# Health Partner Order Portal (HPOP) Site Portal User Guide

# Version 1.1

**July 31, 2023**

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# Recent Changes

Table 1: Recent changes to the application

| Additions | Date |
|---|---|
| Recording stock on hand | July 2023 |
| Editing a previous stock on hand record | July 2023 |
| Recording product administered | July 2023 |
| Editing a previous product administered record | July 2023 |
| Recording dispositions | July 2023 |
| Recording product transferred | July 2023 |
| Recording replacements | July 2023 |

# Site Portal

The version of the Administration for Strategic Preparedness and Response (ASPR) Health Partner Ordering Portal (HPOP) first released on June 20, 2023, includes changes in response structures so the system can flexibly and rapidly respond to a wider variety of events. The redesign also renamed what was formerly known as the "Provider" Portal to the "Site" Portal.

The Site Portal allows individual sites, which could in the future expand beyond pharmaceutical providers, to maintain a list of contacts for each product, add system users, update delivery addresses and times, and, most importantly, order and enter inventory for products.

This user guide will provide screenshots of the portal and instructions on how to accomplish each task.

## Portal Navigation Basics

### Tiles

The main screen of the Site Portal displays large square "tiles" that can be selected to access a page with the related information. A screen capture of the tiles can be found in Figure 5 in the Site Portal Home Page section.

### Hamburger Menu

From all screens, users can utilize the "hamburger" menu (in the top left next to the ASPR logo). Selecting the hamburger menu (Figure 1) will open an outline of the website structure on the left, allowing for quick access to all pages.
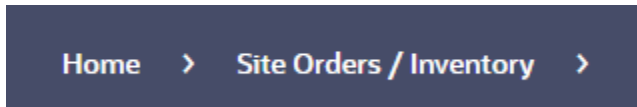
Figure 1: Hamburger menu



**Breadcrumbs**

Once users navigate into the site (i.e., away from the home page), a series of "breadcrumbs" will display in the upper left indicating the user's current location in the website structure, orienting users, and allowing them to easily move back up the pages by selecting higher levels.

Figure 2: Breadcrumb example



## Buttons

On action and information pages, users will find buttons (Figure 3) in the upper right. These buttons are typically used to edit information, create users or orders, or complete steps.

Figure 3: Button example
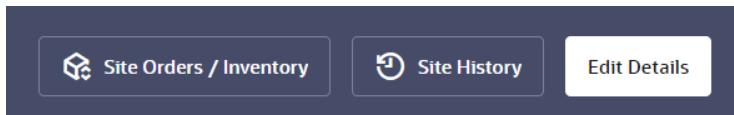


## Tabs

On information pages, users will find a series of tabs that display information about various aspects of the site (Figure 4). The currently displayed tab will be bold and underlined.

Figure 4: Tabs example



# Site Portal Home Page

When users log into the system, they will be greeted by the Site Portal Home Page (Figure 5). From here, they can select tiles or the hamburger menu to navigate.

Users with access to multiple Sites can select their site name (top right) to view a list of the other Sites. They can then select another Site name to work on that site.

Figure 5: Site Portal Home Page



Figure 6: Site name example



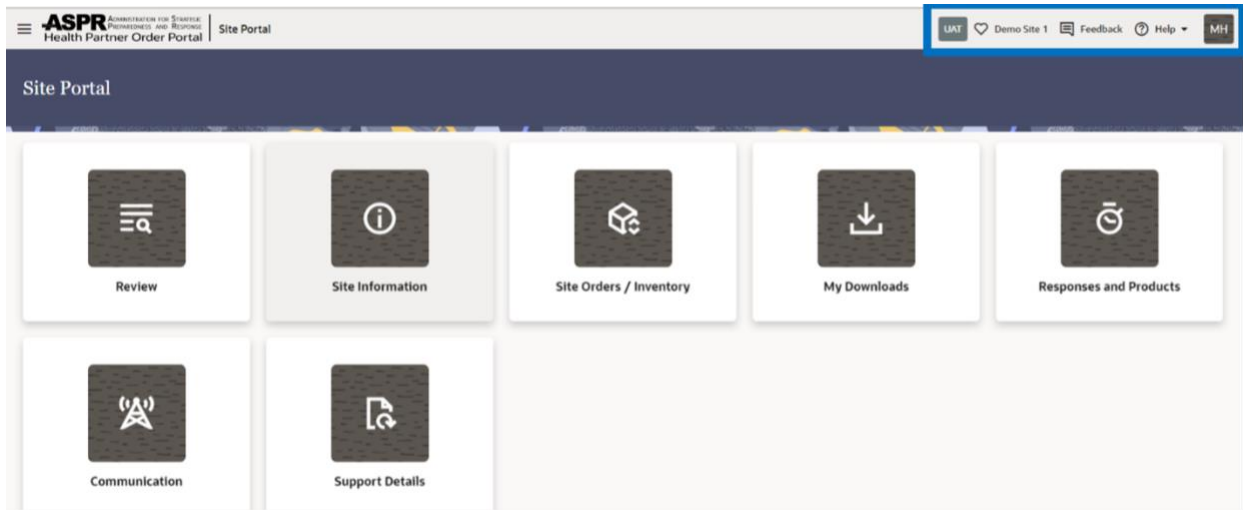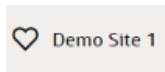The user's initials (top right) allow the user to edit their profile, logout, etc.

Figure 7: User initials and help example
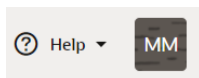


Each of the tiles will be described in following sections. (To order product or enter inventory updates on product, select the "Site Orders/Inventory" tile.)

# Site Information

When users select the Site Information tile, they will be able to view the screen below (Figure 8). Each of the tabs will be described in the following subsections. There are buttons in the upper right; the Site Orders/Inventory button is a constant and will jump directly to the Site Orders/Inventory page. The other buttons will change depending on the selected tab.

Figure 8: Details tab
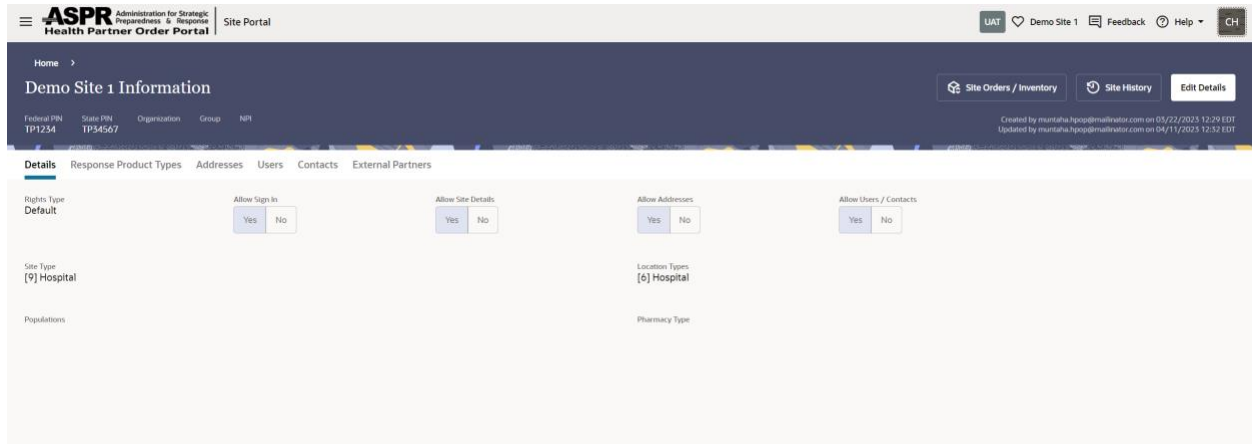


## Site Information → Details

Figure 8, shown above, is the default view.

This page allows users to view the rights, permissions, Site Type, and Location Type for the Site (typically set by the Partner, who can also set the Site's ability to edit the settings).

The buttons in the upper right allow users to take the action of viewing the site history and to edit details of the site, as shown in Figure 9.

Figure 9: Maintain Site Details options
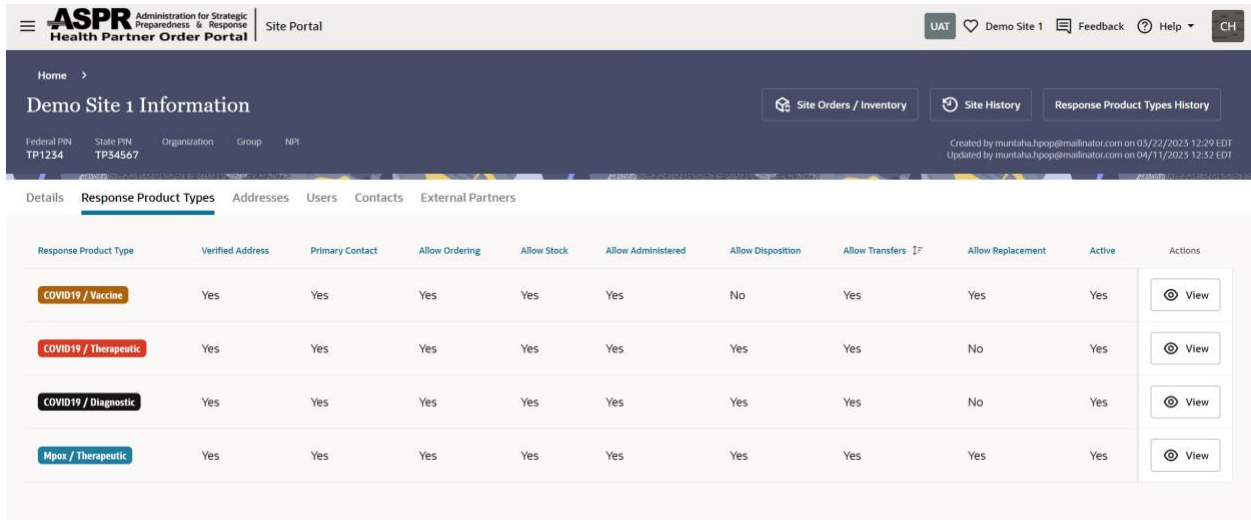


## Site Information → Response Product Types

This tab lists the permissions assigned to the site for each response product type.

The button in the upper right allows users to view the history of settings for each Response Product Type. (See Figure 10.)

Figure 10: Response Product Types tab



## Site Information → Addresses

This tab allows users to edit site details and verify the address and hours associated with each related product the site is authorized to receive.

The button in the upper right allows users to create a new address for a product.

Figure 11: Addresses tab
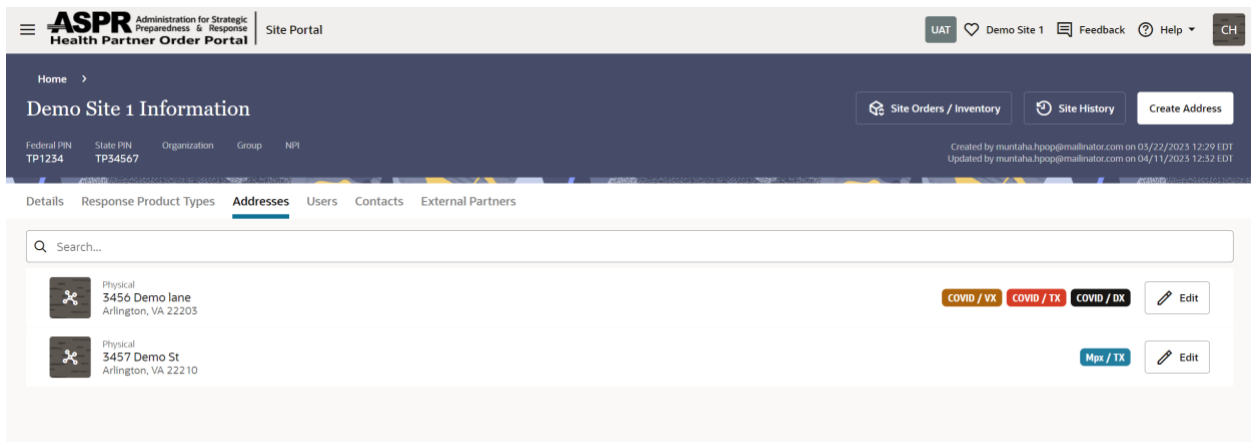


### Site Information → Users

This tab allows users to add and edit information and permissions for site users. Users are uniquely identified by their email address. Users are associated with one or more Response Product Type. Users will be able to log into the system and have permissions to access various screens and tasks. Users may also be contacts. (See Figure 12.)

Figure 12: Users tab



**Site Information → Users → Create a New User**

1. Select the User tab.
2. Select the Create User button.
3. Enter an email address, first name, last name, and add the Response Product type(s) the user with have permissions to manage.
4. Select Create to add the user to the site.

**Site Information → Contacts**

Allows users to add and edit contact information and permissions for site contacts. Contacts are uniquely identified by their email address. Contacts are associated with Response Product Types and must be **Primary**, **Secondary**, or **Other** contacts. (Each Response Product Type must have a Primary Contact for the Site to receive products in that Response Product Type.) Contacts may also be users, but only users will be able to log into the system and have permissions to access various screens and tasks. (See Figure 13.)

Figure 13: Contacts tab
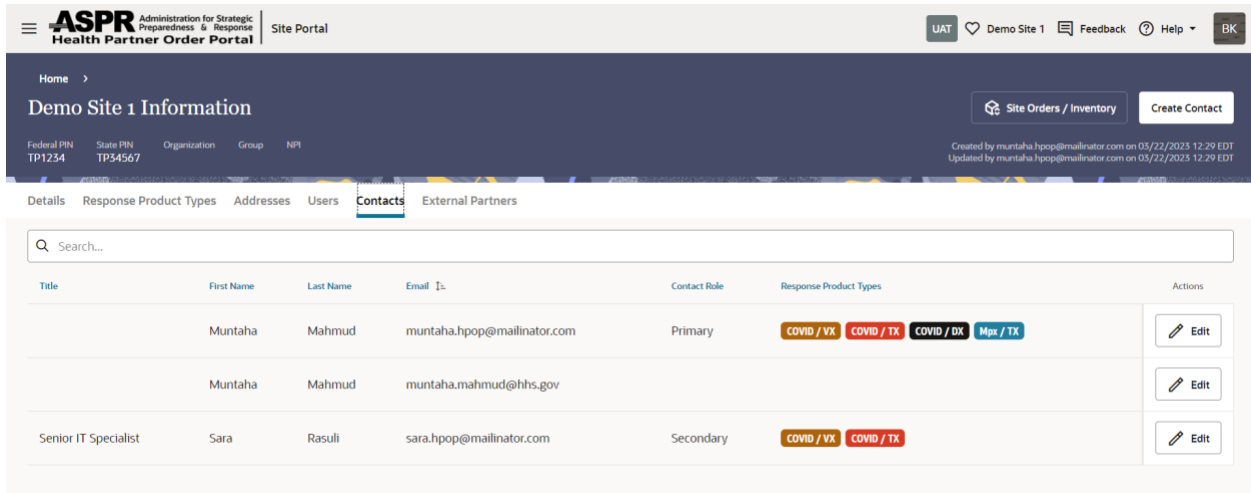


## Site Information → Contacts → Create a New Contact

1. Select the Contacts tab.
2. Select the Create Contacts button.
3. Enter an email address, first name, last name, and add Response Product Type(s). The contact will be the information source.
4. Select the Primary, Secondary or Other button to assign the contact role.
5. Select the Create button to complete to add the contact to the site.

*Note: A site must have a Primary Contact Role.*

## Site Information → External Partners

Allows users to view the information of Partner(s) associated with the Site besides their primary Partner. By selecting the **View** button, users can view which Response Product Types are associated with External Partners.

Figure 14: External Partners tab
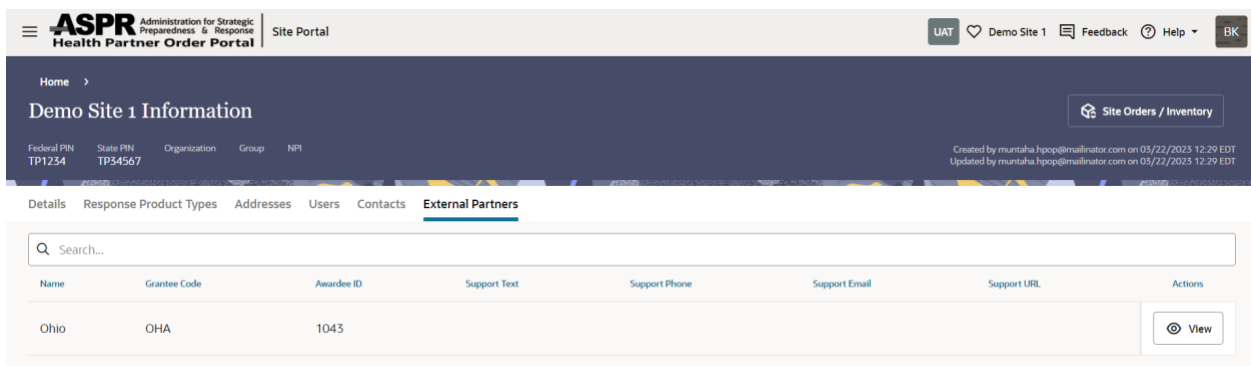
# Site Orders/Inventory

When users select the Site Orders/Inventory tile, they will be able to view the screen below (Figure 15). There are buttons in the upper right; the **Site Information** button is a constant and will jump directly to the Site Information page. The other buttons will change depending on the tab selected.

Figure 15: Orders tab



## Site Orders/Inventory → Orders

Allows users to view and search all orders in a table whose columns include **Response Product Type** (e.g., COVID Diagnostics, COVID Therapeutics, and COVID Vaccine), **Key** (a unique identifier for the order), **Order Date**, **Order Lines** (how many products were part of the order), **Quantity**, **Order Status**, **Order Type**, and **Processing Type**. At the right of each row is an **Action** menu from which users can view more information about the order or cancel the order if it is in a submitted status.

The **Create External Order** and/or the **Create Order** buttons at the upper right will be displayed if the external partner or partner, respectively, has assigned ordering rights to the site. When the buttons are present, the user can create an external order with their external partner and/or an order with their primary partner.

**Site Orders/Inventory → Orders → Create an Order**

1. Select the **Order** tab.
2. Select the **Create Order** button in the upper right of the window.

   Selecting Create Order begins a guided series of steps. As each step is completed, the information collected in that step will be displayed on the Create Order page and the system will move to the next step (See Figure 16).

3. Select the **Response Product Type** for this order.

Examples of Response Product Types include COVID19/Vaccine, COVID19/Therapeutic, COVID19/Diagnostic, and Mpox/Therapeutic, as shown in Figure 16.
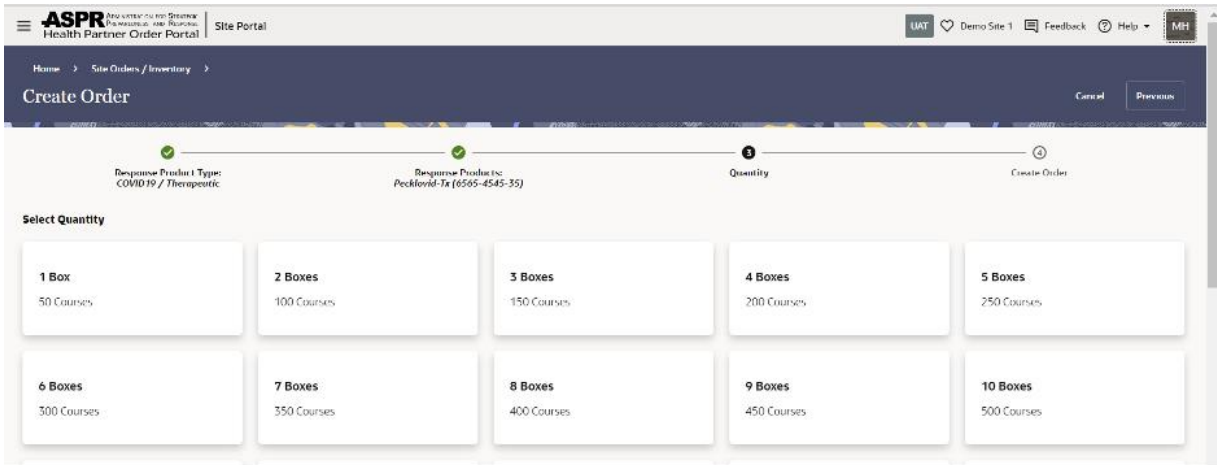
Figure 16: Select a Response Product Type
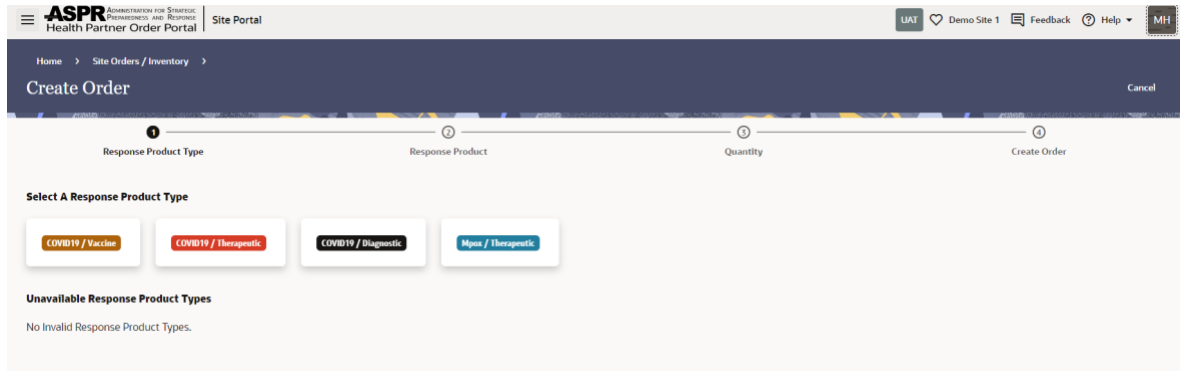


4. Select the **Response Product** for the selected Response Product Type (See Figure 17).

- Examples of a product include Paxlovid for COVID Therapeutic or TPOXX for Mpox Therapeutic.
- This step will be skipped if there is only one response product available at the site for the selected Response Product Type.
- Products that are unavailable to the user and the reason they are unavailable will also be displayed.

Figure 17: Select Response Product
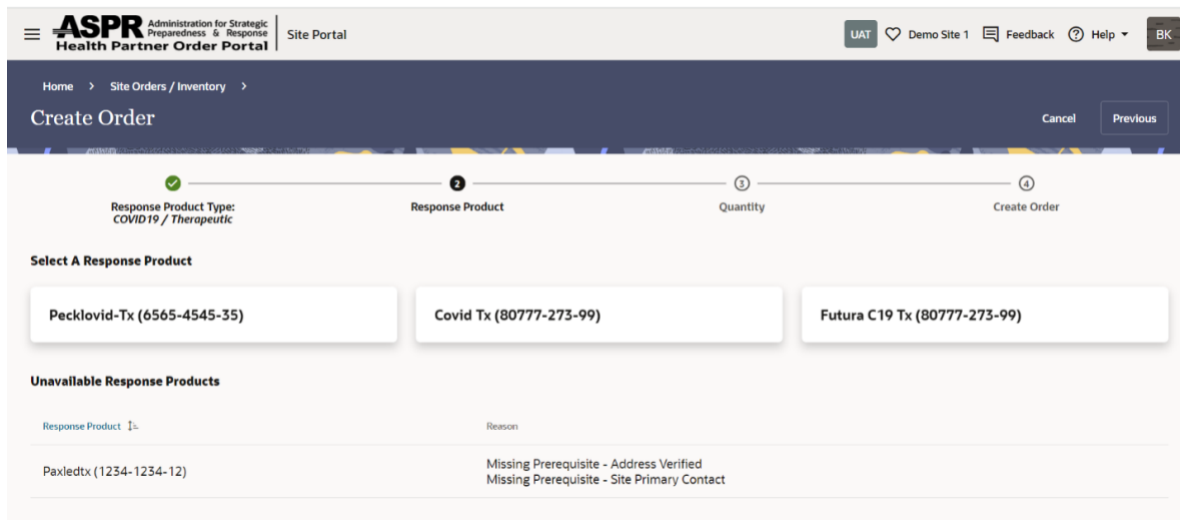


5. Select the desired quantity of the product.

- Each tile will display the quantity of order units and how much product each order unit includes, ranging from the minimum ordering unit allowed in an order to the largest allowed per order. (See Figure 18.)
- It may be necessary to scroll down and allow the page to load additional options to find larger quantities.

Figure 18: Select Quantity



6. Submit the order, add an additional order line for a product of the same Response Product Type, cancel an order line, or cancel the entire order as shown in Figure 19.
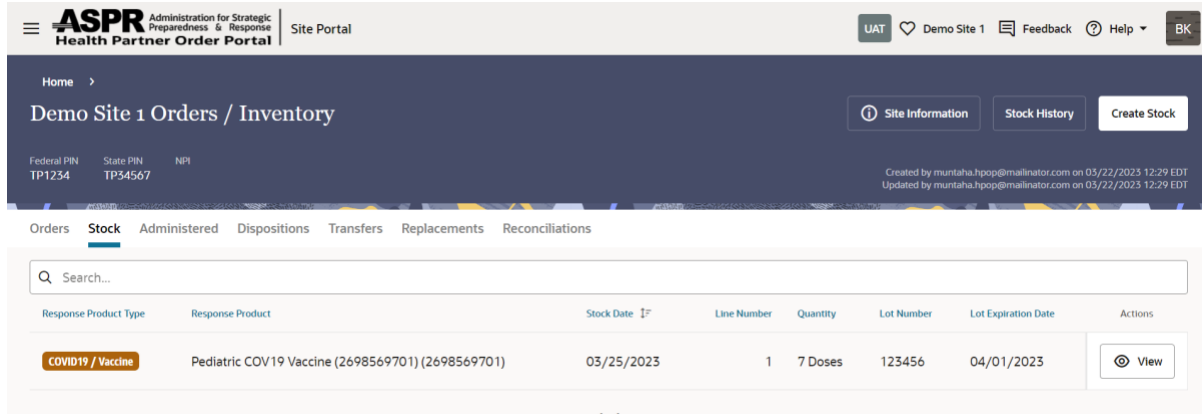
Figure 19: Complete Order
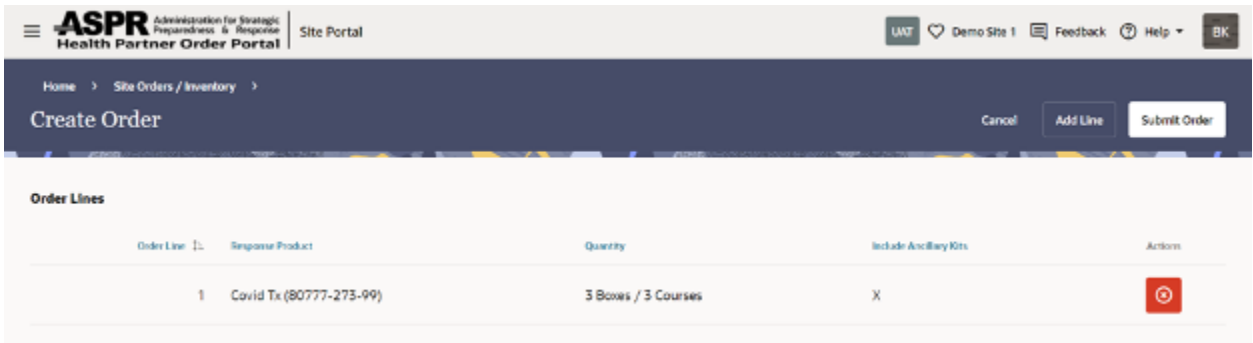


**Site Orders/Inventory → Stock**

The **Stock** tab is where users can enter USG-provided stock on hand.

The **Create Stock** and **Stock History** buttons in the upper right of the window allow users to create a stock on hand record and edit previous stock records, respectively, as shown in Figure 20.

Figure 20: Stock tab



## Site Orders/Inventory → Stock → Create a Stock on Hand Record

1. Select the **Create Stock** button.
2. Enter the Response Product Type, Response Product, date, and quantity (See Figure 21).

   Required fields are assigned by the partner and other required fields may be present e.g., Lot Number and Expiration Date.

3. Select **Create** to add a new the stock on hand record.

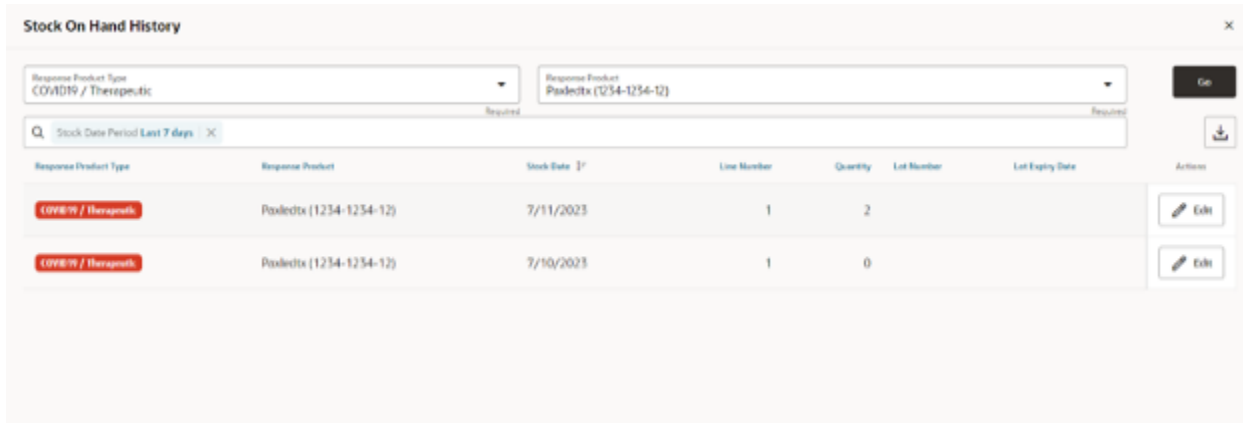Figure 21: Maintain On Hand Stock options
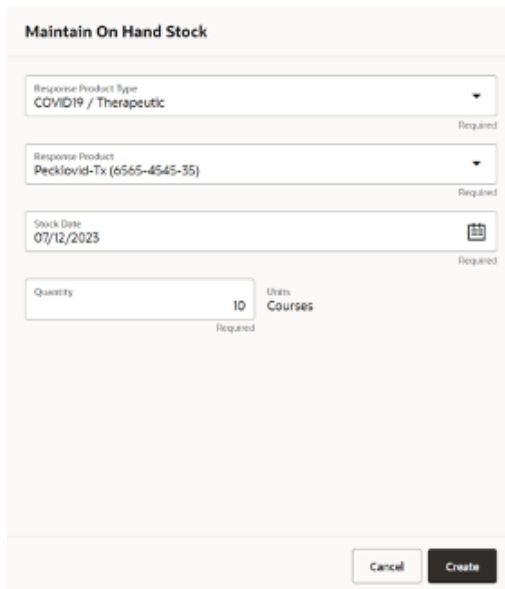


## Site Orders/Inventory → Stock → Modify a Previous Stock Record

1. Select the Stock History button.
2. Select the Edit button to the right of the stock record of interest.
3. Enter the correct quantity and/or date.
4. Select Create to update the stock on hand record, as seen in Figure 22.

Figure 22: Maintain On Hand History



## Site Orders/Inventory → Administered

This tab allows users to see and enter information about when and how much of a product was administered to customers or patients.

The **Create Administered** and **Administered History** buttons at the upper right of the window allow users to create new product administered record, and view or edit previous records, respectively, as shown in Figure 23.

Figure 23: Administered tab
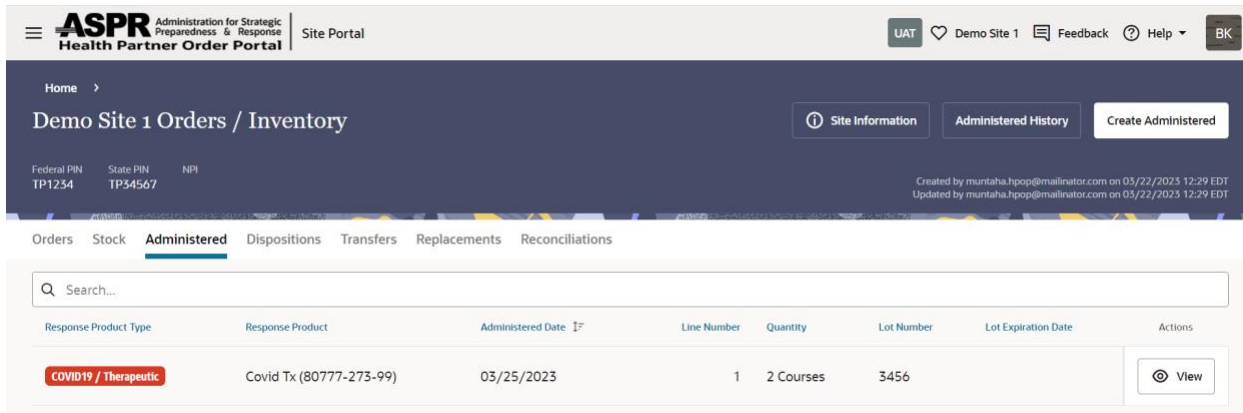


## Site Orders/Inventory → Administered → Create a New Administered Record

1. Select the **Create Administered** button.
2. Enter the Response Product Type, Response Product, date. and quantity (See Figure 24).

   Required field are assigned by the partner and other required fields may be present (e.g., Lot Number and Expiration Date).

3. Select **Create** to add a new product administered record.

## Site Orders/Inventory → Administered → Modify a Previous Administered Record

1. Select the **Administered History** button.
2. Select the **Edit** button to the right of the administered record of interest.

3. Enter the correct quantity and/or date.
4. Select **Create** to update the product administered record.

Figure 24: Maintain Administered options



## Site Orders/Inventory → Dispositions

This tab allows users to enter information about products that are no longer available due to damage, expiration, destruction, return to the manufacturer or distributor, or other reasons.

The **Create Disposition** button at the upper right allows users to create a disposition record, as shown in Figure 25.

Figure 25: Dispositions tab



## Site Orders/Inventory → Dispositions → Create Dispositions Record

1. Select **Create Dispositions** to create a new record.
2. Enter the Response Product Type, Response Product, Disposition Type (wasted or returned), date, disposition reason, quantity, and contact.

Required field are assigned by the partner and other required fields may be present (e.g., Lot Number and Expiration Date).

3. Select **Create** to add a new disposition record.

Figure 26: Maintain Disposition options



**Site Orders/Inventory → Transfers**

This tab allows users to enter information about product that has been transferred to other Sites.

*Note: This does not initiate an actual transfer; it only serves to capture a record of the transfer.*

The **Create Transfer** button in the upper right allows users to create a transfer record, as shown in Figure 27.

Figure 27: Transfers tab
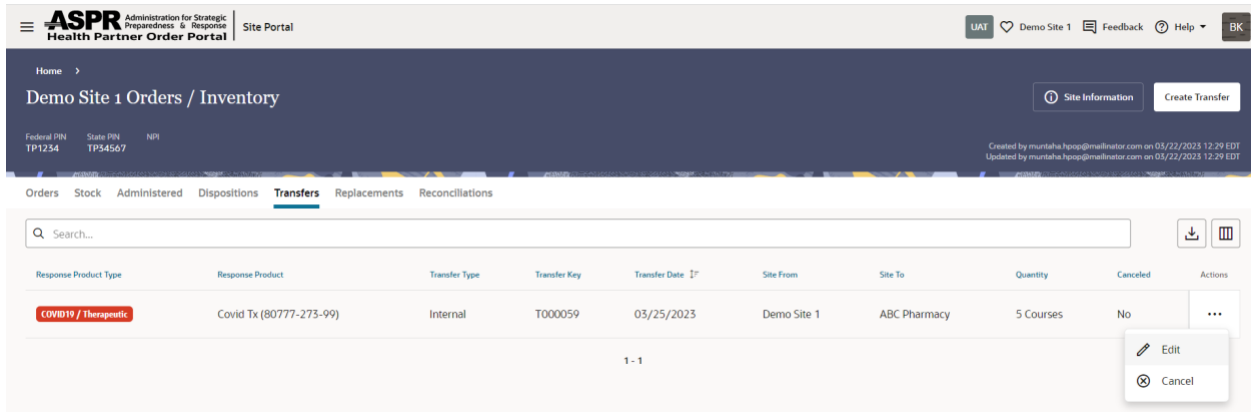


**Site Orders/Inventory → Transfers → Create a Transfer Record**

1.  Select **Create Transfer** button to create a new record.
2.  Enter the Response Product Type, Response Product, transfer date, transfer type, site, contact, quantity (See Figure 28.)
3.  Select **Create** to add a transfer record.

Figure 28: Maintain Transfer options

**Site Orders/Inventory → Replacements**

Allows users to enter information about non-federal product that has been replaced by federal product.

The button in the upper right allows users to create a replacement request, as shown in Figure 29

Figure 29: Replacements tab
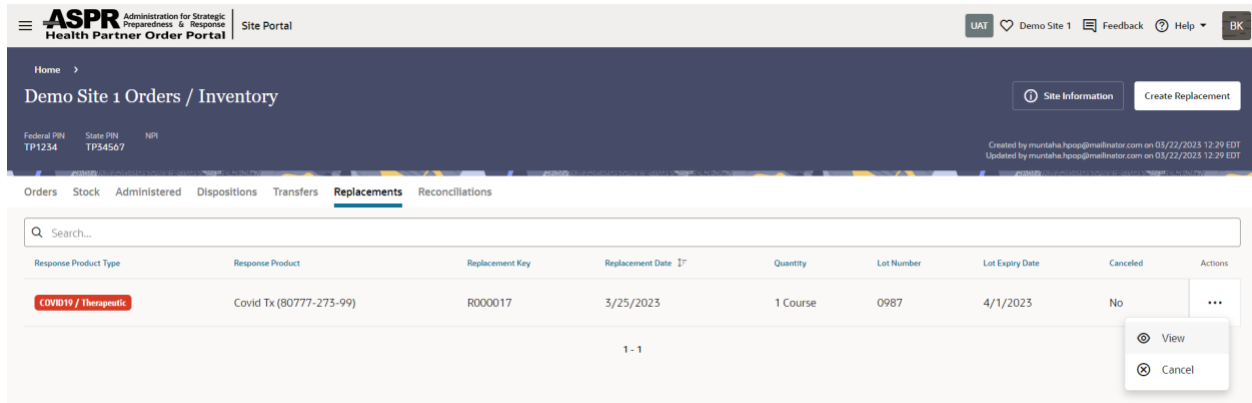


**Site Orders/Inventory → Replacements → Create Replacements Record**

1. Select **Create Replacements**.
2. Enter the Response Product Type, Response Product, Replacement Date, Replacement Reason, and quantity. (See Figure 31)
3. Select **Create** to add a replacement record.

Figure 30: Maintain Replacement options



## Site Orders/Inventory → Reconciliations

Allows users to view a summary of the orders, replacements, transfers, administrations, and dispositions for products in defined time periods.

Figure 31: Reconciliations tab