

Service Delivery Location (SDL)

Functions: <u>Search</u> <u>View SDL</u> <u>Create SDL</u> <u>Update SDL</u> Inactivate SDL

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- A provider is no longer active.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.

Steps: Search

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.



		Cheryl P	arson	s: NS_	INVE	NTOR	Y_PR	IOVIN	IC
Ith Solution for PNS Trai		Help	Cont	act Us	N	ly Acce	ount	Lo	gou
urveillance and Management INVENTORY ADMIN									
			-	^{Prev} Sep	temb	Today er 🔽	201		Ne
The Public Health Solution for Disease Surveillance and Mana control of infectious diseases and outbreaks that pose a threat	gement supports the identification, management and to the publics health.		Su	Мо	Tu	We	Th	Fr	S
Specify your Service Delivery Location (SDL).			3	4	5	6	7	8	6
* Service Delivery Location:	HW SDL 🖸 Select		10	11	12	13	14	15	1
SDL Time Zone: AD	T		17	18	19	20	21	22	2
			24	25	26	27	28	29	3
TARGET AND A DEPARTMENT OF A DEPARTMENT AND A DEPARTMENTANA AND A DEPARTMENT	Specify and view client specific and								
view an your assigned work tasks	Specify and view client specific and aggregate reports.	C.	Refe	KS W	Link	has b	een a	ce I	Lin
Document Management	Specify and view client specific and aggregate reports.	n n	lo Refe	KS W	Link	has b	een a	ce I www.	
Document Management Add, update, delete and search for electronically attached documents.	Specify and view client specific and aggregate reports. Notifications Create and view jurisdiction and threshold notifications.	Ň	lo Refe	viteri vitis w	Link	Refe	een a	ce I	

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

INDICES • Manage Organizations • Manage Providers • Manage Service Delivery Locations Plack Factor Catagories	System administration tasks are grou	ystem Administration uped into categories. Click on a text link to navigate to the area of interes
INDICES • Manage Organizations • Manage Providers • Manage Service Delivery Locations Bick Forter Contractions		
Manage Organizations Manage Providers Manage Service Delivery Locations Disk Easter Categories	INDICES	
Manage Providers Manage Service Delivery Locations Disk Easter Cologonics	Manage Organizations	
Manage Service Delivery Locations Bick Easter Categories	Manage Providers	
Pick Factor Catagorian	Manage Service Delivery Loca	ations
	Risk Factor Categories	



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A new SDL must be attached to an Owner Organization, e.g., Sydney Public Health Office.

- 3. The Search Service Delivery Location (SDL) screen displays.
- 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.



DE Gearch Chiella								A Hide SDL Search Crit
Vildcard characters % (m	Itiple letters) and	_ (single lette	ers) can be i	used when searching by na	ame. Wildcard	d-only sea	rches not a	allowed.
wner Organization: o specify an Organization fi ick 'Close' to close.	rst click on the 'Fin	d' button. Then	search, or ty	pe the name of the Organizat	ion you wish to	o specify, se	lect it and	click on 'Select' button. The
Owner Organization: To	p Level > Level 2	(specific one)) > Level 3 ((specific one) > [Selected	Level 4 Orga	nization]		Find C
								Close X
Type Search								
Organization Name:	Start typin, Select the I Halifax F	ng the name of the match with the solution of	he Organizaı keyboard or Office, -	ion. Matches will begin to ap mouse.	pear below.			Show Info
Organization Name:	Start typin, Select the i Halifax F	ng the name of t match with the Public Health (he Organizai keyboard or Office, -	ion. Matches will begin to ap, mouse.	pear below.			Show Info Select
Organization Name: DL Name Type:	Start typin Select the i Halifax F	ng the name of t. match with the Public Health (he Organizai keyboard or Office, -	ion. Matches will begin to ap, mouse. SDL Name:	pear below. Albro%			Show Info
Organization Name: DL Name Type: ffective Date From:	Start typin Select the Halifax F	ng the name of t. match with the Public Health (he Organizai keyboard or Office, -	ion. Matches will begin to ap, mouse. SDL Name: Effective Date To:	pear below. Albro%	/	/	Show Info

- 7. Click Search.
- 8. Search results will display in the **SDL Search Results** section.

\$ DL S	Search Results				☆ Hide SDL Search Results				
1 SDLs found Click on SDL name to maintain									
Row	Actions: Preview Update			Ne	Click on SDL name to maintain. New Search Create New SDL				
	Name	Address	•	<u>City</u>	Phone 🔻				
۲	Albro Lake Medical Clinic	6 Primrose Street		Dartmouth	(902) 465-4444				

Steps: View SDL

Overview Steps: Search> Select SDL>View SDL>Cancel

1. To view a SDL, select the SDL and click on the Name hyperlink.

SDL S	Search Results				☆ Hide SDL Search Results			
1 SDLs found Click on SDL name to maintai								
Row	Actions: Preview Update			Ne	Click on SDL name to maintain. New Search Create New SDL			
	Name	<u>Address</u>	•	<u>City</u>	Phone 🔻			
۲	Albro Lake Medical Clinic	6 Primrose Street		Dartmouth	(902) 465-4444			



2. The Service Delivery Location Details screen displays.

View Service	e Delivery Location (SDL)	(?	Ē
		<u> </u>	Close
Service Delivery L	ocation Details	e Service Delivery Location E	Details
Service Delivery Location Id:	860		
Effective From Date:		Inactive As Of:	
Owner Organization:	Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia H Authority > Central Zone > Halifax Public Health Office	lealth	
Time Zone:	Atlantic Time		
License Number:		Code:	
Date Last Inspected:		Status: A	ctive
Names:			
Name:	Albro Lake Medical Clinic		
Display Name:	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

A	Addresses								\$⊦	Hide Addresses
	Туре	Address	•	Start Date	•	End Date	•	Preferred	•	Directions
	Postal address	6 Primrose Street, Dartmouth, Nova Scotia Canada B3R1A3						\checkmark		

Contacts						A Hide Contacts
			The preferred of m	nany or the only communicat	ion detail of a cor	ntact is shown in bold.
Description	Contact Type	Address T	Communication D	etails	<u>Status</u> 🔻	Preferred T
	After hours		Telephone	(902) 465-4444	Active	\checkmark

4. Click the **Cancel** button.

Steps: Create SDL



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



1. If the new SDL is not in the system, click the **Create New SDL** button.

SDL Search Results	tide SDL Search Results
0 SDLs found	Please modify your search criteria and search again or create a new SDL.
	New Search Create New SDL

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

4	SDL Naming Convention
\mathbf{X}	• The Name and Display Name are the same for external SDLs. Use the
	name of the provider, e.g., Happy Sydney Pharmacy.
	• For new public health office SDLs, the naming convention is different.
	 Name: Full name of the public health office, e.g., Sydney Public
	Health Office.
	 Display Name: Svdnev PHO

Create Service	Delivery Location (SDI	_)	0 🗏
			Submit Inactivate Clear Cancel
Service Delivery Locati	on Details		Hide Service Delivery Location Details
* Required field Service Delivery Location	n ld:		
Effective From Date:	2017 / 8 / 25	Inactive As Of:	yyyy mm dd
* Time Zone:	Atlantic Time	0	
License Number:		Code:	
Date Last Inspected:	/ / III		
* Owner Organization: To specify an Organization first click 'Close' to close	click on the 'Find' button. Then search, or type the	e name of the Organization you wish to sp	ecify, select it and click on 'Select' button. Then
Owner Organization: Pane Eastern Zone > [Sydney P	orama Cloud > Province of Nova Scotia > Deg ublic Health Office]	partment of Health and Wellness > No	va Scotia Health Authority > Find
Names:			
* Name: Happy Sydney	Pharmacy *	Display Name: Happy Sydne	ey Pharmacy
Comments:			
			Add

3. Required fields:



- Owner Organization
 - Click the **Find** button and use the Type Ahead feature to find the Owner Organization. When the name of the organization displays, select the name and click the **Select** button.
- Name and Display Name
- Time Zone: Select Atlantic from dropdown
- 4. Not mandatory but should be added:
 - Effective From Date: Add the date the SDL became available.
- 5. 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. The new comment will display.
- 6. Not required:
 - Last Inspected
 - License number
- 7. Service Delivery Address
 - Address Type is Mandatory: Select Postal address
 - Address fields, e.g., Street Name, Province/Territory, City, and Postal Code, are not mandatory but should be added.
 - \circ Click the Add button for the address to register.
 - Geo-Coding Information is not required.

Addresses									Alide Ac	dresses
* Address Type:	Postal ad	ddress	\$					Prefer	red	
Country:	Canada	\$								
Address:				Main			Avenue	\$		
	Unit No.		Street No.	Street Name			Street Type		Street Direction	
Province / Territory:	P.O. Box	SIN	RPO	Rural Route	City					
r tovince / terntory.	Nova Sc	olia	~		Oity.	Sydne	ey .			
Postal Code:	B1N	1A1								
Directions:										7
Effective From Date:	2017	/ 8	/ 26		Effective	To Date:		1	/	
	уууу	mm	dd				уууу	mm	dd	
Geo-Coding In	forma	tion								
Geo-Coding Infor	mation:									
Latitude:		Lor	naitude:							
			- <u>-</u>							
									Add	Clear

- 8. Add Contact information.
 - Address Type is required. Select Postal address from the Dropdown menu.

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

Inter description for or po	
Description:	me of contact. Contact Type:
	Preferred Contact
Effective From Date:	VVVV mm dd
* Address Type:	Postal address
Country:	
Address:	
	Unit No. Street No. Street Name Street Type Street Direction
Province / Territory:	City:
Postal Code:	
Required field	Telephone Preferred Communication Type
Data:	
Phone/Fax:	(902)444 - 6666 ext.
Phone/Fax: Effective From Date:	(902) 444 - 6666 ext. yyyy mm dd Effective To Date: / / / III yyyy mm dd Add Clear
Phone/Fax: Effective From Date:	(902) 444 - 6666 ext. / / / Effective To Date: / / / Effective To Date: / / Effective To Date: / / / / / Effective To Date: / / / / / Effective To Date: / / / / / / Effective To Date: / / / / / / Effective To Date: / / / / / / / / / / / / / / Effective To Date: / / / / / / / / / / / / / / / / / / /
Phone/Fax: Effective From Date:	(902) 444 - 6666 ext. yyyy mm dd Effective To Date: / / / III yyyy mm dd Add Clear Add Contact Clear Contact
Phone/Fax: Effective From Date: ceiving Lab Inform	(902) 444 - 6666 ext. yyyy mm dd Effective To Date: yyyy mm dd Add Clear Add Clear Contact Clear Contact Add Contact Clear Contact Add Clear Contact Clear Contact
Phone/Fax: Effective From Date: ceeiving Lab Inform cepts Electronic Huma	(902) 444 - 6666 ext. yyyy mm dd Effective To Date: yyyy mm dd Add Ciear Add Contact Ciear Contact ation Add Contact Ciear Contact Hide Receiving Lab Information n Requisitions:
Phone/Fax: Effective From Date: ceiving Lab Inform cepts Electronic Huma cepts Electronic Non-I	(902) 444 - 6666 oxt. yyyy mm dd Add Clear Add Contact Clear Contact ation Alde Receiving Lab Informations: human Requisitions:
Phone/Fax: Effective From Date: ceiving Lab Inform cepts Electronic Huma cepts Electronic Non-I	(902) 444 - 6666 ext. yyyy mm dd Effective To Date: yyyy mm dd Add Ciear Add Contact Clear Contact ation Add Contact Clear Contact thilde Receiving Lab Information In Requisitions: Human Requisitions:

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

You are about to save all Do you want to save?	changes to	o the database.
C	ancel	ОК

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



Update Se	ervice Delive	ery Locatior	n (SDL)	,			⑦ 昌
The Service Delivery	V Location was saved s	uccessfully					
				Submit	Inactivate	Clear	Cancel

Steps: Update SDL

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 Aride SDL Search Results									
1 SDLs found Click on SDL name to maintain.									
Row	Actions: Preview Update		Ne	w Search Create New SDL					
	Name	Address	City	Phone 🔻					
			D ()						
۲	Albro Lake Medical Clinic	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**.

Apply Update									
Upd	ate Generate Map]							
		Address T	Start Date	End Date	Preferred T				
0	Postal address	-	2017 Sep 15	2017 Sep 19	-				
0	Postal address	45 - 10 Main Street, New Glasgow, Nova Scotia			-				
Tota	l: 2 🔣 🔍	Page 1 of 1 💌 💌		Jump to	page:				

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



Туре:	Preferred Communication Type	
Data:		
Phone/Fax:	() - ext.	
Effective From Date:	/ / Effective To Date: / /	=
	yyyy mm dd yyyy mm dd	
		Add Clear
Jodate		
Type A Dat	ta Vertex Ve	
Telephone (90)	02) 444-4455 ✓ 2017 Sep 15	
- I I I I I I I I I I I I I I I I I I I		

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

Communication	Details of Contact
* Required field * Type:	Telephone 😒 V Preferred Communication Type
Data:	
Phone/Fax:	(902) 444 - 4456 ext.
Effective From Date:	2017 / 09 / 15 Effective To Date: / / / / / / / / / / / / / / / / /

10. Click Submit.

Update Service Delivery Location (SDL)	<u>ا</u>
	Submit Inactivate Clear Cancel
Service Delivery Location Details	★ Hide Service Delivery Location Details

11. A confirmation message will display.

Update Service Delivery Location (SDL)	?≞
The Service Delivery Location was saved successfully	
Submit Inactivate Clear	Cancel

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 Alide SDL Search Results									
1 SDLs found Click on SDL name to maintain.									
Row Actions: Preview Update		New Search Create New SDL							
Name	Address	City	▼ Pho	ne 🔻					
Dr. Green Apple	45 - 10 Main Street	New Glasgo	w						

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

Update Service Delivery Location (SDL)								? 🗏						
										Submit	Inac	tivate	Clear	Cancel
Service D	elivery Locati	on Details								ጵ Hid	e Servic	e Deliver	/ Locatio	n Details
* Required Service	field Delivery Locatio	n ld : 1060												
Effectiv	e From Date:	2017 уууу	/ 09 mm	/ 15 dd				h	nactive As Of:	уууу	/ mm	/ dd	Ħ	
* Time Zo	one:	Atlantic	Time				\$							
License	Number:							c	Code:					
Date La	st Inspected:	уууу	/ mm	/ dd										
* Owner O To specify an click 'Close'	organization: n Organization first to close.	click on the 'F	Find' butt	on. Then	search, o	or type the	name of th	e Organiza	tion you wish to spe	ecify, select	it and cli	ck on 'Sele	ect' butto	n. Then
Owner Or Northern	rganization: Pano Zone > [Pictou Pi	orama Cloud u blic Health	> Provi Office]	nce of No	ova Sco	otia > Dep	artment of	Health an	nd Wellness > Nov	va Scotia H	lealth A	uthority >	Fi	nd Q
Names	5:													
* Name:	Dr. Green Apple	9				*	Display	Name:	Dr. Green App	ble				
Comm	ents:													
											Add	ł		

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	A Hide Service Delivery Location Details			
* Required field Service Delivery Locatio	n ld: 1060									
Effective From Date:	2017 / уууу	/ 09 mm	/ 15 dd		Inactive As Of:	2017 уууу	/09 mm	/ 19 dd		

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

Update Service	Deliv	ery	Loca	tion	(SDL)					?	
							Submit	Inactivate	Clear	Can	cel
Service Delivery Location	on Detail	S					😭 Hide	Service Delive	ery Locat	ion De	tails
* Required field Service Delivery Locatio	n ld: 1060										
Effective From Date:	2017 уууу	/ 09 mm	/ 15 dd		Ina	active As Of:	уууу	/ / 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 Pro	ofile				?
Holding Point Profile				☆ Hide Holding	g Point Profi
* Required field					
* Holding Point Code:	Holding Po	oint Type:	* Holding Point Name:		
Canso Pharmacy-HP	Communi	ty Pharmacy ᅌ	Canso Pharmacy		
Replenishment Centre	Auto	approval Mode	Auto Decrement:		
		Status Comment:			
 Active Fully Suspended 					
Inactive		Effective Status End Date:		View Status History	
Monitored Suspended for Valnactive	3				
Status Last Updated Date:		Status Last Updated By:		Previous Status:	
-					-



16. Click Save.