



WHO e-Prequalification System (ePQS)

Learning materials
WHO Immunization Devices (IMD-PQS)
2025



Prequalification Applicants
Prequalification Holders



Vaccines & Immunization Devices Assessment Team (VAX)
Prequalification Unit (PQT)
Regulation and Prequalification Department (RPQ)
Access to Medicines and Health Products Division (MHP)

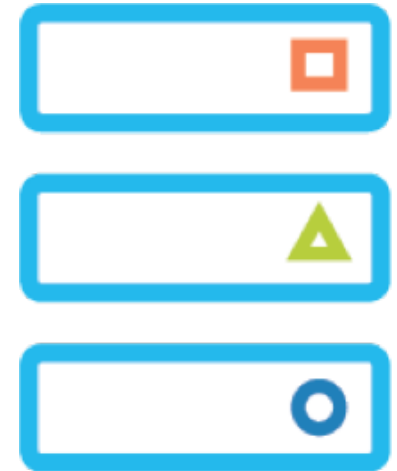
Key access links (for reference)

WHO ePQS Portal landing page:

<https://extranet.who.int/prequal/epqs-portal>

ePQS login link:

<https://who.lightning.force.com/lightning>



Intended audiences of these learning materials

AUDIENCES

1. **Primarily:** IMD-PQS **Prequalification Holders** (manufacturers and resellers of WHO prequalified immunization devices) and **first-time applicants** for WHO Immunization devices prequalification.
2. These learning materials may also be of interest to: IMD-PQS external experts engaged in the evaluation of application dossiers, as a complement to the dedicated materials provided for that group.



Purposes of these learning materials



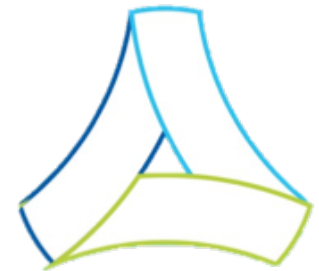
Learning materials are intended as comprehensive resources to support users gain necessary competence and autonomy in using the features and functions of ePQS. **These learning materials concern Immunization Devices (IMD-PQS) users. The deck:**

1. Explains the role(s) of ePQS in the IMD-PQS prequalification process
2. Introduces the ePQS navigation
3. Guides PQ Holders and new applicants through the ePQS prequalification and post-prequalification applications
4. Introduces key concepts and terminology
5. Provides links to all detailed technical guidance



Q&A / coaching sessions with the IMD-PQS ePQS support team may be scheduled subsequent to this self-training.

ePQS Portal



Overview of these learning materials



SECTION A - SET-UP

- Introduction
- Pilot
- Registration
- Terminology



SECTION B – DISCOVERY

- Navigating ePQS features & functions



SECTION C – PROCEDURES

- Step-by-step instructions of the application procedures



SECTION D – SUPPORT

- Additional and forthcoming technical support

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ePQS Portal

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SECTION A – SET-UP



1

ePQS Portal Introduction

1. ePQS Introduction – What is ePQS?



The ePQS “e-PreQualification System” platform provides prequalification [applicants](#) and PQ Holders ([product manufacturers](#) and [resellers](#)) a one-stop online portal to:

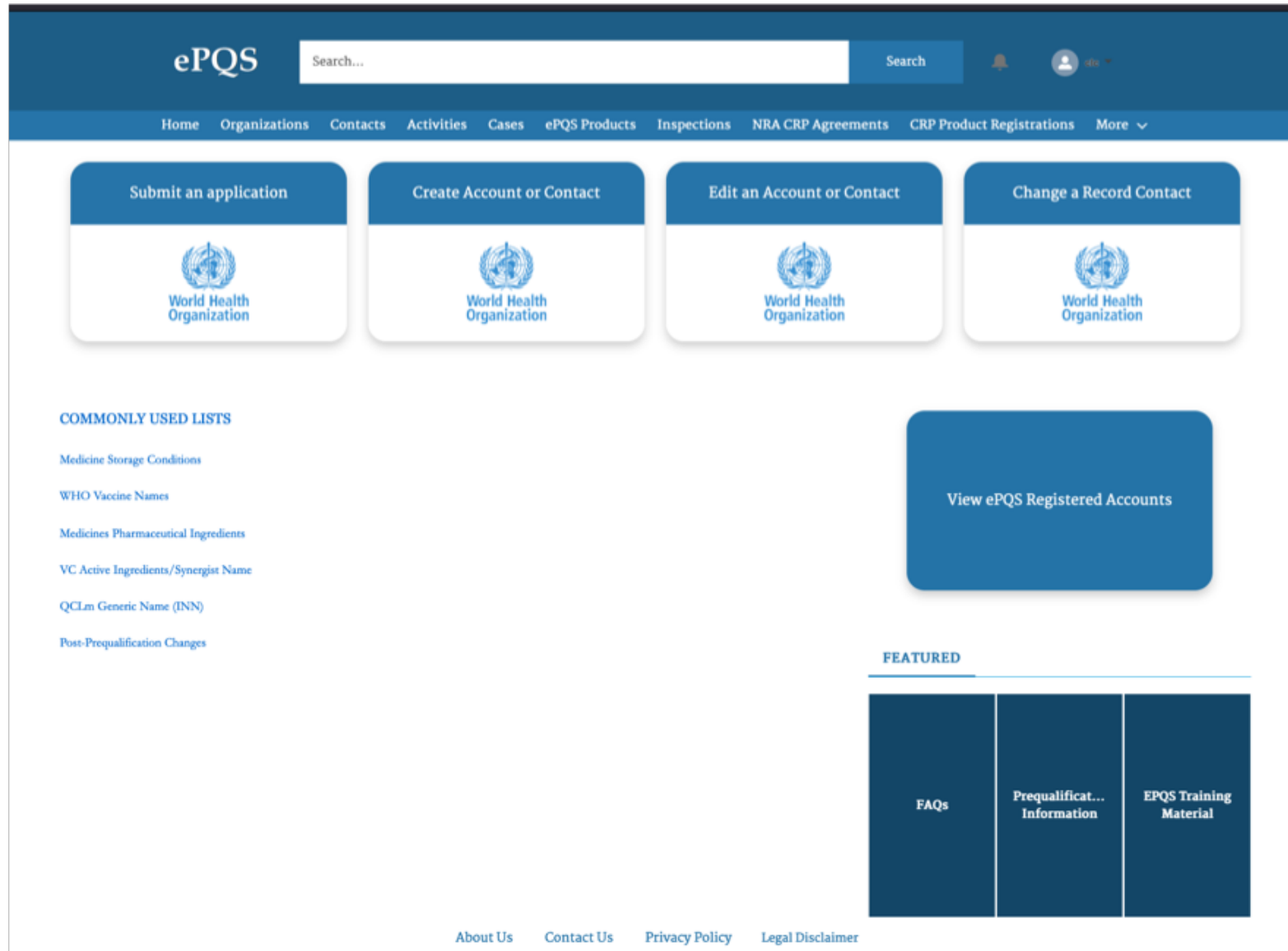
- submit & manage [prequalification applications & post-PQ variations](#)
- follow the [site inspections](#) process
- [view records](#) relevant to them
- submit required changes to account, contact & product information
- upload and download [documents](#) securely
- view and monitor [notifications for pending activities](#)

[Product annual reassessment](#) (the IMD-PQS [Annual Review](#)) will be included in the ePQS system in future (2026/7).



In addition to these processes, the ePQS platform **supports all communication between [applicants](#), [PQ Holders](#) and the WHO PQ** and external experts related to the workflows via a cloud file-sharing system integrated into ePQS system.

1. ePQS Introduction – Home page appearance



1. ePQS Introduction

Communication with IMD-PQS



First contact with IMD-PQS – “offline”

- The first contact with the Immunization Devices (IMD-PQS) Secretariat for a new application for prequalification remains by email ([application pre-submission & fees](#)).
- If the Secretariat deems that an application is warranted, the Secretariat will direct the applicant to register on the ePQS platform.
- Hereafter, all communication related to the prequalification application, up to and including the final decision, will pass through the ePQS platform.



Applications and post-PQ processes

- Communication between applicants / Prequalification Holders and the IMD-PQS Secretariat will take place via:
 - the ePQS application wizard,
 - the ePQS integrated email agent & file-sharing (cloud)
 - the downloadable request forms on the ePQS home page, and
 - the up/download of documents to the relevant “External Communications” folder within each user’s account, or the users ePQS personal folder.

1. ePQS Introduction

Key components of the ePQS platform



The two key components of the WHO ePQS platform

The “application wizard”

Applications for prequalification, as well as submissions for post-prequalification product variations, take place via the “Application Wizard” tool.



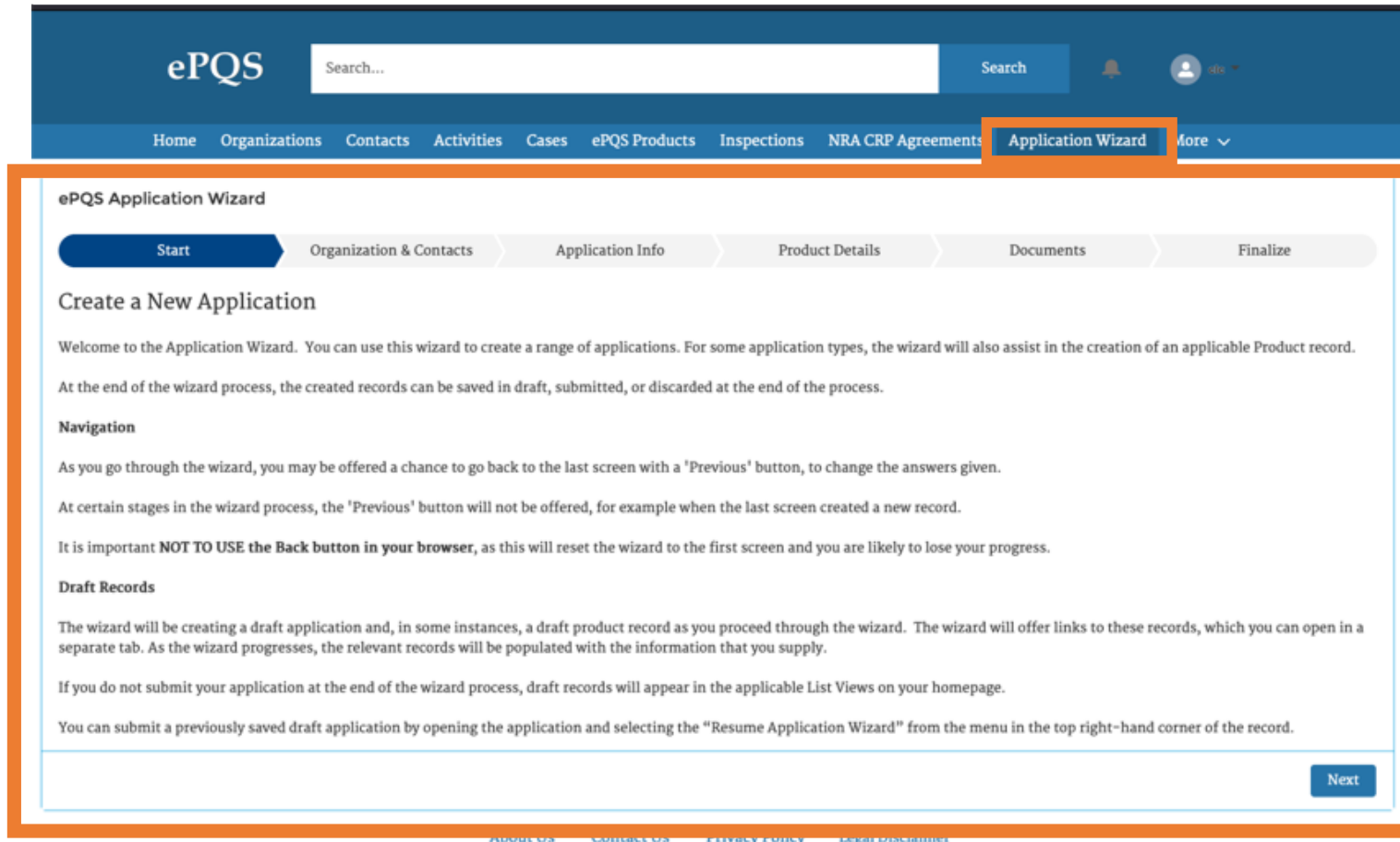
Cloud file-sharing facility (“Box”)

A cloud file-sharing facility manages the uploading, storage and sharing of documents between external applicants, WHO prequalification divisions and external experts. (The name of this cloud file-sharing facility is “Box”.) File-sharing takes place via an “External Correspondence” folder, accessible via document tabs within each ePQS *Account*, *Case Record* or *Product Record*, or the users Personal folder in ePQS.



1. ePQS Introduction

Quick view - Application Wizard



1. ePQS Introduction

Quick view - Document up/download

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a navigation menu including Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the header, a product entry for 'ePQS Product E00X-00X' is shown, with buttons for '+ Follow', 'Edit', 'Delete', and 'Printable View'. A table below the product entry lists details: Product Type (Immunisation Device), Applicant Organization (Vaccine UAT External Contact 1), Product Assessment Procedure (Prequalification - Standard), and Date of Prequalification/Acceptance (25/11/2009). A tabbed interface at the bottom shows 'Details', 'Related', 'Preview Document', and 'Document Download'. The 'Document Download' tab is highlighted with an orange box. An orange arrow points from the 'Document Download' tab to a larger, orange-bordered inset window. This inset window shows a 'box' file manager interface with a search bar and a message stating 'There are no items in this folder.' at the bottom.

ePQS

Search...

Search

Home Organizations Contacts Activities Cases ePQS Products Inspections NRA CRP Agreements CRP Product Registrations More

ePQS Product E00X-00X

+ Follow Edit Delete Printable View

| | | | |
|---------------------|--------------------------------|------------------------------|-------------------------------------|
| Product Type | Applicant Organization | Product Assessment Procedure | Date of Prequalification/Acceptance |
| Immunisation Device | Vaccine UAT External Contact 1 | Prequalification - Standard | 25/11/2009 |

Details Related Preview Document Document Download

box Search files and folders

Vx

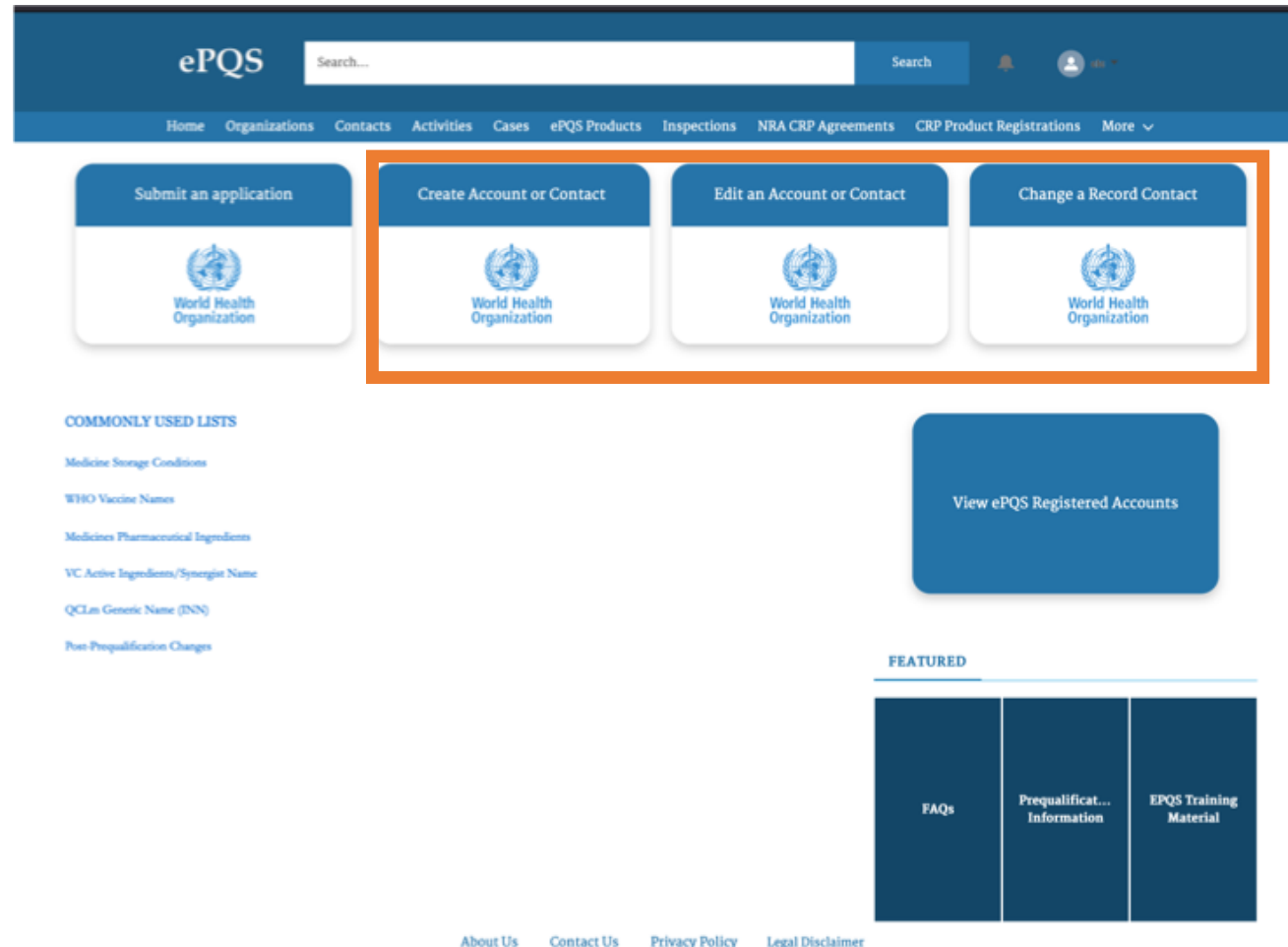
There are no items in this folder.

0 Selected

X

1. ePQS Introduction

Quick view - Data change request forms



1. ePQS Introduction - ALL Features & functions overview

The ePQS platform offers the following features and functionalities to facilitate the prequalification-related processes:

| | |
|-----------------------------------|---|
| ❖ Global search facility | ❖ Outstanding/pending activities tab |
| ❖ Notification “Bell” icon | ❖ Document submission, preview & download |
| ❖ Menu bar for major record types | ❖ Contacts & accounts |
| ❖ List views | ❖ Personalized commonly-used lists |
| ❖ Application Wizard | ❖ FAQs and training materials |



2

Registration & Access

3. Registration

1. Account contacts have already been created for all IMD-PQS Prequalification Holders
2. Prequalification Holders must **verify their account and contact** details prior to registration. The IMD-PQS Secretariat will reach out individually to users with the required forms for this stage.
3. Contacts need to “register” to gain access to the the system.

Registration is via the:

“External Form – New ePQS User” linked here:

https://who.my.salesforce.com/sfc/p/#3X000005AZtm/a/NN000001rmcH/.Kqqi2wVzq1Tliizyfrvloi_0D5v_7CmXUozH01_Ke0

Each new user / registration request must complete:

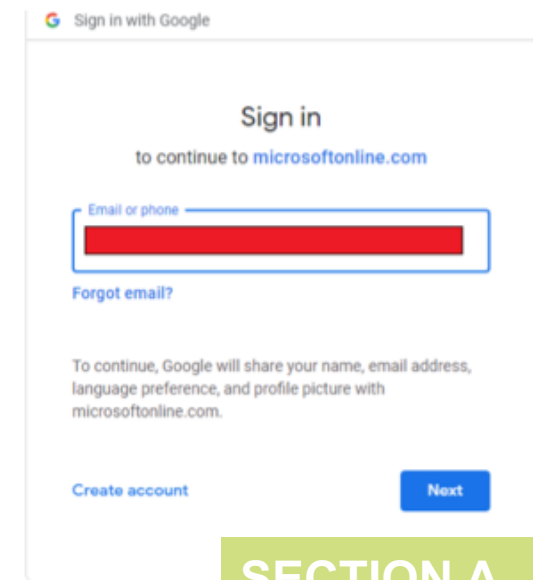
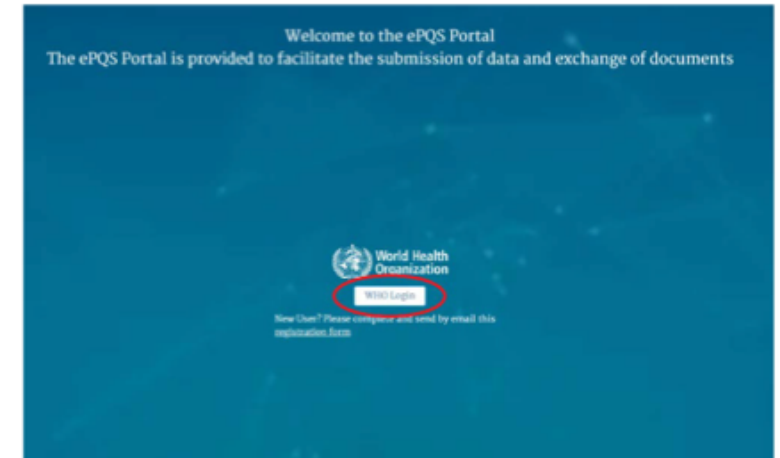
- [Section 1 \(Declaration\)](#),
- [Section 3 \(New User\)](#) and
- [Section 4 \(New Account\)](#)

5. Return the form to vaccprequalification@who.int, with the IMD-PQS Secretariat in copy.

2. Access

Once the registration is successfully completed, access to the ePQS portal can be obtained by:

1. Accessing the link:
<https://who.my.site.com/ePQS/s/login/>
2. **EITHER** - clicking the “WHO Login” button. The user will be directed to WHO Microsoft identity platform where they will be required to enter their username and click on the “Next” button.
3. **OR** - depending on which authentication mechanism is being used by their email address service, WHO’s identity platform will direct the user to provide the password the user uses for the email service.





3

Concepts & terminology

3. Concepts & terminology



This section of the learning materials provides key terms that users will encounter whilst using ePQS.

It is intended as an ongoing reference guide throughout the training and your ePQS use.

3. Concepts & terminology – two critical terms

“Records” and “Cases”

Record

A single instance of object data. Records types include:

- **Product record** (basic information about a product),
- **Product Variant record** (detailed product specification data),
- **Contact record** (individual user),
- **Account record** (PQ Holder organisation),
- **Case record** (record of a prequalification-related application in ePQS).

Case

Every prequalification (or associated) application (E.g. Inspection, post-prequalification product variant) begins with the creation of a *case*.



3. Concepts & terminology – other key terms

“Records” and “Cases”

| | |
|-------------------------|--|
| Activity | Any system activity taken in relation to an ePQS <i>case</i> . |
| Case record type | For each case, the record type will be either “ <i>Vx IMD Application</i> ”, or “ <i>Vx IMD Post-PQ change</i> ” or “ <i>Vx IMD Reassessment</i> ”. These terms are defined below. |
| ePQS Case ID | Once opened, each case will be assigned an ID in the format “PQ-IMD-YEAR-XXXX”. |



3. Concepts & terminology – other key terms

Terms related to applications

| | |
|-------------------------------|---|
| Application | New application for product prequalification, post-PQ change (variation) or Reassessment. Submitted via the Application Wizard. |
| Applicant organization | The legal entity submitting a prequalification application or post-prequalification change. |
| Application number | Unique code assigned to each new application in ePQS, in the format “PQ-IMD-202X-XXXX”. Identical to the “ePQS Case ID”. |
| Application wizard | ePQS process assistant: a user interface that leads users through each ePQS process via a sequence of prompted, guided steps. |



3. Concepts & terminology – other key terms

IMD-PQS-specific application processes on ePQS

| | |
|------------------------------|---|
| Vx IMD Application | IMD-PQS ePQS Application type meaning: “New application for product prequalification”. |
| Vx IMD Post-PQ change | IMD-PQS ePQS Application type meaning: “Post-prequalification variation, a change to product or manufacturing process”. |
| Vx IMD Reassessment | IMD-PQS ePQS Application type meaning: “IMD Annual Review of prequalified products”. |



3. Concepts & terminology – other key terms

Terms related to products

| | |
|--------------------------------|---|
| IMD Product | Section of the application/case/product record that contains the basic information about a product submitted for review. For example, the product name, description, type and applicant organization. |
| IMD Product Variant | Sub-section of the unique product application/case/product record that contains the record of all of the detailed product technical specifications. |
| (WHO) Product ID number | Once a prequalification application is completed and submitted in the application wizard, the product will be assigned an ID number in the format: “P-XXXXX”. |
| External ID | Subsequent to a successful application for prequalification, WHO IMD-PQS will assign an External ID in the traditional format of the “PQS Product number”: “E0XX-XXX”. |
| Product Site | Location and facility at which a product is manufactured. |





SECTION B – DISCOVERY

ePQS navigation & features - Discovery



This “discovery” section of the learning materials guides users through the different features and functions of ePQS and where they can be found.

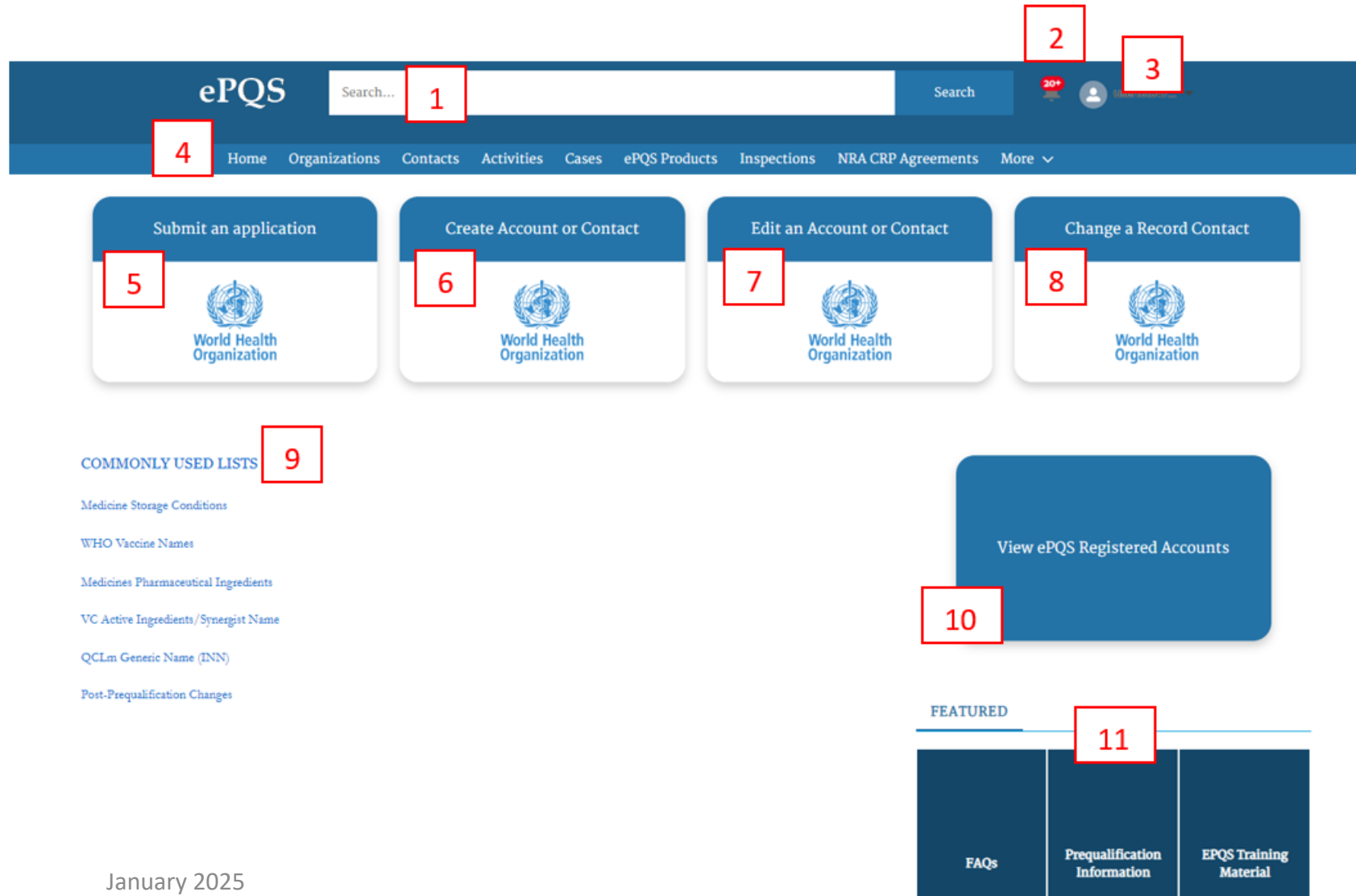
It is intended as a learning aid and ongoing reference guide.



4

Navigating ePQS – General guide

4. ePQS navigation – Homepage map



1) Global search facility

Key word searches will retrieve any record matching the entered criteria, provided the user has access to the record.

2) Notification “Bell” Icon

System generated notifications will be recorded here.

3) Personal Settings and Profile

Using this menu you can access your personal user details and log out of the system.

4) Object Menu Bar

List views of the major record types can be accessed from this menu. The menu items will vary depending on the type of external user.

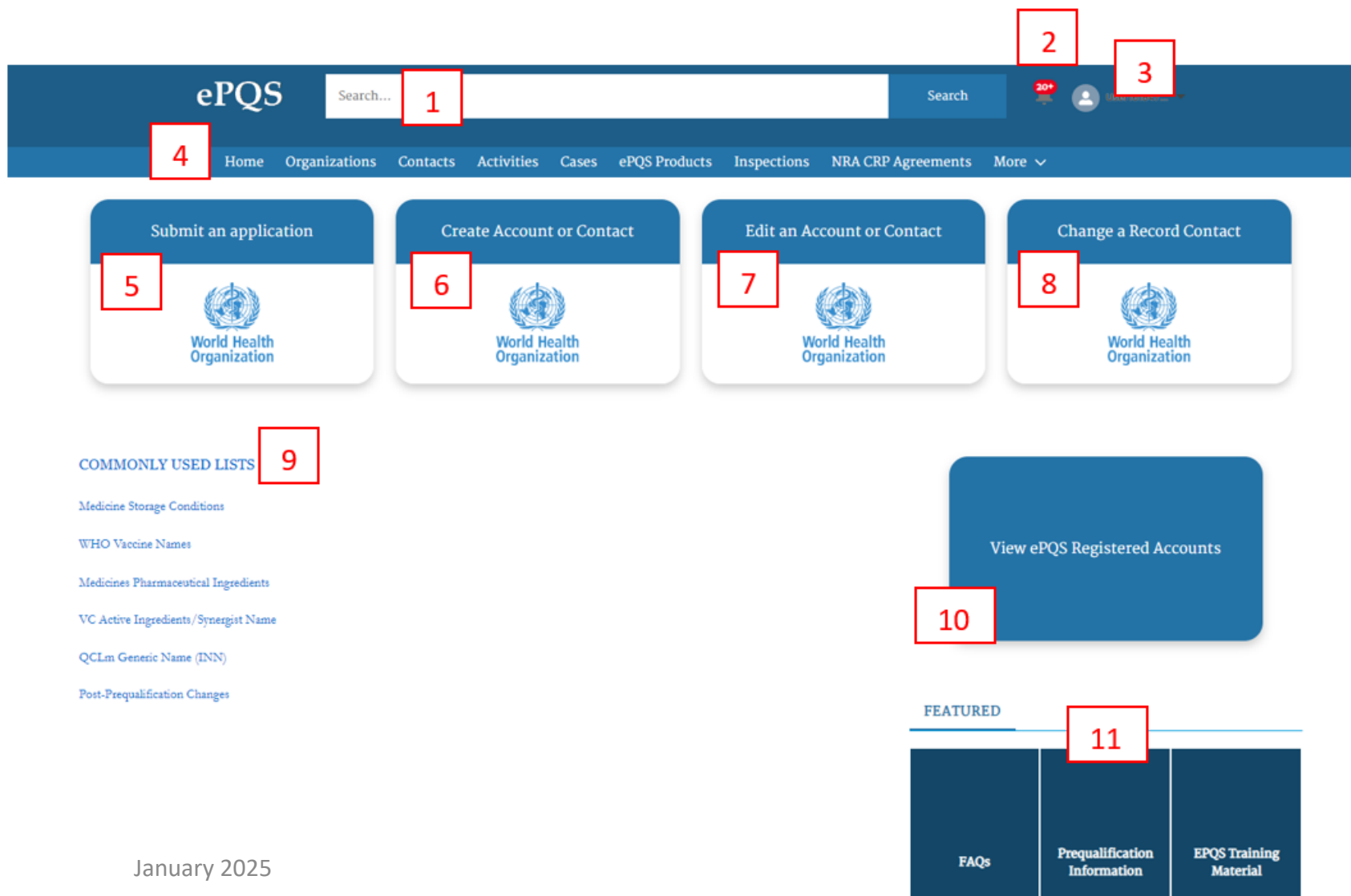
5) Application wizard

This initiates the creation of a new application

6 to 8) Contacts and Accounts

These menu items download the relevant forms for completion.

4. ePQS navigation – Homepage map



9) Commonly Used Lists

These links provide access to a series of reference lists that are referred to at various points of some application wizards.

For instance, as part of the FVP application wizard the applicant will be asked to nominate a WHO Vaccine Name. If the applicant is unfamiliar with the possible WHO Vaccine Names, they can review these from this list.

10) View ePQS Registered Accounts

Account (Organisation) records are important records referred to on product, application, inspection and product site records.

During the wizard process, if an account is not present in the ePQS database, it will not be possible, for instance, to create a manufacturing site (Product Site) for a product.

11) FAQ and training materials

Relevant reference materials and information will be made available via these links.

4. ePQS navigation – My profile



The “My Profile” icon is an important tool on the platform.

Select “My profile” to refer to the information that is stored in ePQS about your contact account.



4. ePQS navigation – My profile



“My profile” appearance.

ePQS

Search...

Search

clic

Home

Organizations

Contacts

Activities

Cases

ePQS Products

Inspections

NRA CRP Agreements

CRP Product Registration

Home

My Profile

My Account

Logout

Name

Title

Email

Address

About Me

January 2025

Manager

Company Name

Active

☒

Contact

Phone

Mobile

SECTION B – DISCOVERY

4. ePQS navigation – My account



The “My account” icon provides users with access to most actions.

Select “My account” to access all related products and documents, as well as available actions.



4. ePQS navigation – My account



“My account” appearance.

5 sub-tabs appear:

- Details;
- Related;
- Preview documents;
- Document download;
- Download submission.

“Details” displays the information that is stored in ePQS related to the PQ Holder (or other supplier entity) that a user is linked to.

ePQS Search... Search

Home Organizations Contacts Activities Cases ePQS Products Inspections NRA CRP Agreements CRP Product Registrations More

Account

+ Follow New Note DocuSign Arms Tobacco Disclosure Update Published Information

Account Record Type Address (2) Email

Details Related Preview Documents Document Download Document Submission

Account Information

Organization UID Account Owner

Legal Name Primary Contact

Account Name Phone

Parent Account Email

Account Record Type

Description

Address Information

WHO Country Information

General Details

Related Links

PQT Information

Account Usage - Collaborators

System Information

4. ePQS navigation – Related



“Related” provides a list of all records in ePQS related to a user’s account.

This includes:

- contacts;
- accounts;
- products;
- product sites;
- inspections;
- files; and
- account history.

The screenshot shows the ePQS interface. At the top, there's a search bar and navigation tabs: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. A user profile dropdown is visible on the right, with 'My Account' highlighted. Below the navigation, there's a section for 'Account' with buttons for '+ Follow', 'New Note', 'DocuSign Arms Tobacco Disclosure', and 'Update Published Information'. The main content area is titled 'Related' and contains several expandable sections: 'Notes (0)', 'Related Contacts (2)' (with a table showing Contact Name, Direct, Active, and Start Date), 'Case (Applications) (6+)' (with a table showing Case Number, ePQS Case ID, Status, and Last Modified Date/Time), 'Products (Applicant Organization) (6+)' (with a table showing WHO Product ID, Product Name, Vaccine Abbreviated Name, and Product Status), 'Product Sites (6+)' (with a table showing Product Site ID, Product Site Status, Site Activity, and Activity Type(s)), 'Inspections (0)', 'CRP Product Registrations (0)', 'CRP Product Registrations (NRA Organisation) (0)', 'NRA CRP Participations (NRA Organization) (0)', 'Files (0)' (with an 'Add Files' button), and 'Account History (0)'. At the bottom, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

4. ePQS navigation – Documents



“Preview documents” is a reference library of all documents related to a user’s account.

“External correspondence” contains the documents users have submitted as correspondence with the IMD-PQS Secretariat.

“Submitted documents” contains the documents uploaded to the account, or as part of an application wizard process.

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a navigation menu. The navigation menu includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. A user profile dropdown menu is open, showing options for Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the header, there is a section for 'Account' with a grid icon and buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. A table with columns for 'Account Record Type', 'Address (2)', and 'Email' is partially visible. The main content area features a tabbed interface with 'Details', 'Related', 'Preview Documents' (highlighted with an orange border), 'Document Download', and 'Document Submission'. The 'Preview Documents' tab is active, showing a 'box' search bar and a table of documents. The table has columns for 'Name', 'Modified', and 'Size'. Two documents are listed: 'External correspondence' and 'Submitted Documents', both modified on 'Fri Apr 12 2024' and having a size of '0 Byte'.

| Name | Modified | Size |
|-------------------------|-----------------|--------|
| External correspondence | Fri Apr 12 2024 | 0 Byte |
| Submitted Documents | Fri Apr 12 2024 | 0 Byte |

4. ePQS navigation – Documents



“Download documents” allows users to download and save locally all the documents related to their account.

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile dropdown menu. The user profile menu is open, showing options: 'Home', 'My Profile', 'My Account' (highlighted with an orange border), and 'Logout'. Below the header is a navigation bar with links: 'Home', 'Organizations', 'Contacts', 'Activities', 'Cases', 'ePQS Products', 'Inspections', 'NRA CRP Agreements', and 'CRP Product Registrations'. The main content area features a 'Document Download' tab, which is highlighted with an orange border. Below the tab is a 'box' search bar with the text 'Search files and folders'. A list of documents is shown, including 'External correspondence' and 'Submitted Documents', both modified on 'Fri Apr 12 2024' and having a size of '0 Byte'. At the bottom, there is a '0 Selected' button and a close button.

4. ePQS navigation – Documents



“Document submission” enables users to upload documents to their account.

ePQSSearch...Search

HomeOrganizationsContactsActivitiesCasesePQS ProductsInspectionsNRA CRP AgreementsCRP Product Registration

Account

+ FollowNew NoteDocuSign Arms Tobacco DisclosureU

Account Record TypeAddress (2) ▼Email

HomeMy ProfileMy AccountLogout

DetailsRelatedPreview DocumentsDocument DownloadDocument Submission

Upload to Account Submission

Welcome to Document Submission Wizard. Please click on **Next** to proceed for Account#Vestfrost Solutions

Next

About UsContact UsPrivacy PolicyLegal Disclaimer


4. ePQS navigation – Documents



“Document submission” interface allow users to upload documents by drag-and-drop or browsing their device.

Details Related Preview Documents Document Download **Document Submission**

Upload to Account Submission



Drag and drop files and folders
[Browse your device](#) or [Select Folders](#)

Cancel

Upload

Next

4. ePQS navigation – Wizard



“Submit an application” tab provides access to the “**Application Wizard**” for prequalification applications and post-PQ variation submissions.

It is **MANDATORY** to complete the Application Wizard **IN FULL**, including all product specification data, before submitting the applications.



4. ePQS navigation – Forms



The three other tabs on the homepage provide access to application forms to request the creation or editing of your account or associated contact details.



4. ePQS navigation – Notes



Under the users
“**account**”
interface, users
may also create
“**notes**”.

Notes may also be
shared with others
(users’ contacts or
internal / WHO
users).

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile icon. Below the header is a navigation menu with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. On the right side, a dropdown menu is open, showing options: Home, My Profile, My Account (highlighted with an orange box), and Logout. In the main content area, there is a 'New Note' button (highlighted with an orange box) and a 'DocuSign Arms Tobacco Disclosure' link. Below this, a 'New Note' form is shown, featuring a text area for entering a note, a 'Share' button (highlighted with an orange box), and a 'Done' button. The form also includes a 'Related to' dropdown menu set to 'Current Record' and a 'Visibility Set by Record' option.

4. ePQS navigation – Organisations



Via the “Organisations” tab users can access a list of all organisation accounts associated with their own.

Various **list views** are available using the inverted arrow; including “all” and “recently viewed”

The screenshot shows the ePQS web application interface. At the top, there is a dark blue header with the ePQS logo, a search bar, and a user profile icon. Below the header is a navigation bar with tabs: Home, Organizations (highlighted with an orange box), Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, there is a section titled 'Accounts' with a sub-header 'ePQS Accounts (Portal)' (also highlighted with an orange box). A dropdown menu is open from the 'ePQS Accounts (Portal)' header, showing a list of 'LIST VIEWS': 'All Vx accounts', 'ePQS Accounts (Portal)' (selected with a blue checkmark), 'Recently Viewed (Pinned list)', and 'Recently Viewed Accounts'. To the right of the dropdown menu, there is a search bar labeled 'Search this list...' and a 'Country (Physical)' dropdown menu.

4. ePQS navigation – Contacts



Via the main “**Contacts**” tab, users can access a list of all organisation accounts associated with their own.

Various **list views** are available; including “all” and “recently viewed”

The screenshot shows the ePQS web application interface. At the top, there is a dark blue header with the ePQS logo, a search bar, and a user profile icon. Below the header is a navigation menu with tabs: Home, Organization, **Contacts** (highlighted with an orange box), Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, the main content area displays the 'Contacts' section. A dropdown menu is open, showing 'All ePQS Contacts (Portal)' (selected) and 'Recently Viewed (Pinned list)'. The main content area shows a table with 2 items, titled 'LIST VIEWS'. The table has columns for 'Account Name' and 'Account: Legal Name'. The first two rows both show 'Vestfrost Solutions'.

| Account Name | Account: Legal Name |
|---------------------|---------------------|
| Vestfrost Solutions | Vestfrost Solutions |
| Vestfrost Solutions | Vestfrost Solutions |

4. ePQS navigation – Activities



Via the “**Activities**” tab, users can access a list of all the “**external activities**” related to their account. This includes applications, post-PQ variants and inspections.

Various **list views** are available; including “My activities” and “recently viewed”

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile icon. Below the header is a navigation bar with several tabs: Home, Organizations, Contact, **Activities** (highlighted with an orange box), Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The 'Activities' tab is selected, showing a section titled 'External Activities' with a 'Recently Viewed' dropdown menu (also highlighted with an orange box). The dropdown menu is open, showing a list of 'LIST VIEWS' options: 'All Activities (Applications - Portal)', 'All Activities (Inspections - Portal)', 'My Activities (Portal)', 'My Open Activities (portal)', and 'Recently Viewed (Pinned list)' (which is selected with a blue checkmark). To the right of the dropdown menu is a search bar labeled 'Search this list...' and several icons for settings, refresh, edit, and filter.

4. ePQS navigation – Cases



Likewise, a list of all “cases” relevant to a user’s account is available via the main tab.

Available **list views** include “Open cases”, “Closed cases”, “All” and “Recently viewed”.

The screenshot shows the ePQS interface. The top navigation bar includes links for Home, Organizations, Contacts, Activities, **Cases**, PQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The 'Cases' tab is highlighted. Below the navigation bar, the 'Cases' section is displayed with a dropdown menu for 'All Cases (Portal)' open, showing a list of views: 'All Cases (Portal)' (selected), 'All Closed Cases (Portal)', 'All Open Cases (Portal)', 'Recently Viewed (Pinned list)', and 'Recently Viewed Cases'. The main content area shows a table of cases with columns for Application S..., WHO Pro..., Date Appl..., Date Appl..., and Date of Pr....

| | Application S... | WHO Pro... | Date Appl... | Date Appl... | Date of Pr... |
|---|------------------|------------|--------------|--------------|---------------|
| 1 | Standard | | 01/01/1900 | 01/01/1900 | |
| 2 | Standard | | 01/01/1900 | 01/01/1900 | |
| 3 | Standard | | 01/01/1900 | 01/01/1900 | |
| 4 | Standard | | 01/01/1900 | 01/01/1900 | |

4. ePQS navigation – Products



Likewise, a list of all “**products**” related to a user’s account is available via the main tab.

The screenshot shows the ePQS web application interface. The navigation bar at the top includes links for Home, Organizations, Contacts, Activities, Cases, **ePQS Products** (highlighted with an orange box), Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, the 'ePQS Products' section is active. A dropdown menu is open for 'All Products (Portal)', showing four options: 'All Active Products (Portal)', 'All Closed Products (Portal)', 'All Products (Portal)' (selected with a checkmark), and 'Recently Viewed (Pinned list)'. The main content area displays a table of products with columns for Product Subtype, Date of Preq..., Date of ..., and Date of Pro....

| Product Subtype | Date of Preq... | Date of ... | Date of Pro... |
|-----------------|-----------------|-------------|----------------|
| s | 25/11/2009 | | |
| s | 18/03/2010 | | |
| s | 14/07/2010 | | |

4. ePQS navigation – Inspections



And a list of all **“Inspections”** related to a user’s product sites is available via the main tab.

The screenshot displays the ePQS web application interface. The top navigation bar is dark blue with the ePQS logo and a search bar. Below it, a secondary navigation bar contains various tabs, with 'Inspections' highlighted by an orange box. A dropdown menu is open for the 'Inspections' tab, showing a list of views: 'All Inspections (Portal)' (selected) and 'Recently Viewed (Pinned list)'. The main content area shows a table with columns for 'Site Contact', 'Manner of Inspection', and 'Inspection Type'. A search bar is also present in the top right corner of the main content area.

| Site Contact | Manner of Inspection | Inspection Type |
|--------------|----------------------|-----------------|
| | | |

4. ePQS navigation – Bell



The **bell notification** provides an overview of all the outstanding notifications and actions relevant to a user's account.





SECTION C

– APPLICATION PROCEDURES



5

Step-by-step guide

5. Step-by-step guide



ePQS activities required of a user to set-up their account and to process applications and associated processes include:

- a. Verifying product data records
- b. Verifying access, accounts and contact details
- c. Verifying correct record visibility and correct product list visibility
- d. Accessing and verifying functionality of personal user folder
- e. Submitting applications (if applicable)
- f. Submitting post-PQ variation submission (if applicable)
- g. Uploading documents (related to the submission)
- h. Downloading documents shared with the applicant
- i. Assigning activities to applicants
- j. Verifying bell and email notifications associated with actions





5a

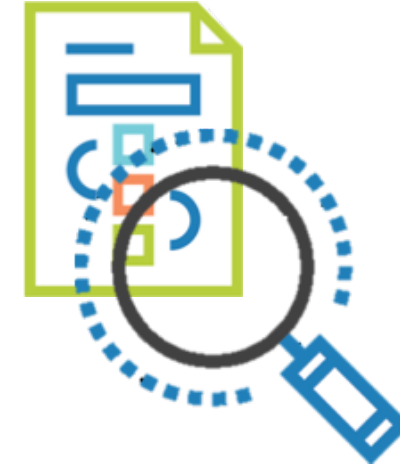
Verification of product data sheets

5a. Verification of product records



TASK

Once registration and access is **obtained**, existing PQ Holders and new applicants must first verify that all data is correct on each of their product pages.



Communicate any omissions or errors to: pqsinfo@who.int & huckerbyg@who.int using the relevant change request form linked on slide 60 of this deck.



5a. Verification of product data records

Registered users may find their product data records for verification:

1. On the ePQS homepage, select the “ePQS Products” tab.
2. In “list view” select “IMDs (All)”
3. In this view users can select individual prequalified products

The screenshot shows the ePQS interface. At the top, there is a search bar and a navigation menu. The 'ePQS Products' tab is highlighted with a red box and the number 1. Below the navigation menu, the 'ePQS Products' section is visible, with 'IMDs (All)' selected, highlighted with a red box and the number 2. Below this, there is a table of products. The first row of the table is highlighted with a red box and the number 3. The table has columns for WHO Product ID, Applicant Organization, Product Status, Date of Application, Date of Prequalification, and Date of Product Cancellation.

| WHO Product ID | Applicant Organization | Product Status | Date of Application | Date of Prequalification | Date of Product Cancellation |
|----------------|------------------------|----------------|---------------------|--------------------------|------------------------------|
| E001- | | Prequalified | 01/01/1900 | 17/08/2010 | |
| E001- | | Prequalified | 01/01/1900 | 20/04/2011 | |
| E001- | | Prequalified | 01/01/1900 | 25/10/2011 | |

5a. Verification of product data records



Users should click on the product code “E00X-XXX” to view the relevant “Product page”.

Important: users need to progress further to the “Product Variant page” to see product’s technical specifications.

Users should click on the “**Related**” sub-tab.

| Product Type | Applicant Organization | Product Assessment Procedure | Date of Application Submission | Date of Prequalification/Acceptance |
|---------------------|------------------------|------------------------------|--------------------------------|-------------------------------------|
| Immunisation Device | | Prequalification - Standard | 01/01/1900 | 17/08/2010 |

| Details | Related | Document | Activity | Chatter | Audit Trail |
|----------|---------|----------|----------|---------|-------------|
| Comments | | | | | |

| Information | |
|--------------------------------|--|
| WHO Product ID | E001- |
| Product Name | |
| Product Description | |
| Product Type | Immunisation Device |
| Product Subtype | E001: Cold rooms, freezer rooms, and related equipment |
| Responsible team | Vaccines Team |
| Product Assessment Procedure | Prequalification - Standard |
| Applicant Organization | |
| Applicant Organization (Legal) | |
| Primary Contact | |
| Secondary Contact | |
| Alternative Secondary Contact | |
| Site Address | |

5a. Verification of product data records



“**Related**” brings up a list of the record-types related to this specific product.

Select the record displayed under “**IMD Product Variant**”



ePQS Product

+ Follow Edit Sharing Printable View

Product Type: Immunisation Device Applicant Organization: Product Assessment Procedure: Prequalification - Standard Date of Application Submission: 01/01/1900 Date of Prequalification/Acceptance: 05/06/2019

Details **Related** Document Activity Chatter Audit Trail

Product Sites (1) 1 item • Updated a few seconds ago

| <input type="checkbox"/> | Product Site ID | Product Site Status | Site | Site Activity | Activity Type(s) |
|--------------------------|-----------------|---------------------|------|-----------------|----------------------------|
| 1 | | Accepted | | IMD Manufacture | Refrigerators and freezers |

[View All](#)

IMD Product Variants (WHO Product ID) (1) 1 item • Updated a few seconds ago

| <input type="checkbox"/> | IMD Variant Ref. |
|--------------------------|------------------|
| 1 | |

Applications (1) 1 item • Updated a few seconds ago

| <input type="checkbox"/> | Case Number | ePQS Case ID | Status | Application Type | Application Subty... | Date Application A... | Date of Prequalificat... |
|--------------------------|-------------|--------------|--------------|------------------|----------------------|-----------------------|--------------------------|
| 1 | | | Prequalified | Prequalification | Standard | 01/01/1900 | 05/06/2019 |

[View All](#)

Commitments/Established Conditions (0) [New](#)

Fees (0) [New](#)

Files (0) [Add Files](#)

5a. Verification of product data records



This brings the user to the
“**product variant page**”
(e.g. here for E001)

USER TASK →

- Review all data fields

- Report any errors or
issues to the IMD-PQS
Secretariat:

pqsinfo@who.int &
huckerbyg@who.int

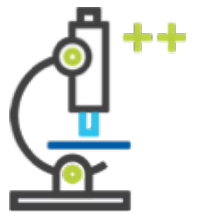
- To report issues please
use the templates on the
following slide.

The screenshot displays the 'IMD-PQS Product Variant' page for 'E001'. The page is organized into several sections, each with a dropdown arrow for expansion. The sections include:

- Product identification:** Fields for Name, Product ID, Record Type, Device sub-category, and Valid until.
- Product specifications - Main:** Fields for Temperature range, Temperature range (differential), Maximum time (h), and Maximum time (h).
- Product specifications - Main:** Fields for Pre-qualified region, Auto return, and others.
- Product specifications - Equipment options:** Fields for Refrigeration, Refrigeration with mounting options, Refrigeration and types, Lighting system, Only sharing, Cold climate protection (h), and Evaporator column guard (h).
- Product specifications - Temperature monitoring & alarm options:** Fields for Temperature recording system, Alarm system, and ISO 10001 certified.
- Warranty, installation and maintenance:** Fields for Warranty period (months), Maintenance service, and Installation service.
- Quality standard:** Fields for Quality Standard, Quality standard (differential), and Specification Reference.
- Verification:** Fields for Verification Laboratory, Verification Report Reference, and Verification Report.
- Records:** Fields for Remarks for Publishing, Created By, Last Modified By, and Published Record Details.



5a. Verification of product data records



Product Data Sheet feedback forms are available on the IMD-PQS website here:



<https://extranet.who.int/prequal/immunization-devices/prequalification-guidance-applicants-prequalification-holders>

There, users will find a feedback form for each category:

- IMD-PQS Data Sheet feedback form E001
- IMD-PQS Data Sheet feedback form E002
- IMD-PQS Data Sheet feedback form E003
- IMD-PQS Data Sheet feedback form E004
- IMD-PQS Data Sheet feedback form E005
- IMD-PQS Data Sheet feedback form E006
- IMD-PQS Data Sheet feedback form E007 Energy Harvest Control
- IMD-PQS Data Sheet feedback form E007 Voltage Stabilisers
- IMD-PQS Data Sheet feedback form E008
- IMD-PQS Data Sheet feedback form E010
- IMD-PQS Data Sheet feedback form E013



5b

**Accessing
registered
accounts**

5b. Accessing registered accounts



To access a list of all accounts related to their own account, users should click either on **“Organisations”** or **“View ePQS Registered Accounts”**.

ePQS Search... Search

Home **Organizations** Contacts Activities Cases ePQS Products Inspections NRA CRP Agreements CRP Product Registrations More ▾

Submit an application
World Health Organization

Create Account or Contact
World Health Organization

Edit an Account or Contact
World Health Organization

Change a Record Contact
World Health Organization

COMMONLY USED LISTS

- Medicine Storage Conditions
- WHO Vaccine Names
- Medicines Pharmaceutical Ingredients
- VC Active Ingredients/Synergist Name
- QCLm Generic Name (INN)

View ePQS Registered Accounts

5b. Accessing registered accounts



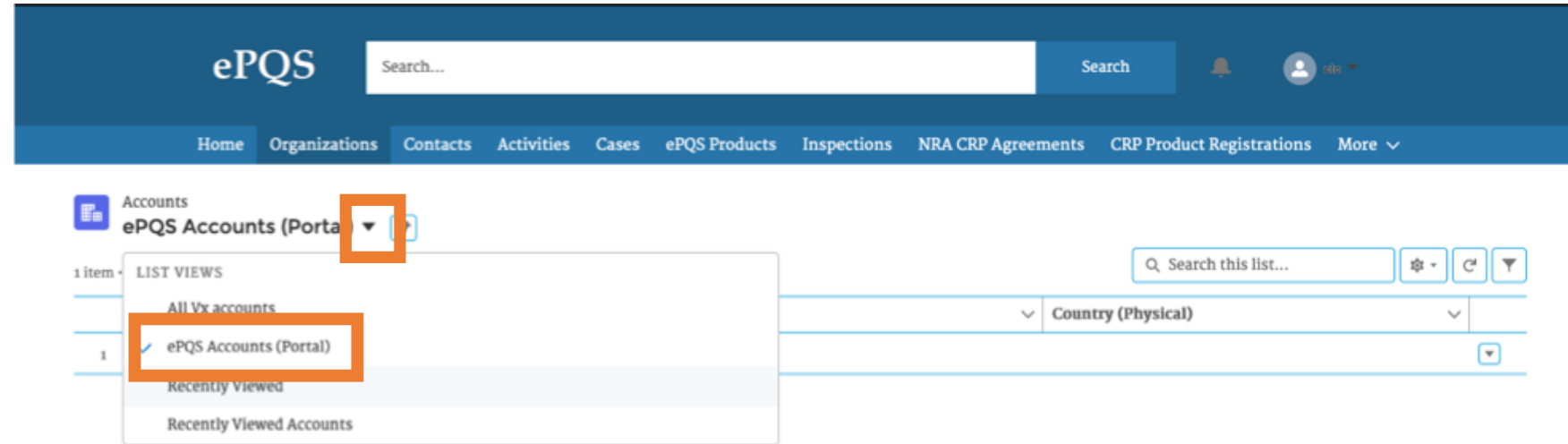
Users may select different **list views**.

Recommended: “**ePQS Accounts**”.

Users should **review each record** that appears in the list:

Account types include:

- Non-State actors (private sector)
- Government institutions
- Institution
- Committee



*** As an IMD-PQS prequalified manufacturer or reseller, the only account to which a user is associated is their own company.

5b. Accessing registered accounts



Inside each account record, users should **open each drop down section** (“Account information”, “Address information” etc.) and **verify that the data** and information contained inside each is correct.

- Report any errors or issues to the IMD-PQS Secretariat:
pqsinfo@who.int &
huckerbyg@who.int

The screenshot displays the ePQS (Electronic Product Quality System) interface. At the top, there's a dark blue header with the ePQS logo, a search bar, and a user profile dropdown menu. The navigation bar includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. The main content area shows the 'Account' record for a 'Non-State Actor'. It includes fields for 'Account Record Type', 'Address (2)', and 'Email'. Below these fields, there's a list of expandable sections: 'Account Information', 'Address Information', 'WHO Country Information', 'General Details', 'Related Links', 'PQT Information', 'Account Usage - Collaborators', and 'System Information'. The footer contains links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.



5c

Correct record visibility

5ci. Correct record visibility



1. Users should click on their profile icon, and select **“My Account”**.

2. Then, click on the sub-tab **“Related”**.

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile icon. The user profile icon is highlighted with an orange box and a red circle containing the number '1'. A dropdown menu is open from this icon, showing options: 'Home', 'My Profile', 'My Account' (highlighted with an orange box), and 'Logout'. Below the header, there is a navigation bar with various menu items. The main content area shows an 'Account' section with a table of account records. Below this, there is a sub-tab navigation bar with 'Details' and 'Related' (highlighted with an orange box and a red circle containing the number '2'). The 'Related' sub-tab is active, displaying a list of account information categories: Account Information, Address Information, WHO Country Information, General Details, Related Links, PQT Information, Account Usage - Collaborators, and System Information.

5ci. Correct record visibility



The “**Related**” sub-tab displays all records, of all types, related to a user’s account.

Users should **open and view** each type of record.

Ensure that each of the following types of records are visible:

- Notes
- Related contacts
- Product sites
- Case
- Products
- Files
- Account history

The screenshot displays the ePQS 'Related' sub-tab interface. The interface shows a list of record types related to the user's account, including Notes, Related Contacts, Product Sites, Case (Applications), Products (Applicant Organization), Inspections, CRP Product Registrations, NRA CRP Participations, Files, and Account History. Each record type has a count in parentheses next to it. The 'Related Contacts' section is expanded, showing a table with columns: Contact Name, Direct, Active, and Start Date. The 'Product Sites' section is also expanded, showing a table with columns: Product Site ID, Product Site Status, Site Activity, and Activity Type(s). The 'Case (Applications)' section is expanded, showing a table with columns: Case Number, ePQS Case ID, Status, and Last Modified Date/Time. The 'Products (Applicant Organization)' section is expanded, showing a table with columns: WHO Product ID, Product Name, Vaccine Abbreviated Name, and Product Status. The 'Files' section has an 'Add Files' button and an 'Upload Files' button. The 'Account History' section is at the bottom. The interface includes a search bar at the top and a navigation menu with links like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The footer contains links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

5cii. Correct record visibility - Products



Products

Expand or click directly on the Products sub-tab.

ePQS Search... Search

Home Organizations Contacts Activities Cases ePQS Products Inspections NRA CRP Agreements CRP Product Registrations More

Account Account Record Type: Non-State Actor Address (1) Email

+ Follow New Note DocuSign Arms Tobacco Disclosure Update Published Information

Details **Related** Preview Documents Document Download Document Submission

Notes (0)

Related Contacts (2)

| Contact Name | Direct | Active | Start Date |
|--------------|--------|--------|------------|
|--------------|--------|--------|------------|

Product Sites (6+)

| Product Site ID | Product Site Status | Site Activity | Activity Type(s) |
|-----------------|---------------------|---------------|------------------|
|-----------------|---------------------|---------------|------------------|

Case (Applications) (6+)

| Case Number | ePQS Case ID | Status | Last Modified Date/Time |
|-------------|--------------|--------|-------------------------|
|-------------|--------------|--------|-------------------------|

Products (Applicant Organization) (6+) New

| WHO Product ID | Product Name | Vaccine Abbreviated Name | Product Status |
|----------------|--------------|--------------------------|----------------|
|----------------|--------------|--------------------------|----------------|

Inspections (0)

CRP Product Registrations (0)

CRP Product Registrations (NRA Organisation) (0)

NRA CRP Participations (NRA Organization) (0)

Files (0) Add Files

Upload Files Or drag files

Account History (0)

About Us Contact Us Privacy Policy Legal Disclaimer

5cii. Correct record visibility - Products



Products

Users should **review the list of products** that is displayed:

1. Users should **verify** that ALL of their previously and currently prequalified products, and/or products currently under review are visible in the list.
2. Users should also **verify** that their account displays ONLY products from their organisation and NOT products of any other organisation.

The screenshot displays the ePQS interface for 'Products (Applicant Organization)'. The header includes the ePQS logo, a search bar, and navigation tabs: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area shows a list of 29 items, each with a 'Product listing details ...' link. The list is highlighted with an orange border. The footer contains links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.



5d

Personal use folder

5d. Personal use folder



ePQS provides external users a “**Personal folder**”, in which they may upload/store documents they are working on, before submitting them or sharing them with IMD-PQS.

To access the personal use folder, users should go to “**Contacts**” and **choose themselves** from the list of contacts.

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The screenshot displays the ePQS web application. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile icon. Below the header is a navigation menu with links: Home, Organizations, **Contacts** (highlighted with an orange box), Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area is titled 'Contacts' and shows 'All ePQS Contacts (Portal)' with a search bar and a table of contacts. The table has 2 items, sorted by Name, filtered by All contacts, and updated 2 minutes ago. The first row of the table is highlighted with an orange box and contains the text '1 YOUR NAME'. The second row is partially visible and contains the text '2'.

| 1 | YOUR NAME | | | | |
|---|-----------|--|--|--|--|
| 2 | | | | | |

5d. Personal use folder



Once inside their own contact record, users should click the **“Preview Documents”** tab. Users will see a folder: **(YourName) “PersonalFolder”**. Upload documents by clicking on the **“+”** icon.

IMPORTANT – personal folders are not private. Internal users (IMD-PQS) can view all external user Personal Folders.

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile icon. Below the header is a navigation bar with tabs: Home, Organization, **Contacts** (highlighted with an orange box), Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area shows a contact record for 'Contact'. Below the contact information, there are tabs: Details, Related, **Preview Documents** (highlighted with an orange box), Download Documents, Preview Mx Documents, and Download Mx Documents. The 'Preview Documents' tab shows a 'box' logo and a search bar. Below the search bar, there is a folder named 'YOUR Personal Folder' (highlighted with an orange box). To the right of the folder name is a '+ ' icon (highlighted with an orange box). Below the folder, there is a message: 'There are no items in this folder.' At the bottom of the page, there are links: About Us, Contact Us, Privacy Policy, and Legal Disclaimer.



5e

Application submission procedure

5e. Application submission procedure



The “**Application Wizard**” tool provides step-by-step instructions for how to complete the application. The wizard welcome page provides an overview of the process:

ePQS Application Wizard

Start

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Create a New Application

Welcome to the Application Wizard. You can use this wizard to create a range of applications. For some application types, the wizard will also assist in the creation of an applicable Product record.

At the end of the wizard process, the created records can be saved in draft, submitted, or discarded at the end of the process.

Navigation

As you go through the wizard, you may be offered a chance to go back to the last screen with a 'Previous' button, to change the answers given.

At certain stages in the wizard process, the 'Previous' button will not be offered, for example when the last screen created a new record.

It is important **NOT TO USE the Back button in your browser**, as this will reset the wizard to the first screen and you are likely to lose your progress.

Draft Records

The wizard will be creating a draft application and, in some instances, a draft product record as you proceed through the wizard. The wizard will offer links to these records, which you can open in a separate tab. As the wizard progresses, the relevant records will be populated with the information that you supply.

If you do not submit your application at the end of the wizard process, draft records will appear in the applicable List Views on your homepage.

You can submit a previously saved draft application by opening the application and selecting the “Resume Application Wizard” from the menu in the top right-hand corner of the record.

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Next



5e. Application submission procedure

VERY IMPORTANT INFORMATION:

- You MUST complete the full Application Wizard, **including the “PRODUCT VARIANT” section**, for your application to be considered by the WHO IMD team. Please do not click “submit” on your application until you have completed the full Application Wizard, including the “PRODUCT VARIANT” section.
 - It is NOT possible to return to a submitted application to complete the **Application Wizard**.
 - If you submit an application *without* completing the Application Wizard, the application will be **discarded** and you will need to submit a new application.
 - (You CAN return to an already-submitted application to submit **documents** or additional documents however, using the “Additional Documents Wizard” tool.)

Kindly also avoid pausing your application during the creation of the “product record” and/or the “product variant record” at the current time, as there is a risk of subsequent Wizard sections being omitted once you restart the application. You may however safely pause before or after these stages in the wizard.



5e. Application submission procedure



Applicants will first be prompted to select the relevant **contacts** (themselves, their colleagues):

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Choose Contact

Choose Applicant Primary Contact

Nominate a primary contact for this application who is an employee of Vaccine UAT External Test Account 1, and also indicate if there are other secondary people involved.

* Primary Contact

Vaccine UAT External Contact 1

Optionally Choose Secondary Contacts

If needed you can optionally choose a secondary and an alternative secondary contact, or leave the selection as "--None--".

* Secondary Contact

--None--

* Alternative Secondary Contact Choice

--None--

Previous

Next

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SECTION C – PILOT

5e. Application submission procedure



Next, select “**Immunization Device**” as the product type:

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Product Type

Select the product area to narrow down the list of application types.

* Product Type

- ☐ Active Pharmaceutical Ingredient
- ☐ Active Pharmaceutical Ingredient Master File
- ☐ Finished Pharmaceutical Product
- ☐ Finished Vaccine Product
- ☐ IMD Evaluating Laboratory
- ☒ Immunisation Device
- ☐ In Vitro Diagnostic
- ☐ Male Circumcision Device
- ☐ Quality Control Laboratory
- ☐ Vector Control Active Ingredient
- ☐ Vector Control Product
- ☐ WHO Prequalification Evaluating Laboratory

Previous Next

5e. Application submission procedure



Next, select “**Prequalification**” as the application type:

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Application Type

Based on the product type, here is the list of application types available.

* Application Type

☒ Prequalification

☐ Post-PQ Change

☐ Reassessment

Previous Next

5e. Application submission procedure



The Wizard will ask for confirmation of the application details:

Note: WHO-IMD applications are classified as **“Vx IMD”** (Vaccines – Immunization Devices) within the ePQS system.

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Confirm Application Details

By proceeding to the next step you will be creating a draft Vx IMD Application. This draft application will be available in your List View of Cases.

- Application Type: Prequalification
- Product Type: Immunisation Device
- Organization: Vaccine UAT External Test Account 1
- Primary Contact: Vaccine UAT External Contact 1

Previous

Next

5e. Application submission procedure



The Wizard will provide the your **case number**.
Make a physical note of this reference number:

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Continue Application

A draft application has been created.

For reference the new application has the case number **PQ-IMD-2023-0040**. You can view the draft application details by following the link.

Next

5e. Application submission procedure



Next, select the “**Product Subtype**” (the IMD-PQS Product Category):

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Additional Application Info

* Product Subtype

- ✓ E001: Cold rooms, freezer rooms, and related equipment
- E003: Refrigerators and freezers
- E004: Cold boxes and vaccine carriers
- E005: Coolant-packs
- E006: Temperature monitoring devices
- E007 EHC: Cold chain accessories
- E007 VS: Cold chain accessories
- E008: Injection devices for immunization
- E010: Waste management equipment
- E013: Injection devices for therapeutic purposes

5e. Application submission procedure



The Wizard will provide the **application number** (which is the same as the case number shown previously):

ePQS Application Wizard

Organization & Contacts

✓

Product Details

Documents

Finalize

Create a Product

New Product
Since this is a Prequalification type application, a new product will be created of type:

- Immunization Device (IMD): E001: Cold rooms, freezer rooms, and related equipment

It will be linked to your application [PQ-IMD-2023-0040](#).

Previous

Next

5e. Application submission procedure



Input a **product name** – the manufacturer product reference. A **description**, and the **type of appliance** (free text) are also useful, but not mandatory:

ePQS Application Wizard

Organization & Contacts

✓

Product Details

Documents

Finalize

Create a Product

Further Vx IMD Details

(Please fill out all required fields)

* Product Name

Product Description

Type of Appliance

Next

5e. Application submission procedure



The following section of the application requires the input of **the full product specifications** (called the “IMD Product Variant” page).

ePQS Application Wizard

Organization & Contacts ✓ Product Details Documents Finalize

Create IMD Product Variants

Variant Information Details Screen 1
(Please fill out all required fields. For picklist fields, --None-- should be selected if the answer is not available.)

Range of cold room sizes available small (smallest, m3)

Range of cold room sizes available large (largest, m3)

Freezer room sizes (smallest, m3)

Freezer room sizes (largest, m3)

* Pre-qualified regions

* ISO 9001/13485 certified

* ISO 14001 certified

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****All fields are required** unless not applicable for a product. There are multiple such pages to complete for each category of product.



5e. Application submission procedure

IMPORTANT REMINDER:

- You MUST complete the “**PRODUCT VARIANT**” section of the “Application Wizard”, for your application to be considered by the WHO IMD team. Please do not click “submit” on your application until you have completed the full Application Wizard, including the “PRODUCT VARIANT” section.
 - It is NOT possible to return to a submitted application to complete the **Application Wizard**.
 - If you submit an application *without* completing the Application Wizard, the application will be **discarded** and you will need to submit a new application.

Kindly also avoid pausing your application during the creation of the “product record” and/or the “product variant record” at the current time, as there is a risk of subsequent Wizard sections being omitted once you restart the application. You may however safely pause before or after these stages in the wizard.



5e. Application submission procedure



Once the Variant Information Detail pages are completed, the wizard will provide the **“IMD Product Variant Ref.”**. Make a physical note of this reference number:

A screenshot of the 'ePQS Application Wizard' interface. At the top, the title 'ePQS Application Wizard' is displayed. Below it is a progress bar with five steps: 'Organization & Contacts' (dark blue with a white checkmark), 'Product Details' (light blue), 'Documents' (light grey), and 'Finalize' (light grey). The main heading is 'Create IMD Product Variants'. Below this, a success message reads 'Success' followed by 'IMD Product Variant Ref. IMDV-00033 created.', where the reference number is highlighted with an orange box. A blue 'Next' button is located in the bottom right corner of the wizard frame.

ePQS Application Wizard

Organization & Contacts ✓ Product Details Documents Finalize

Create IMD Product Variants

Success
IMD Product Variant Ref. **IMDV-00033** created.

Next

5e. Application submission procedure



Next, please provide information about the “**product site**” (the actual site of product manufacture). This information is for the WHO Inspections team. Click on “Product Site” and select the product site option provided (which is related to your company).

- If the product site option provided is your office address and NOT the manufacturing site please contact Huckerbyg@who.int and provide the manufacturing site address. The addresses will then be correctly assigned in ePQS.
- If your prequalified products are manufactured at MORE THAN ONE site, please contact Huckerbyg@who.int and provide the additional manufacturing site address. A new product site will be created and assigned to this product.



ePQS Application Wizard

Organization & Contacts

✓

✓

Product-Related Info

Documents

Finalize

Add Product Related Information

* Choose Product Related Information to Add to Application

☐ Product Site

☒ I don't want to add any more product related information at this time

Previous

Next

5e. Application submission procedure



The final stage of the Wizard allows applicants to upload the (mandatory) documents.

See next slide for information related to what documents to submit:



ePQS Application Wizard


Organization & Contacts ✓ ✓ ✓ Documents Finalize

Upload Documents

Please attach all supporting documentation for your application below. Either drag-and-drop or select one or more files from your desktop, and then click Upload to attach them to this application.

You can review the folders for submission in the next page. There you can also rename, tag or remove documents. You can return to this screen to upload additional documents as part of this submission process. If you save the wizard as a draft, when you recommence the wizard you will have the opportunity to upload and review documents once again before final submission.

When finished, click **Next**.



Drag and drop files and folders
[Browse your device](#) or [Select Folders](#)

CancelUpload

January 2025

5e. Application submission procedure



List of mandatory documents.

The IMD-PQS Secretariat has provided a detailed list of application requirements, including mandatory documents, in their email response to your “Pre-submission” form.

In addition, users may refer to Section 3.4.3 of the [***IMD-PQS Prequalification Holder Guidelines***](#) for a generic list of the documentation that must be provided for a complete application for each product category.

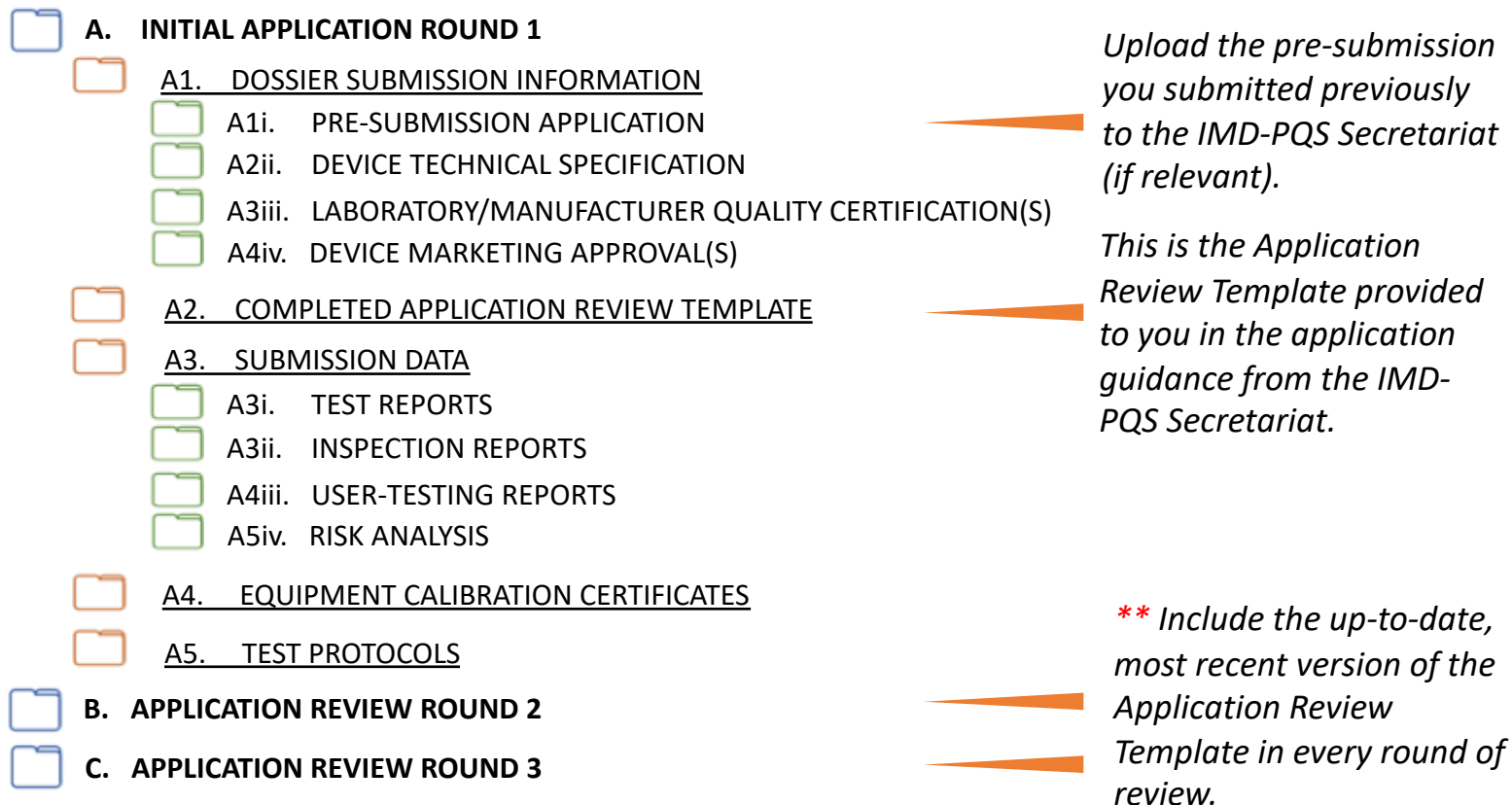
The Prequalification Guidelines can be downloaded from: <https://extranet.who.int/prequal/key-resources/documents/imd-pqs-guidelines-prequalification-applicants-prequalification-holders>



5e. Application submission procedure

MANDATORY folder structure

IMD PQS requires applicants to upload the application documents under the following folder structure.



- This folder structure is **mandatory**.
- However, applicants are only required to create & upload the folders & subfolders that are relevant & required for their application.
- Refer to the detailed list of application requirements provided to you by the WHO IMD-PQS Secretariat.

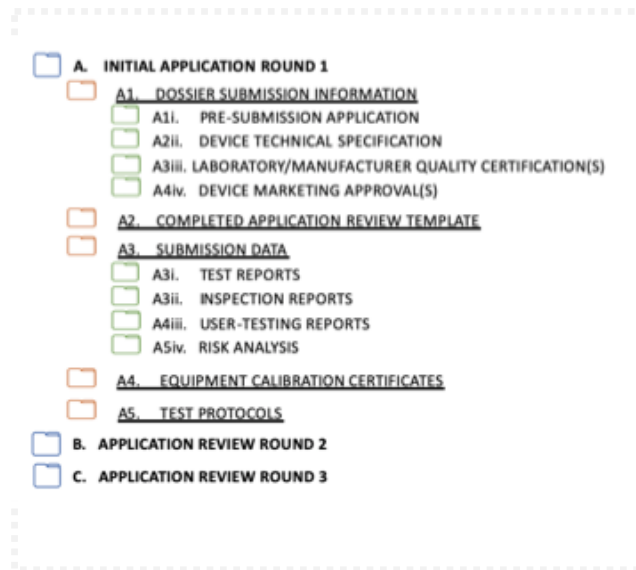
• **CLICK HERE TO DOWNLOAD THIS FOLDER STRUCTURE IN PRE-FORMATTED .ZIP FORMAT:**
<https://extranet.who.int/prequal/key-resources/documents/imd-pqs-epqs-mandatory-folder-structure>



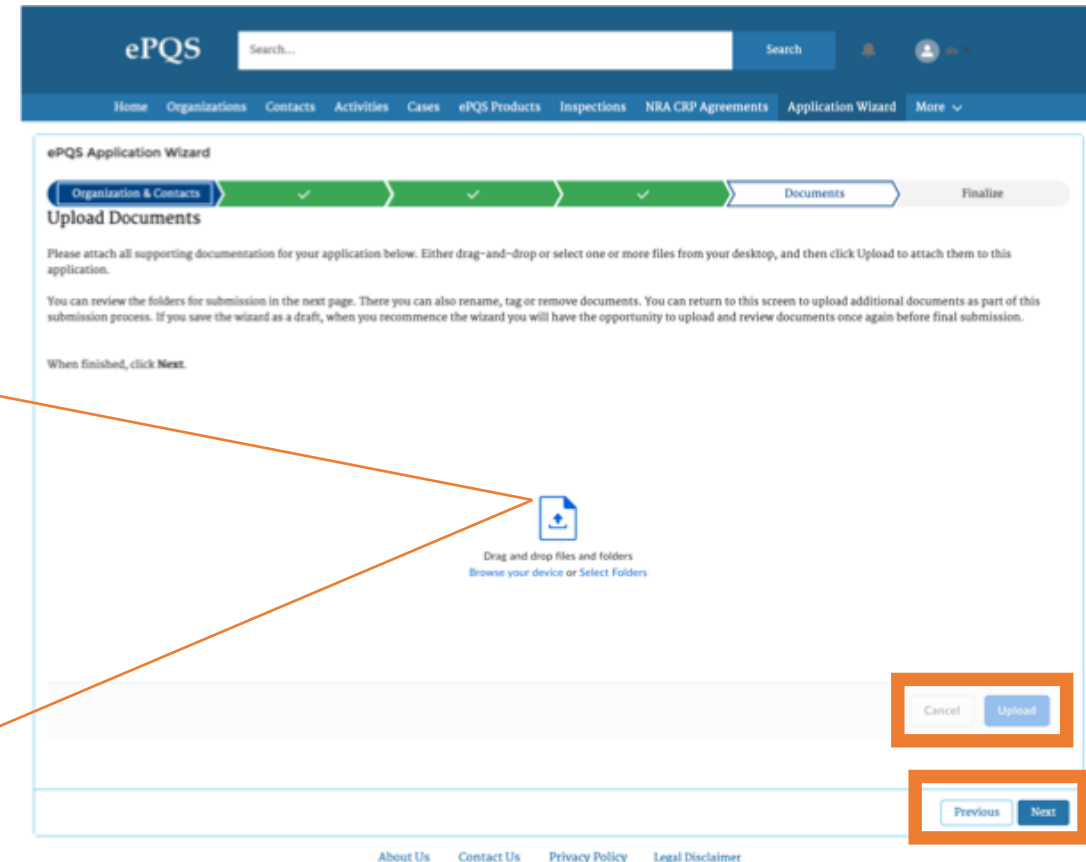
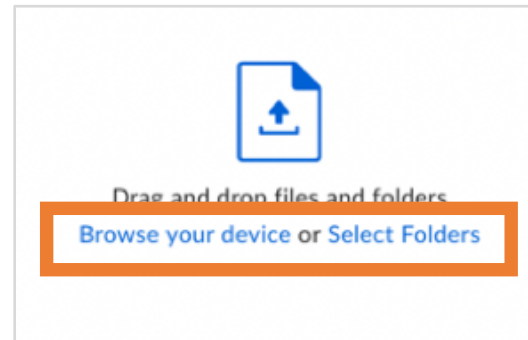
5e. Application submission procedure

MANDATORY folder structure

1 Create the folder structure **locally** on your computer.



2 Then, upload each folder and sub-folder to ePQS on the “Upload Documents” page. Keep the names and numeration as shown on this slide (even if not all folders are relevant).





5e. Application submission procedure

MANDATORY folder structure

- 3 Once uploaded, Box will display the folder structure as shown here.

Once all documents are uploaded, click “next”.

IMPORTANT: A folder will **not** upload if it does not contain a document. Only upload the folders / sub-folders if they contain at least one document.

ePQS

Search...

Search

Home Organizations Contacts Activities Cases ePQS Products Inspections NRA CRP Agreements CRP Product Registrations More

ePQS Resume Wizard

Organization & Contacts Documents Finalize

Document Review

Please review the documents and folders you intend to upload. You may navigate through the folder structure, renaming and deleting folders as necessary. If you wish to upload further documents or folders please use the Previous button to return to the Upload document page. Document type meta-data may also be added to individual documents by opening these documents and adding the metadata value via the document menu that appears.

box Search files and folders

2024-09-19-20:54

> A. Initial application (Round 1)

| NAME | UPDATED | SIZE |
|---|-------------------------|----------|
| A1. Dossier submission information | Aug 15, 2025 by WHO_JWT | 18 Files |
| A2. Completed Application Review Template | Aug 15, 2025 by WHO_JWT | 1 File |
| A3. Submission data | Aug 15, 2025 by WHO_JWT | 8 Files |
| A4. Equipment calibration certificates | Aug 15, 2025 by WHO_JWT | 0 Files |
| A5. Test protocols | Aug 15, 2025 by WHO_JWT | 1 File |

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5e. Application submission procedure



Once the complete documentation has been uploaded to the submission, the Wizard will provide the option to **submit**, **save draft** or **discard draft**:

ePQS Application Wizard

Organization & Contacts

✓

✓

✓

✓

Finalize

Review Application

It is important that you review your application prior to submission. Use the link provided to open it in a new tab and look at the information entered, and also review the related records (click on the Related sub-tab) of which you should be able to open those records too.

Case ID: [PQ-IMD-2023-0040](#)

Product or Laboratory ID: [P-15764](#)

Submit, Save or Discard

Please choose whether you are ready to submit this application, if you need more time then save the existing draft, or discard if made in error.

• Ready to submit?

☒ Yes

☐ No, save existing draft application and product (if applicable)

☐ No, discard this draft application and product (if applicable)

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5e. Application submission procedure



Once “**submit**” has been selected, the Wizard will confirm the Case ID. **The application is complete.** The IMD-PQS Secretariat will contact the applicant via the ePQS email agent and/or “Box” cloud file-sharing system with any further requests for information and with information about next steps.

ePQS Application Wizard

Organization & Contacts

✓

✓

✓

✓

Finalize

Application Submitted

Your application has been successfully submitted. You cannot make any further changes but you can view the information provided on the record directly:

- Case ID: [PQ-IMD-2023-0040](#)
- Application Type: Prequalification
- Product Type: Immunisation Device

Close This Tab or Navigate Away
The application wizard has now finished – you can either close this browser window/tab or navigate to another Salesforce tab. (No need to click 'Next' button.)

Next



6f

Post-PQ variation submission

5f. Post-PQ variation submission procedure



The “**Application Wizard**” tool provides step-by-step instructions for how to complete the application. The wizard welcome page provides an overview of the process:

ePQS Application Wizard

Start

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Create a New Application

Welcome to the Application Wizard. You can use this wizard to create a range of applications. For some application types, the wizard will also assist in the creation of an applicable Product record.

At the end of the wizard process, the created records can be saved in draft, submitted, or discarded at the end of the process.

Navigation

As you go through the wizard, you may be offered a chance to go back to the last screen with a 'Previous' button, to change the answers given.

At certain stages in the wizard process, the 'Previous' button will not be offered, for example when the last screen created a new record.

It is important **NOT TO USE the Back button in your browser**, as this will reset the wizard to the first screen and you are likely to lose your progress.

Draft Records

The wizard will be creating a draft application and, in some instances, a draft product record as you proceed through the wizard. The wizard will offer links to these records, which you can open in a separate tab. As the wizard progresses, the relevant records will be populated with the information that you supply.

If you do not submit your application at the end of the wizard process, draft records will appear in the applicable List Views on your homepage.

You can submit a previously saved draft application by opening the application and selecting the “Resume Application Wizard” from the menu in the top right-hand corner of the record.

January 2025

Next

5f. Post-PQ variation submission procedure



Applicants will first be prompted to select the relevant contacts:

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Choose Contact

Choose Applicant Primary Contact
Nominate a primary contact for this application who is an employee of Vaccine UAT External Test Account 1, and also indicate if there are other secondary people involved.

* Primary Contact

Vaccine UAT External Contact 1

Optionally Choose Secondary Contacts
If needed you can optionally choose a secondary and an alternative secondary contact, or leave the selection as "--None--".

* Secondary Contact

--None--

* Alternative Secondary Contact Choice

--None--

Previous

Next

5f. Post-PQ variation submission procedure



Next, select “**Immunization Device**” as the product type:

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Product Type

Select the product area to narrow down the list of application types.

* Product Type

- ☐ Active Pharmaceutical Ingredient
- ☐ Active Pharmaceutical Ingredient Master File
- ☐ Finished Pharmaceutical Product
- ☐ Finished Vaccine Product
- ☐ IMD Evaluating Laboratory
- ☒ Immunisation Device
- ☐ In Vitro Diagnostic
- ☐ Male Circumcision Device
- ☐ Quality Control Laboratory
- ☐ Vector Control Active Ingredient
- ☐ Vector Control Product
- ☐ WHO Prequalification Evaluating Laboratory

Previous Next

5f. Post-PQ variation submission procedure



Select “**Post-PQ Change**” as the application type:

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Choose Application Type

Based on the product type, here is the list of application types available.

* Application Type

☐ Prequalification

☒ Post-PQ Change

☐ Reassessment

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5f. Post-PQ variation submission procedure



Next, users have a choice between two types of post-PQ variations:

- **Type A - Administration** → Select for ADMINISTRATIVE data changes.
- **Type B – Technical** → Select for TECHNICAL variations that concern product specifications

NOTE – the following sequence of screens are the same for both of these options.

A screenshot of the 'ePQS Application Wizard' interface. It features a horizontal progress bar with five steps: 'Organization & Contacts' (active, dark blue), 'Application Info' (light blue), 'Product Details' (light gray), 'Documents' (light gray), and 'Finalize' (light gray). Below the progress bar, the title 'Choose Application Subtype' is followed by the instruction 'Please enter the following additional information:'. A dropdown menu for '* Application Subtype' is open, showing two options: 'Type A(Administration)' and 'Type B (Technical)'. At the bottom right of the form, there are 'Previous' and 'Next' buttons.

5f. Post-PQ variation submission procedure



The next screen advises that users will be asked to select the product for which they wish to report the variation. The selection happens on the later screen.

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Relevant Products Found

For the specific product type selected, matching relevant prequalified or acceptable status products have been successfully found. You will be asked to link one to this application shortly.

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5f. Post-PQ variation submission procedure



The next screen summarizes the application details that the user has inputted so far, and asks for confirmation.

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Confirm Application Details

By proceeding to the next step you will be creating a draft Vx IMD Post-PQ Change. This draft application will be available in your List View of Cases.

- Application Type: Post-PQ Change
- Application Subtype: Type A (Major)
- Product Type: Immunisation Device
- Organization:
- Primary Contact: |

Previous

Next

5f. Post-PQ variation submission procedure



The draft application has now been created. This screen asks the user to confirm their wish to continue.

It provides an **application case number**. It is recommended to make a physical note of this number.

ePQS Application Wizard

Organization & Contacts

Application Info

Product Details

Documents

Finalize

Continue Application

A draft application has been created.

For reference the new application has the case number [PQC-IMD-2024-0007](#). You can view the draft application details by following the link.

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5f. Post-PQ variation submission procedure



The next screen, **“Add Change Information”** is a recurring screen in the remaining part of the application. It reappears until the user has selected each of these options in sequence, starting here with **“Add products...”**. (Later, the application will loop back and users will need to select “Add one or more pieces of information...”, and finally “No more at this time”.)

At this stage, select **“Add products...”**

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Information

You will need to list the products that are being changed, and also record the change types that apply

Either

- ☒ Add products that are the subject of post-prequalification changes
- ☐ Add one or more pieces of information about the change, including the type
- ☐ No more at this time

Next

5f. Post-PQ variation submission procedure



The Wizard will provide a list of products currently related to the user's account. Users should **select the product** for which they wish to submit a post-PQ variation.

Note – users may only select one product for each round on this screen. If they wish to submit a variation for multiple products, they may add other products the next time this screen appears.

ePQS Application Wizard

Organization & Contacts

✓

✓

Post-PQ Changes

Documents

Finalize

Select Products

Choose a product that is the subject of a change

Only those with a status of Prequalified or Acceptable are available.

* Product(s): To select multiple items, hold down the Ctrl (PC) or Command (Mac) key

Eoo

Eoo

Eoo

Eoo

Eoo

Previous

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5f. Post-PQ variation submission procedure



The next slide confirms the product selection.

ePQS Application Wizard

Organization & Contacts

✓

✓

Post-PQ Changes

Documents

Finalize

Add Products

Success
The following product(s) have been linked with your **PQC-IMD-2024-0007** application:
Eoo

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5f. Post-PQ variation submission procedure



Next, users are presented for a second time the **“Add Change Information”** screen. This time, select **“Add one or more pieces of information...”**.

ePQS Application Wizard

Organization & Contacts

✓

✓

Post-PQ Changes

Documents

Finalize

Add Change Information

You will need to list the products that are being changed, and also record the change types that apply

Either

- ☐ Add products that are the subject of post-prequalification changes
- ☒ Add one or more pieces of information about the change, including the type
- ☐ No more at this time

Next

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5f. Post-PQ variation submission procedure



Here users are asked to select the **precise type of variation** (change) they wish to submit. Select one type of change (variation) from the list.

Note – This same list will appear irrespective of whether “Type A Administrative” or “Type B Technical” change types was selected at the start.

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Info

* Change Type

- ✓ 1. Administrative - Change in primary contact
- 2. Administrative - Change to contact details (email, telephone)
- 3. Administrative - Change in ownership
- 6. Technical - Change in the manufacturing process
- 5. Technical - Change in product components or materials
- 7. Technical - Change in batch size
- 8. Technical - Change in product specifications
- 9. Technical - Change in primary packaging
- 10. Technical - Change in secondary packaging
- 11. Technical - Change in the packaging size or dimensions
- 12. Technical - Other
- 4. Administrative - Other

5f. Post-PQ variation submission procedure



Here users are asked to provide the detailed information related to the change. **It is very important to provide the complete set of information here, as described in the text on the screen.** If complete information is not provided, the application will be returned to the user for further input.

ePQS Application Wizard

Organization & Contacts

✓

✓

Post-PQ Changes

Documents

Finalize

Add Change Info

Please provide: 1. an explanation or rationale for the change; 2. the data currently retained in the prequalified product record (the PQS Data Sheet), related to this information type; 3. the change required (provide the NEW data to be used to update the prequalified product record (PQS Data Sheet) related to this type of information);

Lastly, please describe the evidence to verify the change, and upload the relevant documentation on the following screen.

Change Description

Previous

Next

5f. Post-PQ variation submission procedure



On this screen, the Wizard confirms that the change information has been linked with the product you selected.

ePQS Application Wizard

Organization & Contacts

✓

✓

Post-PQ Changes

Documents

Finalize

Add Change Info

Success
The change of type "1. Administrative - Change in primary contact" has been linked with your [PQC-IMD-2024-0007](#) application.

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5f. Post-PQ variation submission procedure



Next the **“Add change information”** screen displays for a third time.

Note - If is wished to report changes to additional products, the user may begin to add the additional or next product(s) here by re-selecting the second option. The user will be prompted to add the change details for that additional product on the screen that follows.

If it NOT wished to add additional products, select **“No more at this time”**.

The screenshot shows the 'ePQS Application Wizard' interface. At the top, a progress bar indicates the current step: 'Organization & Contacts' (completed, green), 'Post-PQ Changes' (current step, blue), 'Documents' (pending, grey), and 'Finalize' (pending, grey). Below the progress bar, the title 'Add Change Information' is displayed. The instruction reads: 'You will need to list the products that are being changed, and also record the change types that apply'. Under the heading 'Either', there are three radio button options: 'Add products that are the subject of post-prequalification changes', 'Add one or more pieces of information about the change, including the type', and 'No more at this time' (which is selected). A 'Next' button is located at the bottom right of the form.

5f. Post-PQ variation submission procedure



Assuming that “No more at this time” has been selected, the user will be moved onto the start of the document upload procedure. Click “Next”.

ePQS Application Wizard
You are uploading documents to Case#PQC-IMD-2024-0007

[Previous](#) [Next](#)

5f. Post-PQ variation submission procedure



The user should select the type of document you will upload (CTD or eCTD).

WHO requirements and guidance on eCTD documents can be found here:

<https://extranet.who.int/prequal/ectd-portal>

IMPORTANT – WHO IMD-PQS does NOT currently require eCTD documents. IMD-PQS PQ Holders should select “**Non-eCTD**”.

ePQS Application Wizard

* Select Document Type

☐ eCTD

☒ Non-eCTD

Previous

Next

5f. Post-PQ variation submission procedure



On this screen, users should upload ALL the documents related to the change (variation) request, **specifically the evidence required for IMD-PQS to verify the change requested.**

The screenshot shows the 'ePQS Application Wizard' interface. At the top, a progress bar indicates four steps: 'Organization & Contacts' (completed with a checkmark), two intermediate steps (also completed with checkmarks), and 'Documents' (the current step, highlighted with a blue border). A 'Finalize' button is at the end of the progress bar. Below the progress bar, the heading 'Upload Documents' is followed by instructions: 'Please attach all supporting documentation for your application below. Either drag-and-drop or select one or more files from your desktop, and then click Upload to attach them to this application.' Further instructions state: 'You can review the folders for submission in the next page. There you can also rename, tag or remove documents. You can return to this screen to upload additional documents as part of this submission process. If you save the wizard as a draft, when you recommence the wizard you will have the opportunity to upload and review documents once again before final submission.' Below this, it says 'When finished, click Next.' In the center, there is a blue document icon with an upward arrow, and the text 'Drag and drop files and folders' and 'Browse your device or Select Folders'. At the bottom right of the main content area, there are 'Cancel' and 'Upload' buttons. At the very bottom of the wizard, there are 'Previous' and 'Next' buttons.

5f. Post-PQ variation submission procedure




On the subsequent screen, users will see a display list of all the documents that have been uploaded.

ePQS Application Wizard


Organization & Contacts ✓ ✓ ✓ Documents Finalize

Document Review

Please review the documents and folders you intend to upload. You may navigate through the folder structure, renaming and deleting folders as necessary. If you wish to upload further documents or folders please use the Previous button to return to the Upload document page. Document type meta-data may also be added to individual documents by opening these documents and adding the metadata value via the document menu that appears.

 Search files and folders

2024-08-23-16:29



There are no items in this folder.

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5f. Post-PQ variation submission procedure



Users are now at the **review and submit stage**. On this screen, users may opt to use the generated ePQS case number or link provided earlier to review the application. Otherwise, select **“Yes”** to submit, or else **“No, save draft”** if it is wished to come back later to complete or update the submissions, or **“No, discard”**.

ePQS Application Wizard

Organization & Contacts

✓

✓

✓

✓

Finalize

Review Application

It is important that you review your application prior to submission. Use the link provided to open it in a new tab and look at the information entered, and also review the related records (click on the Related sub-tab) of which you should be able to open those records too.

Case ID: [PQC-IMD-2024-0007](#)

Submit, Save or Discard

Please choose whether you are ready to submit this application, if you need more time then save the existing draft, or discard if made in error.

• Ready to submit?

☒ Yes

☐ No, save existing draft application and product (if applicable)

☐ No, discard this draft application and product (if applicable)

Previous

Next

5f. Post-PQ variation submission procedure



The Wizard will confirm that the application has been submitted.
Click **“Finish”** to be taken to an overview of your change application.

ePQS Application Wizard

Organization & Contacts

✓

✓

✓

✓

Finalize

Application Submitted

The application wizard has now finished – click on the **Finish** button to be redirected to the detailed page of your submitted application.

Finish

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5f. Post-PQ variation submission procedure



This screen displays the case information related to the change (variation) submission.

The status will be listed as **“Under Screening”**.

A **“Required action”** notification will be delivered to the IMD-PQS Secretariat and Technical Specialists responsible for reviewing the change request and information submitted.

The screenshot shows the ePQS system interface for a case titled "Case PQC-IMD-2024-0007". The top navigation bar includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, the case details are displayed. The case record type is "Vx IMD Post-PQ Change", the case number is "00026713", and the status is "Under Screening", which is highlighted with an orange box. The applicant organization is "ePQS Vx IMD Queue". The date of prequalification/acceptance is "23/08/2024". The case owner is "ePQS Vx IMD Queue". The product type is "Immunisation Device". The application type is "Post-PQ Change". The application subtype is "Type A (Major)". The product assessment procedure is "Type A (Major)". The case progress shows the date application submitted as "23/08/2024" and the date application accepted for assessment as "23/08/2024". The system information shows the case record type as "Vx IMD Post-PQ Change" and the record status as "Active".

| Case Record Type | Case Number | Status | Applicant Organization | Date of Prequalification/Acceptance | Case Owner |
|-----------------------|-------------|-----------------|------------------------|-------------------------------------|-------------------|
| Vx IMD Post-PQ Change | 00026713 | Under Screening | ePQS Vx IMD Queue | 23/08/2024 | ePQS Vx IMD Queue |

Details Related Activities Preview Document Document Download Document Submission

General Details

| Field | Value |
|------------------------------|---------------------|
| WHO Application Number | PQC-IMD-2024-0007 |
| ePQS Case ID | PQC-IMD-2024-0007 |
| Product Type | Immunisation Device |
| Application Type | Post-PQ Change |
| Application Subtype | Type A (Major) |
| Product Assessment Procedure | Type A (Major) |

Case Progress

| Field | Value |
|--|------------|
| Date Application Submitted | 23/08/2024 |
| Date Application Accepted For Assessment | 23/08/2024 |

System Information

| Field | Value |
|------------------|-----------------------|
| Created By | |
| Case Record Type | Vx IMD Post-PQ Change |
| Last Modified By | |
| Record Status | Active |



5g

Up/downloading of documents

5g. Up/downloading of documents – Related to a PQ application (a “CASE”)



Documents related to a “case” record - i.e. product applications - are available under the “Cases” tab.

The screenshot shows the ePQS web application interface. The top navigation bar includes the ePQS logo, a search bar, and a user profile icon. The main navigation menu contains links for Home, Organizations, Contacts, Activities, **Cases** (highlighted with an orange box), PQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The 'Cases' section is active, displaying a list of cases. A dropdown menu for 'LIST VIEWS' is open, showing options: 'All Cases (Portal)' (selected), 'All Closed Cases (Portal)', 'All Open Cases (Portal)', 'Recently Viewed (Pinned list)', and 'Recently Viewed Cases'. The main table displays a list of cases with columns for Application S..., WHO Pro..., Date Appl..., Date Appl..., and Date of Pr... The table shows four rows of data, all with 'Standard' as the Application S... and '01/01/1900' as the Date Appl... and Date of Pr... A 'Printable View' button is located in the top right corner of the table area.

| | Application S... | WHO Pro... | Date Appl... | Date Appl... | Date of Pr... |
|---|------------------|------------|--------------|--------------|---------------|
| 1 | Standard | | 01/01/1900 | 01/01/1900 | |
| 2 | Standard | | 01/01/1900 | 01/01/1900 | |
| 3 | Standard | | 01/01/1900 | 01/01/1900 | |
| 4 | Standard | | 01/01/1900 | 01/01/1900 | |

5g. Up/downloading of documents – Related to a PQ application (a “CASE”)



Only an “**External correspondence**” folder is available for cases.

The “**Preview**”, “**Download**” and “**Submission**” functions are available.

Users should ensure that they are able to upload documents & visualise them.

The screenshot displays the ePQS web application interface. At the top, there is a search bar and a navigation menu with options like Home, Organizations, Contacts, Activities, **Cases** (highlighted with an orange box), ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, a case card for 'Case PQC-IMD-2024-0007' is shown, with a pink folder icon and a status of 'Under Screening'. To the right of the case card are buttons for '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. Below the case card, there are tabs for 'Details', 'Related', 'Activities', **Preview Document** (highlighted with an orange box), 'Document Download', and 'Document Submission'. The 'Preview Document' tab is active, showing a 'box' logo and a search bar. Below this, a table lists documents. The first document is 'Correspondence (External)', which was modified 'Yesterday' and has a size of '0 Byte'.

| Name | Modified | Size |
|---------------------------|-----------|--------|
| Correspondence (External) | Yesterday | 0 Byte |

5g. Up/downloading of documents – Related to organisation ACCOUNT



Under “**My Account**” or “**Document Submission**”, users may upload, preview and download documents related to their account or organisation (for example, certification and licencing).

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the ePQS logo, a search bar, and a navigation menu. The navigation menu includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registrations. A user profile dropdown menu is open, showing options for Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the header, the main content area shows the 'Account' section with a purple icon and the text 'Account Record Type Non-State Actor'. To the right, there are buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. The 'My Account' button is highlighted with an orange border. Below this, there is a section for 'Details' and 'Related' documents, with 'Preview Documents', 'Document Download', and 'Document Submission' (highlighted with an orange border) being the active tabs. The 'Document Submission' tab shows a form titled 'Upload to Account Submission' with a welcome message: 'Welcome to Document Submission Wizard. Please click on **Next** to proceed for Account#Vestfrost Solutions'. A 'Next' button is visible at the bottom right of the form. At the very bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

5g. Up/downloading of documents – Related to organisation ACCOUNT




Document submission interface →

Once documents are uploaded, users can view them in “**Preview**”.

Details Related Preview Documents Document Download **Document Submission**

Upload to Account Submission



Drag and drop files and folders
[Browse your device](#) or [Select Folders](#)

Cancel

Upload

Next



5h

**Viewing
assigned
activities**

5i. Viewing of assigned activities



Clicking on the **“Activities”** tab will display a list of all pending activities related to your account. Clicking on each list item will take you to the detailed instructions / requirements of each task. **Users should note that they will automatically receive an email (via the contact-registered email address) each time a new activity is assigned.**

Tasks might include the upload/transmission of further information, providing a response to a specific question, or a request to schedule a meeting.

ePQS

Search...

Search

clic

HomeOrganizationsContacts**Activities**CasesePQS ProductsInspectionsNRA CRP AgreementsCRP Product RegistrationsMore ▾

External Activities

All Activities (Applications - Portal) ▾

0 items • Sorted by Activity Name • Filtered by All external activities – Related To (Inspection) • Updated 14 minutes ago

Q Search this list...

| Activity Name ↑ ▾ | Subject ▾ | Owner Last Na... ▾ | Related To (Case) ▾ | Status ▾ | Start Date ▾ | Due Date ▾ | End Date ▾ |
|-------------------|-----------|--------------------|---------------------|----------|--------------|------------|------------|
| ... | | | | | | | |



5i

**Bell and email
notifications &
associations
with actions**

5j. Assignment of activities to applicants



Users will find a list of any pending activities via the **bell notification**.

ePQS Search... Search

Home Organizations Contacts Activities Cases ePQS Products Inspections NR C

Notifications

You don't have any notifications right now.

Submit an application

Create Account or Contact

Edit an Account or Contact

Change a Record or Contact

World Health Organization

World Health Organization

World Health Organization

World Health Organization

COMMONLY USED LISTS

Medicine Storage Conditions

WHO Vaccine Names

Medicines Pharmaceutical Ingredients

VC Active Ingredients/Synergist Name

QCLm Generic Name (INN)

Post-Prequalification Changes

View ePQS Registered Accounts

FEATURED

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SECTION D – TECHNICAL SUPPORT



6

Additional technical support

6i. IMD-PQS Technical support

IMD-PQS will provide the following additional support to new users over 2025/6.



ePQS Personalised Coaching, Q&A Guide



Email support



**PQ Holder Guidelines*
Annex 7**

6ii. General user guidance – specific training

General guidance is available on the ePQS landing page:

Link: <https://extranet.who.int/prequal/epqs-portal>

General Portal Information

[ePQS - Accounts Contacts Users and Record Visibility](#)

[ePQS - Creating or editing a Contact or Account](#)

[ePQS - Portal Introduction and Features](#)

[ePQS - Terms and Conditions of use \(4 October 2023\)](#)

[ePQS - User Registration and accessing the ePQS Portal](#)

ePQS Portal



The ePQS Portal is the externally-facing Salesforce Community site of the WHO Prequalification Unit's new ePQS system. ePQS is a platform for the processing of Prequalification Information for medicines, diagnostics, vector control products, vaccines, immunization devices, quality control laboratories and inspections.

Within the portal, users will have the ability to:

- View Salesforce records relevant to the user
- Submit applications
- Upload and download documents securely
- View and monitor notifications for pending activities

Portal Opening: Final preparations are being made to open the portal. It is anticipated that the portal will go live in the second quarter 2024. Further more specific updates will be provided as timelines become clarified

Registered users will be able to access the Portal at this link: <https://who.my.site.com/ePQS/s/login/>.

Guidance notes related to the features of the portal, processes around applications, document submissions, and many other topics will be progressively posted to this webpage.

Webinars will be announced soon and regular clinics will be held post-go live to support users, answer questions, and identify issues in order to make continuous improvements.

General Portal Information

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