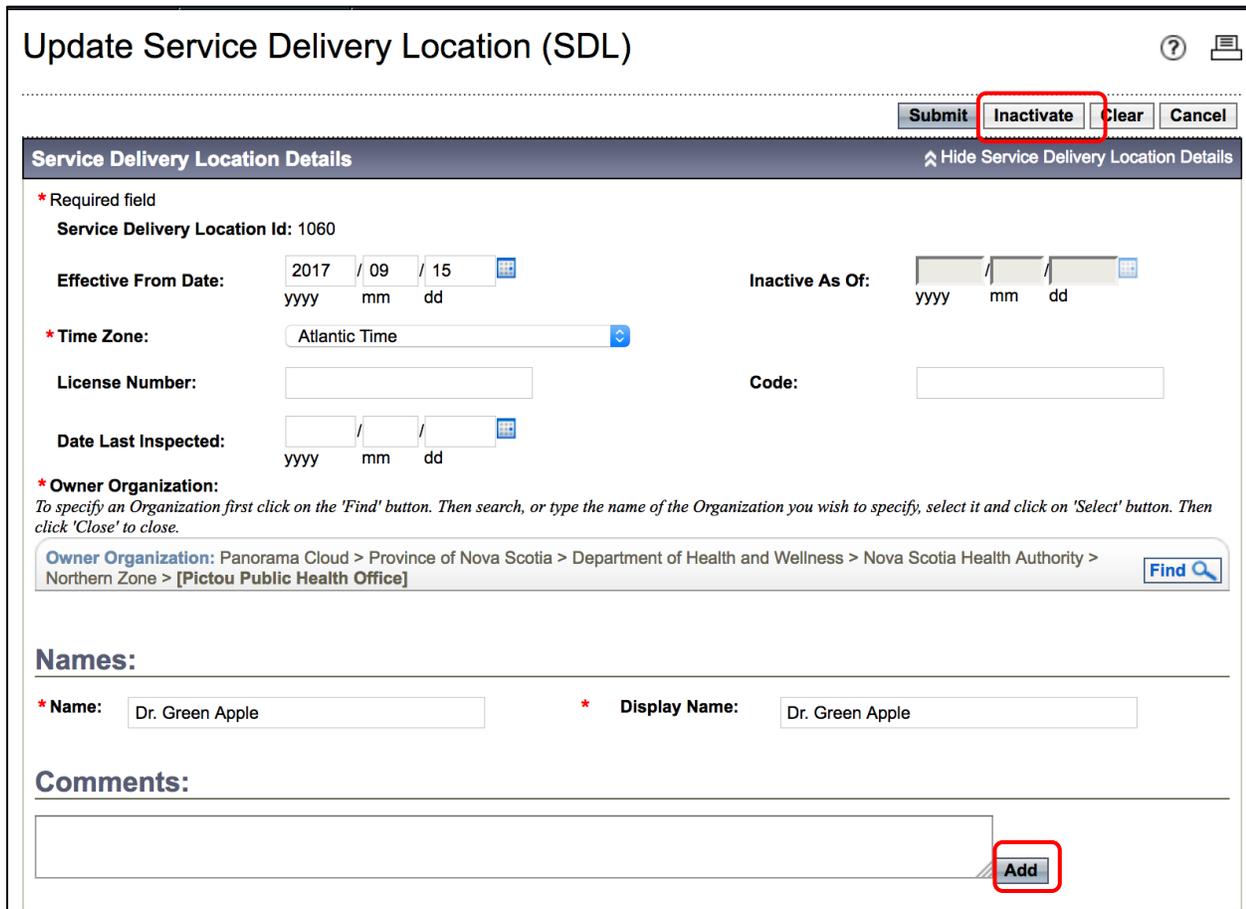
**Overview Steps:** Search>Select SDL>Click **Update**>Inactivate>OK>Submit

1. Search for the SDL.
2. Select the SDL and click the **Update** button.



SDL Search Results			
1 SDLs found			
Row Actions: Preview <b>Update</b>		New Search Create New SDL	
Name	Address	City	Phone
<a href="#">Dr. Green Apple</a>	45 - 10 Main Street	New Glasgow	

3. The **Update Service Delivery Location (SDL) - Service Delivery Location Details** screen displays.



**Update Service Delivery Location (SDL)**

Submit **Inactivate** Clear Cancel

**Service Delivery Location Details**

\* Required field  
 Service Delivery Location Id: 1060

Effective From Date: 2017 / 09 / 15  
 Inactive As Of: / /

\* Time Zone: Atlantic Time

License Number: Code:

Date Last Inspected: / /

\* Owner 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.

Owner Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Northern Zone > [Pictou Public Health Office] Find

**Names:**

\* Name: Dr. Green Apple \* Display Name: Dr. Green Apple

**Comments:**

Add

4. If a comment is required, add a comment in the **Comments** field.

- Click the **Add** button to add the comment. The comment will not be saved without this action.
5. Click the **Inactivate** button at the top of the screen.
  6. A message will display, confirming inactivation of the location. Click **OK**.
  7. The **Inactive As Of** field populates with today's date.

**Service Delivery Location Details** ↑ Hide Service Delivery Location Details

\* Required field

**Service Delivery Location Id:** 1060

**Effective From Date:**  /  /

**Inactive As Of:**  /  /

yyyy mm dd yyyy mm dd

8. To re-activate the SDL, click the **Activate** button.
9. A confirmation message to reactivate the location displays. Click **OK**.
10. A date is longer documented in the **Inactive As Of** field.

**Update Service Delivery Location (SDL)** ? 🖨

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**Service Delivery Location Details** ↑ Hide Service Delivery Location Details

\* Required field

**Service Delivery Location Id:** 1060

**Effective From Date:**  /  /

**Inactive As Of:**  /  /

yyyy mm dd yyyy mm dd

11. Click **Submit**. The changes are saved.
12. If a SDL has been Inactivated, the corresponding Holding Point must also be made Inactive.
13. Click on the **Holding Point Profile** link on the Left Menu.
14. Search for the Holding Point attached to the SDL.
15. Change the **Holding Point Status** to Inactive.

**Holding Point Profile** ? 🖨

**Holding Point Profile** ↑ Hide Holding Point Profile

\* Required field

<p>* <b>Holding Point Code:</b> <input type="text" value="Canso Pharmacy-HP"/></p>	<p><b>Holding Point Type:</b> <input type="text" value="Community Pharmacy"/> <input type="button" value="v"/></p>	<p>* <b>Holding Point Name:</b> <input type="text" value="Canso Pharmacy"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p><input type="checkbox"/> Replenishment Centre    <input type="checkbox"/> Auto approval Mode    <input type="checkbox"/> Auto Decrement:</p>		
<p><b>Status Comment:</b> <input type="text"/></p>		
<p><b>Effective Status End Date:</b> <input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <input type="button" value=""/></p> <p style="font-size: small;">yyyy mm dd</p>		
<p><b>Status Last Updated Date:</b> <input type="text"/></p>		<p><b>Status Last Updated By:</b> <input type="text"/></p>
<p><a href="#">View Status History</a></p>		
<p><b>Previous Status:</b> <input type="text"/></p>		

Active  
 Fully Suspended  
 Inactive  
 Monitored  
 Suspended for Vg Inactive



16. Click **Save**.