PPE Supply Portal User Guide V8 August 4, 2022

Contents

1.	Pu	rpose	1
2.	Use	er Manual and Support Available	2
3.	Glo	ossary	2
4.	Log	g-in and Password Reset/Change	3
	4.1.	How to Log-in to the System	3
	4.2.	How to Change Your Password	3
	4.3.	What to do if it's your First Time Logging In or if You Forgot Your Pass	sword 4
	4.4.	How to Change Your Contact Information	5
5.	Ma	nage Orders	7
	5.1.	How to Place an Order	7
	5.1	.1. How to Find Your Required Item	7
	5.1	.2. How to Checkout	9
	5.1	.3. What Happens After You Submit Your Order	12
	5.2.	When Your Order Must Be Modified/Edited After Submission	13
	5.2	.1. Editing the Shipping Address After Submission	14
	5.2	.2. Editing Order Items After Submission	16
	5.3.	How to Select an Address from a Multi-Address Account	19
	5.4.	How to Enter a New, One-Time Shipping Address	20
	5.5.	How to Submit Multiple Orders, to be Sent to Different Addresses	23
	5.6.	How to View Order History	23
	5.7.	Re-Ordering Items	24
	5.8.	View Order Status	25
6.	Ad	ministrative Functions	26
	6.1.	Change Shipping Address	26
	6.2.	Change Organization Address	27
	6.3.	Cancelling an Order	29
	6.4.	Managing or Adding New Contacts for the Organization	29
	6.5.	Adding/Removing Administrative Privileges for Contacts	31
	6.6 H	ow to Find Out Who Placed a Specific Order within an Account	32
		aracter Limits	



1. Purpose

To streamline the Critical Supplies and Equipment (CSE) request processes, and to capitalize on the stabilization of the supply chain, the province has broadened its vision for Personal Protective Equipment (PPE) stewardship and is shifting to a coordinated model for the distribution of PPE. In this new model, all in-scope organizations will order PPE from the government's stockpile through an integrated order management system, called the PPE Supply Portal (PSP).

New users from various sectors will continue to be brought onboard to support ordering of specific items such as Community PPE kits via the PPE Supply Portal.

Additional functionalities will be implemented in subsequent phases to enhance the user experience.

If you are being invited to order products via the PPE Supply Portal, your organization has already been pre-registered in the Portal. This includes the creation of a profile that reflects your organization's name, organizational address, shipping address(es), and other relevant details.

This document will provide guidance on how to access your profile and navigate the order management system. Instructions below, include how to log-in and access your account, manage your profile, and place orders.

Please note that this is an evolving document that will be updated as the ordering solution evolves. If you have any questions, feedback or concerns about the ordering process, please contact your Ministry of Public and Business Service Delivery Point of Contact (MPBSD PoC) or email SCO.Supplies@ontario.ca.

Please note, the PSP does support ordering in English and French. The chosen language of the website when an order is placed will establish the language of all communications related to that order.

For example, if a user has the website in the English setting, all communications for that order will be in English. Please note, that if a user is looking at their Order History and switches the website to French, some of the text may not change to French since the order was placed when the website was in the English setting.



2. User Manual and Support Available

Below is a step-by-step guide to help users submit an order into the PPE Supply Portal. If you have any points that need clarification or questions about the steps listed below, please do not hesitate to reach out.

If you have technical questions, reach out to the Help Desk, between 8am – 5pm ET, 7 days / week:

o Local: 416-246-7172

o Toll Free: 1-888-444-9102

o ppesupplyportalhelp@ontario.ca

If you have business-related questions, please reach out to your MPBSD PoC via email at: SCO.Supplies@ontario.ca.

3. Glossary

In this section you will find a list of commonly used terms that are referenced throughout this document.

- o **Order**: This refers to the request for products from the user through the PPE Supply Portal.
- Order Status: "Order Status" refers to the status of an entire, single order that may include multiple products. Order Status is sometimes shown as "Status" on the website. There are two states for Order Status:
 - In Progress (once the order has been placed)
 - Complete (once item has been shipped from the warehouse or has been cancelled)
- MPBSD Point of Contact (MPBSD PoC): An MPBSD staff person who supports representatives from different organizations with the ordering process.
- Contacts: Users of the PPE Supply Portal who all belong to the same organization and can order PPE for their organization through the PPE Supply Portal.
- Administrator: Contacts that have administrative rights and can add/manage account details for other contacts within their organization.



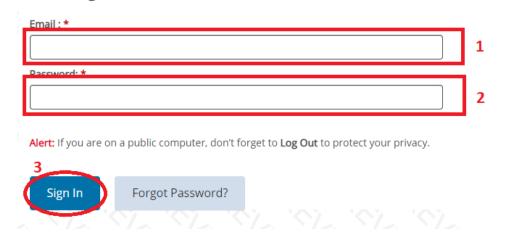
4. Log-in and Password Reset/Change

4.1. How to Log-in to the System

- o Navigate to ppesupply.ontario.ca
- Type in your username (email address)
- Type in your password
- o Click on "Sign In"

Sign In

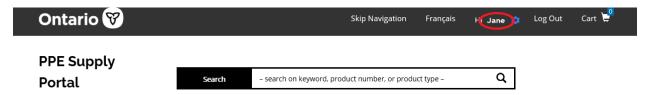
Returning Users



- Please note, for the first-time log-in, you will receive an email saying an online account has been created for you
 - Follow the link in that email to reset your password and activate your account

4.2. How to Change Your Password

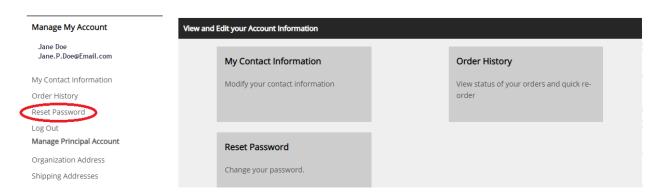
- Log in to the system (see section 4.1 How to Log-in to the System for detailed instructions)
- Click on your name in the tool bar on the top of the page



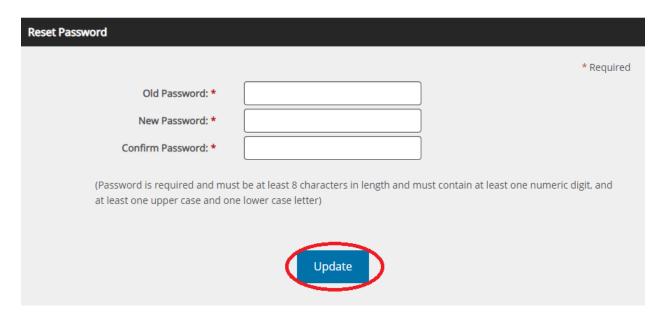


 Under the tool bar on the left-hand side of the screen click on "Reset Password"

My Account



o Follow the instructions on the page and click "Update"



4.3. What to do if it's your First Time Logging In or if You Forgot Your Password

- o Navigate to ppesupply.ontario.ca
- o Click on "Forgot Password"



Sign In

Returning Users Email: * Password: * Alert: If you are on a public computer, don't forget to Log Out to protect your privacy. Sign In Forgot Password?

- Enter your email address (that was used to enroll you in the PPE Supply Portal)
- o Click on "Send Email"

Forgot Your Password?

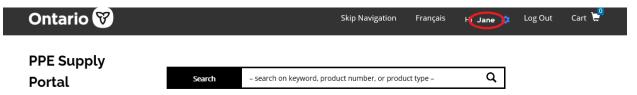
Enter the email address you use to log into your account and we will send you a password reset link



- Check your inbox for an email with further instructions on how to reset your password
 - Please check your junk folder if you are unable to find the password reset email

4.4. How to Change Your Contact Information

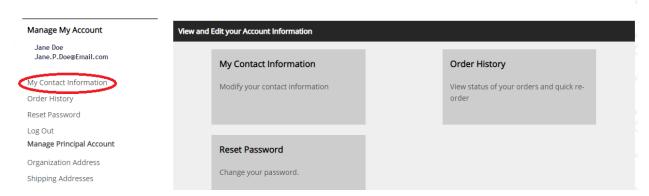
- Log-in to the system (see section 4.1 How to Log-in to the System for detailed instructions)
- Click on your name in the tool bar on the top of the page



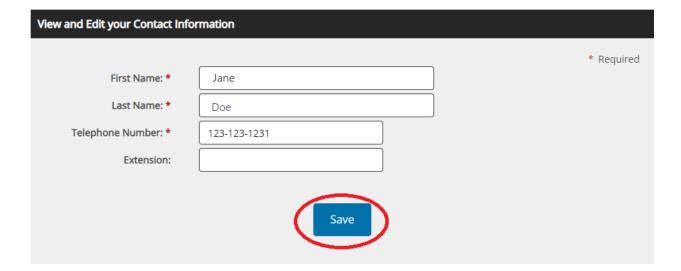
o Click on "My Contact Information" on the left-hand side menu



My Account



- o Change information as needed
- o Click "Save"



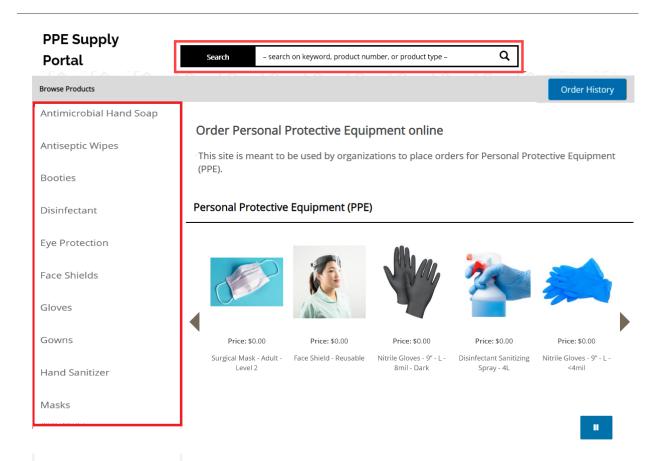


5. Manage Orders

5.1. How to Place an Order

5.1.1. How to Find Your Required Item

- Log into the system using your email and password (see section 4.1 -How to Log-in to the System for detailed instructions)
- Use the list of product categories on the left-hand side, to view products; or
- Click on the search bar at the top of the page
 - Enter a keyword relating to the product you would like to order e.g., "gloves"; "nitrile"; "4mil"
 - When applicable, you can refine your search with additional filters using the tool bar on the left-hand side



- Select the desired item from the search results page to view more details about the product
 - Certain products may have additional attributes to select (e.g., material for gloves). Please select according to your needs.



- Enter the desired quantity in eaches for all products except for liquids (e.g., sanitizers, soaps, sprays, etc.) which should be ordered by number of containers
 - For example, entering "1" in the quantity field for "Hand Sanitizer
 1L" translates to a 1L container of hand sanitizer
 - For example, entering "1000" in the quantity field for gloves translates to 1000 individual gloves (500 pairs)
- Click "Add to Cart"
 - Repeat steps to add additional products to your Cart

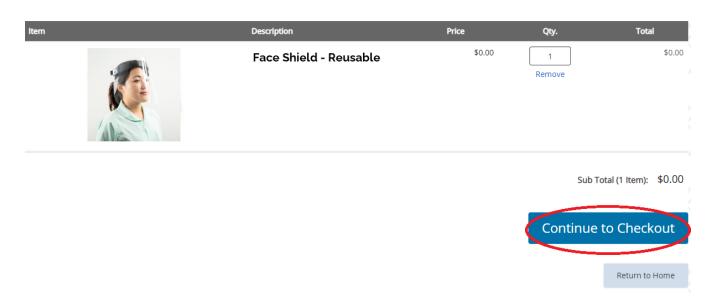


All product images shown are for illustration purposes only and may not be an exact representation of the product(s) you will receive.

 When you are finished adding products to your Cart, review your order and select "Continue to Checkout"



Cart



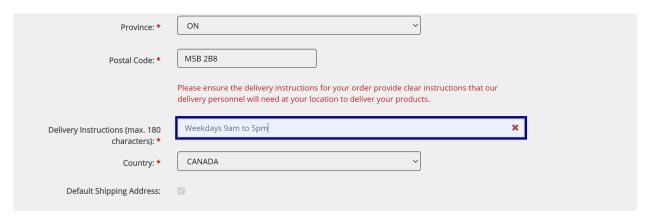
Please note that there is a 24-hour time-out function in this system. After 24 hours of inactivity, your order and/or cart details will be lost. Your order will also be lost if you close your browser. Please plan to complete your order within a 24-hour period as there is no auto-save functionality.

5.1.2. How to Checkout

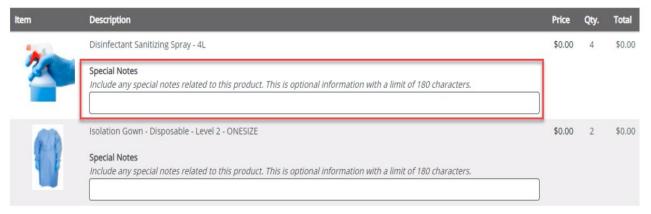
- Review organization address and shipping address
- Use the delivery instructions field to provide clear instructions that the delivery personnel will need to deliver the products. Due to the limited characters (180 maximum) available for the delivery instructions, please use short sentences and abbreviations to ensure all instructions are mentioned as shown in the following example:
 - Instead of: Deliver Mondays to Fridays from 9:00am to 5:00pm.
 Use the entrance behind the building which is locked. To gain entrance, ring the doorbell and somebody will come to meet you
 - Use: Deliver weekdays 9am to 5pm. Use back door entrance off Elgin St. Ring doorbell.
 - The information entered in the Delivery Instructions field will be saved and automatically prepopulated for the next order to this address (does not apply to one-time shipping addresses).
 Please ensure you enter/review the prepopulated Delivery Instructions and make any required changes before continuing by clicking on the "Edit" link.



If your pre-populated address is incorrect, refer to section 5.3 – How to Select an Address from a Multi-Address Account or section 5.4 - How to Enter a New, One-Time Shipping Address to change your shipping address.



- If you have specific requirements related to products in your order, you
 may enter these in the Special Notes fields (optional 180 characters
 maximum). These notes will be viewable by the order processing team.
 - For example, you might request "Unscented only, please", when adding hand sanitizer to your cart.



- o Click "Continue"
 - Please note, a valid Ontario postal code with the format A1A1A1 is required to proceed.





- Insert an order reference number, if you require one (Note: this field is for client-use only and is not viewable by the order processing team)
- Answer the mandatory questions regarding PPE Inventory, PPE conservation and COVID-19 guidance, or regarding Rapid Test Medical Devices.
 - Please note the mandatory questions are specific to the product types contained in the order and are only presented when they are applicable.

Additional Information

Order reference number (max. 180 characters)				
Have engineering and administrative control measures been implemented in your workplace to conserve CSE/PPE? *				
O Yes				
○No				
Does your order align with guidance on COVID-19 for your workplace? *				
○Yes				
○No				
Does your workplace have a supply storage of under 14 days of stock? *				
○Yes				
ONe				

- Please review your order details, Special Notes that you entered, and the Delivery Instructions (use the Edit function to adjust the delivery instructions, if required).
- Once you have reviewed your order, select "Submit Your Order" and you will receive a notification email confirming the order has been received

Please ensure the delivery instructions for your order provide clear instructions that our delivery personnel will need at your location to deliver your products.

Please deliver between 3pm and 5pm Edit





 If your order has been submitted successfully, you will be presented with the Confirmation screen. From here, you will be able to:

Start a New Order:

This will return you to the home page, where you may browse for new items to add to your cart.

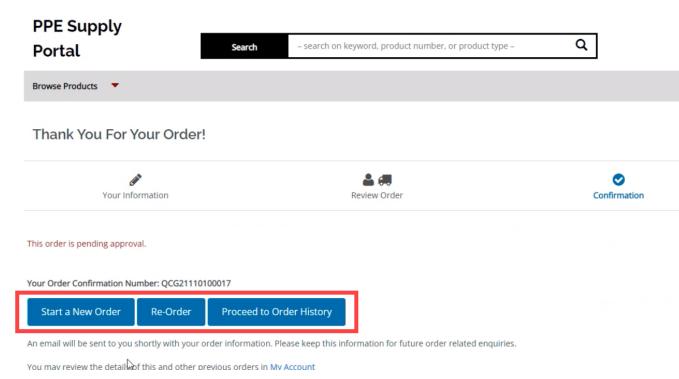
Re-Order

This will add the items that you just ordered to your cart, again, so you can quickly place another order for the same items.

Proceed to Order History

This will take you to your order history, where you can see the details of the orders that you have submitted in the past.

Administrators will also be able to see order details for orders placed by other delegates in their organization (see section 6.6 How to Find Out Who Placed a Specific Order within an Account).



If your order must be changed after submission, refer to section 5.2 –
 When Your Order Must be Modified/Edited After Submission.

5.1.3. What Happens After You Submit Your Order

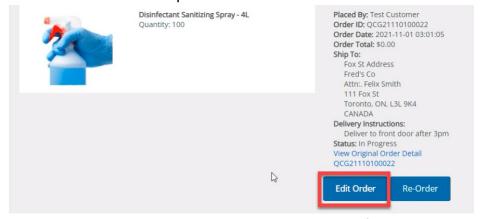
- After the order is entered, you may be contacted for further information to determine if your order can be approved and fulfilled
 - Order Status will be "In Progress"



- Please see section 5.8 View Order Status for steps on how to find this information on the portal
- If your order was not approved, your MPBSD PoC will reach out to you
- Please note that the selected products in your order will be fulfilled based on product availability and may require substitutions or modifications
 - In rare cases, your order may need to be cancelled after it is approved. If this occurs, you will receive an email notification that your order has been cancelled, and your MPBSD
 - PoC will reach out to you.
- Once the order is shipped from the warehouse, you will receive a shipment notification email with a packing list
 - Order Status will be "Complete"

5.2. When Your Order Must Be Modified/Edited After Submission

- Go to Order History and find the order you wish to modify, as detailed in section 5.6 - How to View Order History.
 - "In Progress" orders may be modified up to two times (twice) however a "Complete" order cannot be modified (see section 5.8 View Order Status).
 - If changes are required for an order with a status of "Complete", or if you have already submitted edits to the order, twice and need to make further changes, contact SCO.Supplies@ontario.ca for assistance to cancel your original order and submit a new order.
- Select the "Edit Order" option



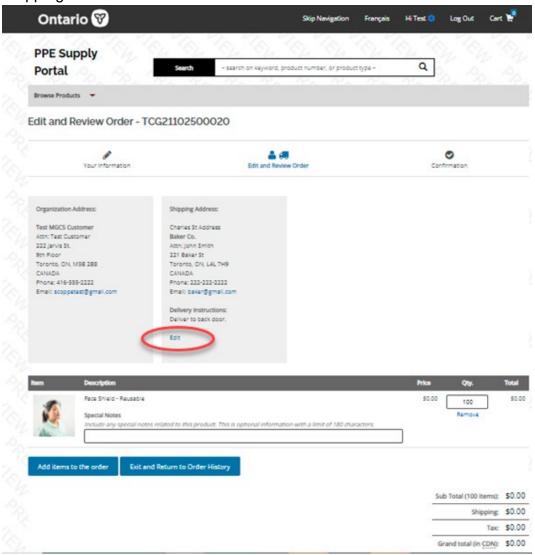
 You may edit the shipping address, using the edit function in the Address pane, and/or modify special notes for items, items quantities, remove items, or select "Add Items to Order" to browse for new items to include.



- To change/modify the shipping address, using the edit function in the Address pane refer to section 5.2.1 -Editing the Shipping Address After Submission.
- To modify change special notes, item quantities, remove items, or add items to the order, refer to section 5.2.2 Editing Order Items After Submission.

5.2.1. Editing the Shipping Address After Submission

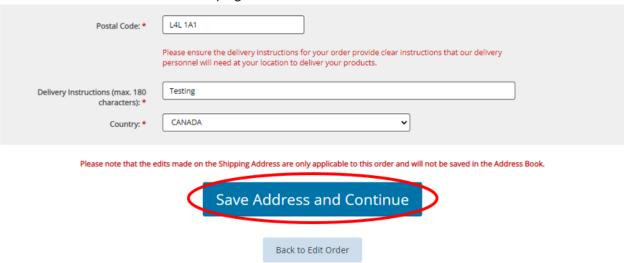
- Find the order you wish to modify, as per section 5.2 When Your
 Order Must Be Modified/Edited After Submission
- To edit the Shipping Address for this order, click on "Edit" in the Shipping Address box



 You can edit the current address, select another address, or create a one-time shipping address.



- Please note that edits made on the Shipping Address are only applicable to this order and will not be saved in the Address Book.
- Select "Save Address and Continue" button to save the change to the address and return to the edit order page.
 - Note, the "Back to Edit Order" button will discard the edits made to the address and return you to the edit order page.



- If there are any further changes required to the order, refer to section
 5.2.2 When Your Order Must Be Modified/Edited After Submission or refer to section
 5.1.2 How to Checkout to submit your changes.
 - Note that changes are not final until you click the "Submit Your Order" button, at the end of the checkout process.
 - Should you wish to cancel your changes during the checkout process, select the "Exit and Return to Order History" button.

Please ensure the delivery instructions for your order provide clear instructions that our delivery personnel will need at your location to deliver your products.

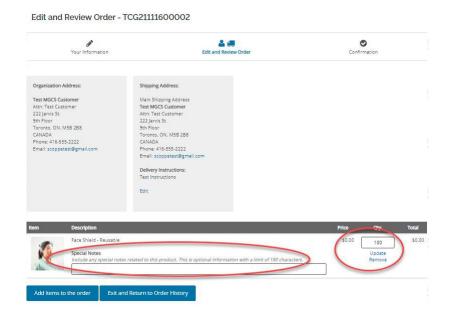
Please deliver between 3pm and 5pm Edit





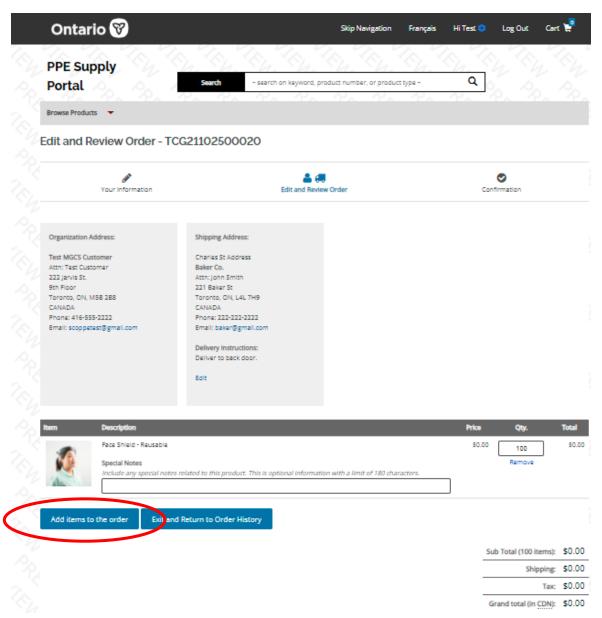
5.2.2. Editing Order Items After Submission

- Find the order you wish to modify, as per section 5.2 When Your Order Must Be Modified/Edited After Submission.
- In the Edit and Review Order screen, you may change the special notes, modify item quantities or remove an item, directly.
 - Remember to click the "update" button when changing item quantities



 If you would like to add items to the order, select the "Add Items to the order" button, to be directed to the Browse Products screen.





 Select the products and quantities you would like to add to the order and click "Add to Order".



Add Items to the Order



- When your changes are complete, select "Review Order and Save Changes" to continue to checkout.
 - The "Review Order and Save Changes" buttons will save your changes and navigate you back to the edit order page, where you can continue to checkout.
 - The "Reject Changes and Continue Shopping" buttons will discard the changes and exit out of the Edit Order functionality.

Add Items to the Order



- If there are shipping address changes required to the order, refer to section 5.2.1 - Editing the Shipping Address After Submission or refer to section 5.1.2 - How to Checkout to submit your changes.
 - Note that changes are not final until you click the "Submit Your Order" button, at the end of the checkout process.
 - Selecting any of the pages in the site header (e.g., My Account, Cart, Home Page) will navigate you out of the Edit Order



- functionality and all changes made to the order will be discarded.
- Should you wish to cancel your changes during the checkout process, select the "Exit and Return to Order History" button.

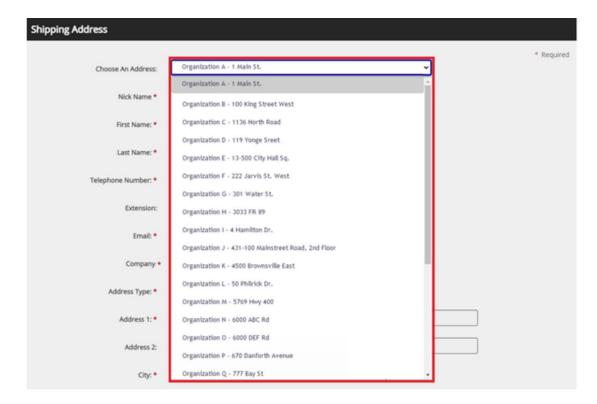
Please ensure the delivery instructions for your order provide clear instructions that our delivery personnel will need at your location to deliver your products.

Please deliver between 3pm and 5pm Edit



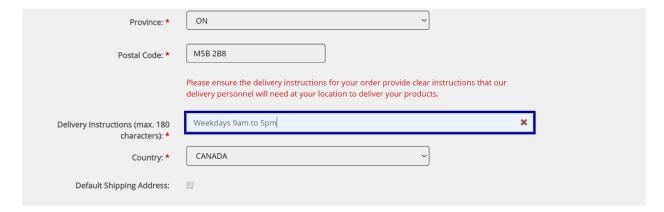
5.3. How to Select an Address from a Multi-Address Account

- Identify your product from the search bar, and "Add to Cart", as detailed in section 5.1.1 – How to Find Your Required Item
- On the checkout page, under "Shipping Address" select a different address from the "Choose an Address" dropdown menu





- Use the delivery instructions field to provide clear instructions that the delivery personnel will need to deliver the products. The information entered in the Delivery Instructions field will be saved and automatically prepopulated for the next order to this address (does not apply to one-time shipping addresses). Please ensure you enter/review the prepopulated Delivery Instructions and make any required changes before continuing.
- Click "Continue"
 - Please note, a valid Ontario postal code with the format A1A1A1 is required to proceed.



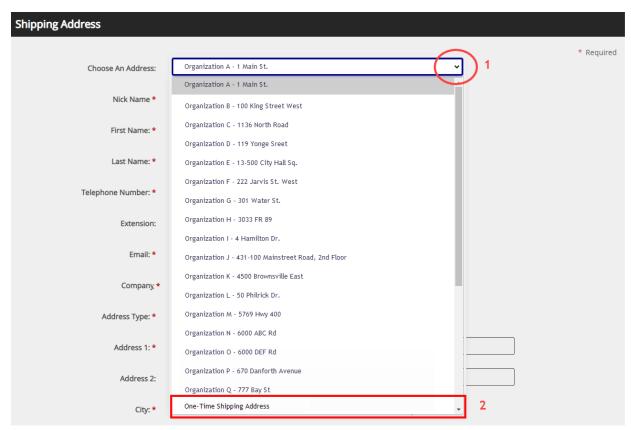
Continue

- Fields marked with a red asterisk are mandatory and must be completed before proceeding to checkout.
- o Proceed with checkout as detailed in section 5.1.2 How to Checkout

5.4. How to Enter a New, One-Time Shipping Address

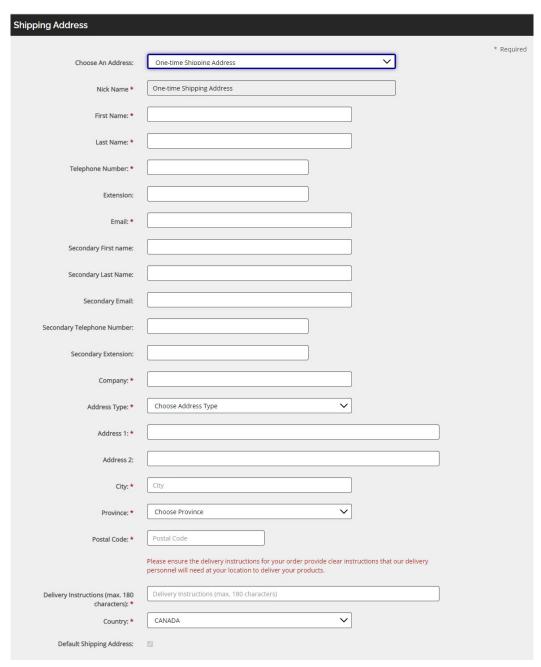
- Identify your product from the search bar, and "Add to Cart", as detailed in section 5.1.1 – How to Find Your Required Item
- On the checkout page, under "Shipping Address" select "One-time Shipping Address" from the "Choose an Address" dropdown menu





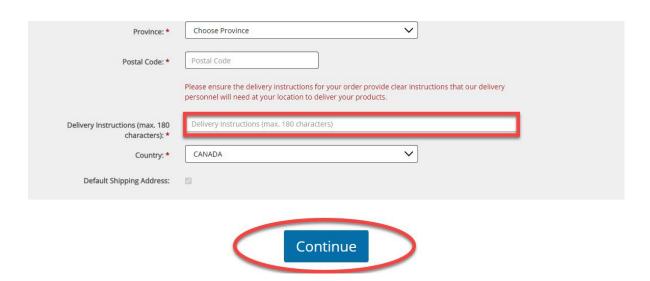
- Enter a new address. Do not select default shipping address
 - Please note, all Contact and Address fields are subject to character limits, as detailed in section 7 – Character Limits.
 - Use the delivery instructions field to provide clear instructions that the delivery personnel will need to deliver the products.
 Please ensure you enter the Delivery Instructions before continuing.





- o Click "Continue"
 - Please note, a valid Ontario postal code with the format A1A1A1 is required to proceed.
- Fields marked with a red asterisk are mandatory and must be completed before proceeding to checkout.





Proceed with checkout as detailed in section 5.1.2 – How to Checkout

5.5. How to Submit Multiple Orders, to be Sent to Different Addresses

- Please note, you will not be able to ship to multiple addresses within a single order.
- Separate orders will have to be entered for each shipping address, as detailed in section 5.1 – How to Place an Order

5.6. How to View Order History

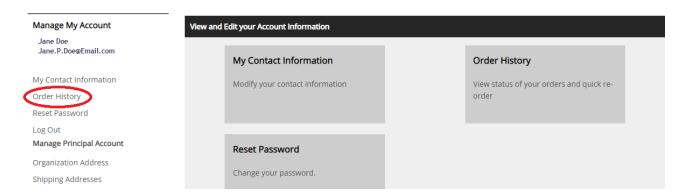
- Log into the system using your email and password (see section 4.1 How to Log into the System for more details)
- o Click on your name in the toolbar at the top of the page



- From the menu on left hand-side select "Order History", to view the items that you have ordered in the past
- Alternatively, select the « Order History » box on the right side of the screen.

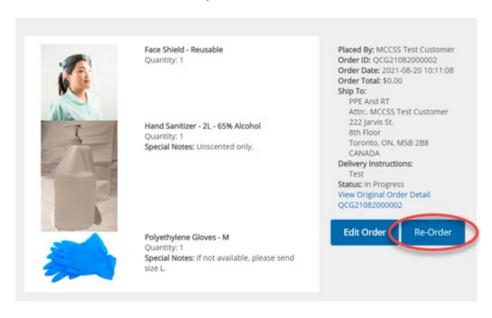


My Account



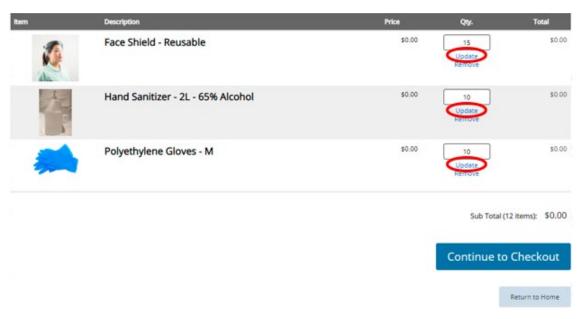
5.7. Re-Ordering Items

- Open your order history, using the steps detailed in section 5.6 How to View Order History
- Click on the blue "Re-Order" button to re-order products
 - Remember to ensure that necessary modifications are made to your order before resubmitting (e.g., change quantities, switch/add product, change Special Notes, etc.)
 - Please note, Special Notes and item quantities entered will carry over



- Once reviewed, click on "Continue to Checkout"
 - Click on "Update" if you have changed the quantity before moving to the next step

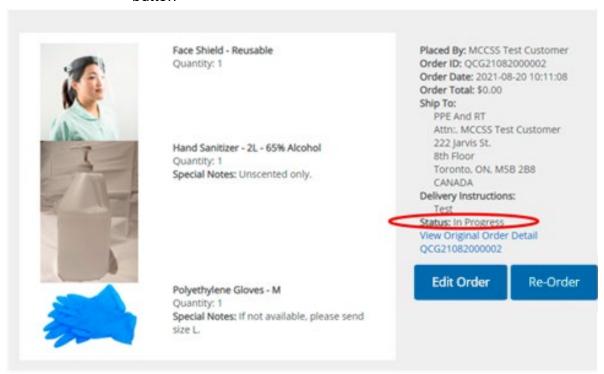




o Proceed with checkout as detailed in section 5.1.2 – How to Checkout

5.8. View Order Status

- Open your order history, using the steps detailed in section 5.6 How to View Order History
- To view Order Status, look for "Status" above the blue "Re-Order" button



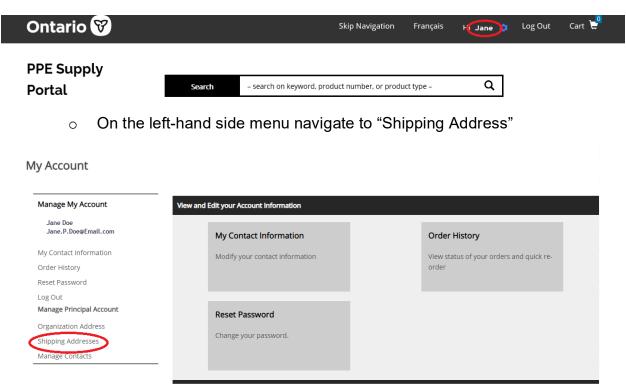


6. Administrative Functions

Please note that the following section is only applicable to those who are assigned as an Administrator for your organization. If you need to change your shipping address(es) or cancel an order and you do not have administrative rights, you can contact your organization's Administrator(s) to complete the task.

6.1. Change Shipping Address

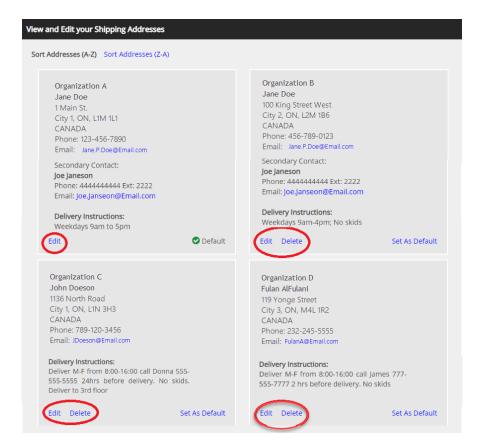
- Log into the system using your email and password (see section 4.1 How to Log into the System for more details)
- Click on your name in the toolbar at the top of the page



- You will be able to edit your shipping address(es) here or add a new one
 - Please note, all Contact and Address fields are subject to character limits, as detailed in section 7 – Character Limits.
 - Please note, a valid Ontario postal code with the format A1A1A1 is required to proceed.
 - Use the delivery instructions field to provide clear instructions that the delivery personnel will need to deliver the products. The information entered in the Delivery Instructions field will be saved and automatically prepopulated for the next order to this address (does not apply to one-time shipping addresses). Please ensure you



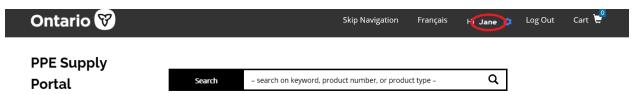
enter/review the prepopulated Delivery Instructions and make any required changes before continuing.



Administrators can add/alter shipping addresses multiple times

6.2. Change Organization Address

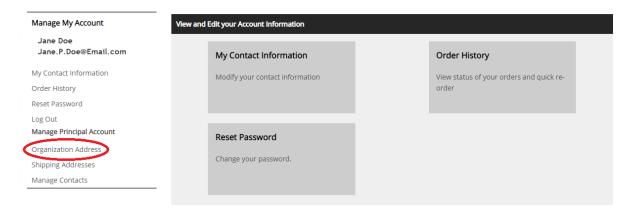
- Log into the system using your email and password (see section 4.1 How to Log into the System for more details)
- Click on your name in the toolbar at the top of the page



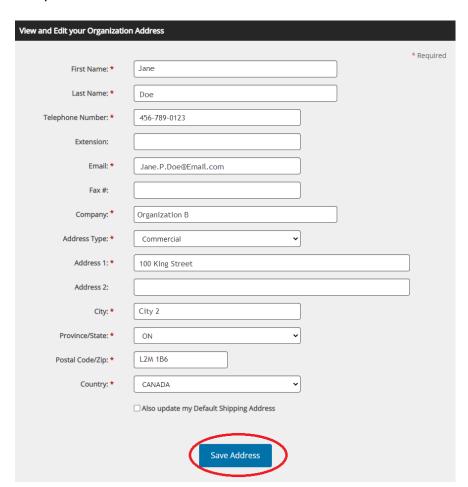
On the left-hand side menu navigate to "Organization Address"



My Account



- You will be able to edit your organization address here
- Click on "Save Address"
 - Please note, all Contact and Address fields are subject to character limits, as detailed in section 7 – Character Limits.
 - Please note, a valid postal code with the format A1A1A1 is required to proceed.





6.3. Cancelling an Order

 If an order must be cancelled please contact <u>SCO.Supplies@ontario.ca</u> for guidance

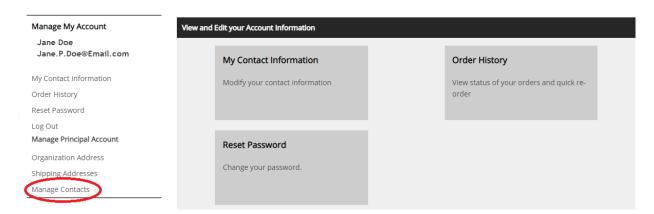
6.4. Managing or Adding New Contacts for the Organization

- Log into the system using your email and password (see section 4.1 How to Log into the System for more details)
- Click on your name in the toolbar at the top of the page



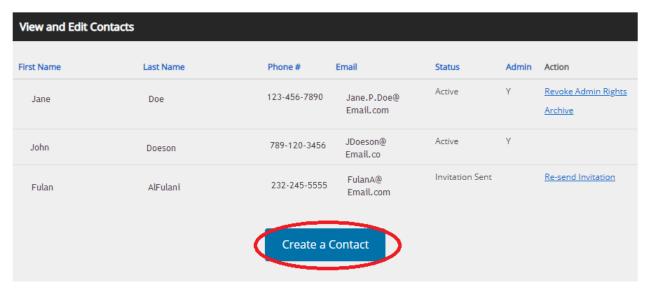
On the left-hand side menu click on "Manage Contacts"

My Account

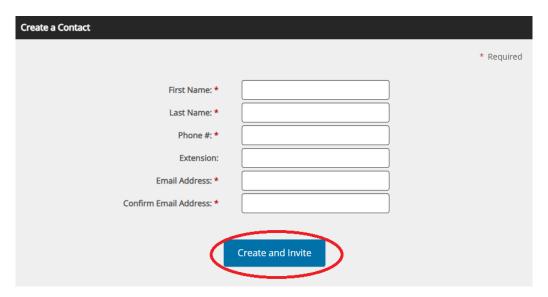


You will be able to add a new contact by selecting "Create a Contact".
 Adding a contact will allow this new user to order PPE on behalf of your organization.



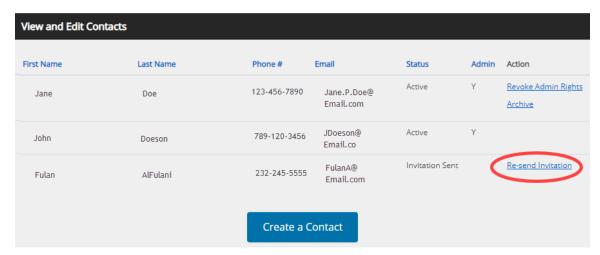


- Enter the required information and select "Create and Invite"
 - Please note, all Contact and Address fields are subject to character limits, as detailed in section 7 – Character Limits.
 - The newly added user will receive an invitation email and can set their password by following the link in that email



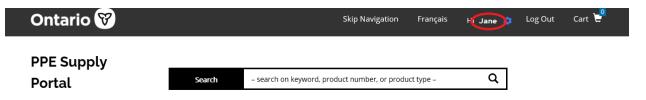
- In the rare case that the new user does not receive the first email invite, you can go to "Manage Contacts", find the name of the new user on the list and click on "Re-send Invitation"
 - Please advise the user to check Junk/Spam folders in their email account as the invitation email might have been redirected there.





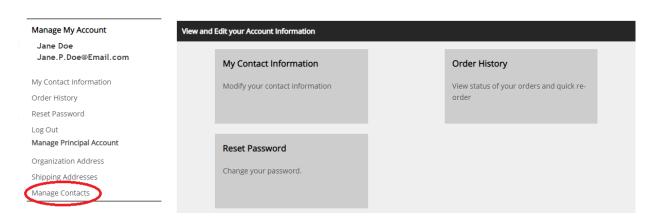
6.5. Adding/Removing Administrative Privileges for Contacts

- Log into the system using your email and password (see section 4.1 How to Log into the System for more details)
- o Click on your name in the toolbar at the top of the page



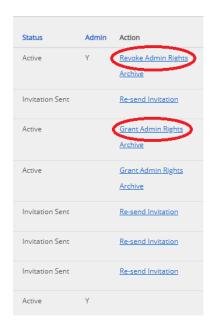
On the left-hand side menu click on "Manage Contacts"

My Account



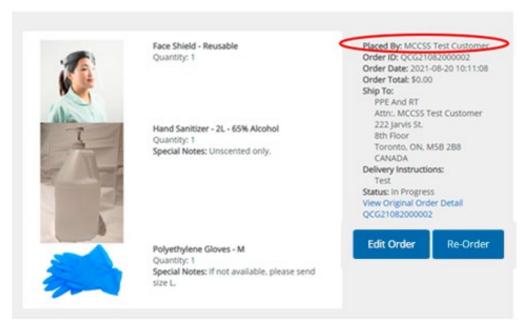
- o You will be able to review the name of contacts for your organization
- Under the "Action" header select "Grant Admin Rights" or "Revoke Admin Rights"





6.6 How to Find Out Who Placed a Specific Order within an Account

- Account Administrators (Admins) can view which contact (delegate or other admin) in their account placed an order on the "Order History" page by looking at the "Placed by" field.
- Delegates will only be able to see the orders that they placed.





7. Character Limits

Please note, the character limits for certain fields are combined to ensure that the address and contact information can be successfully displayed on shipping labels. Please adhere to these character limits or data may be truncated.

For example, a user may enter 19 characters for the First Name field, which has a limit of 19 characters, and 20 characters for the Last Name field, but the shipping label will be produced using only the first 25 characters entered as the First Name + Last Name limit is 25.

Field Name Nick Name (of Shipping Address)	Total Character Limit 25
First Name Last Name	25
Telephone Number Extension	16
Email	45
Fax #	18
Company	30
Address Line 1	35
Address Line 2	35
City	35
Postal Code	10
Secondary First Name	30
Secondary Last Name	30
Secondary Email	70
Secondary Telephone Number	30
Secondary Extension	30
Order Reference # Delivery Instructions	180 180
Special Notes (for products)	180