

U.S. Department of Health & Human Services
Administration for Strategic Preparedness & Response

Health Partner Order Portal (HPOP) Partner Portal User Guide

Version 1.4

November 1, 2023

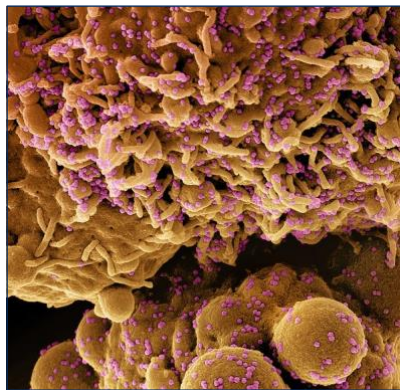


Table of Contents

Recent Changes 1

About the Partner Portal 1

Logging into the Partner Portal 1

Portal Navigation Basics 3

 Tiles 3

 Hamburger Menu 4

 Breadcrumbs 4

 Buttons 4

 Tabs 4

Partner Portal Homepage 5

 Pending Actions 7

 Dashboard 8

 User Search 12

 Manage Email Preferences 13

 Reset MFA 15

 Reset Password 15

 Inactivate Users 16

Sites 16

 Maintain Site Information 17

 Site Orders/Inventory 23

Process Orders 27

 View Orders Ready to be Processed 27

 Processing Orders 28

Bulk Operations 30

 My Downloads 31

 Bulk Downloads 31

 Bulk Uploads 33

 View the Bulk Upload History 35

COVID Vaccine VTrckS 35

Diagnostics – Self Service Portal 36

Self-Service Site Approval..... 37

Activating Site..... 44

Responses and Products..... 45

 View Response Details 45

 View Response Product Types 45

 View Product Details 46

 View Response Products 47

 View Response Product Prerequisites 48

 View Response Product Ancillary Kits 49

 View Response Product Lots 50

 View Response Product Authorizations 50

Limits..... 51

 View the List of Partner Order Limits..... 51

 Create a Partner Order Limit 51

 Modify a Partner Order Limit 52

 Threshold Transfers 53

Site Deduplication 54

 Search Sites 54

 Zip Codes with Multiple Sites (Reference Only)..... 54

Communications 54

 View Partner Portal News 55

 Create a Partner News Item..... 55

 Modify a Partner News Item 55

 Delete a News Item 56

 Dismiss a News Item..... 57

 Manage Project Features and Sprint Details..... 57

Manage Feedback 59

 View user feedback 60

 View and Modify Feedback Details 60

 Add a comment on user feedback entry..... 61

 Modify support details 62

Partner Administration	62
Partner Users	63
Partner Contacts	65
Appendix: Glossary.....	70
Order Status Descriptions	74
Order Type Descriptions	75

List of Figures

Figure 1: Oracle Health Response Readiness Password Reset	2
Figure 2: Secure verification	2
Figure 3: Select default secure verification method	3
Figure 4: Hamburger menu.....	4
Figure 5: Breadcrumb example.....	4
Figure 6: Tabs example	5
Figure 7: Partner Portal homepage.....	5
Figure 8: Review options	7
Figure 9: Pending Actions options	8
Figure 10: Dashboard options.....	8
Figure 11: Orders tab.....	9
Figure 12: Units Ordered graph example.....	9
Figure 13: User Search options	12
Figure 14: Actions menu	13
Figure 15: Email search field	13
Figure 16: Actions menu.....	14
Figure 17: Manage Email Preferences options.....	14
Figure 18: Reset MFA confirmation	15
Figure 19: Reset Password confirmation	16
Figure 20: Sites options	17
Figure 21: Maintain Site Information	17
Figure 22: Site Details options	18
Figure 23: Response Product Types tab	19

Figure 24: Addresses tab.....	20
Figure 25: Address and hours verified.....	20
Figure 26: Site Contacts options.....	21
Figure 27: Maintain Site Orders/Inventory.....	23
Figure 28: Site Orders/Inventory Stock tab.....	23
Figure 29: Maintain Orders/Inventory Stock tab.....	24
Figure 30: Stock On Hand History.....	24
Figure 31: Stock On Hand History list.....	24
Figure 32: Maintain Stock On Hand.....	25
Figure 33: Maintain Orders/Inventory Administered tab.....	25
Figure 34: Maintain Orders/Inventory Dispositions tab.....	26
Figure 35: Maintain Orders/Inventory Transfers tab.....	26
Figure 36: Process Orders Page.....	27
Figure 37: Start Processing Orders button.....	28
Figure 38: Processing Type options.....	28
Figure 39: Response Product Type options.....	29
Figure 40: Units options.....	29
Figure 41: Submitted Orders options.....	29
Figure 42: Adjust Orders options.....	30
Figure 43: Bulk Operations options.....	31
Figure 44: My Downloads options.....	31
Figure 45: Site Information tab.....	32
Figure 46: Downloading processing notification.....	33
Figure 47: Bulk Uploads Orders and Inventory.....	34
Figure 48: Partner Orders Uploads.....	35
Figure 49: Download orders for VTrckS.....	35
Figure 50: VTrckS tab.....	36
Figure 51: Self Service Approval Portal.....	37
Figure 52: Requests per status graph.....	37
Figure 53: Select requested sites to process.....	38
Figure 54: Site Details workflow.....	38

Figure 55: Assigning a partner.....	39
Figure 56: Maintaining Response Product Types	39
Figure 57: Assigning a site program	40
Figure 58: Reviewing site matches	40
Figure 59: Potential matches with site addresses.....	41
Figure 60: Review Contact Matches options	41
Figure 61: Assigning possible match and reviewed statuses	42
Figure 62: Review Receiving Hours.....	42
Figure 63: Confirming receiving hours	42
Figure 64: Approving or rejecting documents	43
Figure 65: Verification options	43
Figure 66: Activating a site.....	44
Figure 67: Request Status options.....	44
Figure 68: Maintain Threshold Transfers	53
Figure 69: Site Deduplication.....	54
Figure 70: Partner Administration Options.....	63
Figure 71: Creating a partner user.....	64
Figure 72: Partner Default Rights/Default tab.....	67
Figure 73: Partner Response Types panel	68

List of Tables

Table 1: Recent changes to the application.....	1
Table 2: Tile descriptions	6
Table 3: Health Partner Ordering Portal (HPOP) glossary of terms	70
Table 4: Order status types and descriptions	74
Table 5: Order types and descriptions	75

Recent Changes

Table 1: Recent changes to the application

Section	Type of Change	Date
Maintain Site Orders and Inventory	Addition	July 2023
Bulk Upload Stock and Stock Administered Data	Addition	July 2023
Partner Default Rights	Addition	July 2023
Manage Groups	Addition	July 2023
Responses and Products	Addition	August 2023
Site Deduplication	Addition	October 2023
External Partners	Addition	November 2023
Viewing Orders to be Processed	Update	November 2023

About the Partner Portal

The version of the Administration for Strategic Preparedness and Response (ASPR) Health Partner Ordering Portal (HPOP), first released on April 17, 2023, includes changes in response structures so the system can flexibly and rapidly respond to a wider variety of events. The Partner portal is used to manage partner, site, and user data. This User Guide will provide screen captures of the portal and provide instructions on how to accomplish each task.

Note: This will be a living document. The version available upon release focuses on ordering, inventory, and managing sites; future versions will add other features. As the portal is updated, this User Guide will be as well.

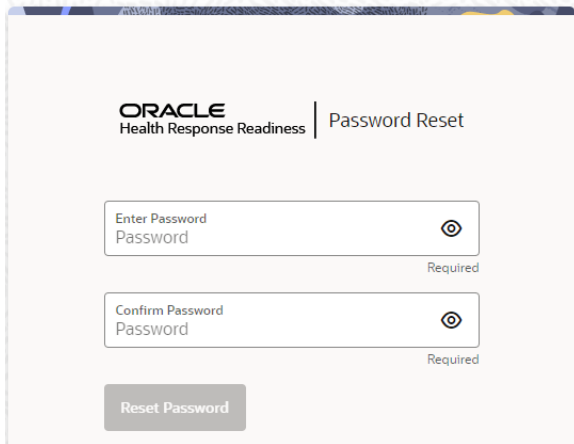
Logging into the Partner Portal

When you open the **registration link** to the Health Partner Ordering Portal (HPOP), you will be taken to a screen to **set your password** and **two-factor authentication**. To ensure security, Health Partner Ordering Portal (HPOP) requires multi-factor authentication (MFA) codes when you sign in. Multi-factor authentication (MFA) ensures the security of the applications by requiring all users to enter something they know (their passwords) and something they have (MFA codes) before they can access the system.

An MFA code is also known as a one-time code because it changes or expires within a set amount of time to ensure no one can guess it.

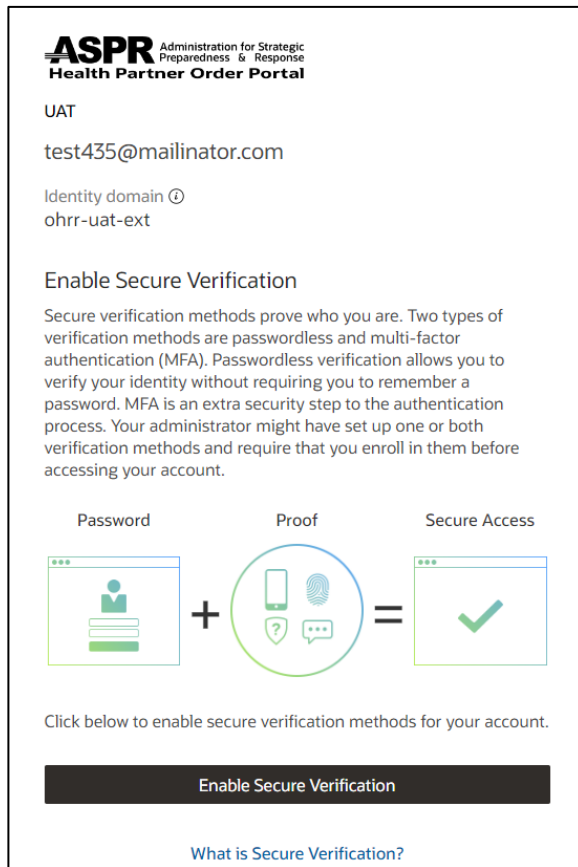
1. Set your password.

Figure 1: Oracle Health Response Readiness Password Reset



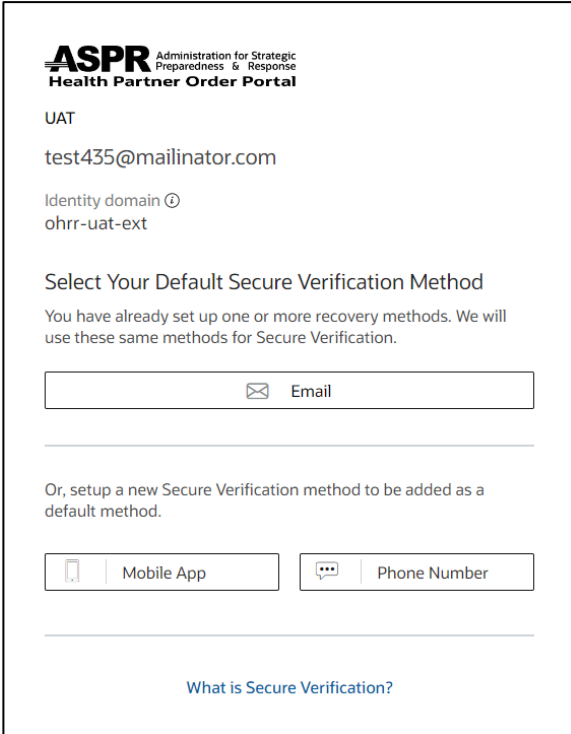
2. Configure your two-factor authentication.

Figure 2: Secure verification



3. Select **Enable Secure Verification**.

Figure 3: Select default secure verification method



ASPR Administration for Strategic Preparedness & Response
Health Partner Order Portal

UAT
test435@mailinator.com

Identity domain ⓘ
ohrr-uat-ext

Select Your Default Secure Verification Method

You have already set up one or more recovery methods. We will use these same methods for Secure Verification.

Email

Or, setup a new Secure Verification method to be added as a default method.

Mobile App | Phone Number

[What is Secure Verification?](#)

You can access your MFA code for Health Partner Ordering Portal (HPOP) in an **email**, by scanning a QR code with an authentication app on your **mobile device**, or through a **phone number** as a text message or call. You can use any method to receive an MFA code, but you must use an MFA code to activate your account and each time you sign into HPOP.

4. If you run into errors, contact the helpdesk:

- For COVID Vaccines or COVID Diagnostics email cars_helpdesk@cdc.gov.
- For COVID Therapeutics or Mpox email hpop.support@hhs.gov.

Portal Navigation Basics

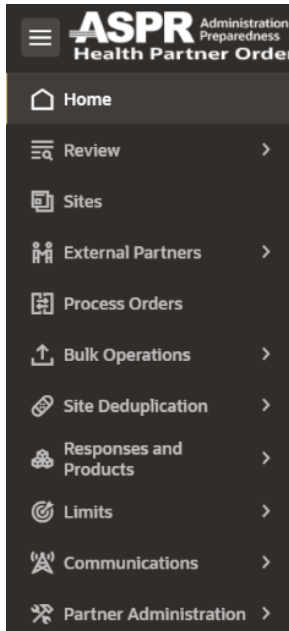
Tiles

The main screen of the Partner Portal displays large square “tiles” that can be clicked to access a page with the related information. Images and descriptions of tiles can be found in the [Partner Portal Homepage](#) section and in [Table 2: Tile descriptions](#).

Hamburger Menu

From all screens, users can select the “hamburger” menu in the top left, next to the ASPR logo, to open the Navigation Pane. The Navigation Pane displays an outline of the website structure on the left, allowing quick access to all pages.

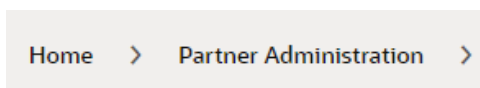
Figure 4: Hamburger menu



Breadcrumbs

Once users navigate into the site (away from the home page), a series of “breadcrumbs” will display in the upper left in the grey indicating the user’s current location in the website structure, orienting users, and allowing them to easily move back up the pages by clicking on a higher level’s name.

Figure 5: Breadcrumb example



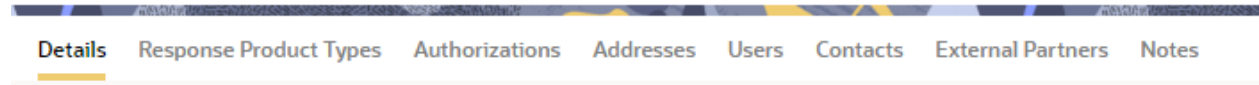
Buttons

Buttons are located on action and information pages, found in the upper right. These buttons are typically used to edit information, create users or orders, or complete steps.

Tabs

On information pages below the header, users will find a series of tabs that will display information about different aspects of the site.

Figure 6: Tabs example



Partner Portal Homepage

When users log into the system, they will be greeted by the Partner Portal Homepage. From here, they can select tiles or the hamburger menu to navigate.

The user's initials (top right) allow the user to edit their profile, logout, and completed other tasks.

Figure 7: Partner Portal homepage

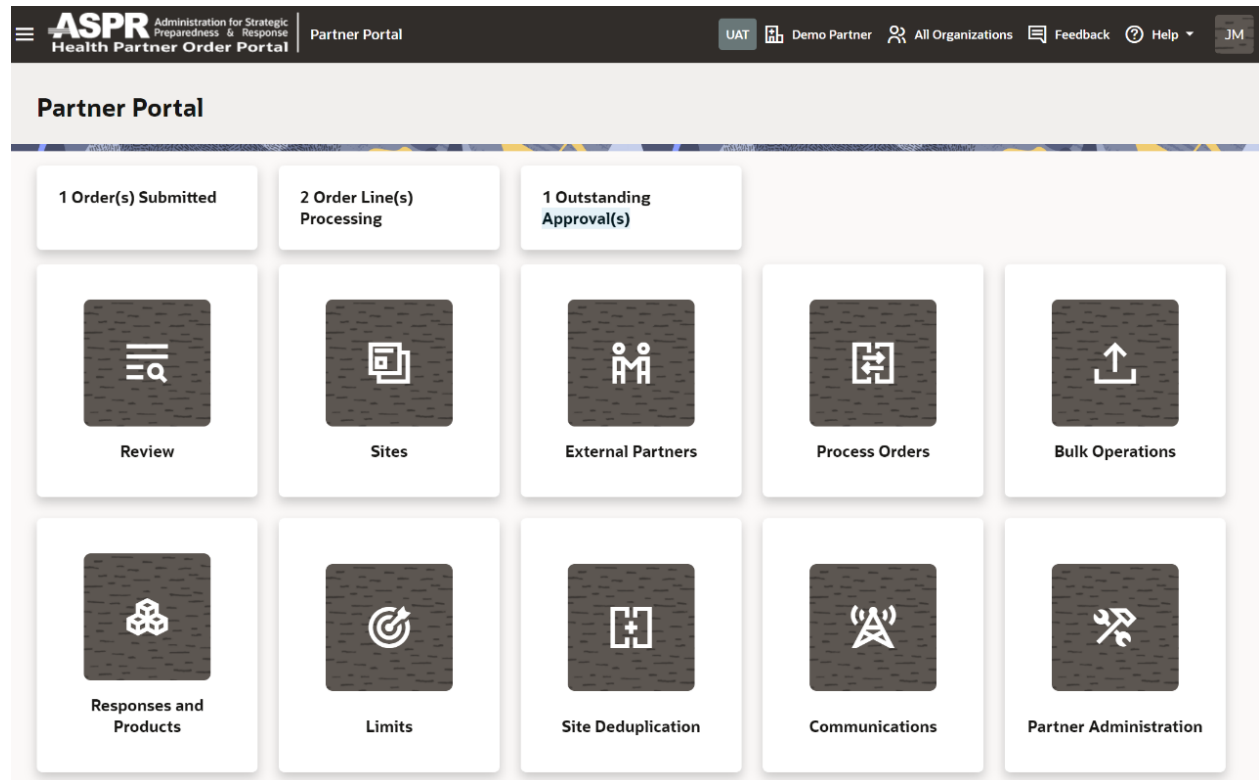
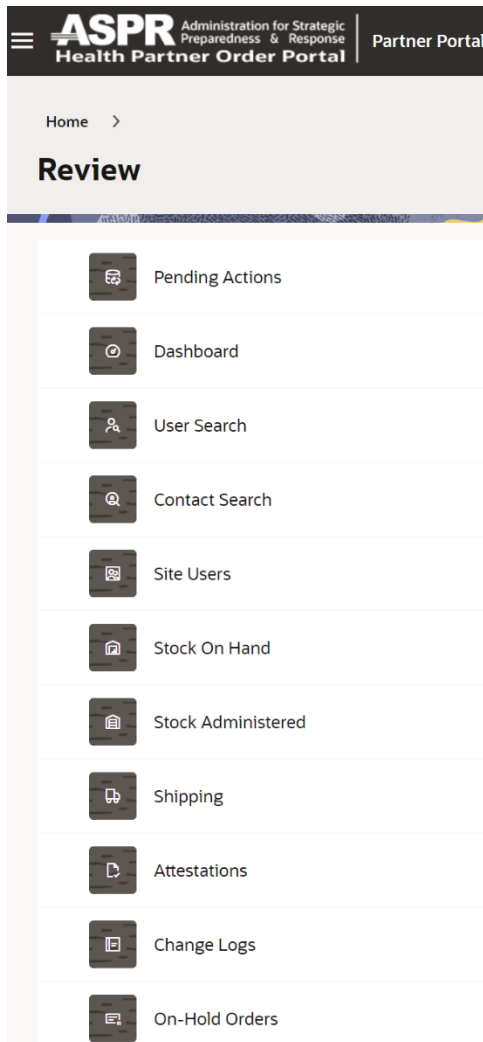


Table 2: Tile descriptions

Tile name	Description
Review	View detailed reports on all pending actions, orders, dispositions (wastage or returns), transfers, replacements, stock on hand, stock administered, shipping details, and partner and site change logs. Search for users and contacts and view attestations.
Sites	Create and manage sites and site inventory and create and manage orders.
External Partners	Manage external partners including approved external partners and external partner requests.
Process Orders	View orders ready to be processed and manage direct and apportionment orders.
Bulk Operations	Perform bulk downloads and uploads and view all upload history.
Responses and Products	View the responses, response product types, products, response products, prerequisites, ancillary kits, lots, and authorization information.
Limits	Manage partner order limits, partner thresholds, and partner site limits.
Site Deduplication	Search for sites, search for and merge duplicate sites, and search for duplicate site addresses.
Communications	Manage portal news, project features and sprint details, and feedback.
Administration	Manage partner users, partner contacts, hub addresses, partner default rights, groups, organizations, authorizations, and support details.

View detailed reports on all pending actions, orders, dispositions (wastage or returns), transfers, replacements, stock on hand, stock administered, shipping details, and partner and site change logs. Search for users and contacts and view attestations.

Figure 8: Review options



Pending Actions

You can view details for all submitted orders and orders processing, and you can search for orders based on specific criteria.

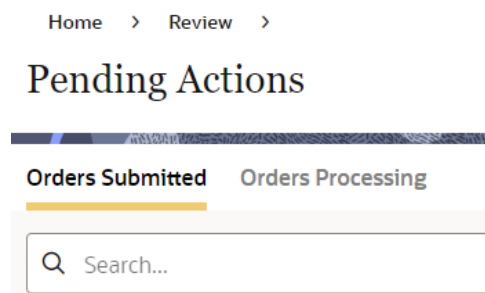
To view the submitted orders:

1. Select **Review** from the Partner Portal Home page.
2. On the **Review** page, select **Pending Actions**.
3. At the top of the **Pending Actions** page, select the **Orders Submitted** tab.
4. To search for a specific order, select the criteria you need from the **Search** dropdown menu and provide any required details. The search results appear as soon as you enter the criteria.

To view the orders being processed:

1. Select **Review** from the Partner Portal Home page.
2. On the **Review** page, select **Pending Actions**.
3. At the top of the **Pending Actions** page, select the **Orders Processing** tab.
4. To search for a specific order, select the criteria you need from the **Search** dropdown menu and provide any required details. The search results appear as soon as you enter the criteria.
5. To view the details for a specific order, find the order in the list and select the **View** icon.

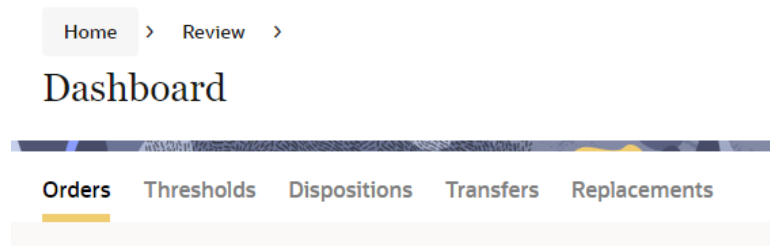
Figure 9: Pending Actions options



Dashboard

The Dashboard provides detailed reports on orders, dispositions (wastage or returns), transfers, and replacements. You can view the data in different formats (totals or charts), and you can search for data using specific criteria.

Figure 10: Dashboard options



View the dashboard report on orders

You can view the dashboard report on orders. To view the dashboard report on orders:

1. Select **Review** from the Partner Portal Home page.
2. On the **Review** page, select **Dashboard**.
3. At the top of the **Dashboard** page, select the **Orders** tab.
4. On the **Dashboard - Orders** page, provide the following information to filter the data.

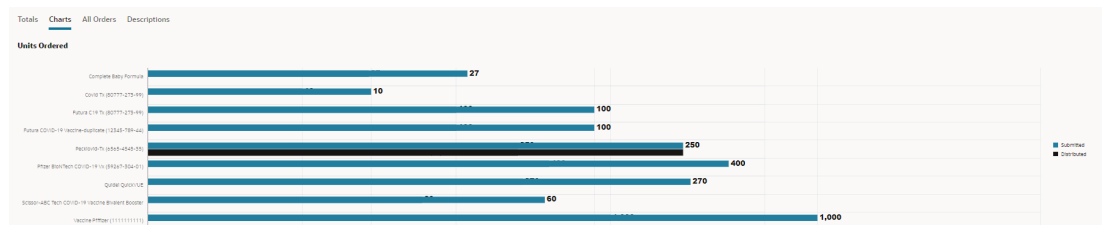
Figure 11: Orders tab

The screenshot shows the 'Orders' tab interface with the following filter options:

- Response:** COVID19
- Response Product Type:** COVID19 / Therapi
- Product:** (Empty)
- Period:** Last 30 days
- From Date:** 08/07/2023
- To Date:** 09/06/2023
- Order Type:** (Empty)
- Processing Type:** (Empty)
- Buttons:** Reset, Go

- **Response**—Select **All** or a specific response (e.g., COVID-19, Monkeypox, Seasonal flu, Baby Formula Shortage, or Hurricane).
 - **Response Product Type**—Select **All** or a specific response product type.
 - **Product**—Select **All** or a specific product type.
 - **Order Type**—Select **All** or a specific order type (e.g., Internal, External, Replacement, Special Event, Program, Administrator, or Open).
 - **Processing Type**—Select **All** or a specific processing type (e.g., Direct, Apportionment, Administrator, Bulk, Replacement, or Open).
 - **Period**—Select Last 7 Days, Last 30 Days, Last 60 Days, Last 90 Days, Last year, or Custom.
 - **From Date**—On the right, select the calendar icon and then select a start date.
 - **To Date**—On the right, select the calendar icon and then select an end date.
5. Select **Go**.
- The page refreshes and shows the data that meets the filter criteria.
 - Select the format for the data you want to view.

Figure 12: Units Ordered graph example



- **Totals**—View the total numbers of units, packages, orders, order lines, and sites with orders.
- **Charts**—View charts of Units Ordered, Completed Orders Timeline (select Daily, Weekly, or Monthly), Order Status Types, Order Types, and Processing Types. Hover over the graphs to display statistic details.
- **All Orders**—Search for a specific order by selecting the criteria you need from the Search drop-down menu and providing any required details. The search results appear as soon as you enter the criteria.
- **Descriptions**—View descriptions of the statuses for the Order Status Types, Order Types, and Processing Types.

View the dashboard report on dispositions

You can view a dashboard report on all dispositions, which include wastage and returns. To view the dashboard report on dispositions:

1. Select **Review** from the Partner Portal Home page.
2. On the **Review** page, select **Dashboard**.
3. At the top of the **Dashboard** page, select the **Dispositions** tab.
4. Provide the following information to filter the data.
 - **Response**—Select **All** or a specific response (e.g., COVID-19, Monkeypox, Seasonal Flu, Baby Formula shortage, or Hurricane).
 - **Response Product Type**—Select **All** or a specific response product type.
 - **Product**—Select **All** or a specific product type.
 - **Period**—Select Last 7 Days, Last 30 Days, Last 60 Days, Last 90 Days, Last year, or Custom.
 - **From Date**—On the right, select the calendar icon and then select a start date.
 - **To Date**—On the right, select the calendar icon and then select an end date.
5. Select **Go**. The page refreshes and shows the data that meet the filter criteria.
 - On the lower half of the **Dashboard - Dispositions** page, select the format for the data you want to view.
 - **Totals**—View the total numbers of units and total disposition lines.
 - **Charts**—View charts of Units Dispositioned and Dispositions Timeline (select a timeline: Daily, Weekly, or Monthly). Hover over the graphs to display statistic details.
 - **All Dispositions**—Search for a specific disposition by selecting the criteria you need from the Search drop-down menu and providing any required details. The search results appear as soon as you enter the criteria.

View the dashboard report on transfers

You can view summary statistics for all order transfers. To view the dashboard report on transfers:

1. Select **Review** from the Partner Portal Home page.
2. On the **Review** page, select **Dashboard**.
3. At the top of the **Dashboard** page, select the **Transfers** tab.
4. Provide the following information to filter the data.
 - **Response**—Select **All** or a specific response (e.g., COVID-19, Monkeypox, Seasonal flu, Baby Formula Shortage, or Hurricane).
 - **Response Product Type**—Select **All** or a specific response product type.
 - **Product**—Select **All** or a specific product type.

- **Period**—Select Last 7 Days, Last 30 Days, Last 60 Days, Last 90 Days, Last year, or Custom.
- **From Date**—On the right, select the calendar icon and then select a start date.
- **To Date**—On the right, select the calendar icon and then select an end date.

5. Select **Go**.

The page refreshes and shows the data that meet the filter criteria.

Select the format for the data you want to view on the lower half of the **Dashboard - Transfers** page.

- **Totals**—View the total numbers of units transferred.
- **Charts**—View charts of Units Transferred and Transfers Timeline. (Select a timeline: Daily, Weekly, or Monthly.) Hover over the graphs to display statistic details.
- **All Transfers**—Search for a specific transfer by selecting the criteria you need from the **Search** drop-down menu and providing any required details. The search results appear as soon as you enter the criteria.

View the dashboard report on replacements

You can view summary statistics for all order replacements. To view the dashboard report on order replacements:

1. Select **Review** from the Partner Portal Home page.
2. On the **Review** page, select **Dashboard**.
3. At the top of the **Dashboard** page, select the **Replacements** tab.
4. Provide the following information to filter the data.
 - **Response**—Select **All** or a specific response (e.g., COVID-19, Monkeypox, Seasonal flu, Baby Formula Shortage, or Hurricane).
 - **Response Product Type**—Select **All** or a specific response product type.
 - **Product**—Select **All** or a specific product type.
 - **Period**—Select Last 7 Days, Last 30 Days, Last 60 Days, Last 90 Days, Last year, or Custom.
 - **From Date**—On the right, select the calendar icon and then select a start date.
 - **To Date**—On the right, select the calendar icon and then select an end date.
5. Select **Go**. The page refreshes and shows the data that meet the filter criteria.
6. On the lower half of the **Dashboard - Replacements** page, select the format for the data you want to view.
 - **Totals**—View the total numbers of units replaced.
 - **Charts**—View charts of **Units Replaced** and **Replacements Timeline**. (Select a timeline: Daily, Weekly, or Monthly,) Hover over the graphs to display statistic details.

- **All Replacements**—Search for a specific replacement by selecting the criteria you need from the **Search** drop-down menu and providing any required details. The search results appear as soon as you enter the criteria.

User Search

You can search for any user and view their account details and usage activity. If you don't know a user's email address or if it was entered incorrectly, you can use a wild card search to find the user using a partial name or email address.

You can search for active and inactive users.

The read-only user details include the user's name and email, whether the user's account is enabled, and information on logins and account creation and updates.

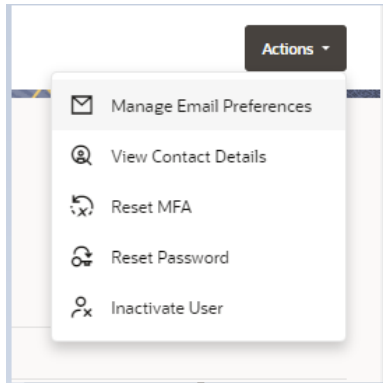
Figure 13: User Search options

The screenshot displays the ASPR Partner Portal interface. At the top, the navigation bar includes the ASPR logo, 'Partner Portal', and user information like 'UAT Demo Partner'. The main content area is titled 'User Search' and features a search input field containing 'Email demopartneruserjm1@email.com'. A 'Go' button and a 'Wild Card Search' button are positioned to the right of the input field. Below the search bar, the 'User Details' section is presented as a table:

First Name	Demo
Last Name	PartneruserJM1
Email	demopartneruserjm1@email.com
Account Enabled	Yes
New Account Email Sent	08/24/2023 09:58 EDT
Created	08/24/2023 09:58 EDT
Created by	jessica.marks@hhs.gov
Updated	08/24/2023 09:58 EDT
updated by	jessica.marks@hhs.gov

At the bottom of the page, the 'Partner Portal' section shows a table header with columns: Partner Organization, Response Product Type, Role, Active, and Updated.

Figure 14: Actions menu



To search for a user:

1. Select **Review** from the Partner Portal Home page.
2. On the **Review** page, select **User Search**.
3. Complete the search criteria.
 - If you know the email address of the user you are searching for, enter the address in the **Email** field and select **Go**. Proceed to step 4.

Figure 15: Email search field

 A screenshot of a search interface. It features a text input field with a magnifying glass icon on the left. The field contains the text 'Email' and 'muntaha.hpop@mailinator.com'. Below the field, the word 'Required' is written in small text. To the right of the field is a dark grey button labeled 'Go' and a white button labeled 'Wild Card Search'.

- If you don't know the email address of the user you are searching for,
 - i. Select **Wild Card Search**.
 - ii. On the **Wild Card User Search** panel, enter at least three characters in the **Email** field, and select **Go**. The search results appear in the panel.
 - iii. Find the user whose details you want to view and select **View** in the **Actions** column.
4. On the **User Search** page, in the **User Details** section, view a summary of the user's account information.

On the lower part of the page, in the Partner Portal section, view the user's portal details including the response product type, partner organization, role, active status, and date last updated.

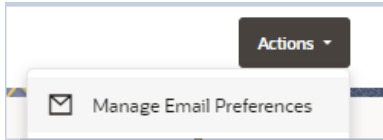
Manage Email Preferences

As a Partner Administrator you can set whether a user receives an email notification when orders are completed or shipped, when the user is added to a new provider, when the user's permissions are updated, or when one of the user's feedback entries is updated.

To reset a user's email preferences:

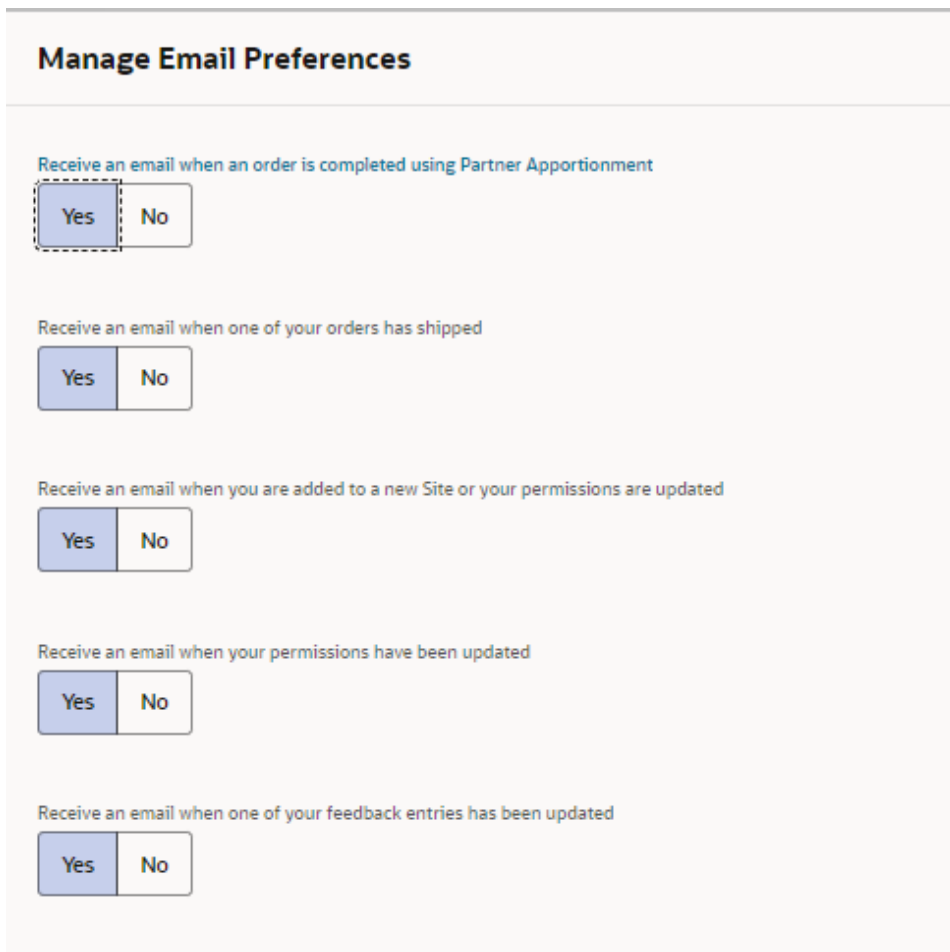
1. Open the details for the user whose email preferences you want to reset as described below.
2. Search for a user and view account details.
3. On the **User Search** page, at the top right, select **Manage Email Preferences** from the **Actions** drop-down menu.

Figure 16: Actions menu



4. On the **Manage Email Preferences** panel, select **Yes** or **No** for each notification, as needed.

Figure 17: Manage Email Preferences options

A screenshot of the 'Manage Email Preferences' panel. The title 'Manage Email Preferences' is at the top. Below it are five notification options, each with a 'Yes' or 'No' button. The first option, 'Receive an email when an order is completed using Partner Apportionment', has a dashed box around its 'Yes' button. The other options are: 'Receive an email when one of your orders has shipped', 'Receive an email when you are added to a new Site or your permissions are updated', 'Receive an email when your permissions have been updated', and 'Receive an email when one of your feedback entries has been updated'.

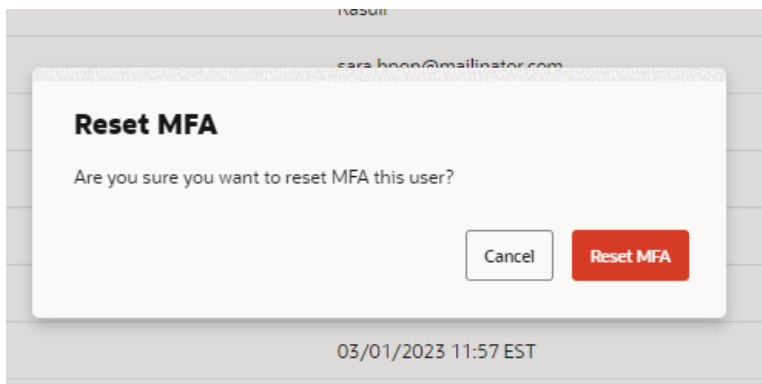
- Receive an email when an order is completed using **Partner Apportionment**
- Receive an email when one of your orders has shipped

- Receive an email when you are added to a new site, or your permissions are updated
 - Receive an email when your permissions have been updated
 - Receive an email when one of your feedback entries has been updated
5. Select **Save**.

Reset MFA

When users activate their accounts with a mobile application, each account is associated with a QR code and the device. If a user has a new device or if the user's authentication app was deleted from the device, the multi-factor authentication (MFA) must be reset.

Figure 18: Reset MFA confirmation



To reset an MFA:

1. Open the details for the user whose MFA you need to reset as described in User Search and view account details.
2. On the **User Search** page, at the top right, select **Reset MFA** from the **Actions** drop-down menu.
3. Select **Save**.

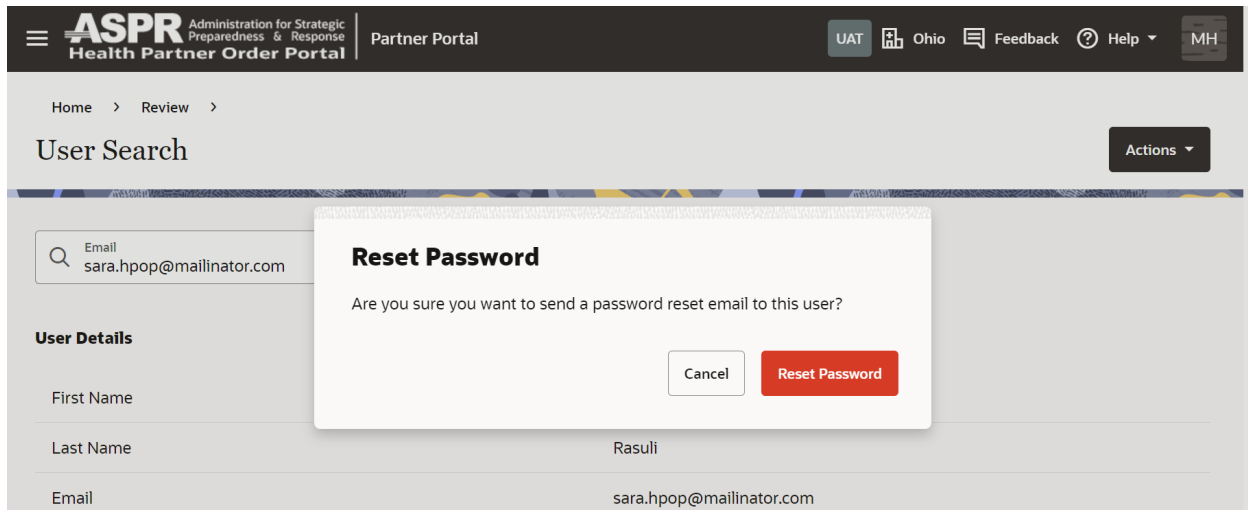
At the next sign in, the user is prompted to activate their account again.

Reset Password

As a Partner administrator you can reset user's password. The user will receive an email notification that their password has been reset.

1. Open the details for the user whose email you want to reset as described in [User Search](#).
2. On the **User Search** page, at the top right, select **Reset Password** from the **Actions** drop-down menu.
3. On the Reset Password panel, select **Cancel** or **Reset Password**.

Figure 19: Reset Password confirmation



Inactivate Users

As a Partner administrator you can inactivate a user's account. The user will receive an email notification that their password has been reset.

1. Open the details for the user whose email you want to reset as described in User Search.
2. On the **User Search** page, at the top right, select **Inactivate User** from the **Actions** drop-down menu.
3. On the Inactivate User panel, select **Cancel** or **Inactivate User**.

Sites

You can view the list of sites. To view the list of sites, select **Sites** from the Partner Portal homepage.

1. On the **Sites** page, for each site, you can view the Federal PIN, State PIN, NPI, partner organization, partner group, address, and the response product types.
2. To search for a specific site, select the criteria you need from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.

Figure 20: Sites options

The screenshot shows the ASPR Partner Portal interface. At the top, there is a navigation bar with the ASPR logo, 'Administration for Strategic Preparedness & Response Health Partner Order Portal', and 'Partner Portal'. On the right, there are links for 'UAT', 'Demo Partner', 'Feedback', 'Help', and 'MH'. Below the navigation bar, there is a breadcrumb 'Home >' and the title 'Sites' with a 'Create' button. A search bar is present with the text 'Search...'. Below the search bar is a table with the following columns: Site, Federal PIN, State PIN, Organization, Group, NPI, Address, Response Product Types, and Actions. The table contains three rows of data for 'Demo Site 1', 'Demo Site 2', and 'Demo Site 3'. Each row has a dropdown menu in the 'Actions' column.

Site	Federal PIN	State PIN	Organization	Group	NPI	Address	Response Product Types	Actions
Demo Site 1	TP1234	TP34567				3456 demo lane Arlington, VA 22205	COVID / VX COVID / TX COVID / DX Mpx / TX	...
Demo Site 2	TP3456	TP37889				8989 test lane Columbia, MD 21045	COVID / VX COVID / TX COVID / DX Mpx / TX	...
Demo Site 3	TP2456	TP39876				5566 demo site rd Fairfax, VA 22035	COVID / VX COVID / TX COVID / DX Mpx / TX	...

Maintain Site Information

Site Details

You can view the details for a site, which include identification information, response product types, authorizations, addresses and business hours, users, contact, and notes. From the site details page, you can access site inventory information, which includes details on orders, stock on hand, stock administered, dispositions, transfers, replacements, and reconciliations.

To view the details for a site:

1. Select **Sites** from the Partner Portal homepage.

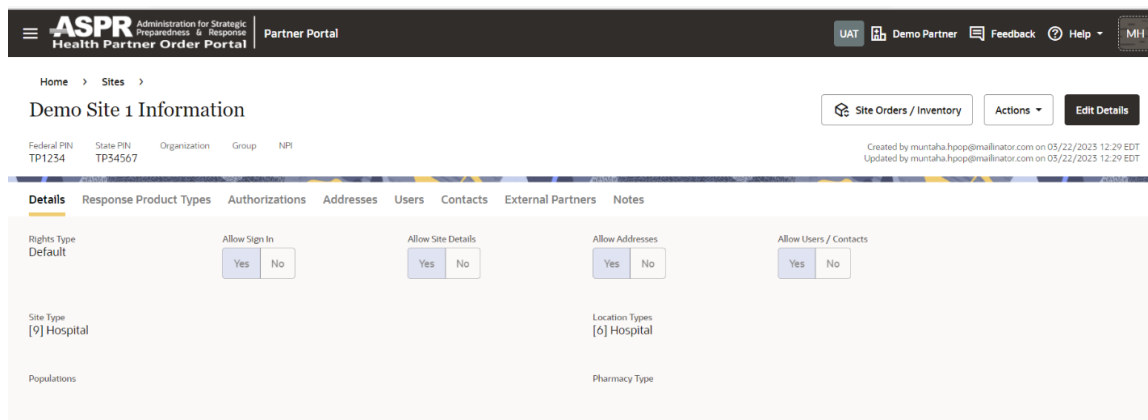
Figure 21: Maintain Site Information

This screenshot is similar to Figure 20 but shows the 'Actions' dropdown menu for 'Demo Site 1' open. A red arrow points to the dropdown icon, and a red box highlights the menu items: 'Maintain Site Information' and 'Maintain Site Orders / Inventory'.

Site	Federal PIN	State PIN	Organization	Group	NPI	Address	Response Product Types	Actions
Demo Site 1	TP1234	TP34567				3456 demo lane Arlington, VA 22205	COVID / VX COVID / TX COVID / DX Mpx / TX	<ul style="list-style-type: none"> Maintain Site Information Maintain Site Orders / Inventory
Demo Site 2	TP3456	TP37889				8989 test lane Columbia, MD 21045	COVID / VX COVID / TX COVID /	...
Demo Site 3	TP2456	TP39876				5566 demo site rd Fairfax, VA 22035	COVID / VX COVID / TX COVID / DX Mpx / TX	...

2. On the Sites page, find the site of interest, select the ellipsis in the **Action** column to open the menu and then select **Maintain Site Information**.

Figure 22: Site Details options



3. At the top of the **[Site Name] Information** page, select the following tabs to view, add, or modify the details.

- a. **Details**—Shows the rights, site, location, and pharmacy types, associated populations, and the rights set for signing in and for editing site details, addresses, users, and contacts

You can modify the site details, inactivate the site, view the site history, and access the site inventory.

- To modify any of the site details, select the **Details** tab, and select **Edit Details**.
- To inactivate the site, select **Inactivate Site** from the **Actions** drop-down menu.
- To view site history, select **Site History** from the **Actions** drop-down menu.
- To view the inventory for the site, select **Site Inventory** at the top center of the page. The inventory page provides links to information on orders, stock on hand, stock administered, dispositions, transfers, replacements, and reconciliations. To return to the site information page, select **Site Information** at the top center of the page.

- b. **Users**—For each site user, shows the title, first and last name, email address, associated response product types, and whether they are active.

You can search for, add, and modify users.

- To add a user, select the **Users** tab, and at the top right select **Create User**.
- To modify a user, select the **Users** tab, find the user you want to modify, and select **Edit** in the **Actions** column.

- c. **Contacts**—For each contact, shows the title, first and last name, email address, contact role, associated response product types, and whether they are active. Ordering is disabled until you add one primary contact.

You can search for, add, and modify contacts.

- To add a contact, select the **Contacts** tab, and at the top right select **Create Contact**. See [Add a contact for an existing site](#).

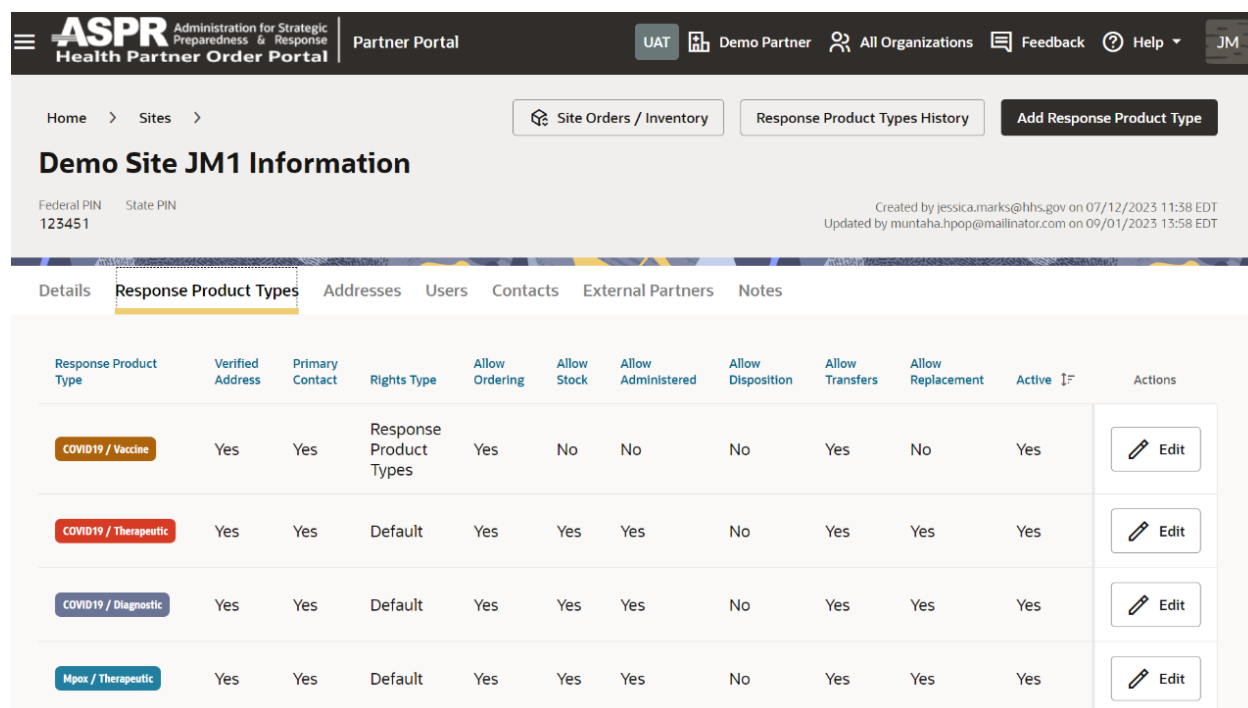
- To modify a contact, select the **Contacts** tab, find the contact you want to modify, and select **Edit** in the **Actions** column. See [Modify a contact for an existing site](#).
- d. **Notes**—Shows the notes associated with the site, the date of entry, and whether they are active.

You can add a new note and modify existing notes.

- To add a note, select the **Notes** tab, and at the top right select **Create Note**.
- To modify a note, select the **Notes** tab, find the note you want to modify, and on the right, select the ellipsis, and choose **Edit**.

Response Product Type

Figure 23: Response Product Types tab



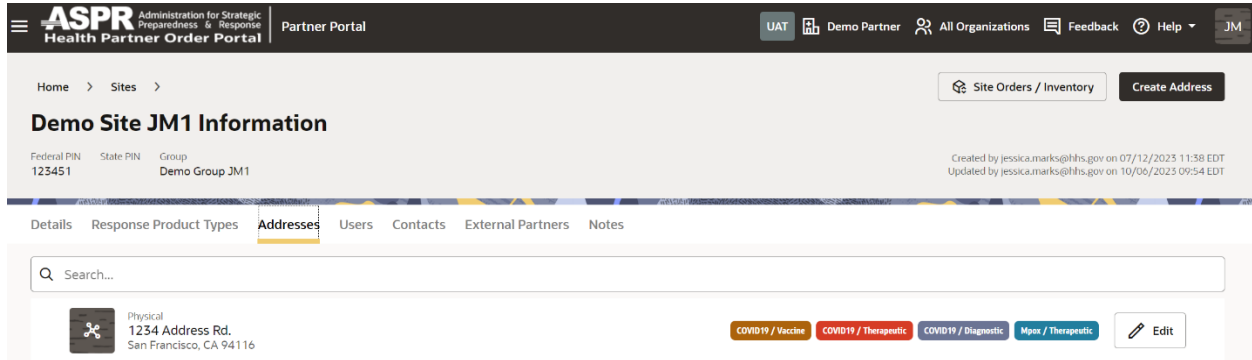
Response Product Types—Displays the response product types available at the site, the rights for managing ordering, stock on hand, stock administered, dispositions, transfers, and replacements, and whether the response product type is active.

You can search for, add, and modify response product types.

- To add a response product type, select the **Response Product Types** tab, and at the top right select **Add Response Product Type**.
- To modify a response product type, select the **Response Product Types** tab, find the response product type you want to modify, and select **Edit** in the **Actions** column.

Site Address

Figure 24: Addresses tab

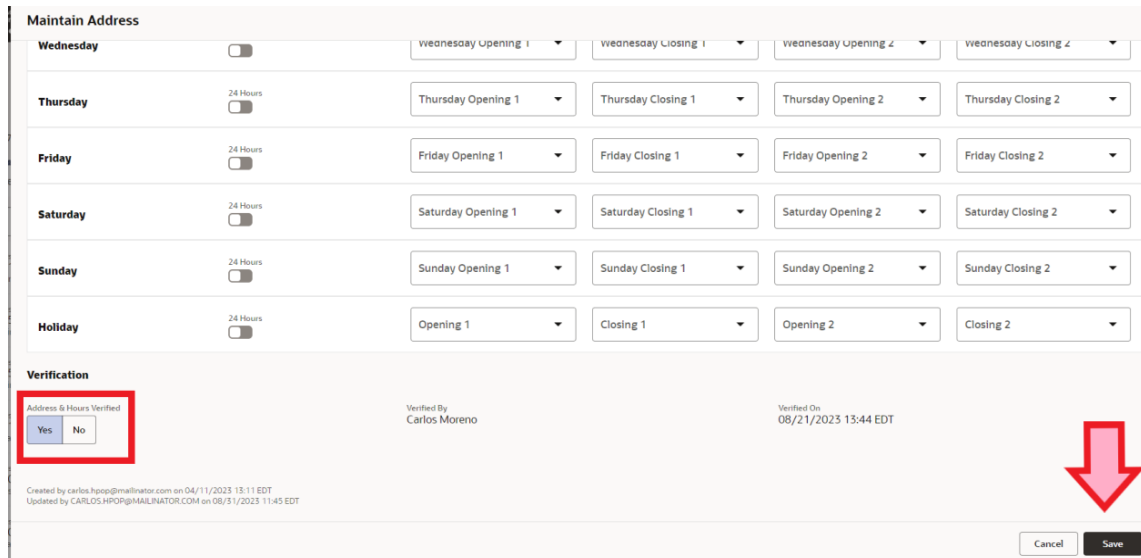


Addresses—For each site address, shows the type of address (physical or hub), verification status, location, and the response product type for the address. Ordering is disabled until you verify at least one address.

You can search for, add, modify, and verify addresses.

- To add an address, select the **Addresses** tab, and at the top right select **Create Address**.
- To modify an address, select the **Addresses** tab, find the address you want to modify, and on the right select **Edit** in the **Actions** column.
- To verify an address, click on **Edit** on the Address you are trying to Verify, scroll to the bottom on the **Maintain Address** window that will pop up, select **Yes** for Address and Hours Verified field, and then select **Save**.

Figure 25: Address and hours verified



Site Contacts

Figure 26: Site Contacts options

ASPR Administration for Strategic Preparedness & Response Health Partner Order Portal Partner Portal UAT Demo Partner All Organizations Feedback Help JM

Home > Sites > Site Orders / Inventory Create Contact

Demo Site JM1 Information

Federal PIN 123451 State PIN

Created by jessica.marks@hhs.gov on 07/12/2023 11:38 EDT
Updated by muntaha.hpop@mailinator.com on 09/01/2023 13:58 EDT

Details Response Product Types Addresses Users **Contacts** External Partners Notes

Q Search... [Download]

First Name	Last Name	Email [v]	Job Title	Contact Role	Response Product Types	Actions
Demosite	JM1User2	demositejm1user2@email.com		Other	COVID / TX	...
Demosite	JM1user	demositejm1user@email.com		Primary	Mpx / TX COVID / DX COVID / TX COVID / VX	...

Contacts—For each contact, shows the title, first and last name, email address, contact role, associated response product types, and whether they are active. Ordering is disabled until you add one primary contact.

You can search for, add, and modify contacts.

- **Add a contact for an existing site** – select the **Contacts** tab, and at the top right select **Create Contact**.
- **Modify a contact for an existing site** – select the **Contacts** tab, find the contact you want to modify, and select **Edit** in the **Actions** column.

External Partners

External Contacts —You can add an external partner for an Existing Site individually.

Note If you need to add multiple external partners for a site, you can save time by using a template and bulk uploading it into Partner Portal.

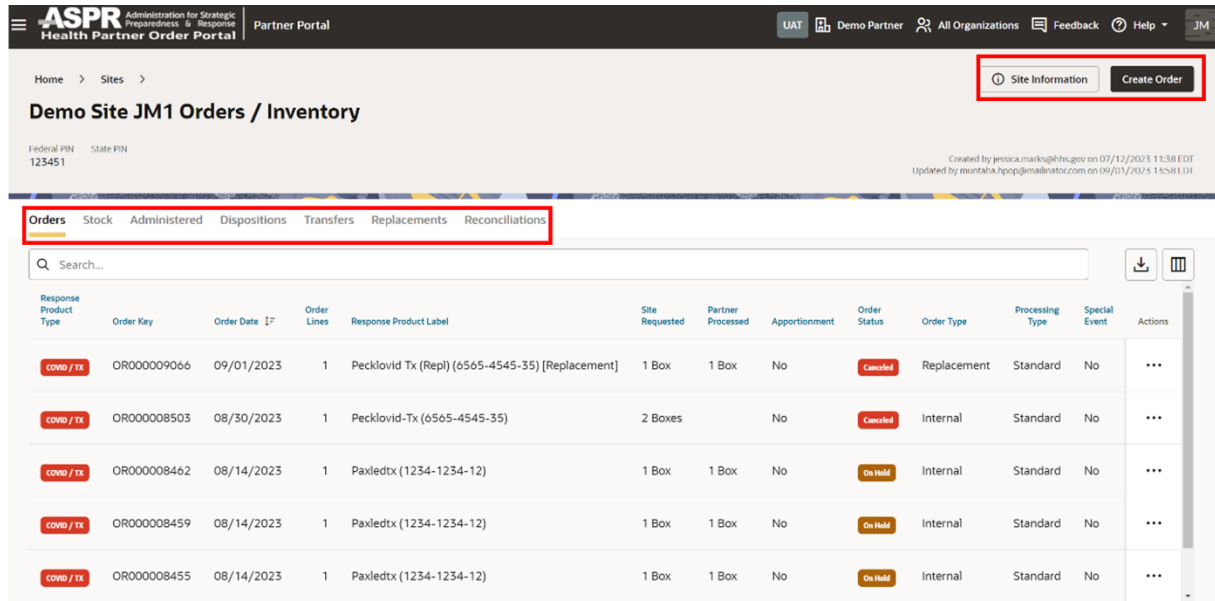
To add an external partner to an existing site:

1. At the top right, select **Create External Partner Request**.
2. In the **Maintain External Partner Request** page, provide the following information:
 - **Owning Partner**—Read-only
 - **Actual Site**—Read-only
 - **External Partner**
3. In the **Response Product Types** section, select **Add Response Product Type**.
4. In the **Maintain Site Response** panel, select a response product type. The panel refreshes and shows additional information. The information that appears depends on the response product type.

5. Provide the following information:
 - **Response Product Type**—Read-only
 - **Product Categories**—Required. Select at least one product category.
 - **Site Programs**
 - **Alternative ID** [External Systems]
 - **Allow Ordering**—Select **Yes** or **No**
 - **Allow Stock**—Select **Yes** or **No**
 - **Allow Administered**—Select **Yes** or **No**
 - **Allow Disposition**—Select **Yes** or **No**
 - **Allow Transfers**—Select **Yes** or **No**
 - **Allow Replacement**—Select **Yes** or **No**
6. Select **Add**. The response product type you added appears in the **Maintain External Partner Request** page in the **Response Product Types** section.
7. In the **Response Product Types** section, do any of the following:
 - To add additional response product types, repeat steps 6 to 9, as needed.
 - To modify a response product type, find it in the list and on the right select the ellipsis and then **Edit** in the **Actions** column. In the **Maintain Site Response** panel, update the information as described in step 8, and select **Save**.
8. To delete a response product type, find it in the list and on the right select the ellipsis and then **Delete** in the **Actions** column. In the **Maintain Site Response** panel, select **Delete**.
9. At the top right of the **Maintain External Partner Request** page, select **Submit Request**.

Site Orders/Inventory

Figure 27: Maintain Site Orders/Inventory



On the **Maintain Sites Orders/Inventory** page there are multiple tabs pertaining to the sites inventory.

Orders

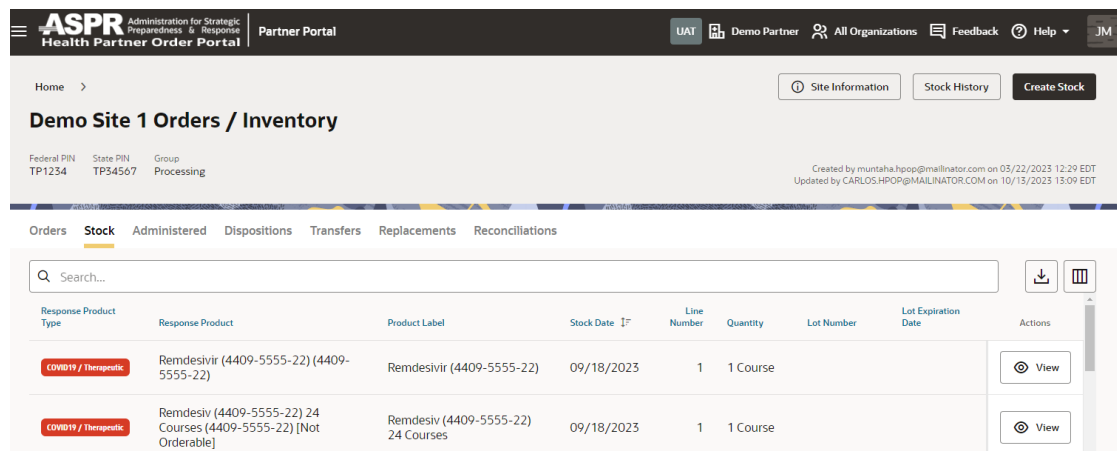
In the **Orders** tab users can navigate to the site information and create orders using the buttons in the upper right corner.

Stock

In the **Stock** tab users can review the last stock on hand report for each response product type.

- The stock on hand is not automatically updated, when a shipment is received or product is reported as administered, wasted, returned, or transferred.

Figure 28: Site Orders/Inventory Stock tab

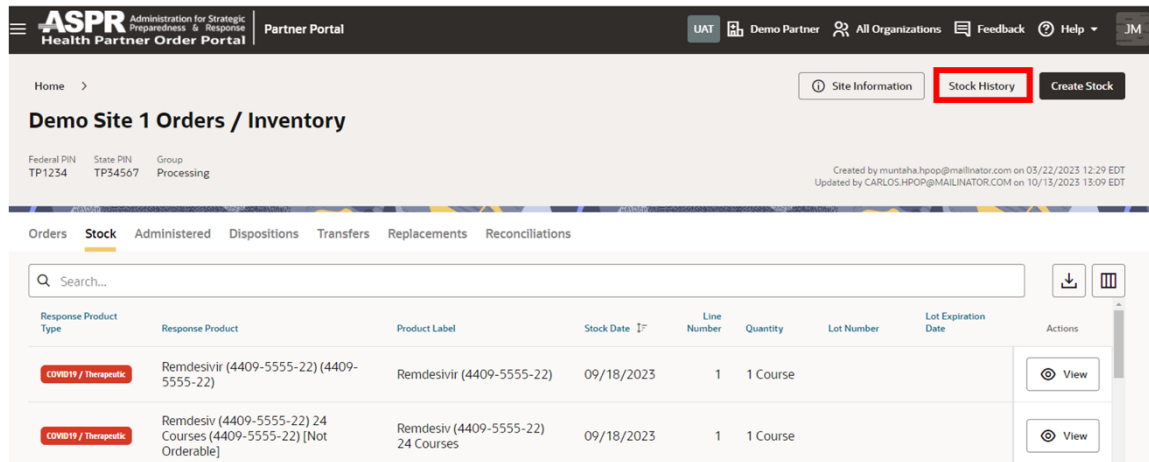


- **Stock History** – Users can review previous reports of stock on hand and edit previous entries as necessary.

To edit a previous stock on hand report:

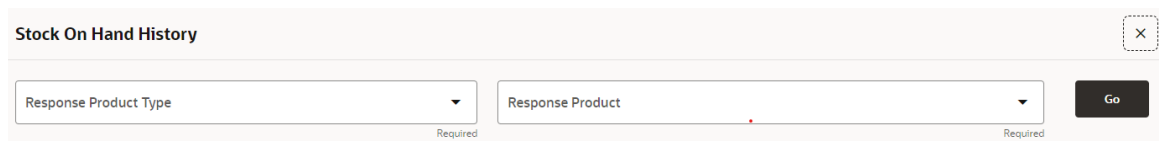
1. Select the **Stock History** button.

Figure 29: Maintain Orders/Inventory Stock tab



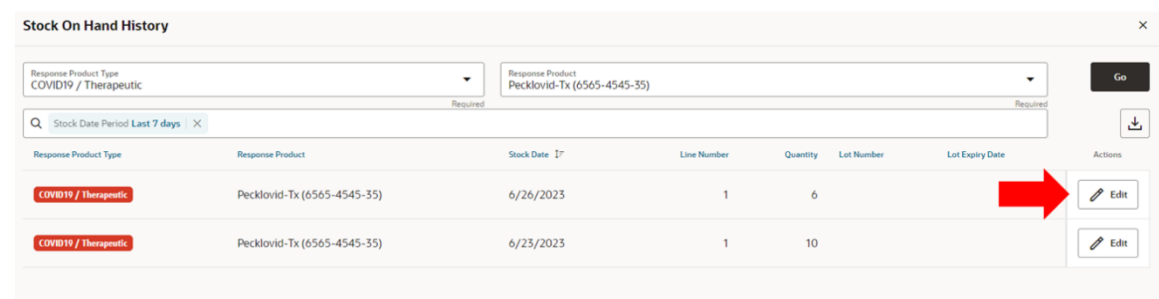
2. Select **response product type** and **response product** from the drop-down menus.

Figure 30: Stock On Hand History



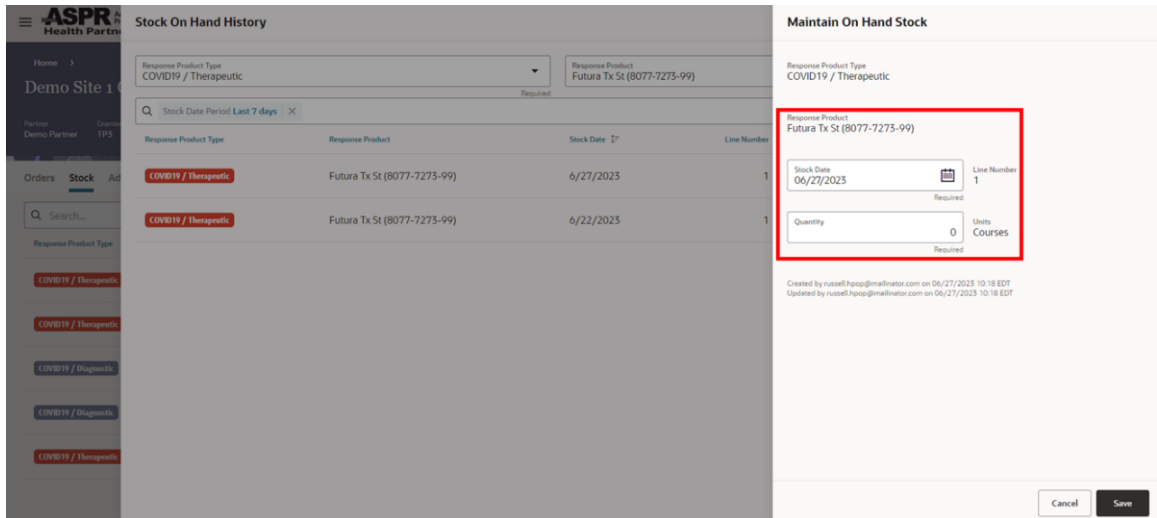
3. Select **Go**. A list of stock on hand reports for the response product selected will populate.
4. Select **Edit** at the end of the product line of interest.

Figure 31: Stock On Hand History list



5. Correct the date and/or quantity and then select **Save**.

Figure 32: Maintain Stock On Hand

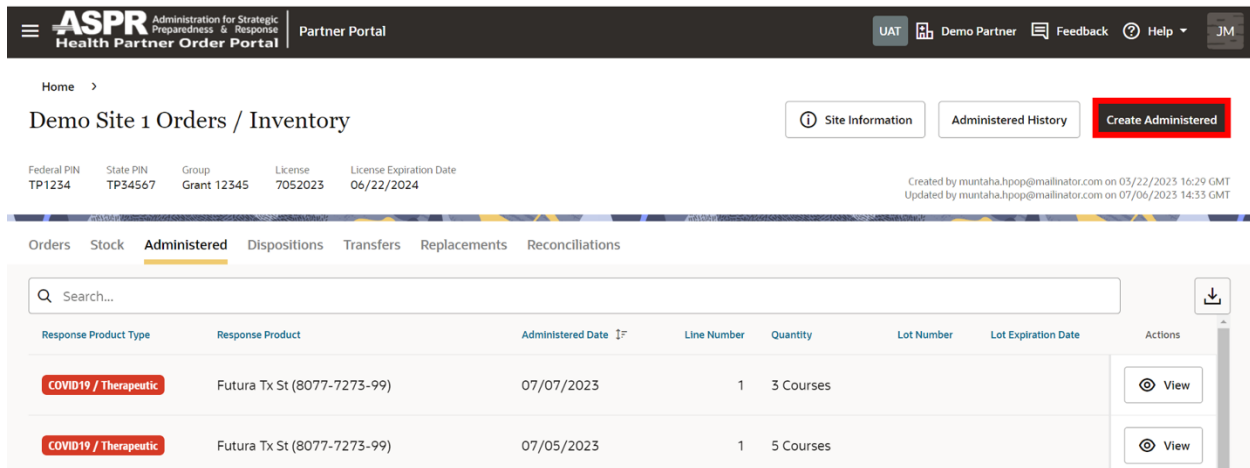


Administered

On the **Administered** tab, users can report how much of a product was administered in a specified time frame, and review and edit previous reports.

Reporting product administered and editing previous reports follow the same steps as editing previous stock on hand reports.

Figure 33: Maintain Orders/Inventory Administered tab

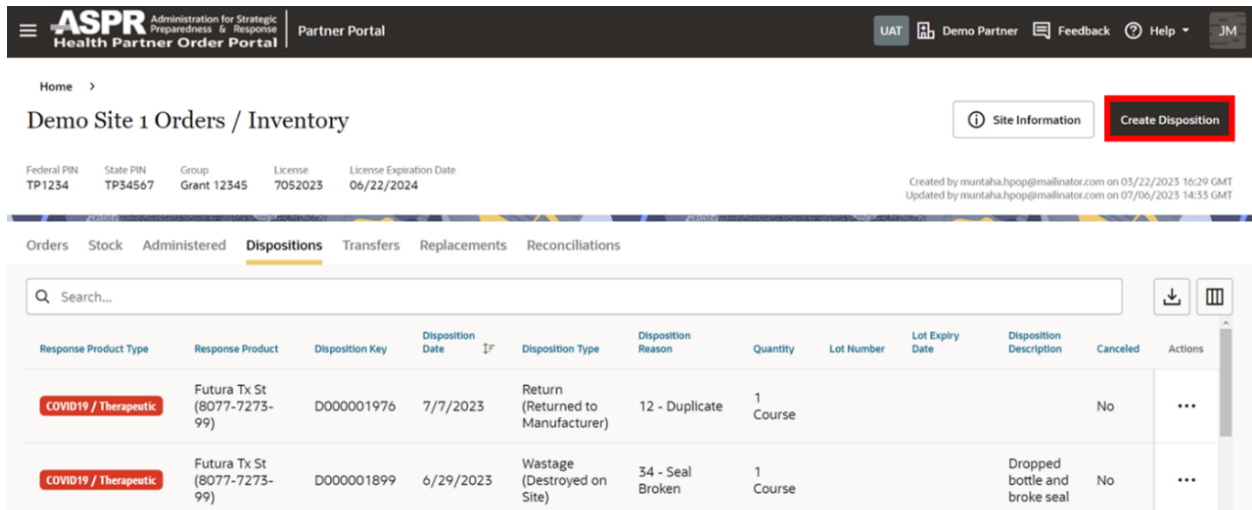


Dispositions

On the **Dispositions** tab, users can report how much of a product was wasted (destroyed on site) or returned in a specified time frame, and review and edit previous reports.

Reporting product as wasted or returned follows the same steps as editing previous stock on hand reports.

Figure 34: Maintain Orders/Inventory Dispositions tab

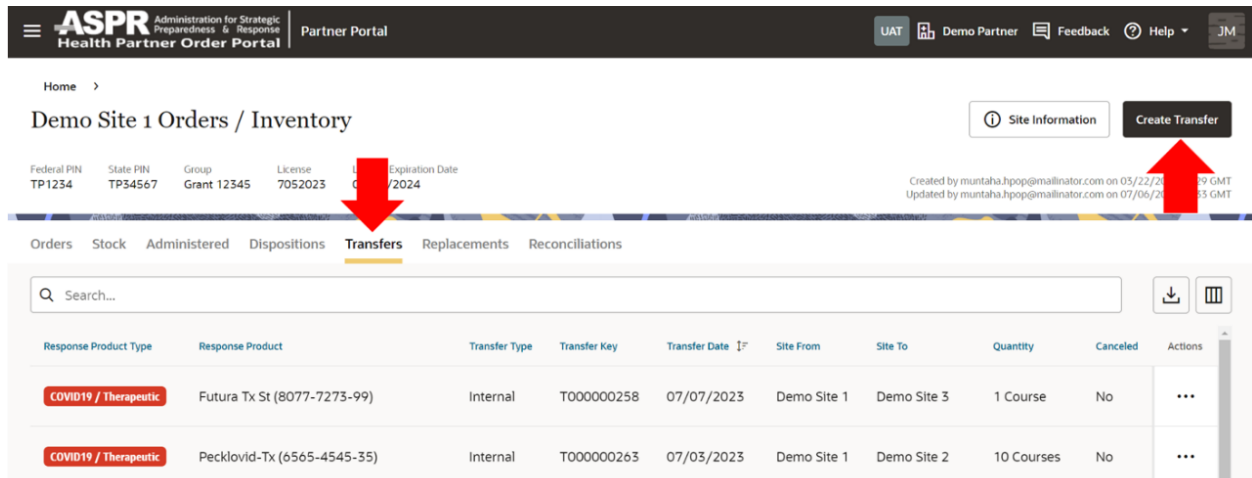


Transfers

On the **Transfers** tab, users can report how much a product was transferred to another site in a specified time frame and review and edit previous reports.

- This does not initiate an actual transfer. It only serves to capture a record of the transfer.
- Reporting product as transferred follows the same steps as editing previous stock on hand reports.

Figure 35: Maintain Orders/Inventory Transfers tab



Replacements

On the **Replacements** tab, users can report how much United States Government (USG)-provided product was received to replace non-USG provided stock in accordance with USG guidelines, and review and edit previous reports.

Reporting product replacements follows the same steps as editing previous stock on hand reports.

Process Orders

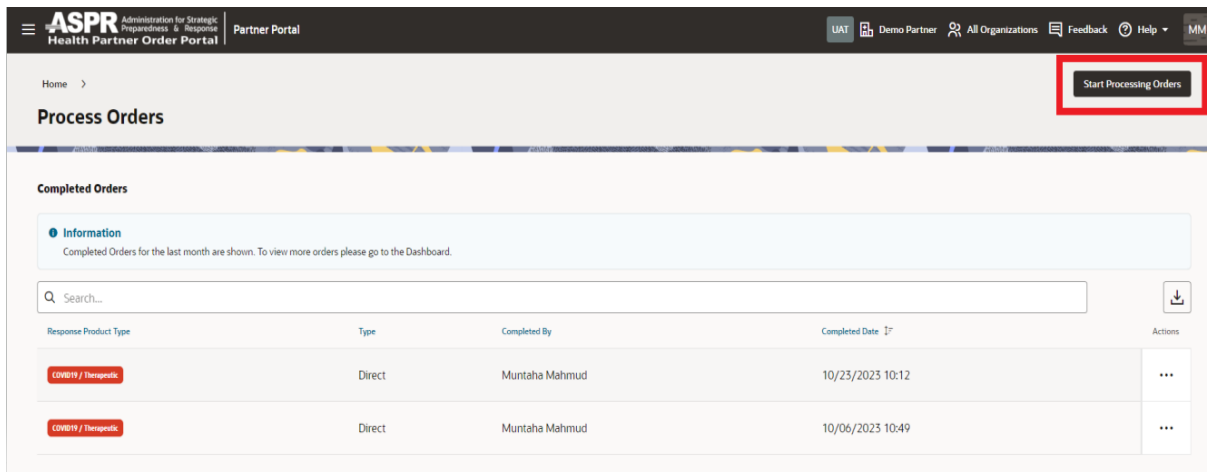
You can view the list of orders ready to be processed, and you can view the details for each order.

View Orders Ready to be Processed

To view the list of orders ready to be processed:

1. Select **Process Orders** from the Partner Portal homepage.
2. On the **Process Orders** page, you can view orders that were **Completed** in the last 30 days.
3. Click on **Start Processing Orders** to view information for each order submitted in the last month that is ready to be processed.

Figure 36: Process Orders Page



The screenshot shows the 'Process Orders' page in the ASPR Health Partner Order Portal. The page header includes the ASPR logo and navigation links. A red box highlights the 'Start Processing Orders' button in the top right corner. Below the header, there is a 'Completed Orders' section with an information message and a search bar. A table displays two completed orders with columns for Response Product Type, Type, Completed By, Completed Date, and Actions.

Response Product Type	Type	Completed By	Completed Date	Actions
COVID19 / Therapeutic	Direct	Muntaha Mahmud	10/23/2023 10:12	...
COVID19 / Therapeutic	Direct	Muntaha Mahmud	10/06/2023 10:49	...

4. Select the processing type.
 - **Direct** (shows the user)
 - **Apportionment** (shows the site)
5. Select the response product type.
6. Select units.
7. To view the details for an order, find the order in the list and select **View**. The **Completed Order Details** panel will open.

Processing Orders

When processing a direct order, you can do any of the following:

- Revert order processing
- Cancel order lines
- Cancel the complete order
- Download sites for orders
- Download orders for VTrckS

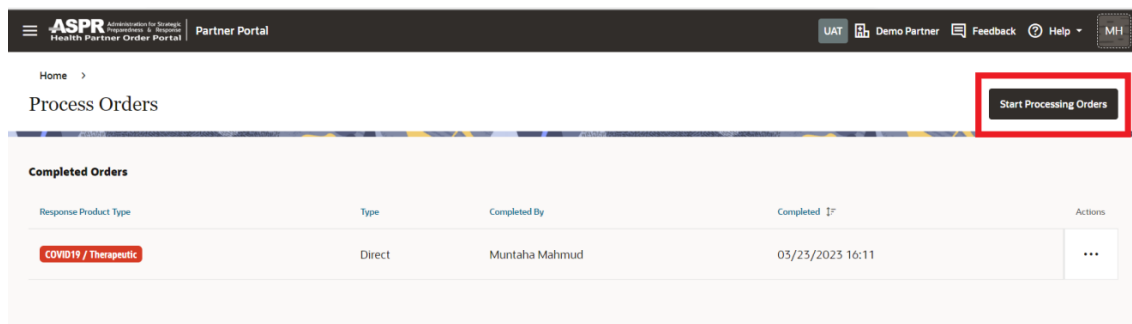
When processing an apportionment order, you can do any of the following:

- **Cancel Order Lines**
- **Cancel Complete Order**
- **Add Units**

To process orders:

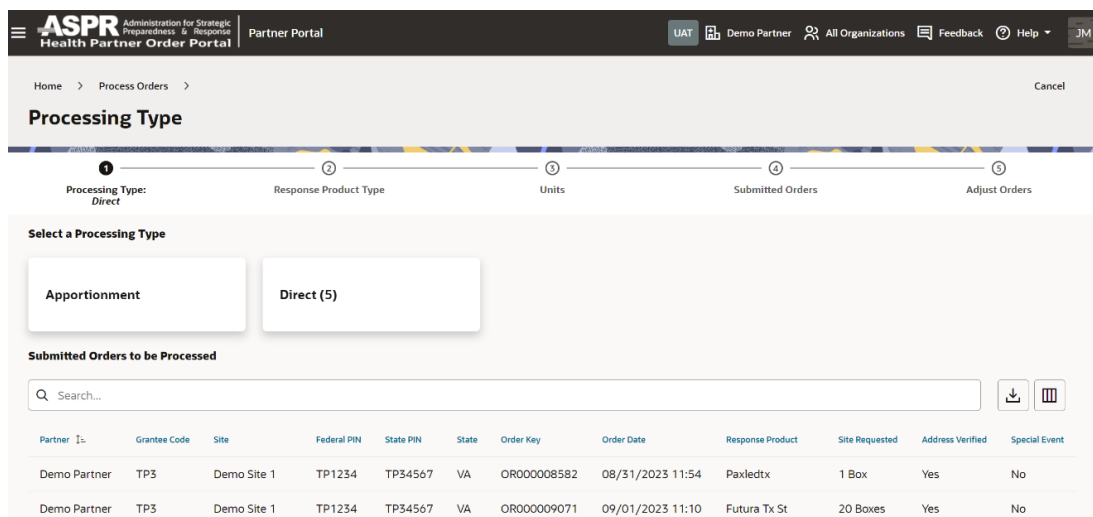
1. Select **Start Processing Orders**.

Figure 37: Start Processing Orders button



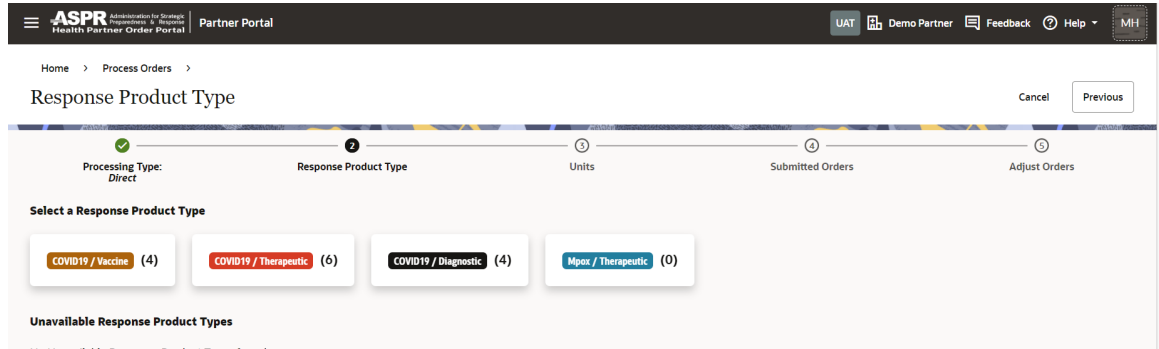
2. Select the type of orders to process.

Figure 38: Processing Type options



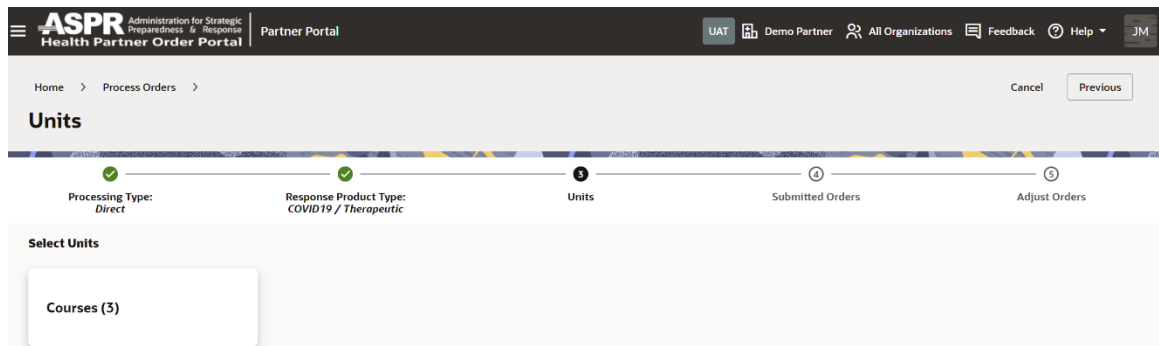
3. Select a **response product type**.

Figure 39: Response Product Type options



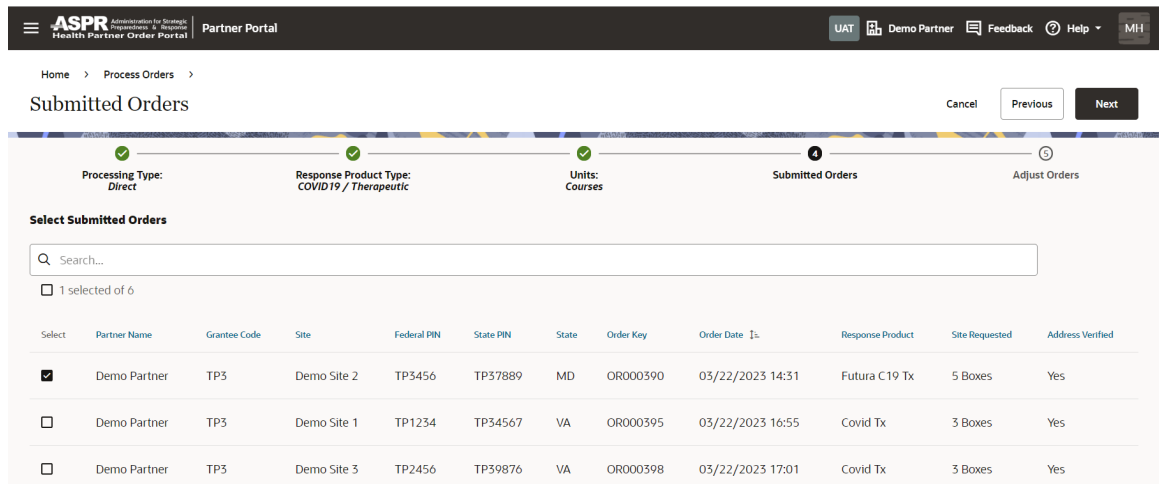
4. Select the unit associated with the response product of interest.

Figure 40: Units options



5. Select from the **Submitted Orders** list which order to process and select **Next**.

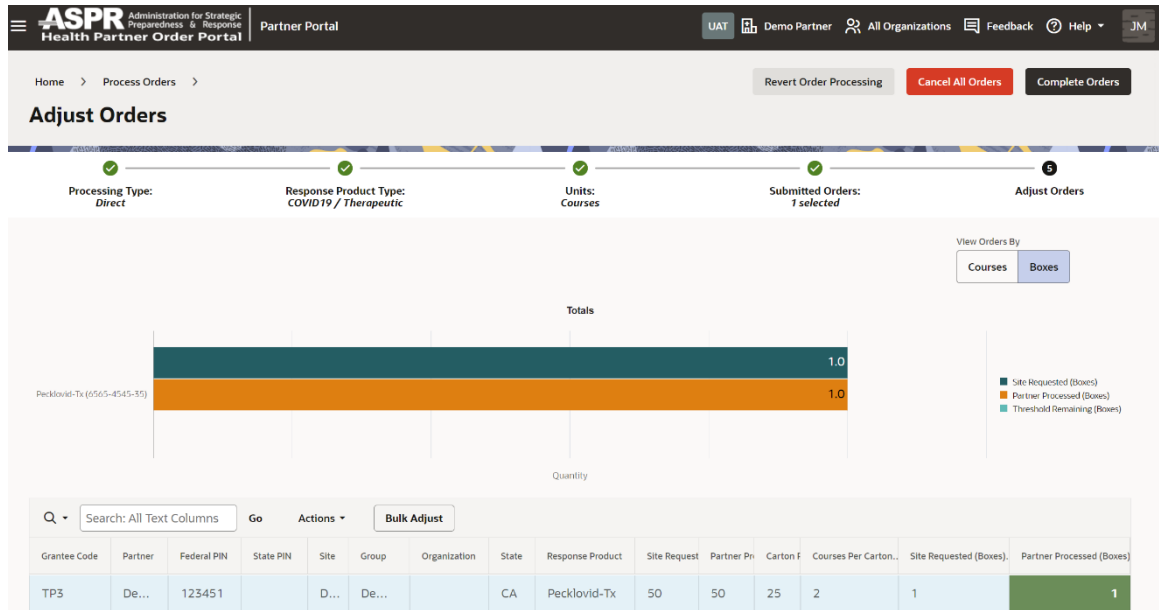
Figure 41: Submitted Orders options



6. Filter the orders in the table, if needed.

7. Select **Complete Orders**.

Figure 42: Adjust Orders options



Bulk Operations

Bulk operations in the Partner Portal include downloading templates to use for updating existing site data, uploading templates for adding new site data, viewing your downloads, and viewing the history of all downloads.

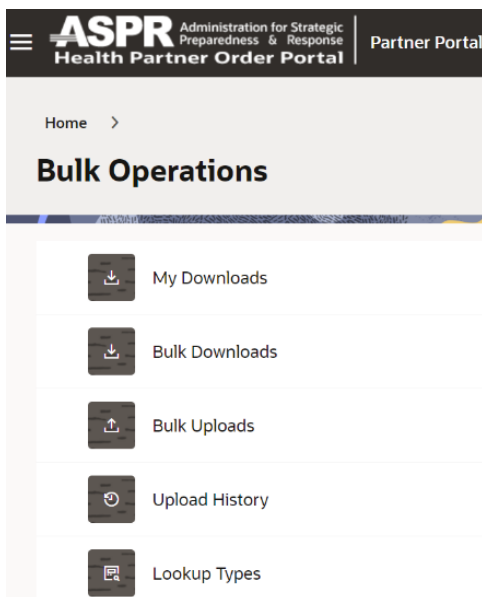
My Downloads

You can view the details of your downloads.

To view your downloads:

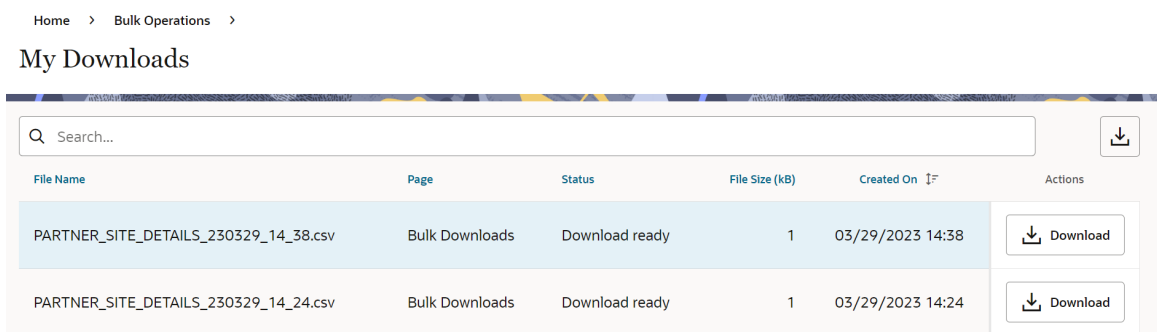
1. Select **Bulk Operations** from the Partner Portal Home page.

Figure 43: Bulk Operations options



2. On the **Bulk Operations** page, select **My Downloads**.

Figure 44: My Downloads options



3. On the **My Downloads** page, search for a specific download select the criteria you need from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.
4. Select **Download** to view the file.

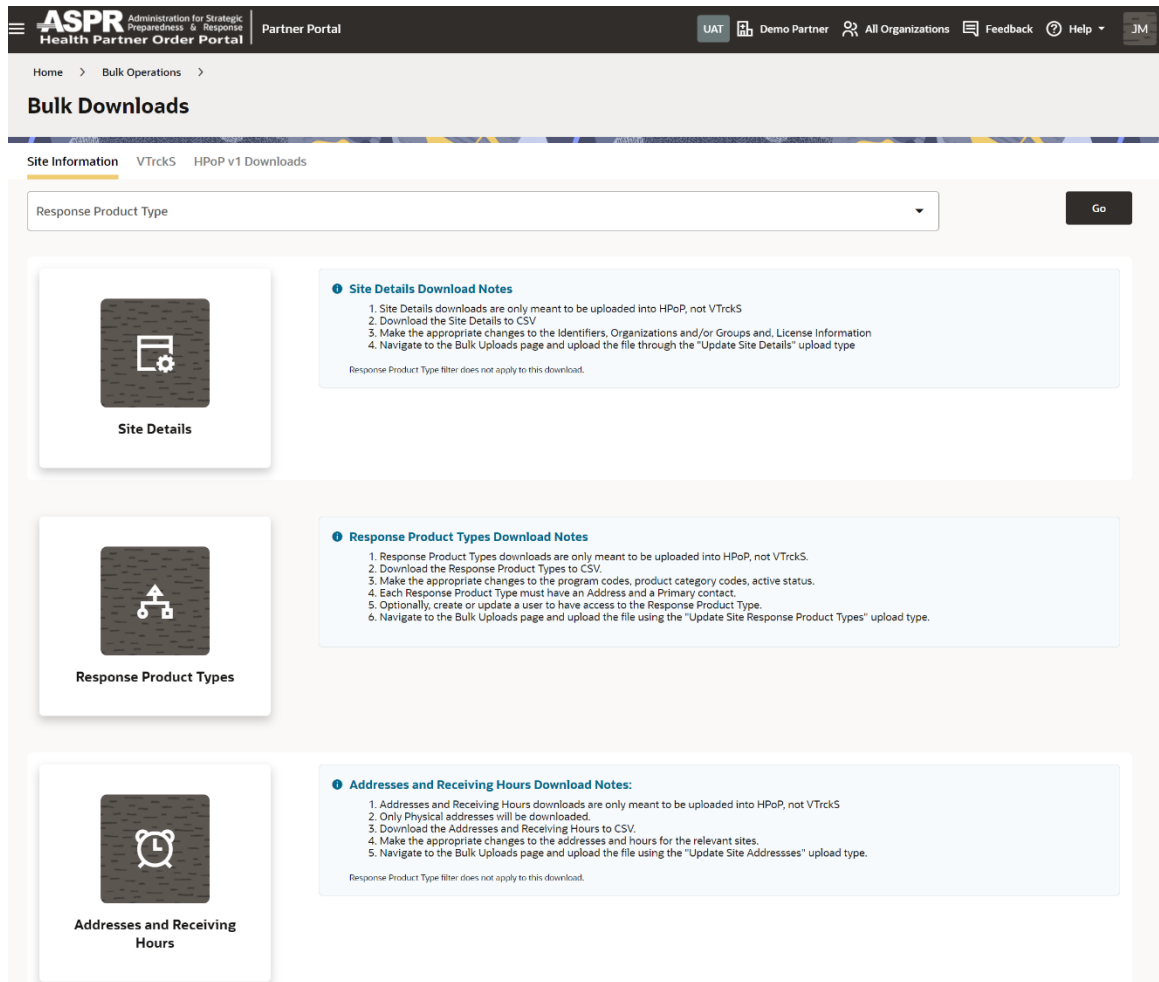
Bulk Downloads

You can download site data. Use the **Download Site Details** templates to update data. Only Partner Portal users with administrator roles can download data.

To download data:

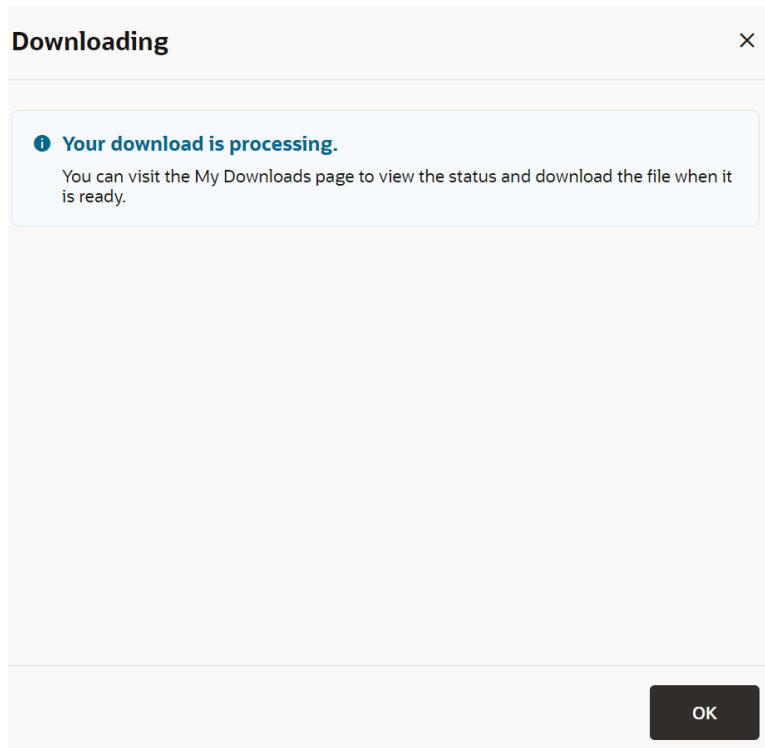
1. Select **Bulk Operations** from the Partner Portal Home page.
2. On the **Bulk Operations** page, select **Bulk Downloads**.
3. On the **Bulk Downloads** page select the type of data you would like to download.

Figure 45: Site Information tab



Once selected, the file will automatically begin downloading.

Figure 46: Downloading processing notification



4. Select **OK**.
5. Navigate to the **Bulk Operations** page and select **My Downloads** to access the file.

Bulk Uploads

You can upload site data into Partner Portal to place response product type orders for sites or so that sites can place their own orders.

Use the blank **Create Sites sample** templates only for uploading new sites. Use the downloaded **Sites Details file as a** templates to update data.

Only Partner Portal users with administrator roles can upload data. To upload data:

1. Select **Bulk Operations** from the Partner Portal Home page.
2. On the **Bulk Operations** page, select **Bulk Uploads**.
3. On the **Bulk Uploads** page, provide the **Upload Type** (required). Select the type of data to upload (e.g., orders, transfers, administered, dispositions, stock on hand).
4. Select **Next**.
5. In the **Select File** section of the **File Upload** panel, select **Download Sample Template** to download a sample CSV file of the **Upload Type** you selected in Step 3.

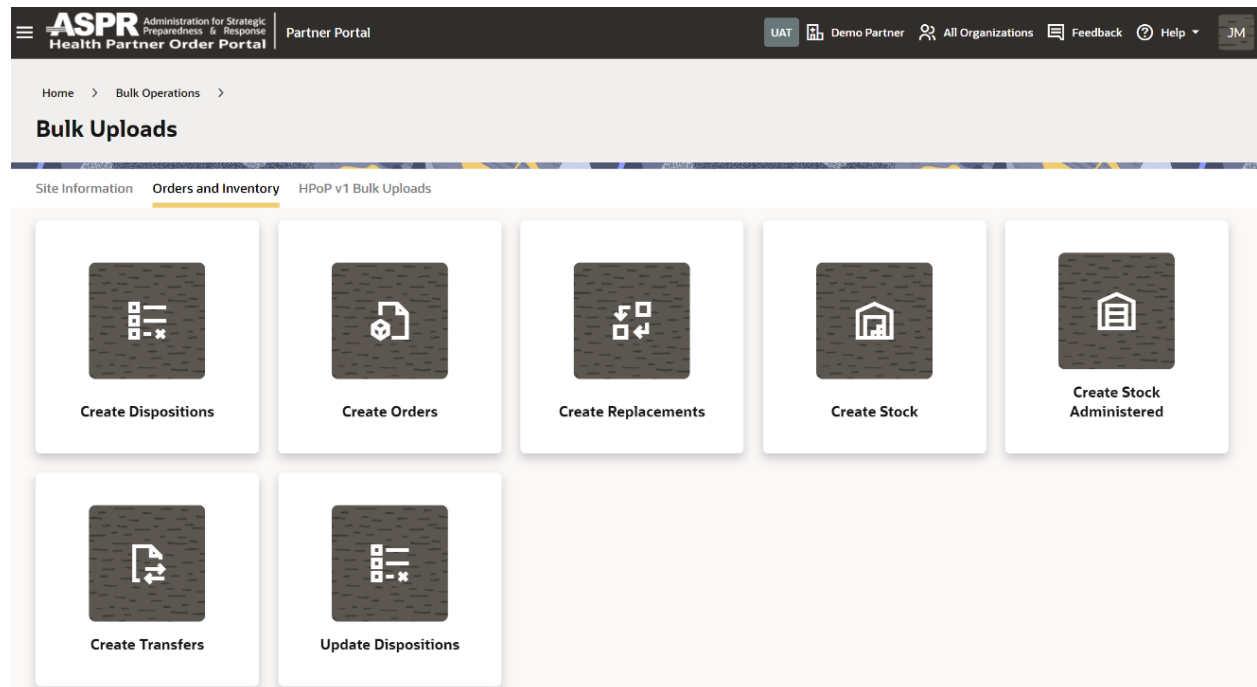
- a. Open the CSV file, and then enter and review the required information in the sample template. The files contain a header row to indicate what information should be entered. The rest of the rows will appear empty.
 - b. Fill in one row for each site by entering the appropriate data in each column (if required).
 - c. Save the file. You can give it a name that helps you identify it, but you cannot include spaces. Keep the file type as CSV.
 - Select **Information**. On the **File Format** panel, view details for the **Upload Type** you selected in Step 3. Select the **X** in the upper right to close the panel.
 - Drag and drop the files to upload into the **File** block. If your file contains a header row to indicate what information entered, set the **First Row Contains Header** field to **Yes**.
6. On the **Create Orders** upload page, do the following.
- a. Select **Process** to update the data in the system with the information in the CSV file.
 - b. Select **Validate** to check the data.

Bulk Upload Stock and Stock Administered Data

Partners can now bulk upload stock and product administered data.

Stock and **Administered** records across multiple response products and sites can be uploaded with different dates in one file.

Figure 47: Bulk Uploads Orders and Inventory



View the Bulk Upload History

If you upload files for response products for multiple sites, you can access details on the upload history to review orders and any load errors.

Before you can review the history, you (or another user) must upload the orders as described in [Bulk Uploads](#).

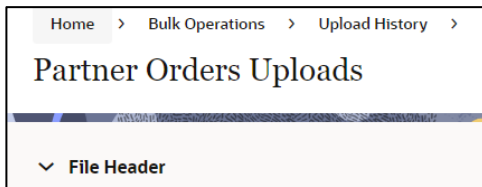
To view the history of bulk uploads:

1. Select **Bulk Operations** from the Partner Portal Home page.
2. On the **Bulk Operations** page, select **Upload History**.
3. On the **Upload History** page view details for all uploaded files.

To view details for an uploaded file (including any warning or error messages), select the **View** icon in the **Actions** column. A page with the upload details will open.

4. Select the dropdown next to the **File Header** to view details on the specific file.

Figure 48: Partner Orders Uploads



COVID Vaccine VTrckS

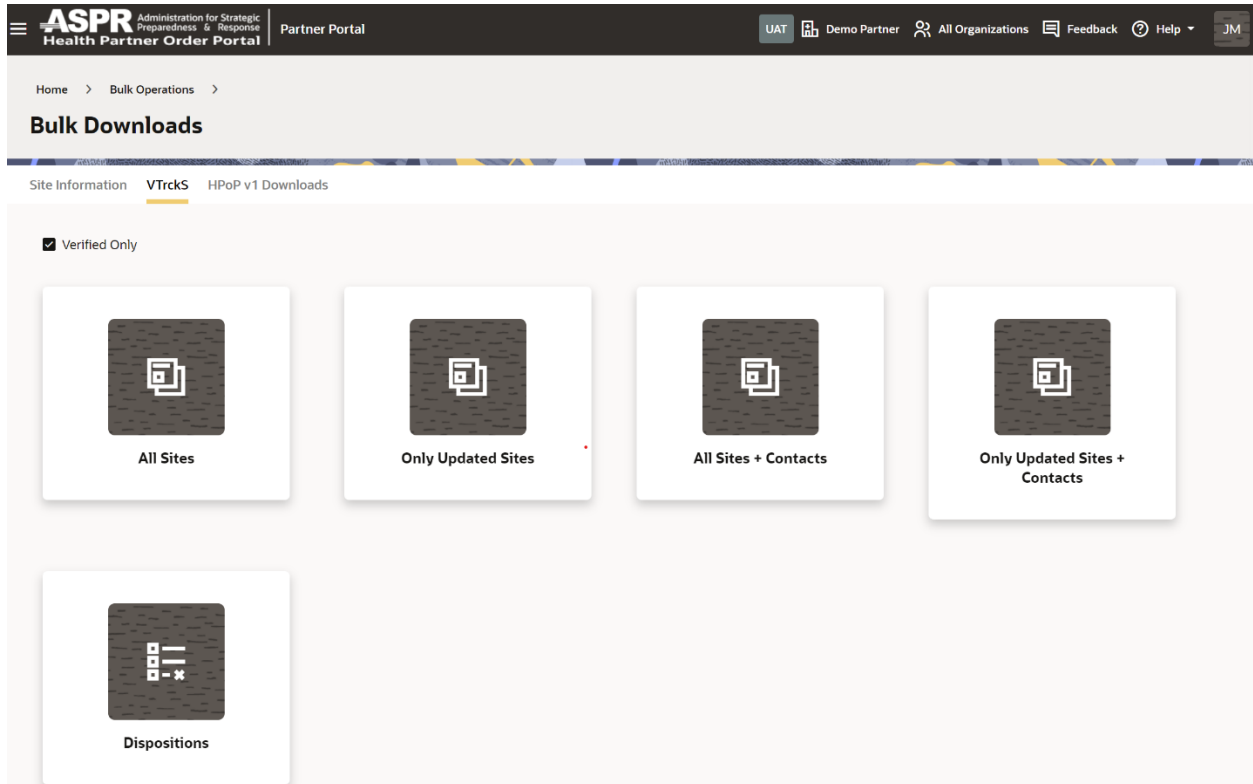
For COVID vaccine orders you can download the orders for VTrckS, you would follow the same steps as the [Process Orders](#) section and have the below option in Figure 49.

Figure 49: Download orders for VTrckS



For **Bulk Operations**, you have the option to download data for VTrckS as well. See Figure 50 below. There is a tab in [Bulk Downloads](#) for VTrckS.

Figure 50: VTrckS tab



Diagnostics – Self Service Portal

The Self-Service Portal is used to approve request submitted by sites who wish to join HPOP. Currently, the HPOP Self-Service Portal is available only to Diagnostic Partners.

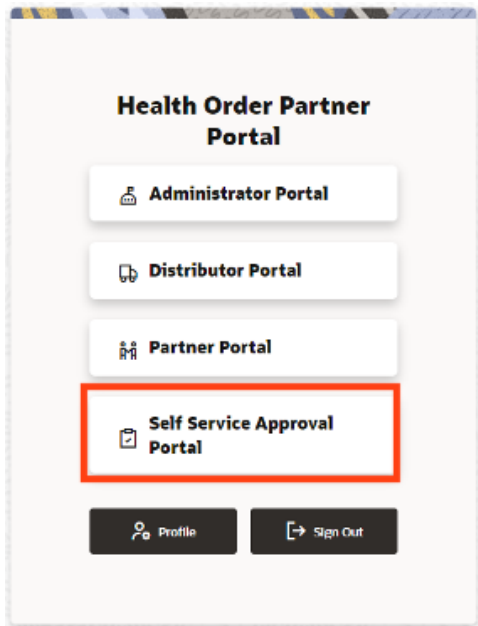
Partners can review, approve, and activate requests sent from the Self-Service Provider Portal. After requests are approved and activated, users can sign into their Site Portal to order diagnostics (e.g., test kits).

Self-Service Site Approval

To approve a Self-Service Site Request:

1. Select **Self Service Approval Portal** from the launchpad.

Figure 51: Self Service Approval Portal



2. You are then welcomed by the dashboard shown in Figure 52 below. Select **Partner Review** in the **Review** drop down menu to identify sites that have submitted requests on behalf of a specific partner.

Figure 52: Requests per status graph



3. **Requests pending partner review** will populate. Select **Requested Sites** to process.

Figure 53: Select requested sites to process

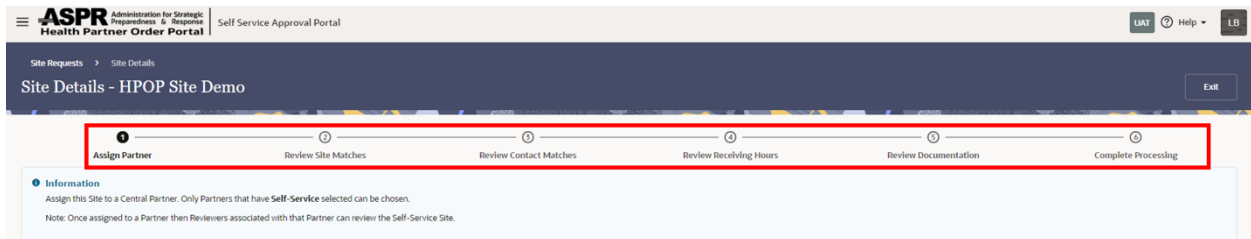
Created	Site Name	Status	Partner Name	Federal PIN	Address Reviewed	Contact Reviewed	Documentation Reviewed	Receiving Hours Reviewed	Primary Contact Verified	Address Verified	Receiving Hours Verified	Requestor	Email	Phone	Address1	Address2	City	Cou	Actions
03/29/2023 12:16 EDT	HPOP Site Demo	SUBMITTED	Food Bank (LDB)					No	No	No	No	Enhanced HPOP	enhanced@mailinator.com	1231231122	123 Right Way				View
03/29/2023 10:26 EDT	Food Site 1	SUBMITTED	Food Bank (LDB)					No	No	No	No	Enhanced HPOP	enhanced_hpop@mailinator.com	1112223333	123 Right Way		Colorado Springs		View

Review Request

The request for the site will include the following items in the train sequence.

- Assign Partner
- Review Site Matches
- Review Contact Matched
- Review Receiving Hours
- Review Documentation
- Complete Processing

Figure 54: Site Details workflow



Assign Partner

1. In the **Actions** section, verify the assigned partner, organization, and group.

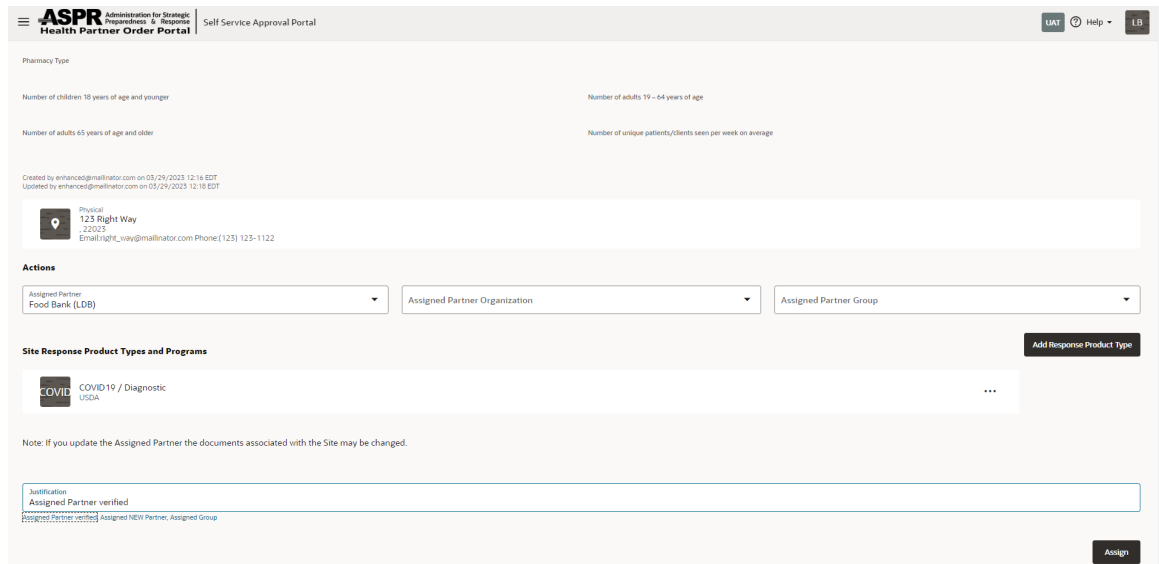
Figure 55: Assigning a partner

2. Select **Add Response Product Type**.
3. From the dropdown list, select the **Response Product Type**.

Figure 56: Maintaining Response Product Types

4. Select a **Site Program** and then select **Add**.
5. Populate the justification field accordingly and select **Assign**.

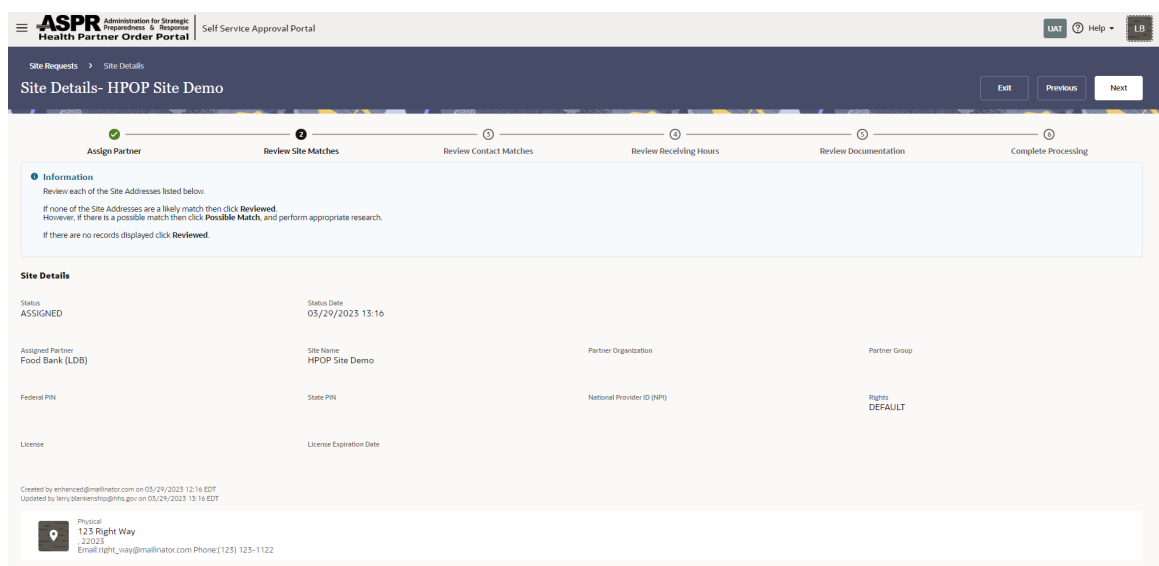
Figure 57: Assigning a site program



Review Site Matches

1. If none of the **Site Addresses** are a likely match, then select **Reviewed**. However, if there is a possible match then select **Possible Match**, and perform the appropriate research.

Figure 58: Reviewing site matches



2. Select one of the following:
 - **Address is NOT verified**
 - **Address is verified**
3. Populate the justification field accordingly.
4. Select **Reviewed** or **Possible Match**.

Figure 59: Potential matches with site addresses

Potential Matches with Site Addresses

Match Criteria	Partner	Grantee	Site	Federal EIN	Address 1	Address 2	City	County	State	Zip	Email	Phone	Phone Extension	Fax	Status	Created	Created By
Email, Phone	Food Bank (LDB)	FD1	HPOP Site Demo		123 Right Way					22023	right_wyay@mailinator.com	(123) 123-1122			PENDING	29-MAR-23 12:16:12.014561 PM	enhanced@mailinator.com

Actions

- Information**
It is expected that you **SHOULD NOT FIND** a match with CHRR Site Addresses.
- Verified Address
 Address is NOT verified
 Address is verified
- Justification
 Reviewed against Site Addresses
 Possible Site Address match record found. Reviewed against Site Addresses

Possible Match | Reviewed

Review Contacts Matched

1. Select from the following.
 - **Primary Contact is NOT Correct**
 - **Primary Contact is Correct**

Figure 60: Review Contact Matches options

ASPR Administration for Strategic Preparedness & Response | Self Service Approval Portal

Site Requests > Site Details

Site Details - HPOP Site Demo | Exit | Previous | Next

Progress: Assign Partner (✓) | Review Site Matches (✓) | **Review Contact Matches (3)** | Review Receiving Hours (○) | Review Documentation (○) | Complete Processing (○)

Information
 Review each of the Contacts listed below.
 If none of the Contacts are a likely match then click **Reviewed**.
 However, if there is a possible match then click **Possible Match**, and perform appropriate research.
 If there are no records displayed click **Reviewed**.

Site Contacts

Status: ASSIGNED	Status Date: 03/29/2023 13:17		
Assigned Partner: Food Bank (LDB)	Site Name: HPOP Site Demo		
First Name: Enhanced	Last Name: HPOP	Title:	
Email: enhanced@mailinator.com	Mobile:		
Phone: (123) 123-1122	Phone Extension:	Fax:	User Status: PENDING

Created by: ENHANCED@MAILINATOR.COM on 03/29/2023 11:58 EDT
 Updated by: enhanced@mailinator.com on 03/29/2023 13:14 EDT

2. Populate the **Justification** field accordingly and select **Possible Match** or **Reviewed**.

Figure 61: Assigning possible match and reviewed statuses

Potential Matches with Existing Site Contacts

Match Criteria	Partner Name	Grantee Code	Site Name	Federal PIN	First Name	Last Name	Title	Email	Phone	Phone Extension	Fax	Active	Source
First*Last	Food Bank (LDB)	FD1	Food Site 1		Enhanced	HPOP		enhanced_hpop@mailinator.com	(111) 222-3333			Yes	OHRH Site Contact
First*Last	Food Bank (LDB)	FD1	Food Site 1		Enhanced	HPOP		enhanced_hpop@mailinator.com	(111) 222-3333				Self Service Requestor
First*Last, Email, Phone	Food Bank (LDB)	FD1	HPOP Site Demo		Enhanced	HPOP		enhanced@mailinator.com	(123) 123-1122			Yes	OHRH Site Contact

Actions

Information
It is expected that you **SHOULD NOT FIND** a match with Site Contacts.

Contact Verified
 Primary Contact is NOT Correct
 Primary Contact is Correct

Justification
 Reviewed against Contacts
 Possible Contact match record found, Reviewed against Contacts

Possible Match **Reviewed**

Review Receiving Hours

1. Review and verify **Receiving Hours**.

Figure 62: Review Receiving Hours

ASPR Administration for Strategic Preparedness & Response
 Health Partner Order Portal | Self Service Approval Portal

Site Requests > Site Details

Site Details - HPOP Site Demo

Exit Previous Next

Assign Partner Review Site Matches Review Contact Matches Review Receiving Hours Review Documentation Complete Processing

Site Details

Status: ASSIGNED Status Date: 03/29/2023 13:19 Assigned Partner: Food Bank (LDB) Site Name: HPOP Site Demo

Physical
 123 Right Way
 22023
 Email:right_way@mailinator.com Phone:(123) 123-1122

Business Hours

	24 Hours	Monday Opening 1	Monday Closing 1	Monday Opening 2	Monday Closing 2
Monday	Yes				
Tuesday	No	Tuesday Opening 1 9:00	Tuesday Closing 1 17:00	Tuesday Opening 2	Tuesday Closing 2

2. Select one of the following.
 - **Receiving Hours are NOT Correct**
 - **Receiving Hours are Correct**

Figure 63: Confirming receiving hours

Actions

Verify Receiving Hours
 Receiving Hours are NOT Correct
 Receiving Hours are Correct

Justification
 Reviewed against Site Addresses
 Receiving hours reviewed

Reviewed

3. Populate the **Justification** appropriately and select **Reviewed**.

Review Documentation

1. In the **Review Documentation** section, verify the documents and approve or reject.

Figure 64: Approving or rejecting documents

The screenshot shows the 'Site Details - HPOP Site Demo' interface. At the top, there is a breadcrumb trail 'Site Requests > Site Details' and buttons for 'Previous' and 'Exit'. A progress bar at the top indicates the current step is 'Review Documentation', with other steps like 'Assign Partner', 'Review Site Matches', 'Review Contact Matches', 'Review Receiving Hours', and 'Complete Processing' marked as completed. Below the progress bar is an 'Information' section with 'Next Steps' and instructions for 'Partner Review', 'Approve', 'Activate', 'Reject', and 'Complete Processing'. The 'Self-Service Site Details' section contains a table with fields like Status, Assigned Partner, Federal PIN, License, Site Type, etc. Below this is a 'Justification' field with a text area and a note: 'Not all documents approved. All documents uploaded and approved. Documents already provided.' At the bottom right, there are buttons for 'Documentation Incomplete' and 'Reviewed'.

2. Select from the following.
 - **Documentation Incomplete**
 - **Reviewed**
3. Populate the **Justification** field accordingly.

Figure 65: Verification options

The screenshot shows the 'Verifications' section. It features a table with the following columns: 'Created', 'Verification Status', 'Justification', and 'Created By'. The table contains several rows of verification records, all with a status of 'VERIFIED'. Below the table is a 'Justification' field with a text area and a note: 'Partner review required, Site review complete'. At the bottom, there is a 'Warning' message: 'Note: This Justification may be displayed to the Requestor!' and buttons for 'Partner Review', 'Reject', and 'Approve'.

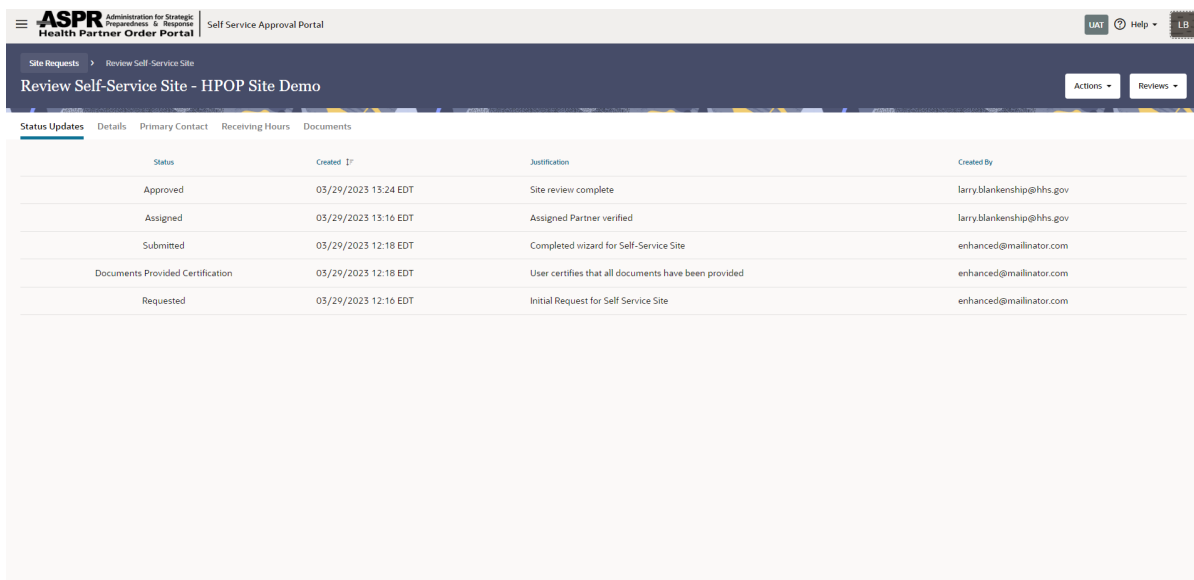
4. Select one of the following.

- **Partner Review**
- **Reject**
- **Approve**

Activating Site

Once a site is approved in the sites requests section you can view additional details and can activate the site from here as well.

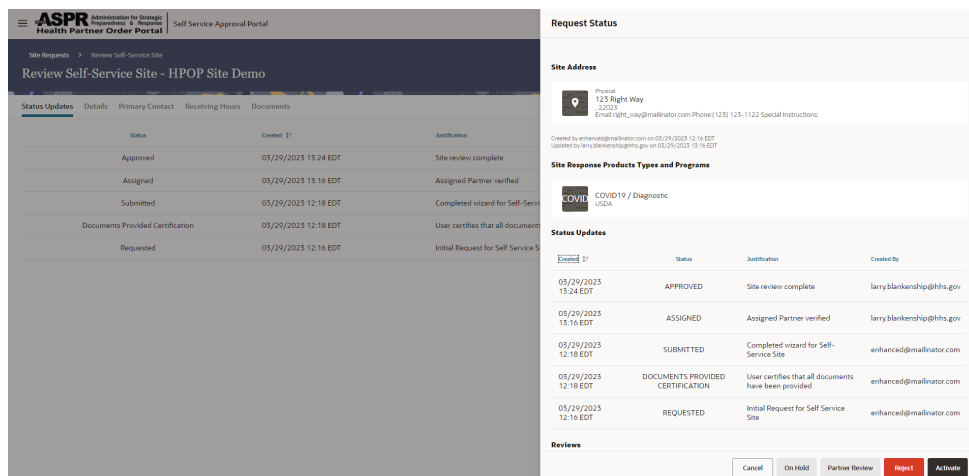
Figure 66: Activating a site



To activate a site:

1. Select the **Actions** dropdown list.
2. Select **Request Status**.

Figure 67: Request Status options



3. Select **Activate**.

Responses and Products

View the responses, response product types, products, response products, prerequisites, ancillary kits, lots, and authorization information defined by HPOP Administrators.

View Response Details

Responses are events, circumstances, or programs being (or preparing to be) responded to (e.g., a COVID-19 or Monkeypox outbreak, an infant formula shortage, or a hurricane) to ensure public health. Products are distributed to meet the population needs of the event, circumstance, or program.

1. On the **Response Details** page, to search for a specific response, enter text or select criteria from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.
2. On the **Maintain Response** panel, view the following read-only information.
 - Response
 - Abbreviation
 - Owing Entity—e.g., HHS, CDC.
 - Color Preference—e.g., Neutral, Red, Yellow, Green, Blue, Pink, Purple, Teal
 - Description
 - Display Order
3. Select **Cancel**.

View Response Product Types

Response product types are a combination of a response and a product type that identifies the type of product needed for a specific Response (incident). This is done by HPOP Administrators; Partner Administrators can view it.

1. On the **Response Product Types** page, find the response product type you want to view, and select View in the Actions column.
2. In the **Maintain Response Product Type** panel, view the following read-only information.
 - Response
 - Product Type
 - Product Category Codes
 - Site Program Codes
 - Display Order
 - Color Preference

- Inbound Interface
 - Outbound Interface
 - Maximum Inventory Value
 - Allow Special Event—**Yes** or **No**
 - Support Email
 - Support Phone
 - Support Text
 - Support URL
 - Partner Response Product Type Support Email
 - Partner Response Product Type Support Phone
 - Partner Response Product Type Support Text
 - Partner Response Product Type Support URL
3. Select **Cancel**.

View Product Details

Products are specific items (e.g., water bottles) within a product type (e.g., water). Product details include identification information such as the product name, manufacturer, product unit, product type, product category, number, or responses, and whether the product is active.

To view the list of available products:

1. Select **Responses and Products** from the Partner Portal Home page.
2. On the **Responses and Products** page, select **Product Details**.
3. On the **Product Details** page, to search for a specific product, enter text or select criteria from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.
4. On the **Maintain Product** panel, view the following read-only information.
 - Name
 - Authorization Licensing
 - Product Type
 - Product Category
 - Product Unit
 - Manufacturer
 - NDC 10
 - NDC 11
 - Serial Number
 - Part Number
 - Product Number

- Product URL
 - Product Support
 - Cpt
 - Cvx
 - Adjuvant
 - Diluent
 - Dosage Form
 - Dosage Units
 - Handling Instructions
 - Storage Instructions
 - Preservative
 - Display Order
 - Active
 - Show Lot Number
5. Select **Cancel**.

View Response Products

Response products are the specific products made available for a response.

To view the details for a response product:

1. Select **Responses and Products** from the Partner Portal Home page.
2. On the **Responses and Products** page, select **Response Products**.
3. On the **Response Products** page, find the response product you want to view, and select **View** in the **Actions** column.
4. On the **Maintain Response Product** panel, view the following read-only information.
 - Response
 - Response Product Type
 - Product • Product Label
 - Product Label Abbreviation
 - Processing Type
 - Response Product Description
 - Response Product URL
 - Response Product Support
 - Start
 - End
 - Orderable—**Yes** or **No**

- Allow Stock—**Yes** or **No**.
 - Allow Administered—**Yes** or **No**
 - Allow Disposition—**Yes** or **No**
 - Allow Transfers—**Yes** or **No**
 - Allow Replacement—**Yes** or **No**
 - Replacement Threshold
 - Number of Vials per Package
 - Number of Packages per Box
 - Number of Boxes per Pallet
 - Shipping Units
 - Minimum Shipping Quantity (Boxes)
 - Maximum Shipping Quantity (Boxes)
 - How Administered
 - Strength
 - Distributor
 - Substitution Group
 - Display Order
 - Dosage Schedule
 - Dosage Interval
 - Number Of Series
 - Intended Use
 - Target Age Population
 - Storage Temperature
 - UouNdc
5. Select **Cancel**.

View Response Product Prerequisites

Response product prerequisites define what information is required to allow the ordering, processing, and distribution of response products.

1. On the **Response Product Prerequisites** page, to search for a specific prerequisite, enter text or select criteria from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.
2. On the **Response Product Prerequisites** page, find the prerequisite you want to view, and select **View** in the **Actions** column.
3. On the **Maintain Response Product Prerequisite** panel, view the following read-only information.

- Response Product
- Prerequisite Type—Ordering, Processing, or Distribution
- Prerequisites
 - Federal PIN
 - State PIN
 - Federal or State PIN
 - Site Type Code
 - National Provider Identifier
 - License
 - Address Verified
 - Physical Address
 - Partner Primary Contact
 - Partner Secondary Contact
 - Site Primary Contact
 - Site Secondary Contact
 - Distributor Account Number 5

4. Select **Cancel**.

View Response Product Ancillary Kits

Ancillary kits provide accessories or supplemental materials to be available to order on behalf of any of your sites to support response product requirements.

To view the details for a response product ancillary kit:

1. Select **Responses and Products** from the Partner Portal Home page.
2. On the **Responses and Products** page, select **Response Product Ancillary Kits**.
3. On the **Response Product Ancillary Kits** page, find the response product ancillary kit you want to view, and select **View** in the **Actions** column.
4. On the **Maintain Response Product Ancillary Kit** panel, view the following read-only information.
 - Response Product
 - Product Ancillary Kit
 - Display Order
 - Included by Default—**Yes** or **No**
 - Active—**Yes** or **No**
5. Select **Cancel**.

View Response Product Lots

Response product lots are identifiers for response products from a manufacturer.

You can view the details for a response product lot. Response product lot details include the response product name, lot type, lot number, and lot expiration date.

To view the details for a response product lot:

1. Select **Responses and Products** from the Partner Portal Home page.
2. On the **Responses and Products** page, select **Response Product Lots**.
3. On the **Response Product Lots** page, find the response product lot you want to view, and select **View** in the **Action** column.
4. On the **Maintain Response Product Lots** panel, view the following read-only information.
 - Response Product
 - Lot Type
 - Lot Number
 - Lot Expiry Date
5. Select **Cancel**.

View Response Product Authorizations

Response product authorizations define whether working with a response product requires permission and an attestation.

To view the details for a response product authorization:

1. Select **Responses and Products** from the Partner Portal Home page.
2. On the **Responses and Products** page, select **Response Product Authorizations**.
3. On the **Response Product Authorizations** page, find the response product authorization you want to view, and select **View** in the **Actions** column.
4. On the **Maintain Response Product Authorization** panel, view the following read-only information.
 - Response Product
 - Authorization
 - Attestation—**Yes** or **No**
 - Active—**Yes** or **No**
5. Select **Cancel**.

Limits

Partner order limits define how much of a product each site can order at any given time. Once submitted orders are processed, the ordering limit is reset, and the site can order up to the maximum of that product again.

Order Limits are only utilized with direct ordering and not with apportionment. You can view, create, and modify partner order limits.

View the List of Partner Order Limits

You can view the list of partner order limits, which for each partner include the organization, response product, administrator and partner start and end dates, and administrator and partner minimum and maximum quantities.

To view the list of partner order limits:

1. Select **Limits** from the Partner Portal Home page.
2. On the **Limits** page, select **Partner Order Limits**.
3. On the **Partner Order Limits** page, to search for a specific partner order limit, select the criteria you need from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.

Create a Partner Order Limit

You can create a partner order limit, which defines how much of a product each site can order at any given time. Once submitted orders are processed, the ordering limit is reset, and the site can order up to the maximum of that product again.

Note: Order Limits are only utilized with direct ordering and not with apportionment.

To create a partner order limit:

1. Select **Limits** from the Partner Portal Home page.
2. On the **Limits** page, select **Partner Order Limits**.
3. On the **Partner Order Limits** page, at the top right, select **Create**.
4. On the **Maintain Partner Order Limits** panel, provide the following information.
 - **Partner**—Required
 - **Response product**—Required
 - **Partner start**—Select the calendar icon on the right and select the start date for the partner order limit.
 - **Partner end**—Select the calendar icon on the right and select the end date for the partner order limit.
 - **Partner minimum quantity**
 - **Partner maximum quantity**

5. Select **Create**.

Modify a Partner Order Limit

You can modify a partner order limit if necessary.

To modify a partner order limit:

1. Select **Limits** from the Partner Portal Home page.
2. On the **Limits** page, select **Partner Order Limits**.
3. On the **Partner Order Limits** page, find the partner order limit you want to modify, and select **Edit** in the **Actions** column.
4. On the **Maintain Partner Order Limits** panel, update the following information as needed.
 - **Partner**—Required
 - **Response product**—Required
 - **Partner start**—Select the calendar icon on the right and select the start date for the partner order limit.
 - **Partner end**—Select the calendar icon on the right and select the end date for the partner order limit.
 - **Partner minimum quantity**
 - **Partner maximum quantity**
5. Select **Save**.

Threshold Transfers

Figure 68: Maintain Threshold Transfers

Maintain Threshold Transfers

Partner From
Ohio

Required

Required

Remaining Threshold From Before Remaining Threshold To Before

Required

Required

Remaining Threshold From After Remaining Threshold To After

You can transfer thresholds to other partners.

1. Select **Limits** from the Partner Portal Home page.
2. On the **Limits** page, select **Threshold Transfers**.
3. Select **Create**.
4. In the **Maintain Threshold Transfers** panel, update the following information as needed.
 - **Partner to**—Required
 - **Response product**—Required
 - **Quantity**—Required
 - **Transfer date**—Required
 - **Transfer reason**
5. Select **Create**.

Site Deduplication

The **Site Deduplication** section in the Partner Portal allows partners to merge two sites that share similar zip code, federal or state PIN.

Search Sites

You can use the **Site Deduplication** to merge two sites with same ZIP code.

Note: If a site address does not have a Response Product Type, it will not appear in the search.

Figure 69: Site Deduplication

The screenshot shows the 'Site Deduplication' page in the ASPR Partner Portal. The search criteria are: Site ZIP: 78734, Federal PIN: (empty), State PIN: (empty). The results table is as follows:

Site	Federal PIN	State PIN	NPI	Grantee Code	Response Product Types	Partner Organization	Partner Group	Address1	Address2	City	County	State	Zip	Phone	Actions
Demo Site JM6	123456			TP3	COVID / TX			12344 Address Rd.		Austin	TRAVIS	TX	78734	512123456	View
Demo Site JM9	123459			TP3	COVID / TX			12344 Address Rd.		Austin	TRAVIS	TX	78734	512123456	View
Demo Site JRM5	123455			TP3	COVID / TX			12344 Address Rd.		Austin	TRAVIS	TX	78734	512123456	View
Demosite JM8	123458			TP3	COVID / TX			12344 Address Rd.		Austin	TRAVIS	TX	78734	512123456	View

To deduplicate:

1. From the **Home** menu, select **Site Deduplication** tile, and search for sites by ZIP code, Federal or State PIN.
2. Click the **View** button to select the site you want to keep.
3. Select the site for deduplication and click the button **Deduplicate Selected Site**.

Zip Codes with Multiple Sites (Reference Only)

You may look up for reference only the sites you wish to deduplicate by going to **ZIP Codes with Multiple Sites**.

Communications

The **Communications** section in the Partner Portal allows partners to manage portal News, project features and feedback.

View Partner Portal News

You can view news items that include the alert type (information, success, alert, or warning), the response product type, and the start and end dates for the news item.

To view the news items:

1. Select **Communication** from the Partner Portal Home page. The **Communications** page will open.
2. On the **Communications** page, select **News**.
3. At the top of the **News** page, select the **Partner News** tab to view partner news. To filter the list to find a specific partner news item, enter the name in the **Search** field or select the criteria to search for. Separate multiple entries with commas. The search results appear as soon as you enter the criteria.

Create a Partner News Item

You can add a news item to display in **Partner Portal**, **Site Portal**, or in both portals. To create a news item:

1. Select **Communication** from the Partner Portal Home page. The **Communications** page opens.
2. On the **Communications** page, select **News**.
3. At the top of the **News** page, select the **Partner News** tab.
4. On the right, select **Create**.
5. On the **Maintain News** panel, provide the following information.
 - **Alert type**—Required. Select **Information**, **Success**, **Alert**, or **Warning**.
 - **Displayed on**—Required. Select the portal(s) where you want the news to be available. Select **Partner Portal** or **Site Portal**.
 - **Start date** and **end date**—Required. The times are based on your time zone. Select the calendar icon on the right to select the dates.
 - **Response product type**—Required
 - **Title**—Required
 - **Description**—Required
 - **Allow users to dismiss**—Select **Yes** or **No** to indicate whether to allow users to dismiss (remove) the news item from the display in the selected portal(s).
6. Select **Create**. If you selected to display the news item in Partner Portal, the information appears on the **News** page and on the homepage.

Modify a Partner News Item

You can modify all or some of a partner news item depending on its start and end dates. You cannot modify administration news.

To modify a partner news item:

1. Select **Communication** from the Partner Portal Home page. The **Communications** page will open.
2. On the **Communications** page, select **News**.
3. At the top of the **News** page, select the **Partner News** tab.
4. On the **Partner News** page, find the news item you want to modify, select the menu, and then **Edit** in the **Actions** column.
5. On the **Maintain News** panel, modify the following information as needed.
 - **Alert type**—Required. Select **Information**, **Success**, **Alert**, or **Warning**.
 - **Displayed on**—Required. Select the portal(s) where you want the news to be available. Select **Partner Portal** or **Site Portal**.
 - **Start date** and **end date**—Required. The times are based on your time zone. Select the calendar icon to select the dates.
 - If the **start date** is in the future, you can update all the fields or delete the news item.
 - If the **start date** is in the past and the **end date** is in the future, you can update only the **end date** and/or the **allow dismissal** option.
 - If the **end date** is in the past, you cannot update the news item. The **Maintain News** panel will open, all the information is read-only, and there will be no **Save** button in the panel.
 - **Response product type**—Required
 - **Description**—Required
 - **Allow users to dismiss**—Select **Yes** or **No** to indicate whether to allow users to dismiss (remove) the news item from the display in the selected portal(s).
6. Select **Save**.

Delete a News Item

You can delete a news item if its start date is in the future. To delete a news item:

1. Select **Communication** from the Partner Portal Home page. The **Communications** page will open.
2. On the **Communications** page, select **News**.
3. At the top of the **News** page, select the **Partner News** tab.
4. On the **Partner News** page, find the news item you want to delete, select the menu, and then **Delete** in the **Actions** column.

Note: You can only delete news item if the Start Date is in the future. If the Start Date for the new item is not in the future, the Delete option doesn't appear in the Actions menu.

5. In the **Maintain News** panel, select **Delete** to confirm that you want to delete the news item.
6. In the **Confirmation** dialog box, select **Delete**.

Dismiss a News Item

You can dismiss (remove) a news item from the Partner Portal Home page if allowed when the item was created or modified.

To dismiss a news item:

1. Open the Partner Portal Home page. If a news item was set to display in Partner Portal when it was created, the information appears at the top of the page.
2. On the right, select **Dismiss**.

Note: The Dismiss button only appears if the “Allow Users to Dismiss option” was set to Yes when the news item was created or modified. For more information, see [Create a Partner News Item](#) or [Modify a Partner News Item](#).

Manage Project Features and Sprint Details

You can view, suggest, and vote on product enhancements, follow your suggested enhancements, and view sprint details and feature overviews.

Suggest a New Feature or Enhancement

You can enter a request for a new feature or product enhancement with or without screenshots and follow the status of the request.

To suggest a new feature or product enhancement:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Project Management**.
3. On the **Project Management** page, select **Feature Requests**.
4. On the right of **Feature Requests** page, select **Create**.
5. On the **Maintain Feature** panel, provide the following information.
 - **Title**—Required. A brief summary of the new feature or enhancement.
 - **Status**—Read-only. Options for the status of the enhancement request are PLANNED, REQUESTED, OPEN, PENDING, or CLOSED.
 - **Follow**—Select **Yes** or **No** to indicate whether you want to follow the status of your new feature or enhancement request, as described in View your followed features.
 - **Requested By**—Read-only
 - **Description**—A description of the new feature or enhancement
 - **Justification**—An explanation of why you are requesting the new feature or enhancement
 - **Response product type**—Required

- **Tags**

6. Do one of the following.

- Select **Create** to save the feature request.
- Select **Create and Add Screenshot** to add comments and screenshots to the feature request. The panel refreshes and opens additional fields.

In the **Comments & Screenshots** section, add and save any comments, upload screenshots as needed, and select **Create**.

Modify a New Feature or Enhancement Request

You can modify a new feature or product enhancement request if necessary. To modify a new feature or product enhancement request:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Project Management**.
3. On the **Project Management** page, select **Feature Requests**.
4. On the **Feature Requests** page, find the request you want to modify and then select **Edit** in the **Actions** column.
5. In the **Maintain Feature** panel, update the following information as needed.
 - **Title**—Required. A brief summary of the new feature or enhancement.
 - **Status**—Read-only. Options for the status of the enhancement request are PLANNED, REQUESTED, OPEN, PENDING, or CLOSED.
 - **Follow**—Select **Yes** or **No** to indicate whether you want to follow the status of your new feature or enhancement request, as described in View your followed features.
 - **Requested By**—Read-only
 - **Description**—A description of the new feature or enhancement
 - **Justification**—An explanation of why you are requesting the new feature or enhancement
 - **Response Product Type**—Required
 - **Tags**
6. Select **Comments** or **Screenshots** in the middle of the **Maintain Feature** panel.
 - **Comments**—View the comments or questions about the feedback. To add a new comment, on the right select **Add Comment**. In the **Add Request Comment** panel, enter a comment or question, and then select **Create**.
 - **Screenshots**—View the list of screenshots associated with the request.
7. Select **Save**.

Close a new feature or product enhancement request

You can close a new feature or product enhancement request if necessary. To close a new feature or product enhancement request:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Project Management**.
3. On the **Project Management** page, select **Feature Requests**.
4. On the **Feature Requests** page, find the request you want to close, select the menu, and then select **Close** in the **Actions** column.
5. On the **Close Request** panel, enter the reason for closing the request, and then select **Close Request**.

View your followed features

You can view the status of the new product features or enhancements you suggested and chose to follow.

You can suggest a new product feature or enhancement and set whether to follow it as described in Suggest a New Feature or Enhancement.

To view your followed features:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Project Management**.
3. On the **Project Management** page, select **My Followed Features**.
4. On the **My Followed Features** page, to search for a specific item, select the criteria you need from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.

View sprint features

You can open the sprint feature overviews, which provide detailed descriptions of the features added in each product sprint. You can choose to view the features for all sprints or a particular sprint, or you can search for specific sprints using text or for a specific portal.

To view the sprint features:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Project Management**.
3. On the **Project Management** page, select **Sprint Feature Overview**.
4. On the **Sprint Feature Overview** page, provide the following information.
 - **Sprint**—Select **All** or a sprint number.
 - **Title**—Use if you don't know the exact title of the sprint feature. Enter, for example, **Allow** or **Display**. The search is not case-sensitive.
 - **Portal**—Select **All**, **Partner**, or **Site**.

Manage Feedback

Partner Portal provides a way for you to provide feedback and to view all user feedback.

View user feedback

You can view all user feedback provided by users of the Site Portal and Partner Portal. You can view all feedback, or you can filter the feedback by status (open, closed, or pending).

To view user feedback:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Feedback**.
3. On the **Feedback** page, to search for a specific item, select the criteria you need from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.
4. To review the details for a feedback entry or to change the status of a request, locate the entry you want to view, and select the and then **Edit** in the **Actions** column.
5. On the **Manage Feedback** panel, view and update the following information as needed. (Most of the information is read-only.)
 - **Application**—Read-only. The portal for feedback.
 - **Page**—Read-only. The user interface page in the portal for feedback.
 - **Rating**—Read-only. The feedback reported: Neutral, Satisfactory, or Unsatisfactory.
 - **Type**—Read-only. Bug or Comment.
 - **Feedback Key, Name, Email**—Read-only. Identifiers for the user who submitted the feedback.
 - **Comments**—Read-only. The comment submitted by the user.
 - **Status**—Select Closed, Open, or Pending to change the status of the request.
 - **Response Product Type**—Read-only
 - **Jira Number**—Read-only. An internal identifier for the feedback.
6. In the middle of the **Maintain Feedback** panel, select **Comments** or **Screenshots**.
 - **Comments**—View the comments or questions about the feedback. To add a new comment, select **Add Comment**. In the **Add Feedback Response** panel, enter a comment or question, and then select **Create**.
 - **Screenshots**—View the list of screenshots associated with the feedback. To add a screenshot, drag the file into the block and then select **Save**.
7. On the **Feedback** page, to add a comment about a feedback entry, locate the entry, select the menu, and then select **Add Comment** in the **Actions** column.
8. In the **Add Feedback Response** panel, enter a comment or question, and then select **Create**.

View and Modify Feedback Details

You can view all user feedback provided by users of the Site Portal and Partner Portal. You can view all feedback, or you can filter the feedback by status (open, closed, or pending).

To modify feedback details:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Feedback**.
3. On the **Feedback** page, find the entry you want to review, select the menu, and then select **Edit** in the **Actions** column.
4. In the **Manage Feedback** panel, view and update the following information as needed. (Most of the information is read-only.)
 - **Application**—Read-only. The portal for feedback.
 - **Page**—Read-only. The user interface page in the portal for feedback.
 - **Rating**—Read-only. The feedback reported: Neutral, Satisfactory, or Unsatisfactory.
 - **Type**—Read-only. Bug or Comment.
 - **Feedback Key, Name, Email**—Read-only. Identifiers for the user who submitted the feedback.
 - **Comments**—Read-only. The comment submitted by the user.
 - **Status**—Select **Closed**, **Open**, or **Pending** to change the status of the request.
 - **Response Product Type**—Read-only
 - **Jira Number**—Read-only. An internal identifier for the feedback.
5. In the middle of the **Maintain Feedback** panel, select **Comments** or **Screenshots**.
 - **Comments**—View the comments or questions about the feedback. To add a new comment, on the right-click **Add Comment**. In the **Add Feedback Response** panel, enter a comment or question, and then select **Create**.
 - **Screenshots**—View the list of screenshots associated with the feedback. To add a screenshot, drag the file into the block and then select **Save**.
6. On the **Feedback** page, to add a comment about a feedback entry, locate the entry, select the menu, and then select **Add Comment** in the **Actions** column.
7. On the **Add Feedback Response** panel, enter a comment or question, and then select **Create**.

Add a comment on user feedback entry

You can view all user feedback provided by users of the Site Portal and Partner Portal. You can view all feedback, or you can filter the feedback by status (open, closed, or pending).

To add a comment on user feedback:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Feedback**.
3. On the **Feedback** page, to search for a specific item select the criteria you need from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.

4. Locate the entry you want to add a comment for select the menu, and then select **Add Comment** in the **Actions** column.
5. On the **Add Feedback Response** panel, enter a comment or question, and then select **Create**.

Modify support details

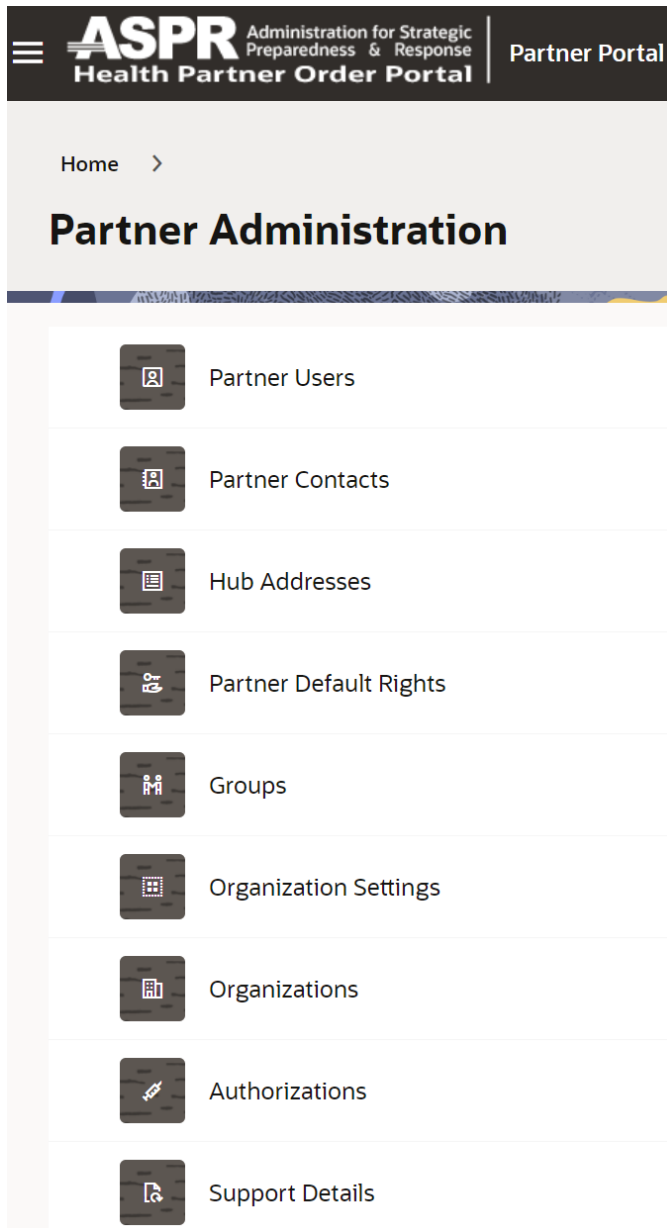
You can modify support details if necessary. To modify support details:

1. Select **Communications** from the Partner Portal Home page.
2. On the **Communications** page, select **Feedback**.
3. On the **Feedback** page, on the right-click **Edit Support Details**.
4. On the **Maintain Support Details** panel, update the following information, as needed.
 - **Name**—Read-only
 - **Grantee Code**—Read-only
 - **Email**
 - **Support Phone**
 - **Support Text**
 - **Support Email**
 - **Support URL**
 - **Phone**
 - **Phone Extension**
 - **Fax**
5. Select **Save**.

Partner Administration

The Administration section provides an overview on managing partner users, partner contacts, hub addresses, partner default rights, groups, organizations, authorizations, and support details.

Figure 70: Partner Administration Options



Partner Users

A partner user is a person who works in Partner Portal. You can view, add, and modify partner users.

View the list of partner users

Only the people added as users can work in Partner Portal. To view the list of partner users:

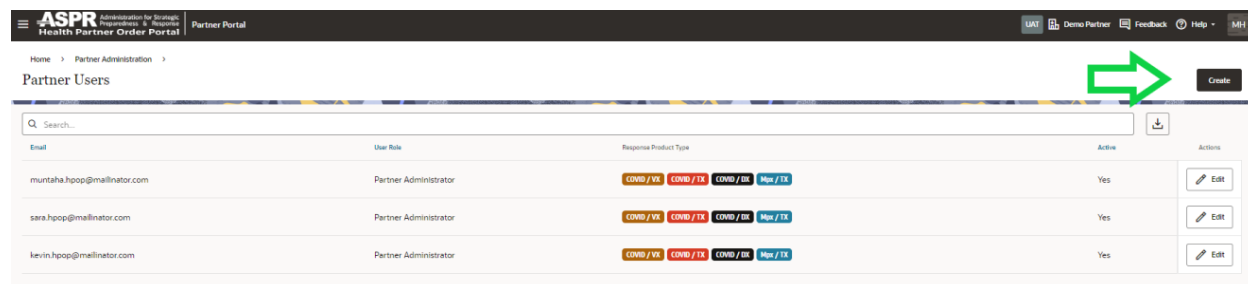
1. Select **Administration** from the Partner Portal Home page.
2. On the **Administration** page, select **Partner Users**.

3. On the **Partner Users** page, to search for a specific user, select the criteria you need from the **Search** drop-down menu, and provide any required details. The search results appear as soon as you enter the criteria.

Create a partner user

You can create a partner user. Only the people added as partner users can work in Partner Portal. An attestation may be required before you can enter user details.

Figure 71: Creating a partner user



To create a partner user:

1. Select **Administration** from the Partner Portal Home page.
2. On the **Administration** page, select **Partner Users**.
3. On the **Partner Users** page, at the top right select **Create**.
4. On the **Create Partner User** panel, in the **Email** field, enter the email address of the user you want to add, and then select **Next**.
 - If the user already exists in the system, the panel refreshes, and the user details appear in the panel. You can modify the details for a user as described in Modify a partner user.
 - If the user doesn't exist in the system, the panel refreshes and shows the details you must enter.
5. On the **Maintain Partner Users** panel, provide the following information:
 - **Email—Read-only.** The user's email address.
 - **First Name**
 - **Last Name**
 - **Title**
 - **Mobile, Phone, Extension, and Fax**—Enter the contact information for the person. Make sure that the person monitors the phone and fax numbers regularly.
6. Select **Create**.

Partner Portal sends a welcome email to the user you just added. The email contains instructions for activating their account in Partner Portal.

Modify a partner user

You can modify a partner user if necessary. To modify a partner user:

1. Select **Administration** from the Partner Portal Home page.
2. On the **Administration** page, select **Partner Users**.
3. On the **Partner Users** page, find the user you want to modify, and on the right-click **Edit** in the **Actions** column.
4. On the **Maintain Partner Users** panel, update the following information as needed.
 - **Email**—Read-only. The user's email address.
 - **First Name**
 - **Last Name**
 - **Title**
 - **Mobile, Phone, Phone Extension, and Fax**—Enter the contact information for the person. Make sure that the person monitors the phone and fax numbers regularly.
 - **Active**—Select **Yes** or **No**.
5. Select **Apply Changes**.

Partner Contacts

A contact is a person who works in Partner Portal. An administrator adds one contact for your organization, and that person is responsible for adding all the other contacts. When an administrator adds your organization to Partner Portal, they include one person as the primary contact.

View the list of partner contacts

When an administrator adds your organization to Partner Portal, they include one person as the primary contact. You can change the primary contact if necessary.

To view the list of partner contacts:

1. Select **Administration** from the Partner Portal Home page.
2. On the **Administration** page, select **Partner Contacts**.
3. On the **Partner Contacts** page, to search for a specific contact, select the criteria you need from the **Search** drop-down menu, and provide any required details. The search results appear as soon as you enter the criteria.

Create a partner contact

A contact is an individual whose contact information is associated with a site for shipping and receiving purposes, but who does not require access to the system for placing their own orders. Contacts can also be system users, but do not have to be.

To create a partner contact:

1. Select **Administration** from the Partner Portal Home page.
2. On the **Administration** page, select **Partner Contacts**.
3. On the **Partner Contacts** page, at the top right, select **Create**.
4. On the **Create Partner Contact** panel, in the **Email** field, enter the email address of the contact you want to add, and then select **Next**.
 - If the contact already exists in the system, the panel refreshes, and the contact details appear in the panel. You can modify the details for the contact as described in [Modify a partner contact](#).
 - If the contact doesn't exist in the system, the panel will refresh and show the details you must enter.
5. On the **Maintain Partner Contacts** panel, provide the following information:
 - **Email**—Required. The contact's email address.
 - **First Name**—Required
 - **Last Name**— Required
 - **Title**
 - **Mobile, Phone, Phone Extension, and Fax**—Enter the contact information for the person. Make sure that the person monitors the phone and fax numbers regularly.
6. Select **Create**.

Partner Portal sends a welcome email to the contact you just added. The email contains instructions for activating their account in Partner Portal.

Modify a partner contact

You can modify a partner contact if necessary. To modify a partner contact:

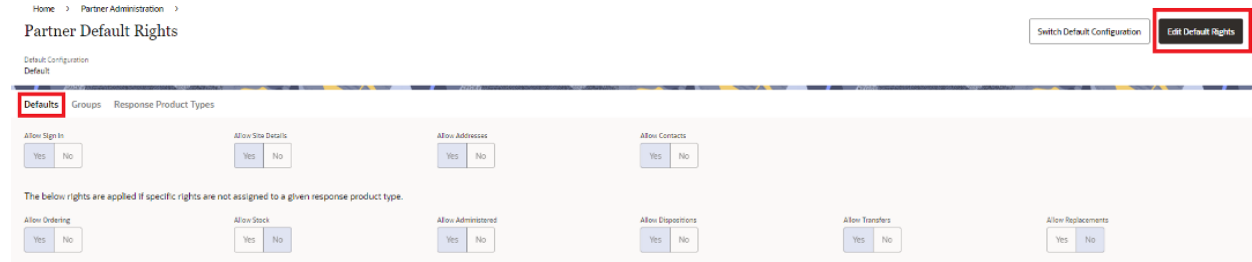
1. Select **Administration** from the Partner Portal Home page.
2. On the **Administration** page, select **Partner Contacts**.
3. On the **Partner Contacts** page, find the contact you want to modify, and on the right, select **Edit** in the **Actions** column.
4. Select the **Administration** tile. The **Administration** page will open.
5. On the **Maintain Partner Contacts** panel, update the following information, as needed.
 - **Email**—Required. The contact's email address
 - **First Name**—Required
 - **Last Name**— Required
 - **Title**
 - **Mobile, Phone, Phone Extension, and Fax**—Enter the contact information for the person. Make sure that the person monitors the phone and fax numbers regularly.
 - **Active**—Select **Yes** or **No**

6. Select **Apply Changes**.

Partner Default Rights

Partner default rights set the permissions for Site Portal users.

Figure 72: Partner Default Rights/Default tab



View the default rights for partners

As an administrator, you can set default rights for all partners, groups, and response product types.

To view the default rights for partners:

1. Select **Partner Administration** from the Partner Portal Home page.
2. On the **Partner Administration** page, select **Partner Default Rights**.
3. At the top of the **Partner Default Rights** page, select the **Defaults** tab.
4. Select **Edit Default Rights** in the upper right-hand corner.

View the default rights for groups

As an administrator you can view the default rights for all groups available in the system.

To view the default rights for all groups:

1. Select **Partner Administration** from the Partner Portal Home page.
2. On the **Partner Administration** page, select **Partner Default Rights**.
3. At the top of the **Partner Default Rights** page, select the **Groups** tab.
4. Select **Create Default Group Rights** in the upper right-hand corner.

Modify the default rights for response product types

As an administrator you can modify the default rights for response product types if necessary.

To modify the default rights for a response product type:

1. Select **Partner Administration** from the Partner Portal Home page.
2. On the **Partner Administration** page, select **Partner Default Rights**.
3. At the top of the **Partner Default Rights** page, select the **Response Product Types** tab.
4. In the list, find the response product type whose default rights you want to modify, and select **Edit** in the **Actions** column.

5. On the **Partner Response Types** panel, update the following information as needed.
 - **Response Product Type**—Read-only
 - **Allow Ordering**—Select **Yes** or **No**
 - **Allow Stock**—Select **Yes** or **No**
 - **Allow Administered**—Select **Yes** or **No**
 - **Allow Disposition**—Select **Yes** or **No**
 - **Allow Transfers**—Select **Yes** or **No**
 - **Allow Replacement**—Select **Yes** or **No**
 - **Allow Replacement**—Select **Yes** or **No**

Figure 73: Partner Response Types panel

Partner Response Types

Response Product Type Required

Partner Group

Allow Ordering: Yes No

Allow Stock: Yes No

Allow Administered: Yes No

Allow Disposition: Yes No

Allow Transfers: Yes No

Allow Replacement: Yes No

Active: Yes No

6. Select **Save**.

Manage Groups

A group is a collection of sites that you can use to better manage sites who use the same ordering permissions. Once created, you can add sites to the group when you create a site.

You can view, create, and modify groups.

[View the list of groups](#)

As an administrator you can view the list of groups available in the system.

To view the list of groups:

1. Select **Partner Administration** from the Partner Portal Home page.
2. On the **Partner Administration** page, select **Groups**.
3. On the **Groups** page, to search for a specific group, enter text or select criteria from the **Search** drop-down menu and provide any required details. The search results appear as soon as you enter the criteria.

Create a group

As an administrator you can create a new group.

To create a group:

1. Select **Partner Administration** from the Partner Portal Home page.
2. On the **Partner Administration** page, select **Groups**.
3. On the **Groups** page, at the top right, select **Create**.
4. On the **Maintain Groups** panel, provide the following information.
 - **Name**—Required
 - **Description**
 - **Active**—Select **Yes** or **No**
5. Select **Create**.

Modify a group

As an administrator you can modify a group, if necessary.

To modify a group:

1. Select **Partner Administration** from the Partner Portal Home page.
2. On the **Partner Administration** page, select **Groups**.
3. On the **Groups** page, find the group you want to modify, and select **Edit** in the **Actions** column.
4. On the **Maintain Groups** panel, update the following information as needed.
 - **Name**—Required
 - **Description**
 - **Active**—Select **Yes** or **No**.
5. Select **Save**.

Appendix: Glossary

The glossary provides descriptions and examples of the terms that appear in the portal applications.

Table 3: Health Partner Ordering Portal (HPOP) glossary of terms

Term	Obsolete Term	Description
Apportionment	NA	Process by which a partner places order for a site
Change Log	Audit Log	Audit history that provides details for a partner or site within a specified time period
Contact	Primary Contact	An individual whose contact information is associated with a site for shipping and receiving purposes, but who does not require access to the system for placing their own orders Contacts can also be system users, but do not have to be.
Direct ordering	N/A	Process where sites create their own orders
Disposition	Wastage, Returns	Description and reason for wasted and returned products. Can also include products given away as international donations Products can be wasted for many reasons, including a broken vial/syringe, lost or unaccounted for product, an expired or damaged product. Products can be returned for many reasons, including refrigeration was too warm or too cold, or a mechanical failure.
Distributor account number	ASD account number	Unique identifier defined for each site so that distributors can identify each specific site and its attributes with a numeric code The account number is removed from a site if the address changes. This ensures the distributor is notified of the change and can provide a new account for the new site.
Group	NA	Collection of sites that you can use to better manage sites who use the same ordering permissions Once created, you can add sites to the group when you create a site.

Term	Obsolete Term	Description
Order Limit	Override	<p>Limit of how much of a product each site can order at any given time</p> <p>After you process submitted orders, the system resets the order limit, and the site can order up to the maximum of that product again.</p> <p>Order limits are only utilized with direct ordering and not with apportionment.</p>
Organization	Team	<p>Collection of one or more sites</p> <p>Partners can set different default permissions for each organization, which allows them to segregate the management of their sites.</p> <p>As a Partner you can set different default permissions for each organization, which allows you to segregate the management of their sites.</p>
Partner order limit	N/A	<p>Amount of a product each site can order at any given time. Once submitted orders are processed, the ordering limit is reset, and the site can order up to the maximum of that product again.</p> <p>Order Limits are only utilized with direct ordering and not with apportionment.</p>
Partner site limit	NA	<p>Number of sites an organization within a partner can include when processing orders.</p> <p>The site limits for each partner for a given product can be set to any value. If not set, the partner can send product to any number of sites.</p>
Partner threshold	NA	Limit of how much an organization within a partner can process of a given product.
Product	NA	A specific product (e.g., water bottles) within a Product Type (e.g., water).
Product Category	Therapeutic Category, Diagnostic Category	Group of treatments or solutions (e.g., antiviral, monoclonal antibody, test kit, or personal protective equipment)
Product Type	NA	Type of product needed for distribution (e.g., vaccine, therapeutic, diagnostic, food, or water)

Term	Obsolete Term	Description
Product Unit	Therapeutic Courses, Vials, or Bottles or Diagnostic Test Kit	<p>Container for a product type (e.g., courses, vials, bottles, or box)</p> <p>You can separate ordering and processing by different units for ease of use and to ensure consistency.</p>
Response	Module	<p>Event, circumstance, or program that is being (or preparing to be) responded to (e.g., a COVID-19 or Monkeypox outbreak, an infant formula shortage, or a hurricane) to ensure public health</p> <p>Products are distributed to meet the population needs of the event, circumstance, or program.</p>
Response Product	Module	<p>A specific product made available for a response (e.g., Paxlovid for COVID-19 or Brand X water bottles for a hurricane response)</p>
Response Product Type	NA	<p>Combination of a Response and Product Type that identifies the type of product needed for a specific response (incident)</p> <p>For example, you can create different combinations of products used for a response (such as, COVID-19/Vaccine, Monkeypox/Therapeutic, or Hurricane/Water).</p> <p>Previous separations for vaccines, therapeutics, and diagnostics are now reconfigured to use responses (COVID-19 and Monkeypox) combined with Product Types (vaccine, therapeutic, and diagnostic). This allows users, products, rights, and order processing to be correctly separated for different Response Product Types, such as COVID-19/Vaccines and Monkeypox/Vaccines.</p>
Right	Permission	<p>Permission that allows partners to give users access to the application menus and features</p> <p>You customize different rights for each site.</p>

Term	Obsolete Term	Description
Site	Site	<p>Businesses or association that administers or distributes response products to patients and customers</p> <p>Sites include chain or independent pharmacies and organizations such as hospitals, clinics, doctors' offices, or dialysis centers.</p>
Site Limit	N/A	<p>Limit of how many sites each partner can include when processing orders</p> <p>The site limit for each partner for a given product can be set to any value. If not set, the partner can send product to any number of sites.</p>
Site Program	Site Program	Program created for a site to meet specific distribution needs (e.g., Food Distribution Centers or Long-Term Care Pharmacy)
State PINs	NA	Each Site must be assigned a PIN by their Partner. This PIN is a combination of the Partner's Grantee Code and a six-digit value assigned by the Partner. For example, a state PIN for a Site under the Florida Partner may be FLA123456.
Stock Administered	Inventory	Amounts of stock administered for each response (incident) that required one or more products
Stock on Hand	Inventory	Amounts of stock on hand for each response (incident) that requires one or more products
Support Details	Support Information	Contact information to reach a support person for assistance
Threshold	NA	<p>Limit of how much each partner can process of a given product</p> <p>Thresholds can utilize either cyclic (recommended) or additive types. For off-cycle changes, administrators can enter top up values.</p> <p>Partners cannot process orders greater than their limits and must wait until new limits are added before processing additional orders. Thresholds can be used with both direct ordering and apportionment.</p>

Term	Obsolete Term	Description
Transfer	Inventory	Amount of a response product moved to a different site for each response (incident) that required one or more products
User	Primary Contact	Individual associated with a site, organization, partner, distributor, or administrator who needs to be able to sign into and work in Health Partner Ordering Portal (HPOP). A user can be—but does not have to be—a contact.

Order Status Descriptions

The status descriptions provide lists and descriptions of the order status types, order types, and processing types that appear in the application.

Table 4: Order status types and descriptions

Order Status Type	Description
Submitted	Order is submitted to site for review and processing
Processing	Order is processing
Completed	Order is completed
Distributed	Order is distributed
On-Hold	Order is on-hold Completed orders that cannot be transmitted
Transmitted	Order is transmitted
Shipped	Order is shipped
Cancelled	Order is cancelled

Order Type Descriptions

The type descriptions provide descriptions of the order types that appear in the application.

Table 5: Order types and descriptions

Order Type	Description
Internal	Order from an owning partner
External	Order from an external partner
Replacement	Replacement order
Special Event	Order for a special event
Program	Order for a program
Administrator	Order by an Administrator
Open	Open order