

WHO e-Prequalification System (ePQS)

Learning materials 2025



Laboratory accreditation applicants



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

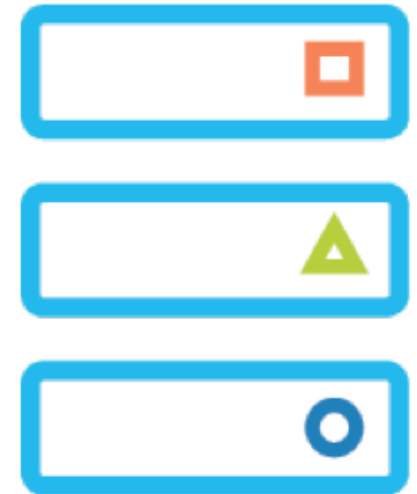
Key access links (for reference)

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:** Laboratories seeking accreditation or re-accreditation to test cold chain products for WHO pre-qualification
2. These learning materials may also be of interest to: IMD-PQS external experts engaged in the evaluation of accreditation dossiers, as a complement to the dedicated materials provided for that group.



Purposes of these learning materials



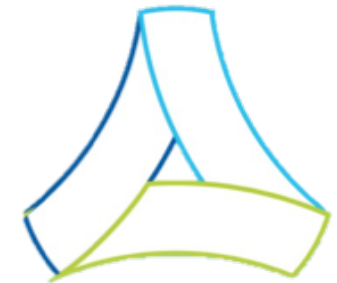
Learning materials are to provide comprehensive resources to enable you to develop your capabilities (semi-) autonomously for the various feature and functions of ePQS, and the pilot requirements. This deck:

1. Explains the role(s) of ePQS in the laboratory accreditation process
2. Introduces ePQS navigation
3. Guides laboratory applicants through the ePQS accreditation process
4. Introduces key concepts and terminology
5. Provides links to all detailed technical guidance where they exist



Q&A / coaching sessions with the IMD-PQS ePQS support tea, 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 accreditation procedures



SECTION D – SUPPORT

- Additional and forthcoming technical support

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ePQS Portal

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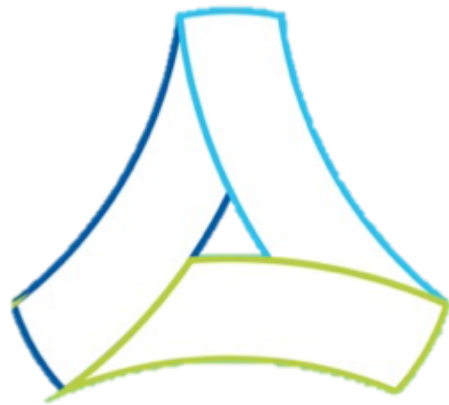
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SECTION A – SET-UP



1

ePQS Portal Introduction

1. ePQS Introduction – What is ePQS?



The ePQS “e-**Pre**Qualification **S**ystem” platform provides laboratories applying for accreditation a one-stop online portal to:

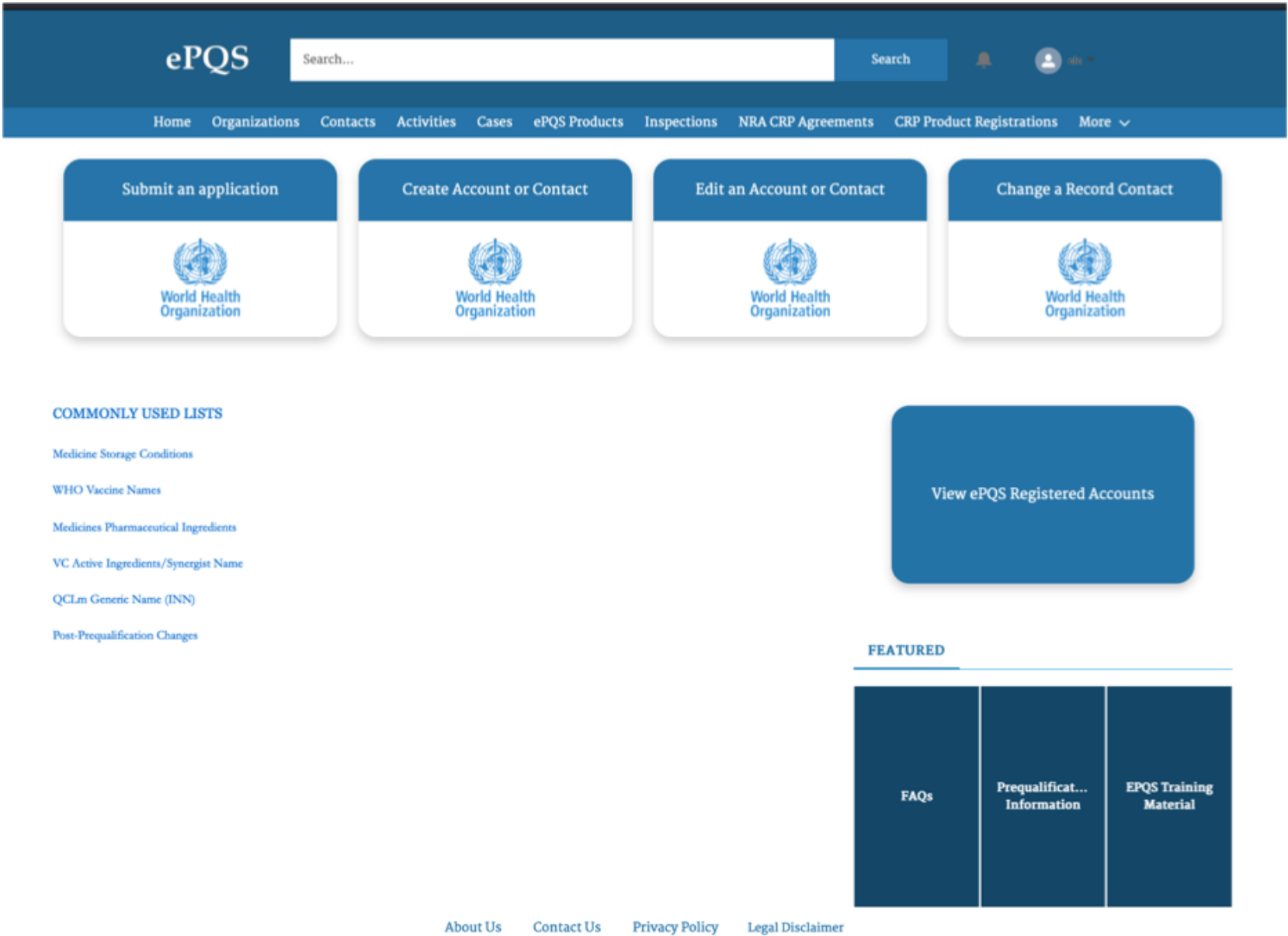
- submit & manage [accreditation applications](#)
- follow the [site inspections](#) process
- [view all records](#) relevant to their laboratory
- submit required changes to account, contact & product information
- upload and download [documents](#) securely
- view and monitor [notifications for pending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

[Re-accreditation procedures](#) will be included in the ePQS system in future (2026/7).



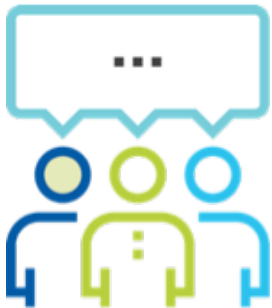
In addition to these processes, the ePQS platform **supports all communication between accreditation applicants, the WHO prequalification divisions** and external experts related to the workflows via a cloud file-sharing system integrated into ePQS system.

1. ePQS Introduction – Home page appearance



1. ePQS Introduction

Communication with IMD-PQS



First contact with IMD-PQS – “offline”

- the first contact with the IMD-PQS Secretariat for a new accreditation application will continue to be via an invitation by email from the IMD-PQS Secretariat.
- the Secretariat will direct the applicant to register on the ePQS platform.
- thereafter all communication related to the accreditation application, up to and including the final decision, will take place via the ePQS platform.



Applications in the ePQS system

- communication between accreditation applicants and the IMD-PQS Secretariat will take place via:
 - the application wizard,
 - the downloadable request forms on the home page,
 - the up/download of documents to the relevant “External Communications” folder within each user’s account.

1. ePQS Introduction

Key components of the ePQS platform



The two key components of the WHO ePQS platform

The “application wizard”

Applications for accreditation and related processes 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 brand name of this cloud file-sharing facility is “Box”.) The file-sharing takes place via an “External Correspondence” folder, accessible via document tabs within each ePQS *Account, Case Record or Product Record*.



1. ePQS Introduction

Quick view - Application Wizard

ePQS

Search...

Search

Home Organizations Contacts Activities Cases ePQS Products Inspections NRA CRP Agreements **Application Wizard** More

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.

Next

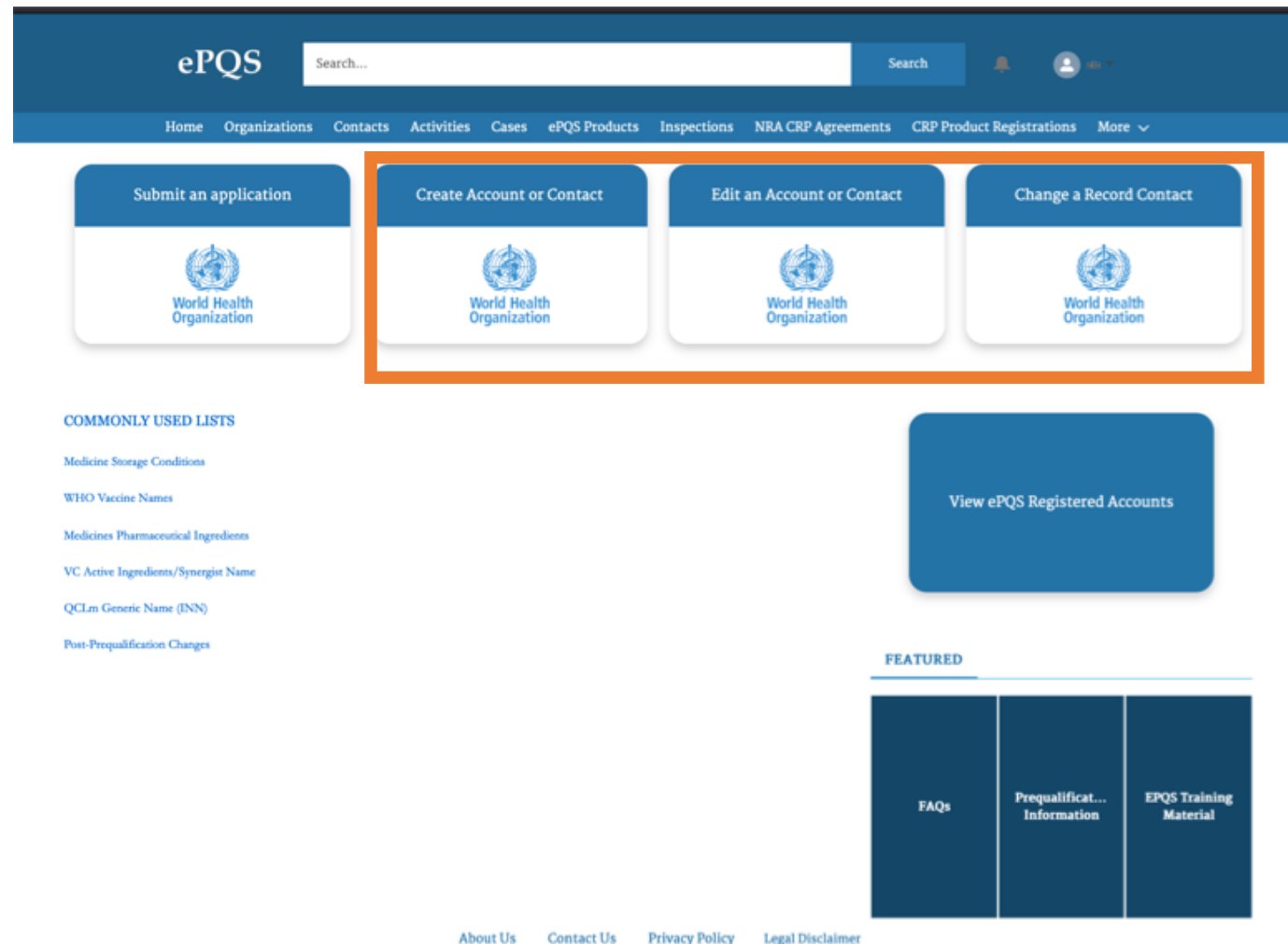
1. ePQS Introduction

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 'Search' button. Below the header is a navigation menu with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area shows details for an 'ePQS Product' with ID 'E00X-00X'. It includes fields for Product Type (Immunisation Device), Applicant Organization (Vaccine UAT External Contact 1), Product Assessment Procedure (Prequalification - Standard), and Date of Prequalification/Acceptance (25/11/2009). Below these fields are tabs: Details, Related, Preview Document, and Document Download. The 'Document Download' tab is highlighted with an orange box. An orange arrow points from this tab to a large orange-bordered overlay window. This overlay is a Box file manager interface, showing a search bar, a folder icon, and the text 'There are no items in this folder.' at the bottom. The overlay also has a '0 Selected' status and a close button.

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 accreditation-related processes:

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



2

Registration & access

3. Registration

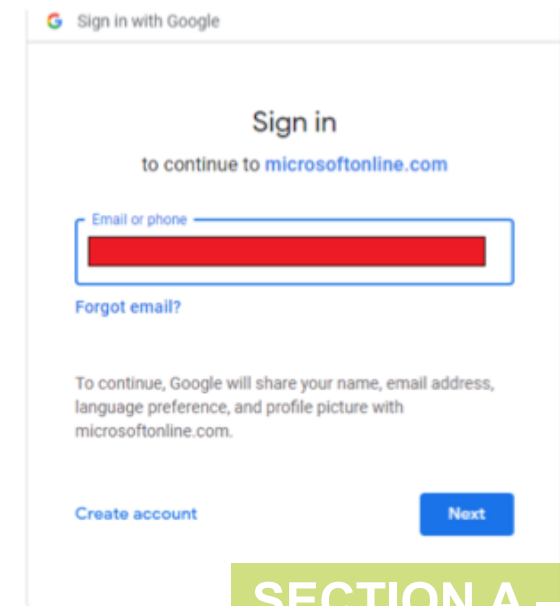
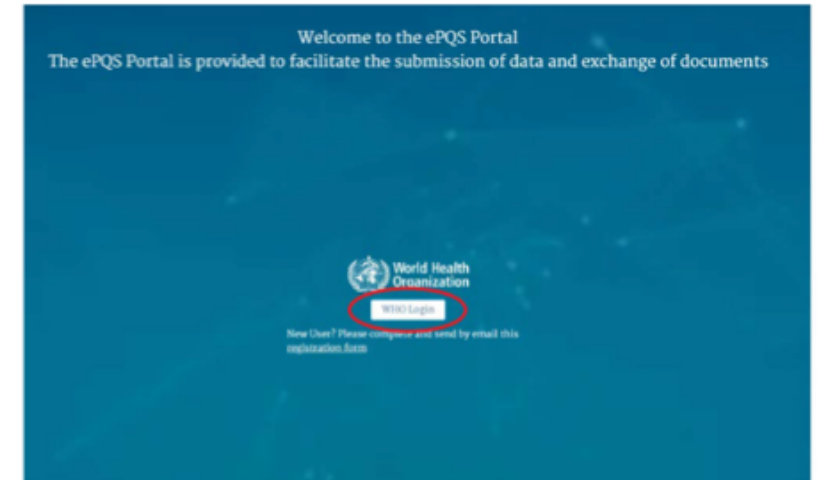
1. Account contacts have already been created for all currently-accredited laboratories.
2. Accredited laboratories must **verify their account and contact** details prior to registration. The IMD-PQS Secretariat will reach out individually to users with the required forms for this stage.
3. Contacts need to register to gain access to the the system.
Registration is achieved via this form :
“External Form – New ePQS User” linked here.
5. New registrees must this form and **return it 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 user password (the password used for the email service).





3

Concepts & terminology

3. Concepts & terminology



This section of the learning materials includes key terms that you will encounter whilst navigating ePQS.

It is intended as an ongoing reference guide throughout registration and use.

3. Concepts & terminology – two critical terms

“Records” and “Cases”

Record

A single instance of object data. Records types include:

- Product Record,
- Product Variant Record,
- Contact Record,
- Account Record,
- Case Record.

Case

Every prequalification application 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 WHO IMD-PQS case, the record type will be either “Vx <i>IMD Application</i> ”, or “Vx <i>IMD Post-PQ change</i> ” or “Vx <i>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

IMD-PQS 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 applications

Application	New application for product prequalification, post-PQ variation or Reassessment. Submitted via the Application Wizard.
Applicant organization	The legal entity submitting a prequalification application or post-prequalification commitment.
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.

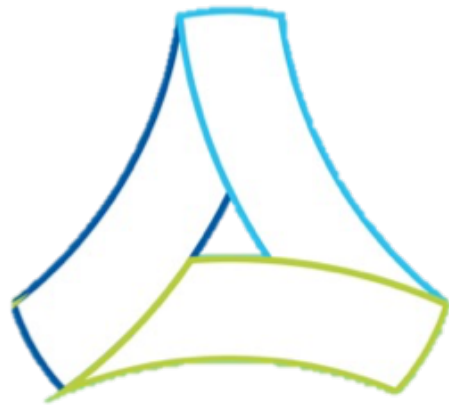


3. Concepts & terminology – other key terms

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 and 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”: “IMD-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 introduces the features and functions of ePQS.

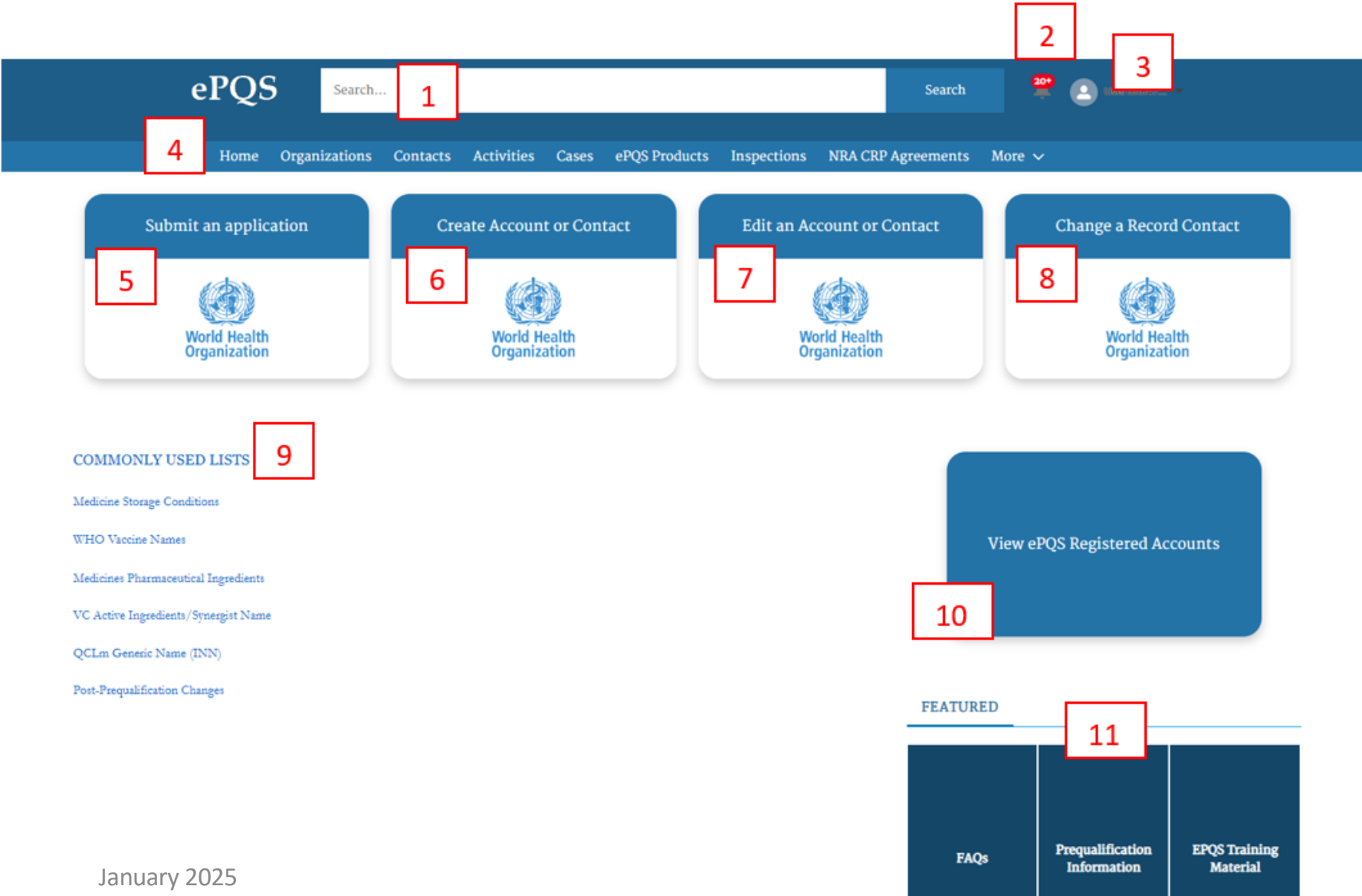
It is intended as a learning aid and ongoing reference guide.



4

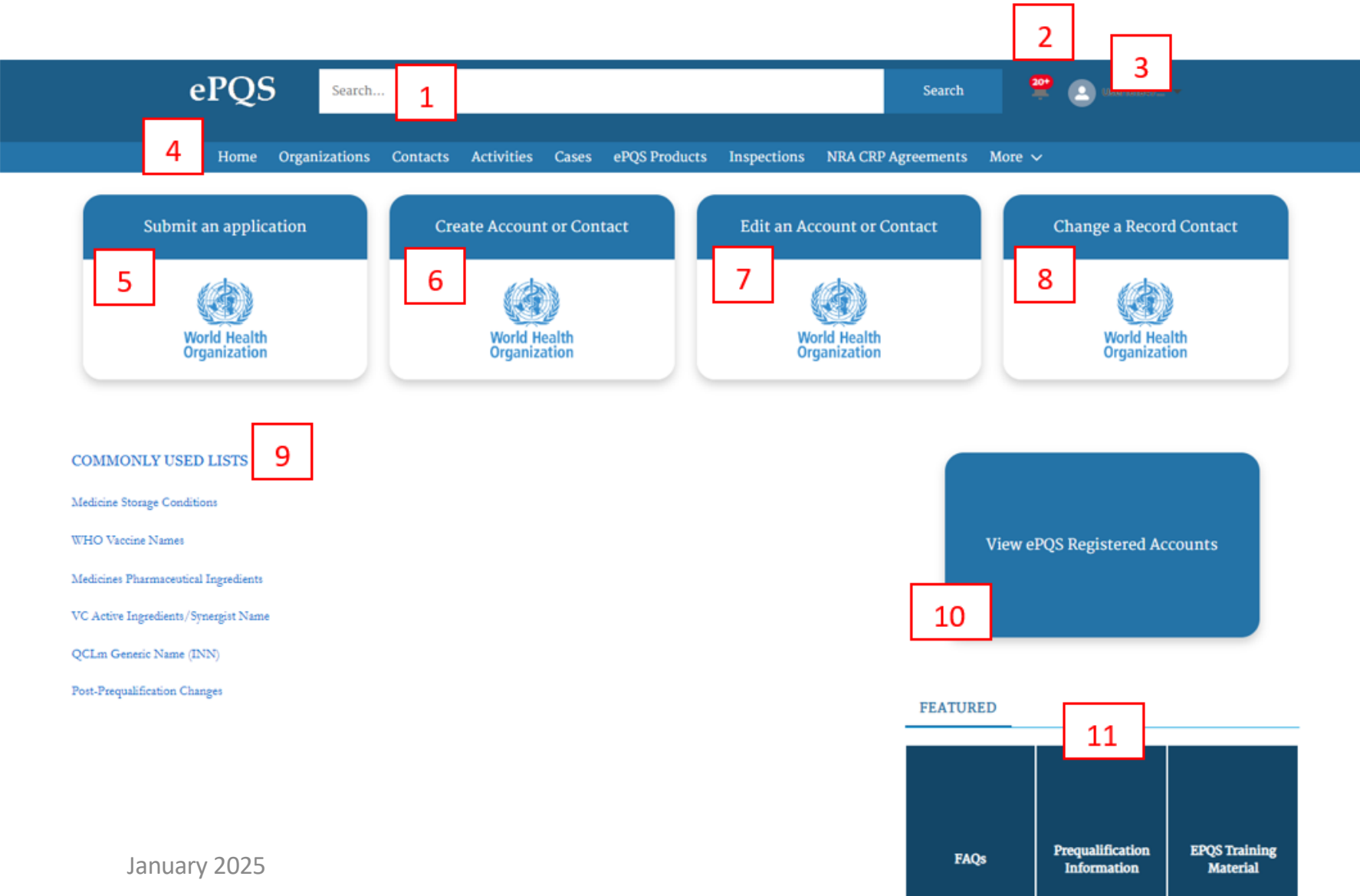
Navigating ePQS – General guide

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 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

Manager

Company Name

Active

☒

Contact

Phone

Mobile

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 actions.



4. ePQS navigation – My account



“My account” provides access to 5 sub-tabs : Details; Related; Preview documents; Document download; Download submission.

”Details” displays the information that is stored in ePQS related to the accredited laboratory.

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

Home My Profile My Account Logout

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 the account.

This includes:

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

The screenshot shows the ePQS user interface. At the top is a dark blue header with the 'ePQS' logo, a search bar, and navigation links: 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 header is an 'Account' section with buttons for '+ Follow', 'New Note', 'DocuSign Arms Tobacco Disclosure', and 'Update Published Information'. The main content area is titled 'Details' and has a 'Related' tab selected. It displays several record categories: 'Notes (0)', 'Related Contacts (2)' with a table of contact information, 'Case (Applications) (6+)' with a table of case details, 'Products (Applicant Organization) (6+)' with a table of product information, 'Product Sites (6+)' with a table of site information, '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 an 'Upload Files' button, and 'Account History (0)'. The footer contains 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 the account.

“External correspondence” contains the documents the user has 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 table listing account records. The table has columns for Account Record Type, Address (2), and Email. Below the account section, there is a 'Details' tab, a 'Related' tab, and a 'Preview Documents' tab (highlighted with an orange border). The 'Preview Documents' tab shows a 'box' search bar and a table of documents. The table has columns for Name, Modified, and Size. It lists two folders: 'External correspondence' and 'Submitted Documents', both with a modified date of 'Fri Apr 12 2024' and 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 the user to download and locally save all the documents related to your 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 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, there is a section for 'Account' with a table of account records. The table has columns for Account Record Type, Address (2), and Email. Below the table, there are tabs for Details, Related, Preview Documents, Document Download (highlighted with an orange border), and Document Submission. The 'Document Download' tab is active, showing a 'box' logo and a search bar for files and folders. Below the search bar, there is a list of documents. The first document is 'External correspondence' with a modified date of 'Fri Apr 12 2024' and a size of '0 Byte'. The second document is 'Submitted Documents' with a modified date of 'Fri Apr 12 2024' and a size of '0 Byte'. At the bottom of the interface, there is a footer with links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer. A green banner at the bottom right contains the text 'SECTION B – DISCOVERY'.

4. ePQS navigation – Documents



“Document submission” enables the user to upload documents to their account.

ePQS

Search...

Search

edf

[Home](#)[Organizations](#)[Contacts](#)[Activities](#)[Cases](#)[ePQS Products](#)[Inspections](#)[NRA CRP Agreements](#)[CRP Product Registration](#)

Account

[+ Follow](#)[New Note](#)[DocuSign Arms Tobacco Disclosure](#)[U](#)

Account Record Type

Address (2) ▼

Email

Home

My Profile

My Account

Logout

[Details](#)[Related](#)[Preview Documents](#)[Document Download](#)[**Document Submission**](#)

Upload to Account Submission

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

[Next](#)

[About Us](#)[Contact Us](#)[Privacy Policy](#)[Legal Disclaimer](#)


4. ePQS navigation – Documents



“Document submission” interface.

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



The “Submit an application” tab provides access to the “Application Wizard”, for accreditation applications.

ePQS

Search...

Search

Notifications

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

Submit an application

Create Account or Contact

Edit an Account or Contact

Change a Record 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

4. ePQS navigation – Forms



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

The screenshot displays the ePQS homepage. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a 'Search' button. To the right of the search bar are icons for notifications and a user profile. Below the header is a navigation bar with the following tabs: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and a 'More' dropdown menu. The main content area features four large blue buttons, each with the World Health Organization logo and text: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Change a Record Contact'. The first button is not highlighted, while the other three are enclosed in an orange rectangular frame. Below these buttons, there is a section titled 'COMMONLY USED LISTS' with a list of links: 'Medicine Storage Conditions', 'WHO Vaccine Names', 'Medicines Pharmaceutical Ingredients', 'VC Active Ingredients/Synergist Name', 'QCLm Generic Name (INN)', and 'Post-Prequalification Changes'. To the right of this list is a large blue button labeled 'View ePQS Registered Accounts'.

4. ePQS navigation – Notes



Under “Account” the user may also create “notes”.

Notes may also be shared with other 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 for the user profile, showing options: Home, My Profile, My Account (highlighted with an orange box), and Logout. In the main content area, there is a button labeled '+ Follow' and a button labeled 'New Note' (highlighted with an orange box). An orange callout arrow points from the 'New Note' button to an inset window. The inset window shows the 'New Note' form, which includes a text area for entering a note, a 'Save' button (highlighted with an orange box), and a 'Related to' dropdown menu set to 'Current Record'. At the bottom of the inset window, there are buttons for 'View Version History', 'Delete', 'Add to Records', and 'Done'.

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 displays the ePQS web application interface. The top navigation bar includes the ePQS logo, a search bar, and a user profile icon. The 'Organizations' tab is highlighted in the navigation bar. Below the navigation bar, the 'Accounts' section is visible, showing 'ePQS Accounts (Portal)' with a dropdown arrow. The dropdown menu is open, displaying 'LIST VIEWS' with four options: 'All Vx accounts', 'ePQS Accounts (Portal)' (selected with a checkmark), 'Recently Viewed (Pinned list)', and 'Recently Viewed Accounts'. The main content area shows a search bar labeled 'Search this list...' and a table with columns for 'Country (Physical)' and a filter icon.

4. ePQS navigation – Contacts



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

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

The screenshot displays 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 is visible, with the 'Contacts' tab highlighted. Below the navigation bar, the 'Contacts' section is active, showing a dropdown menu for 'All ePQS Contacts (Portal)'. The dropdown menu lists three options: 'All ePQS Contacts (Portal)' (selected), 'Recently Viewed (Pinned list)', and 'Recently Viewed Contacts'. The main content area displays a table with columns 'Account Name' and 'Account: Legal Name'. The table is currently empty, and a search bar is visible above it.

4. ePQS navigation – Activities



Via the “Activities” tabs, users can access a list of all the “external activities” related to their account. This includes applications 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 'Search' button. 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'. Below the navigation bar, the 'External Activities' section is visible. It features a green circular icon with a play symbol and the text 'External Activities'. Below this, there is a dropdown menu for 'Recently Viewed' (highlighted with an orange box). The dropdown menu is open, showing a list of 'LIST VIEWS': 'All Activities (Applications - Portal)', 'All Activities (Inspections - Portal)', 'My Activities (Portal)', 'My Open Activities (portal)', and 'Recently Viewed (Pinned list)' (which is selected and highlighted with a blue checkmark). To the right of the dropdown menu, there 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 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, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The 'Cases' tab is highlighted with an orange box. Below the navigation bar, the 'Cases' section is displayed. It includes a 'Printable View' button and a search bar labeled 'Search this list...'. A dropdown menu is open, showing 'LIST VIEWS' with the following options: 'All Cases (Portal)' (selected), 'All Closed Cases (Portal)', 'All Open Cases (Portal)', 'Recently Viewed (Pinned list)', and 'Recently Viewed Cases'. The dropdown menu is also highlighted with an orange box. Below the dropdown menu, a table of cases is visible. The table has columns: Application S..., WHO Pro..., Date Appli..., Date Appli..., and Date of Pr... The table contains four rows of data, each with a 'Standard' application and a date of '01/01/1900'. Each row has a dropdown arrow on the right side.

	Application S...	WHO Pro...	Date Appli...	Date Appli...	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



A list of all “Products” related to a user’s account is available via the main toolbar.

The screenshot shows the ePQS interface. The main toolbar at the top contains the ePQS logo, a search bar, and a user profile icon. The navigation menu below the toolbar includes links for Home, Organizations, Contacts, Activities, Cases, **ePQS Products** (highlighted with an orange box), Inspections, NRA CRP Agreements, CRP Product Registrations, and a More dropdown. Below the toolbar, the 'ePQS Products' dropdown menu is open, showing a list of views: 'All Active Products (Portal)', 'All Closed Products (Portal)', 'All Products (Portal)' (selected with a blue checkmark), and 'Recently Viewed (Pinned list)'. To the right of the dropdown menu, a table displays product data with columns for Product Subtype, Date of Preq..., Date of ..., and Date of Pro....

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

4. ePQS navigation – Inspections



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

The screenshot shows the ePQS main toolbar with a search bar and a navigation menu. The 'Inspections' menu item is highlighted with an orange box. Below the toolbar, the 'Inspections' section is visible, showing a dropdown menu for 'All Inspections (Portal)' and a table of inspection data.

ePQS Search... Search

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

Inspections
All Inspections (Portal) ▾ ↗

o items LIST VIEWS

- ✓ All Inspections (Portal)
- Recently Viewed (Pinned list)

Search this list... ⚙️ ↺ ⚙️

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 that a user will have to undertake to set-up an account and to submit applications for accreditation are:

- a. Access ePQS, verify accounts and contact details
- b. Verify correct record and correct product list visibility
- c. Verify access and functionality of personal user folder
- d. Submission an application for accreditation (if applicable)
- e. Submission a post-accreditation data change (if applicable)
- f. Upload documents (related to the submission)
- g. Download documents shared with the applicant
- h. Assign activities to applicants
- i. Verify functioning of the bell and email notifications





5a

Accessing registered accounts

5a. Accessing registered accounts





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

ePQS

Search...

Search

caroline.so...

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

5a. Accessing registered accounts

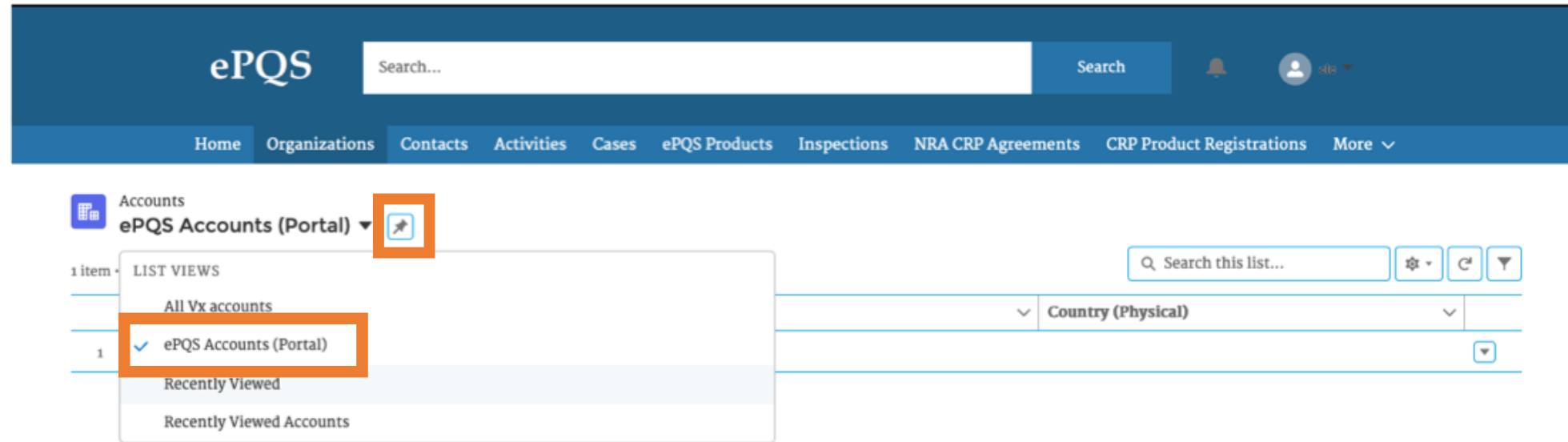


Users may select different list views. Recommended: “ePQS Accounts”.

Then users should review each record that appears in the list:

Account types include:

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



*** WHO-accredited laboratory can only visualise accounts associated to their own company.

5a. 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.

A screenshot of the ePQS web application. The header is dark blue with the 'ePQS' logo, a search bar, and a user profile dropdown menu. The main navigation bar is light blue with links to Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. The user profile dropdown menu is open, showing options: Home, My Profile, My Account, and Logout. The main content area shows an 'Account' record with fields for Account Record Type, Address (2), and Email. Below the fields are tabs for Details, Related, Preview Documents, Document Download, and Document Submission. The 'Details' tab is active, showing a list of expandable sections: Account Information, Address Information, WHO Country Information, General Details, Related Links, PQT Information, Account Usage - Collaborators, and System Information.



5b

**Correct record
visibility**

5bi. Correct record visibility



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

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

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. A dropdown menu is open from the profile icon, showing options: 'Home', 'My Profile', 'My Account' (highlighted with an orange box and a red circle with the number 1), and 'Logout'. Below the header, the main content area shows the 'Account' section. The 'Details' tab is active, and the 'Related' sub-tab is highlighted with an orange box and a red circle with the number 2. The 'Related' sub-tab displays 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'.

5bi. 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.

Users should ensure that each of the following types of records are visible:

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

The screenshot shows the ePQS application interface. At the top, there is a search bar and navigation tabs: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation, there is an 'Account' section with buttons for '+ Follow', 'New Note', 'DocuSign Arms Tobacco Disclosure', and 'Update Published Information'. The main content area is titled 'Related' and contains a list of record types with counts in parentheses:

- Notes (0)
- Related Contacts (2)
- Product Sites (6+)
- Case (Applications) (6+)
- Products (Applicant Organization) (6+)
- Inspections (0)
- CRP Product Registrations (0)
- CRP Product Registrations (NRA Organisation) (0)
- NRA CRP Participations (NRA Organization) (0)
- Files (0)
- Account History (0)

Each record type has a corresponding table below it, showing columns for various attributes. For example, the 'Related Contacts' table has columns for Contact Name, Direct, Active, and Start Date. The 'Product Sites' table has columns for Product Site ID, Product Site Status, Site Activity, and Activity Type(s). The 'Case (Applications)' table has columns for Case Number, ePQS Case ID, Status, and Last Modified Date/Time. The 'Products' table has columns for 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 currently empty.

5bii. Correct record visibility - *Products*



Products

Users can visualise the “products” – i.e. instances of accreditation - by expanding or click directly on the “Products” sub-tab.

The screenshot displays the ePQS web application interface. The top navigation bar includes the ePQS logo, a search bar, and a user profile icon. Below the navigation bar, there are tabs for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The 'ePQS Products' tab is currently selected and highlighted in orange. The main content area shows a list of product-related items, including Notes (0), Related Contacts (2), Product Sites (6+), Case (Applications) (6+), and Products (Applicant Organization) (6+). The 'Products (Applicant Organization) (6+)' section is highlighted with an orange border and contains a table with columns: WHO Product ID, Product Name, Vaccine Abbreviated Name, and Product Status. Below this table are sections for Inspections (0), CRP Product Registrations (0), CRP Product Registrations (NRA Organisation) (0), NRA CRP Participations (NRA Organization) (0), Files (0), and Account History (0). The footer includes links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

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

5bii. Correct record visibility - Products



Products

Users should review the list of products that are displayed:

1. Verify that the account displays ONLY instances of accreditation from your laboratory and NOT products of any other laboraratory.

The screenshot displays the ePQS interface for 'Products (Applicant Organization)'. The header includes the ePQS logo, a search bar, and a navigation menu with options like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area shows a table of products with columns: WHO Produc..., Product Name, Vaccine ..., Product Status, Product Type, and Product Subtype. The table lists 10 items, each labeled 'Product listing details ...'. The table is highlighted with an orange border. The page also includes a 'New' button and a 'More' dropdown menu.



5c

Personal use folder

5c. Personal use folder



ePQS offers external users a “Personal folder”, in which they may upload/save documents being worked before submitting them or sharing them with internal 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 'Search' button. Below the header is a navigation menu with links for Home, Organizations, **Contacts** (highlighted with an orange box), Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and a 'More' dropdown. The main content area shows the 'Contacts' section with a sub-header 'All ePQS Contacts (Portal)' and a search bar labeled 'Search this list...'. Below this, a table lists contacts. The first row is highlighted with an orange box and contains the text '1 USER NAME'. The second row is partially visible with the number '2'. The table has a status bar at the top indicating '2 items • Sorted by Name • Filtered by All contacts • Updated 2 minutes ago' and icons for settings, refresh, and filter.

1	USER NAME			
2				

To access the personal use folder, users should navigate to “Contacts” and choose their own contact account from the list of contacts.

5c. Personal use folder



Within the contact record, a user should click the “Preview Documents” tab. The user will see a folder with name conventions (YourName) “PersonalFolder”. Users should 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 is active, showing a 'box' logo and a search bar. Below the search bar, there is a folder named 'User(s) 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 name, 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.



5d

Accreditation application submission procedure



5d. Accreditation 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

StartOrganization & ContactsApplication InfoProduct DetailsDocumentsFinalize

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 2025Next

5d. Accreditation submission procedure



Applicants will first be prompted to select the relevant contacts.
Users should select themselves:

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

5d. Accreditation submission procedure



Next, users should select “IMD Evaluating Laboratory” as the product type:

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there's a header bar with the text 'Application Wizard'. Below it, a progress bar shows five steps: 'Organization & Contacts' (active), 'Application Info', 'Product Details', 'Documents', and 'Finalize'. The main content area is titled 'Choose Product Type' and includes the instruction 'Select the product area to narrow down the list of application types.' Under the heading '• Product Type', there are three radio button options: 'Finished Vaccine Product', 'Immunisation Device', and 'IMD Evaluating Laboratory'. The 'IMD Evaluating Laboratory' option is selected and highlighted with an orange rectangular border. At the bottom right, there are two buttons: 'Previous' and 'Next'.

5d. Accreditation submission procedure



Next, select “IMD Lab Accreditation” as the application type:

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there's a header bar with the title 'Application Wizard'. Below it, a progress bar shows five steps: 'Organization & Contacts', 'Application Info', 'Product Details', 'Documents', and 'Finalize'. The 'Application Info' step is currently active. The main content area is titled 'Choose Application Type' and includes a sub-header 'Based on the product type, here is the list of application types available.' Below this, there's a section labeled 'Application Type' with three radio button options: 'IMD Lab Accreditation' (which is selected and highlighted with an orange box), 'IMD Lab Change', and 'IMD Lab Reassessment'. At the bottom right, there are 'Previous' and 'Next' buttons.

5d. Accreditation 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.

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there's a header bar with the text 'Application Wizard' and a green icon. Below this, the main content area is titled 'ePQS Application Wizard'. A horizontal progress bar contains five steps: 'Organization & Contacts' (highlighted in blue), 'Application Info', 'Product Details', 'Documents', and 'Finalize'. Below the progress bar, the section is titled 'Confirm Application Details'. A message states: 'By proceeding to the next step you will be creating a draft Vx IMD Lab New Accreditation. This draft application will be available in your List View of Cases.' Below this message, there is a bulleted list of application details: 'Application Type: IMD Lab Accreditation', 'Product Type: IMD Evaluating Laboratory', 'Organization: Intertek (Switzerland)', and 'Primary Contact: Gerd Scherer'. At the bottom right, there are two buttons: 'Previous' (disabled) and 'Next' (active).

5d. Accreditation submission procedure



The Wizard will provide you with an “application number” (which is the same as the “case number”):

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there's a header bar with the title 'Application Wizard' and a green icon. Below this, the main content area is titled 'ePQS Application Wizard'. A progress bar is visible with four steps: 'Organization & Contacts' (highlighted in blue), 'Product Details' (highlighted in green with a checkmark), 'Documents', and 'Finalize'. Below the progress bar, the section 'Create a Product' is displayed. Under 'New Product', it states: 'Since this is a IMD Lab Accreditation type application, a new product will be created of type:'. A bulleted list follows: '• IMD Accredited Laboratory'. Below this, it says: 'It will be linked to your application, [New-IMDLab-2024-0005](#).' At the bottom right, there are two buttons: 'Previous' and 'Next'.

5d. Accreditation submission procedure



Select the laboratory site related to the laboratory (hint: type the first few characters of the laboratory name, then select the site that appears in the drop-down menu):

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there's a header bar with a green icon and the text 'Application Wizard'. Below this, the main content area is titled 'ePQS Application Wizard'. A progress bar is visible with five steps: 'Organization & Contacts' (dark blue), a green bar with a white checkmark, 'Product Details' (light blue), 'Documents' (light grey), and 'Finalize' (light grey). Below the progress bar, the section is titled 'Create a Product'. Underneath, it says 'Further IMD Laboratory Details 1a' and provides a hint: 'Click 'Previous' if the site you require is not on the list.' A red asterisk is followed by the label 'Laboratory Site'. Below this is a large, empty text input field. At the bottom right, there are two buttons: 'Previous' (light blue) and 'Next' (dark blue).

5d. Accreditation submission procedure



The Wizard will confirm the association of the chosen product site with the accreditation application:

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there's a header bar with the text 'Application Wizard' and a green icon. Below this, the main content area is titled 'ePQS Application Wizard'. A progress bar is visible with four steps: 'Organization & Contacts' (highlighted in blue), 'Product Details' (highlighted in green with a checkmark), 'Documents', and 'Finalize'. Below the progress bar, the section 'Create a Product' is displayed. Under this section, a message states 'Laboratory Successfully Updated' and provides details about the update, including a link to 'New-IMDLab-2024-0005'. A list item shows 'Product: P-13220'. At the bottom right, there are 'Previous' and 'Next' buttons.

5d. Accreditation submission procedure



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

A screenshot of a web application window titled "Application Wizard". Inside the window, the header says "ePQS Application Wizard". Below the header, it states "You are uploading documents to Case#New-IMDLab-2024-0005". At the bottom right of the window, there are two buttons: "Previous" and "Next". The "Next" button is highlighted in blue, indicating it is the active step.

Application Wizard

ePQS Application Wizard

You are uploading documents to Case#New-IMDLab-2024-0005

Previous Next

5d. Accreditation submission procedure



Select the type of documents you will upload: eCTD or non-eCTD.

A screenshot of a web application titled "Application Wizard" and "ePQS Application Wizard". It features a section titled "Select Document Type" with two radio button options: "eCTD" (which is selected) and "Non-eCTD". At the bottom right of the form, there are two buttons: "Previous" and "Next".

Application Wizard

ePQS Application Wizard

Select Document Type

☒ eCTD

☐ Non-eCTD

Previous Next

Information related to eCTDs for WHO prequalification can be found here:
<https://extranet.who.int/prequal/ectd-portal>

5d. Accreditation submission procedure



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

Application Wizard

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](#)

Cancel Upload

Previous Next

The Secretariat will provide complete guidance on the required documents, which will include: type(s) of testing the laboratory wishes to carry out; copies of relevant certifications and registrations; and details of facilities, competencies, staff and referees.

5d. Accreditation submission procedure



On this screen, the applicant can review and also re-organize the files and folders they have uploaded.

The screenshot shows the 'ePQS Application Wizard' interface. At the top, a progress bar indicates the current step is 'Documents', with previous steps 'Organization & Contacts' and 'Finalize' also visible. Below the progress bar, the 'Document Review' section contains instructions: '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.' A search bar with the 'box' logo and the text 'Search files and folders' is present. Below the search bar, the breadcrumb 'All Files > Error' is shown. The main content area displays a blue icon of a pot with a stick and a network error message: 'A network error has occurred while trying to load.' At the bottom right, there are 'Previous' and 'Next' buttons.

5d. Accreditation submission procedure



The applicant may then choose to submit, save as draft or discard the application.

Application Wizard

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: [New-IMDLab-2024-0005](#)

Product or Laboratory ID: [P-13220](#)

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

5d. Accreditation submission procedure



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

A screenshot of the 'ePQS Application Wizard' interface. At the top, a header bar says 'Application Wizard'. Below it, the title 'ePQS Application Wizard' is displayed. A progress bar shows five steps: 'Organization & Contacts' (active), followed by four steps marked with green checkmarks, and a final 'Finalize' step. Below the progress bar, the text 'Application Submitted' is shown. A message states: 'The application wizard has now finished - click on the **Finish** button to be redirected to the detailed page of your submitted application.' A blue 'Finish' button is located in the bottom right corner.



5e

**Post-
accreditation
change
submission**

5e. Accreditation submission procedure



The Wizard will also provide the user with the opportunity to submit administrative or technical changes to an accredited laboratory.

Step-by-step guidance will be provided in the course of 2025.



5f

Uploading of documents

5f. Uploading of documents – account / organisation



Under “My Account” / “Document Submission” users may upload documents

ePQS

Search...

Search

Home

Organizations

Contacts

Activities

Cases

ePQS Products

Inspections

NRA CRP Agreements

CRP Product Registration

Account

+ Follow

New Note

DocuSign Arms Tobacco Disclosure

U

Account Record Type

Address (2) ▼

Email

Home

My Profile

My Account

Logout

Details

Related

Preview Documents

Document Download

Document Submission

Upload to Account Submission

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

Next

About Us

Contact Us

Privacy Policy

Legal Disclaimer

5f. Uploading of documents – account / organisation




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

5f. Uploading of documents - cases



Documents related to cases (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 has several tabs: Home, Organizations, Contacts, Activities, **Cases** (highlighted with an orange box), PQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, the 'Cases' section is displayed. It features a 'Cases' icon, a dropdown menu for 'All Cases (Portal)', and a 'Printable View' button. A list of cases is shown with columns for Application S..., WHO Pro..., Date Appl..., Date Appl..., and Date of Pr... The list contains four items, all with a 'Standard' application status and a date of 01/01/1900. A 'LIST VIEWS' dropdown menu is open, showing options: All Cases (Portal) (selected), All Closed Cases (Portal), All Open Cases (Portal), Recently Viewed (Pinned list), and Recently Viewed Cases.

	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	

5f. Uploading of documents - cases



The “Preview”, “Download” and “Submission” functionalities work in the same way.

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

Users should ensure they are able to upload documents and visualise them afterwards.

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 various options: Home, Organizations, Contacts, Activities, **Cases** (highlighted with an orange box), PQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, there is a section for a specific case, 'Case PQC-IMD-2024-0007' (highlighted with an orange box). This section includes buttons for '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. Below this, there is a table with columns: Case Record Type, Case Number, Status, Date of Prequalification/Acceptance, and Case Owner. Below the table, there is a section for document management with tabs: Details, Related, Activities, **Preview Document** (highlighted with an orange box), Document Download, and Document Submiss. Below the tabs, there is a 'box' logo and a search bar for files and folders. Below the search bar, there is a table with columns: Name, Modified, and Size. The table shows a folder named 'Correspondence (External)' (highlighted with an orange box) with a modified date of 'Yesterday' and a size of '0 Byte'.

Case Record Type	Case Number	Status	Date of Prequalification/Acceptance	Case Owner
	PQC-IMD-2024-0007			

Name	Modified	Size
Correspondence (External)	Yesterday	0 Byte



5g

Downloading of documents

5g. Downloading of documents



Under “My Account” / “Document Download” at least two folders should appear: “External correspondence” folder and “Submitted documents”.

Once they have submitted an application, users should open the folders and test-download the contents.

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 links to Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registrations. A dropdown menu is open under the user profile icon, showing options: Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the navigation bar, there is a section for 'Account' with a table of account records. The table has columns for Account Record Type, Address (2), and Email. Below the table, there are tabs for Details, Related, Preview Documents, Document Download (highlighted with an orange border), and Document Submission. The Document Download tab is active, showing a 'box' search bar and a list of folders: 'External correspondence' and 'Submitted Documents', both modified on Fri Apr 12 2024. At the bottom of the interface, there is a footer with links to About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

5g. Uploading of documents - cases



The “Preview”,
“Download” and
“Submission”
functionalities
work in the same
way.

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

users should
ensure they can
download
documents from
this location.

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 (highlighted with an orange box), ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, there is a section for a specific case, 'Case PQC-IMD-2024-0007' (highlighted with an orange box). To the right of the case name are buttons: '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. Below this is a table with columns: Case Record Type, Case Number, Status, Date of Prequalification/Acceptance, and Case Owner. Below the table, there is a section for document management with tabs: Details, Related, Activities, Preview Document (highlighted with an orange box), Document Download, and Document Submission. Below the tabs is a 'box' logo and a search bar. Below the search bar is a table with columns: Name, Modified, and Size. The table contains one row: 'Correspondence (External)' with a modified date of 'Yesterday' and a size of '0 Byte'.

Case Record Type	Case Number	Status	Date of Prequalification/Acceptance	Case Owner

Name	Modified	Size
Correspondence (External)	Yesterday	0 Byte



5h

**Viewing
assigned
activities**

5h. 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 users to the detailed instructions / requirements of each task. **Users will automatically receive an email (via their contact-registered email address) each time a new activity is assigned to them.**

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

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 is located below the header, with the 'Activities' tab highlighted by an orange box. The 'Activities' page displays a table of activities. The table has the following columns: Activity Name, Subject, Owner Last Name, Related To (Case), Status, Start Date, Due Date, and End Date. The table is currently empty, showing only three dots in the first row. The page also includes a search bar for the list, a filter icon, and a refresh icon.



5i

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

5i. Assignment of activities to applicants



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

The screenshot displays the ePQS (Electronic Product Quality System) website. At the top, there is a dark blue header with the ePQS logo, a search bar, and a notification bell icon highlighted with an orange box. Below the header, a navigation menu includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, and NR/C. A 'Notifications' pop-up window is open, showing the message 'You don't have any notifications right now.' Below the navigation menu, there are four white cards with blue headers and the World Health Organization logo. The cards are labeled: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Change a record contact'. Below these cards, there is a section titled 'COMMONLY USED LISTS' with links to 'Medicine Storage Conditions', 'WHO Vaccine Names', 'Medicines Pharmaceutical Ingredients', 'VC Active Ingredients/Synergist Name', 'QCLm Generic Name (INN)', and 'Post-Prequalification Changes'. To the right of this section is a large blue button labeled 'View ePQS Registered Accounts'. At the bottom of the page, there is a 'FEATURED' section and a footer with links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.



SECTION D – TECHNICAL SUPPORT



6

Additional technical support

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

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

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