



# 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)

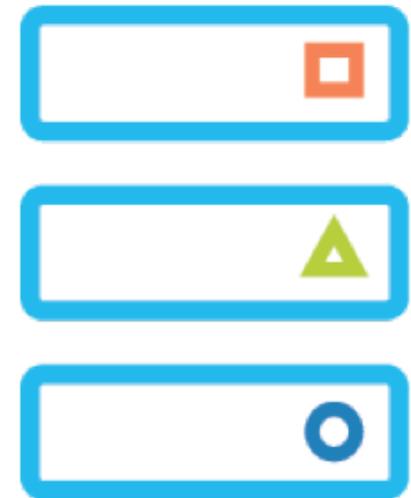
# Key access links (for reference)

WHO ePQS Portal landing page:

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

ePQS login link:

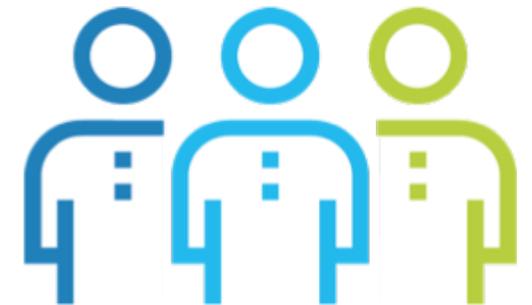
<https://who.lightning.force.com/lightning>



# 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..**

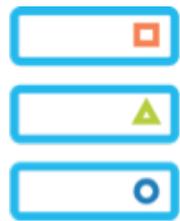
**ePQS Portal**



# Overview of these learning materials



ePQS Portal



## 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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# SECTION A – SET-UP



# 1

## ePQS Portal Introduction

# 1. ePQS Introduction – What is ePQS?



The ePQS “e-PreQualification System” platform provides laboratories applying for accreditation a one-stop online portal to:

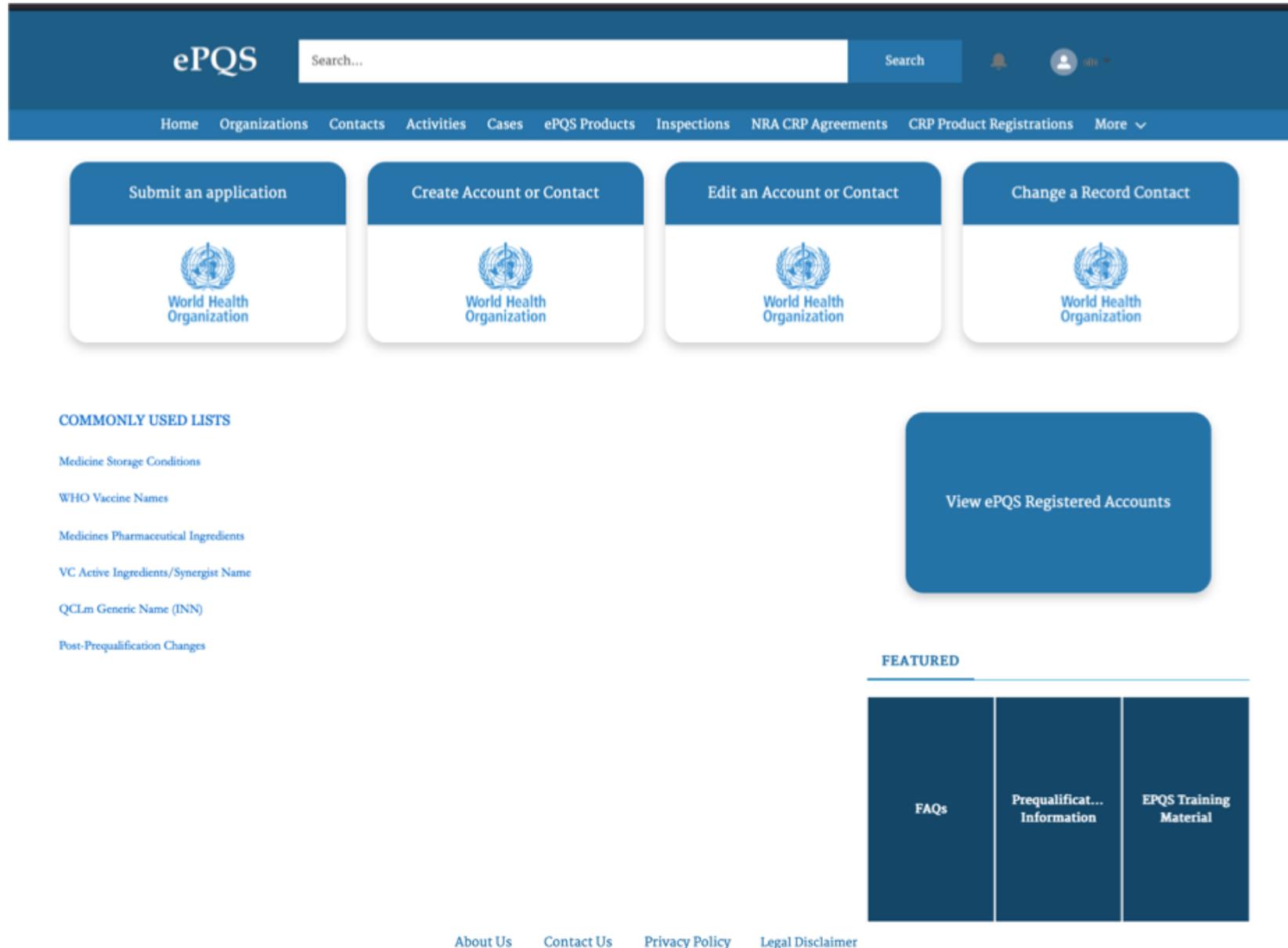
- submit & manage [accreditation applications](#)
- follow the [site inspections](#) process
- [view all records](#) relevant to their laboratory
- submit required changes to account, contact & product information
- upload and download [documents](#) securely
- view and monitor [notifications for pending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

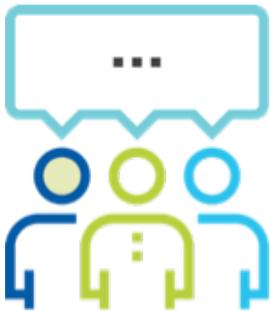
# 1. ePQS Introduction – Home page appearance



January 2025

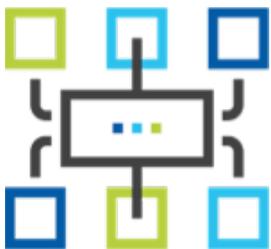
# 1. ePQS Introduction

## 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.

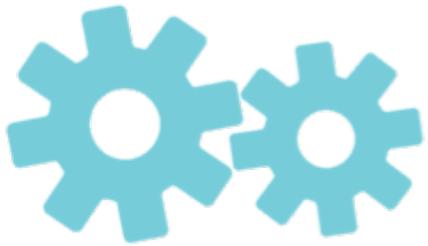


### Applications in the ePQS system

- 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



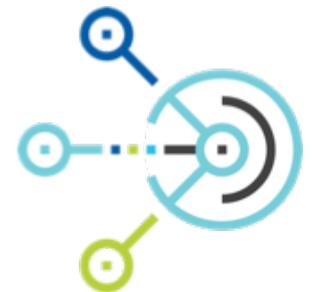
### The two key components of the WHO ePQS platform

#### *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

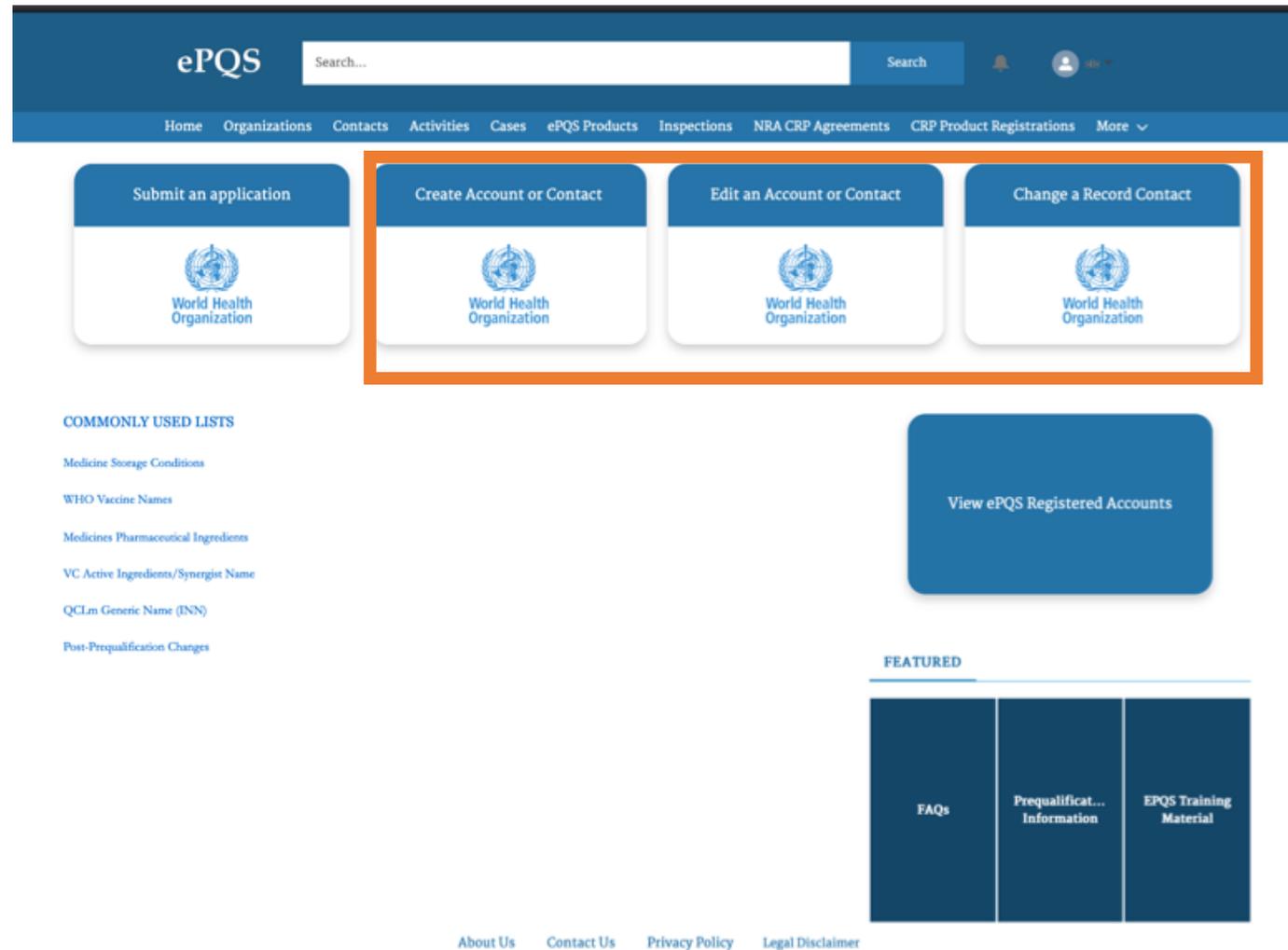
# 1. ePQS Introduction

## 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 for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area shows an 'ePQS Product' entry for 'E00X-00X'. Below this, there are four columns of metadata: 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 row of action buttons includes '+ Follow', 'Edit', 'Delete', and 'Printable View'. Below the metadata, there are two tabs: 'Details' and 'Related'. The 'Document Download' tab is highlighted with an orange box. Below the tabs, a file manager interface is shown, featuring a search bar with the text 'Search files and folders', a folder icon, and the message 'There are no items in this folder.' The file manager also includes a '0 Selected' indicator 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.

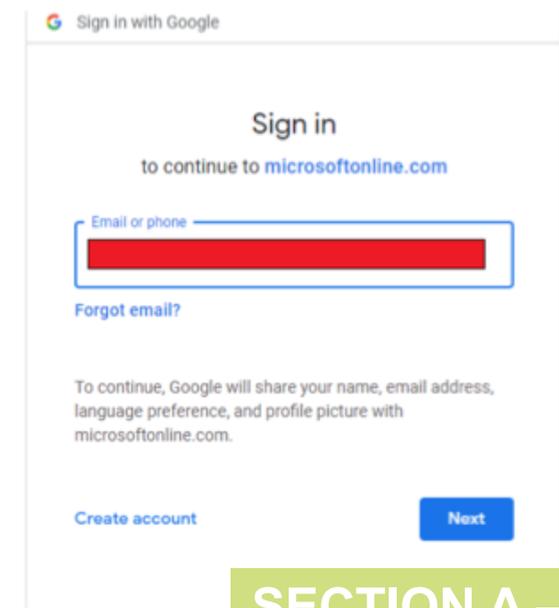
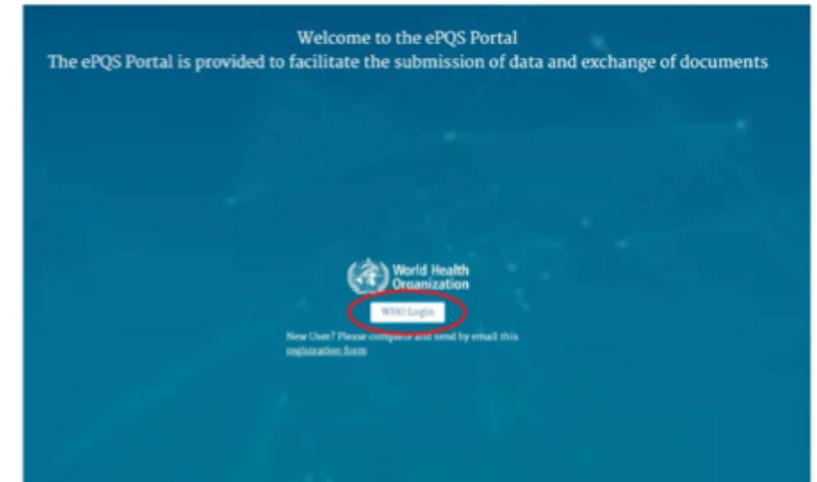


5. New registrees must this form and **return it to [vaccprequalification@who.int](mailto:vaccprequalification@who.int), with the IMD-PQS Secretariat in copy.**

## 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).



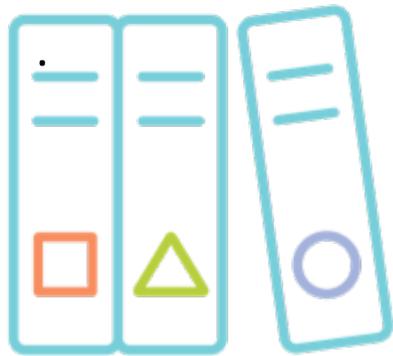


# 3

## Concepts & terminology

# 3. Concepts & terminology

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**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”

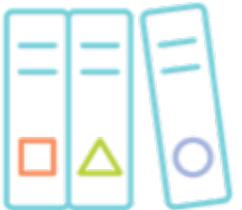
### Record

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

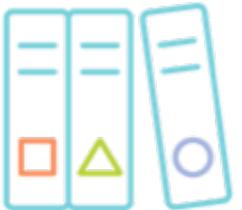
Any system activity taken in relation to an ePQS *case*.

### Case record type

For each WHO IMD-PQS case, the record type will be either “*Vx IMD Application*”, or “*Vx IMD Post-PQ change*” or “*Vx IMD Reassessment*”. 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

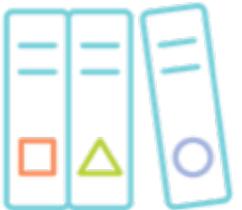
IMD-PQS ePQS Application type meaning: “New application for product prequalification”.

### 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

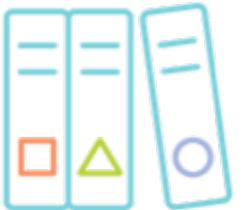
|                               |   |
|-------------------------------|---|
| <b>Application</b>            | New application for product prequalification, post-PQ variation or Reassessment. Submitted via the Application Wizard.        |
| <b>Applicant organization</b> | The legal entity submitting a prequalification application or post-prequalification commitment.                               |
| <b>Application number</b>     | Unique code assigned to each new application in ePQS, in the format “PQ-IMD-202X-XXXX”. Identical to the “ePQS Case ID”.      |
| <b>Application wizard</b>     | 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

|                                |  |
|--------------------------------|--|
| <b>IMD product</b>             | 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. |
| <b>IMD product variant</b>     | Sub-section of the unique product application/case/product record that contains the record of all of the detailed product technical specifications.  |
| <b>(WHO) Product ID number</b> | 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”.  |
| <b>External ID</b>             | 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”.                               |
| <b>Product site</b>            | 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.**

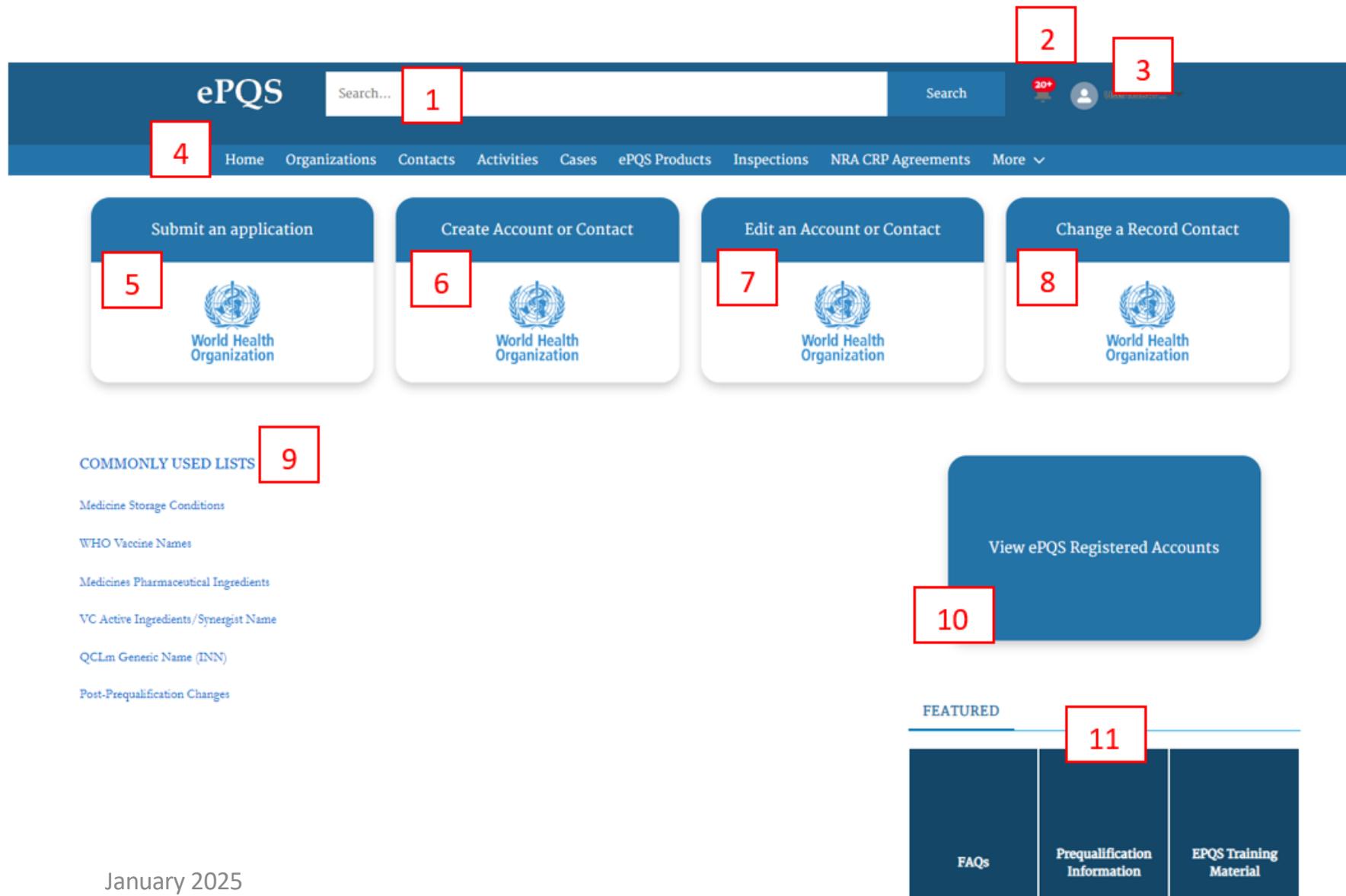
**It is intended as a learning aid and ongoing reference guide.**



# 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.

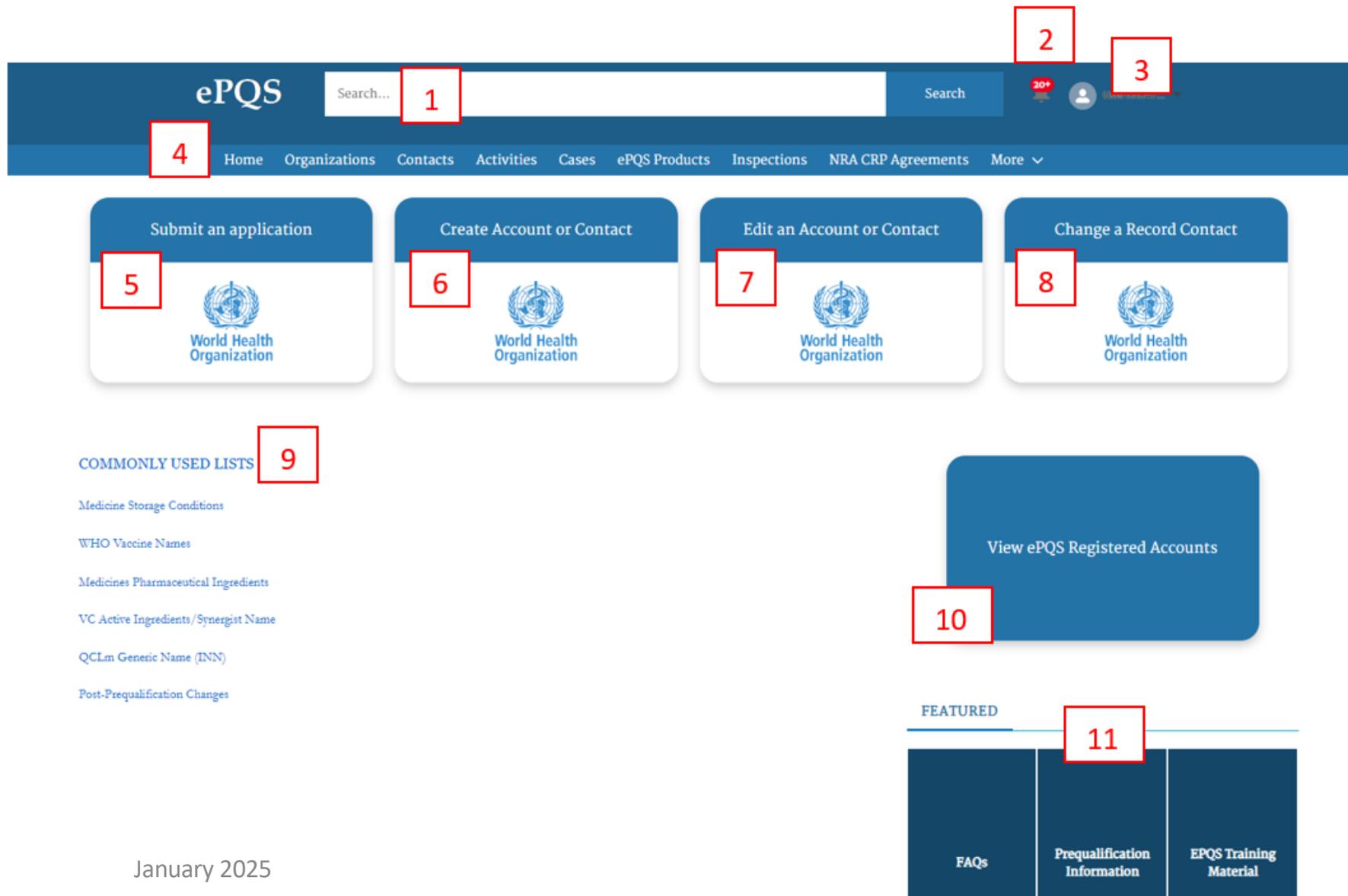
## 5) Application wizard

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.

A screenshot of the ePQS web application interface. The top navigation bar is dark blue and contains the 'ePQS' logo, a search bar with the placeholder text 'Search...', and a 'Search' button. To the right of the search bar is a notification bell icon and a user profile icon (a person silhouette) which is highlighted with an orange box. Below the navigation bar is a horizontal menu with the following items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. Below the horizontal menu are four large white buttons with blue headers and the World Health Organization logo. The buttons are: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Contact'. A dropdown menu is open from the user profile icon, listing 'Home', 'My Profile' (highlighted with an orange box), 'My Account', and 'Logout'. The World Health Organization logo is visible at the bottom of each of the four buttons.

# 4. ePQS navigation – My profile



“My profile” appearance.

**ePQS** Search... Search

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.

A screenshot of the ePQS website interface. At the top left is the 'ePQS' logo. To its right is a search bar with the placeholder text 'Search...' and a blue 'Search' button. Further right are a notification bell icon and a user profile icon labeled 'cic'. Below these elements is a horizontal navigation menu with the following items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. Below the navigation menu are four large, rounded rectangular buttons, each featuring the World Health Organization logo and a specific action: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Contact'. A dropdown menu is open from the user profile icon, listing the following options: Home, My Profile, My Account (highlighted with an orange border), and Logout.

# 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.

The screenshot displays the ePQS user interface. At the top, there is 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. A user profile dropdown menu is visible on the right, with 'My Account' highlighted in orange. Below the navigation, there are buttons for '+ Follow', 'New Note', 'DocuSign Arms Tobacco Disclosure', and 'Update Published Information'. The main content area shows the 'Account' page with sub-tabs: 'Details' (highlighted in orange), 'Related', 'Preview Documents', 'Document Download', and 'Document Submission'. The 'Details' section is expanded, showing 'Account Information' with fields for Organization UID, Legal Name, Account Name, Parent Account, Account Record Type, and Description. To the right, there are fields for Account Owner, Primary Contact, Phone, and Email. Below this, there are sections for Address Information, WHO Country Information, General Details, Related Links (highlighted with a blue border), PQT Information, Account Usage - Collaborators, and 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 interface with the 'Related' tab selected. The page displays a list of record categories for an account:

- Notes (0)
- Related Contacts (2) - Includes a table with columns: Contact Name, Direct, Active, Start Date.
- Case (Applications) (6+)
- Products (Applicant Organization) (6+) - Includes a table with columns: WHO Product ID, Product Name, Vaccine Abbreviated Name, Product Status.
- Product Sites (6+) - Includes a table with columns: Product Site ID, Product Site Status, Site Activity, Activity Type(s).
- Inspections (0)
- CRP Product Registrations (0)
- CRP Product Registrations (NRA Organisation) (0)
- NRA CRP Participations (NRA Organization) (0)
- Files (0) - Includes an 'Add Files' button and an 'Upload Files' button with the text 'Or drop files'.
- Account History (0)

The 'Related' tab is highlighted with an orange box. The 'My Account' link in the top right navigation menu is also highlighted with an orange box.

# 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 on the left, a search bar with the text 'Search...', and a 'Search' button on the right. Below the header is a navigation menu with links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. On the right side of the header, there is a user profile icon with a dropdown menu containing 'Home', 'My Profile', 'My Account' (highlighted with an orange border), and 'Logout'. Below the navigation menu, there is an 'Account' section with a '+ Follow' button, a 'New Note' button, and a 'DocuSign Arms Tobacco Disclosure' button. Below this, there are columns for 'Account Record Type', 'Address (2)', and 'Email'. The main content area has tabs for 'Details', 'Related', 'Preview Documents' (highlighted with an orange border), 'Document Download', and 'Document Submission'. Below the tabs is a 'box' search bar with the text 'Search files and folders'. Below the search bar is a table with columns for 'Name', 'Modified', and 'Size'. The table contains two rows: '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 user profile icon. Below the header is a navigation menu with links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Register. A user account dropdown menu is open, showing options for Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the navigation menu, there are 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. 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 and 0 Byte. At the bottom of the interface, there is a '0 Selected' button and a close button.

# 4. ePQS navigation – Documents



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

The screenshot displays the ePQS website interface. At the top, there is a dark blue header with the 'ePQS' logo on the left, a search bar in the center, and a 'Search' button on the right. Below the header is a navigation menu with links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. A user profile dropdown menu is open on the right, showing options for Home, My Profile, My Account (highlighted with an orange box), and Logout. Below the navigation menu, there is an 'Account' section with a grid icon and a 'U' button. To the right of the 'Account' section are buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. Below these buttons are fields for 'Account Record Type', 'Address (2) ▼', and 'Email'. The main content area shows a breadcrumb trail: 'Details > Related > Preview Documents > Document Download > Document Submission' (the last item is highlighted with an orange box). Below the breadcrumb trail is a box titled 'Upload to Account Submission' with the text 'Welcome to Document Submission Wizard. Please click on **Next** to proceed for Account#Vestfrost Solutions'. A 'Next' button is located at the bottom right of this box. At the bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and '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

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 shows the ePQS homepage. At the top, there is a dark blue header with the 'ePQS' logo on the left, a search bar in the center, and a 'Search' button on the right. To the right of the search bar are icons for notifications and a user profile. Below the header is a navigation menu with the following items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More (with a dropdown arrow). 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'. These four buttons are highlighted with an orange border. Below the 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 on the left, a search bar in the center, and a user profile icon on the right. Below the header is a navigation menu with various options: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. A dropdown menu is open under the user profile icon, showing options: Home, My Profile, My Account (highlighted with an orange box), and Logout. In the main content area, there is a record titled 'DocuSign Arms Tobacco Disclosure'. Below this record, there are two buttons: '+ Follow' and 'New Note' (highlighted with an orange box). An orange arrow points from the 'New Note' button to a larger inset window showing the 'New Note' form. The form has a title 'Untitled Note', a rich text editor with a toolbar, and a 'Related to' section with a dropdown menu set to 'Current Record'. At the bottom of the form, 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 shows the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo on the left, a search bar in the center, and a 'Search' button on the right. Below the header is a navigation menu with several tabs: 'Home', 'Organizations', 'Contacts', 'Activities', 'Cases', 'ePQS Products', 'Inspections', 'NRA CRP Agreements', 'CRP Product Registrations', and 'More'. The 'Organizations' tab is highlighted with an orange box. Below the navigation menu, there is a section for 'Accounts' with a sub-section 'ePQS Accounts (Portal)'. A dropdown arrow next to 'ePQS Accounts (Portal)' is highlighted with an orange box. This dropdown menu is open, showing a list of 'LIST VIEWS': 'All Vx accounts', 'ePQS Accounts (Portal)' (which is 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 several icons for settings, refresh, and filter.

# 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 shows the ePQS web application interface. At the top, there is a dark blue header with the ePQS logo on the left, a search bar in the center, and a user profile icon on the right. Below the header is a navigation menu with several 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" page. The page title is "Contacts" and the main heading is "All ePQS Contacts (Portal)" (highlighted with an orange box). Below the heading, there is a search bar labeled "Search this list..." and several icons for settings, refresh, and filter. A dropdown menu is open, showing "LIST VIEWS" with two items: "All ePQS Contacts (Portal)" (checked) and "Recently Viewed (Pinned list)". Below the dropdown, there are two rows of list view options: "Recently Viewed (Pinned list)" and "Recently Viewed Contacts".

# 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 shows the ePQS web application interface. The top navigation bar is dark blue with the ePQS logo, a search bar, and a user profile icon. Below the navigation bar, the 'Activities' tab is highlighted with an orange box. A dropdown menu is open, showing a list of view options: 'All Activities (Applications - Portal)', 'All Activities (Inspections - Portal)', 'My Activities (Portal)', 'My Open Activities (portal)', and 'Recently Viewed (Pinned list)'. The 'Recently Viewed (Pinned list)' option is selected with a checkmark. To the right of the dropdown, 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. The top navigation bar is dark blue with the 'ePQS' logo and a search bar. Below it is a horizontal menu with tabs for 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 features a 'Cases' icon, a dropdown menu for 'All Cases (Portal)', and a 'Printable View' button. A list view dropdown is open, showing options: 'All Cases (Portal)', 'All Closed Cases (Portal)', 'All Open Cases (Portal)', 'Recently Viewed (Pinned list)', and 'Recently Viewed Cases'. The 'Recently Viewed (Pinned list)' option is highlighted. Below the dropdown, a table of cases is visible with columns for Application S..., WHO Pro..., Date Appl..., Date Appl..., and Date of Pr....

# 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 web application interface. At the top, there is a dark blue header with the ePQS logo on the left, a search bar in the center, and a user profile icon on the right. Below the header is a main navigation toolbar with several menu items: Home, Organizations, Contacts, Activities, Cases, ePQS Products (highlighted with an orange box), Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the toolbar, the ePQS Products section is visible, showing a dropdown menu for 'All Products (Portal)' (also highlighted with an orange box) and a list of products. The list has columns for Product Subtype, Date of Preq..., Date of ..., and Date of Pro... The first three items in the list are: 1. All Active Products (Portal), 2. All Closed Products (Portal), and 3. All Products (Portal) (selected with a checkmark). Below the list, there are icons for settings, refresh, edit, and filter.

|   | Product Subtype | Date of Preq... | Date of ... | Date of Pro... |
|---|-----------------|-----------------|-------------|----------------|
| 1 | :rs             | 25/11/2009      |             |                |
| 2 | :rs             | 18/03/2010      |             |                |
| 3 | :rs             | 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 displays the ePQS 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 main navigation bar with several menu items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections (highlighted with an orange box), NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, the Inspections section is active, showing a dropdown menu for 'All Inspections (Portal)' (also highlighted with an orange box). The dropdown menu lists 'LIST VIEWS' with two options: 'All Inspections (Portal)' (selected with a blue checkmark) and 'Recently Viewed (Pinned list)'. To the right of the dropdown menu, there is a search bar labeled 'Search this list...' and a table with columns for 'Site Contact', 'Manner of Inspection', and '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”.

The screenshot shows the ePQS website interface. At the top, there is a search bar and a user profile icon. The navigation menu includes: 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 are four cards, each with a blue header and the World Health Organization logo: "Submit an application", "Create Account or Contact", "Edit an Account or Contact", and "Change a Record Contact". Below these cards is a section titled "COMMONLY USED LISTS" with links to: "Medicine Storage Conditions", "WHO Vaccine Names", "Medicines Pharmaceutical Ingredients", "VC Active Ingredients/Synergist Name", and "QCLm Generic Name (INN)". On the right side, there is a blue button with an orange border labeled "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

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 options: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area displays the 'Accounts' section, specifically 'ePQS Accounts (Portal)'. A dropdown menu is open, showing 'LIST VIEWS' with three options: 'All Vx accounts', 'ePQS Accounts (Portal)' (which is selected and highlighted with an orange box), and 'Recently Viewed'. Below the dropdown, there is a table with a search bar and a filter for 'Country (Physical)'. The table currently shows 1 item.

\*\*\* 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 interface. The top navigation bar is dark blue with the ePQS logo, a search bar, and a user profile dropdown menu. The main content area shows an account record with a table of account information and a list of expandable sections. The user profile dropdown menu is open, showing options: Home, My Profile, My Account, and Logout. The account record table has columns for Account Record Type, Address (2), and Email. Below the table 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.

ePQS Search... Search

Home Organizations Contacts Activities Cases ePQS Products Inspections NRA CRP Agreements CRP Products

Account + Follow New Note DocuSign Arms Tobacco Dis nformation

| Account Record Type | Address (2) | Email |
|---------------------|-------------|-------|
|                     |             |       |

Details Related Preview Documents Document Download Document Submission

- > Account Information
- > Address Information
- > WHO Country Information
- > General Details
- > Related Links
- > PQT Information
- > Account Usage - Collaborators
- > 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 labeled 'clc'. A dropdown menu is open from the profile icon, showing options: Home, My Profile, My Account (highlighted with an orange box and a '1' in a circle), and Logout. Below the header is a navigation bar with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. The main content area shows an 'Account' record with a table of 'Account Record Type', 'Address (2)', and 'Email'. Below the table, there are tabs: 'Details' (selected), 'Related' (highlighted with an orange box and a '2' in a circle), 'Preview Documents', 'Document Download', and 'Document Submission'. Under the 'Details' tab, a list of expandable sections is visible: 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 displays the 'Related' sub-tab in the ePQS system. The interface includes a navigation bar with various menu items, a search bar, and a user profile section. The main content area is organized into several expandable sections, each representing a different type of record related to the user's account. The sections are: Notes (0), Related Contacts (2) with a table of contact details, Product Sites (6+), Case (Applications) (6+), Products (Applicant Organization) (6+) with a 'New' button, 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' area, and Account History (0). At the bottom, there are links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

# 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 'Home', 'Organizations', 'Contacts', 'Activities', 'Cases', 'ePQS Products', 'Inspections', 'NRA CRP Agreements', 'CRP Product Registrations', and 'More'. The 'ePQS Products' tab is selected and highlighted in orange. Below the navigation bar, there is an 'Account' section with a search bar and buttons for '+ Follow', 'New Note', 'DocuSign Arms Tobacco Disclosure', and 'Update Published Information'. The main content area shows a list of related items, with the 'Products (Applicant Organization) (6+)' item highlighted in orange. This item has a 'New' button next to it. Below this, there are several other sections: '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'.

# 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 laboratory.

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 items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area displays a table titled "Products (Applicant Organization)" with 29 items. The table has columns for WHO Produc..., Product Name, Vaccine..., Product Status, Product Type, and Product Subtype. The first 10 rows of the table are highlighted with an orange border. Each row contains a number (1-10) and a link labeled "Product listing details ...". At the bottom of the page, there are links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.



# 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 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 items: Home, Organizations, **Contacts** (highlighted in orange), Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, the 'Contacts' section is active, showing a purple icon and the text 'Contacts All ePQS Contacts (Portal)'. A search bar labeled 'Search this list...' is present. Below the search bar, there is a table with 2 items, sorted by Name, filtered by All contacts, and updated 2 minutes ago. The table has columns for selection, name, and actions. The first row is highlighted in orange and contains the text '1 USER NAME'. The second row contains the text '2'.

| 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 search bar and a navigation menu with the following items: 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, there is a contact record for a contact named 'Contact'. The record includes fields for Job Title, Account Name, Phone (2), Email, and Contact Owner. There are three buttons: '+ Follow', 'New Note', and 'Make Contact Info Private'. Below the contact record, there is a tabbed interface with the following tabs: Details, Related, **Preview Documents** (highlighted with an orange box), Download Documents, Preview Mx Documents, and Download Mx Documents. Below the tabs, there is a search bar for files and folders. Below the search bar, there is a folder named 'User(s) Personal Folder' (highlighted with an orange box) and a plus icon (+) for uploading (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 for '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

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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# 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 displays the 'ePQS Application Wizard' interface. At the top, a progress bar shows five steps: 'Organization & Contacts' (highlighted in dark blue), 'Application Info' (highlighted in light blue), 'Product Details', 'Documents', and 'Finalize'. Below the progress bar, the section is titled 'Choose Product Type' with the instruction 'Select the product area to narrow down the list of application types.' Underneath, there is a list of product types under the heading 'Product Type': 'Finished Vaccine Product', 'Immunisation Device', and 'IMD Evaluating Laboratory'. The 'IMD Evaluating Laboratory' option is selected, indicated by a blue radio button and a red rectangular highlight. At the bottom right of the form, there are 'Previous' and 'Next' buttons.

# 5d. Accreditation submission procedure



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

The screenshot displays the 'ePQS Application Wizard' interface. At the top, a progress bar shows five steps: 'Organization & Contacts' (active), 'Application Info', 'Product Details', 'Documents', and 'Finalize'. Below the progress bar, the section is titled 'Choose Application Type' with the instruction: 'Based on the product type, here is the list of application types available.' Underneath, there is a list of application types under the heading 'Application Type':

- IMD Lab Accreditation
- IMD Lab Change
- IMD Lab Reassessment

At the bottom right of the form, there are two buttons: 'Previous' and 'Next'.

# 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 displays the 'Application Wizard' interface. At the top, it says 'Application Wizard'. Below that, it is titled 'ePQS Application Wizard'. A progress bar shows five steps: 'Organization & Contacts' (highlighted in blue), 'Application Info', 'Product Details', 'Documents', and 'Finalize'. The main content area is titled 'Confirm Application Details' and contains the following text: '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 text 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' and 'Next'.

# 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 'Application Wizard' interface. At the top, there is a header 'Application Wizard' with a green icon. Below it, the title 'ePQS Application Wizard' is displayed. A progress bar contains four steps: 'Organization & Contacts' (highlighted in green with a checkmark), 'Product Details', 'Documents', and 'Finalize'. Under the 'Product Details' step, the heading 'Create a Product' is followed by the text 'New Product' and 'Since this is a IMD Lab Accreditation type application, a new product will be created of type:'. A bulleted list shows 'IMD Accredited Laboratory'. Below this, it states 'It will be linked to your application, [New-IMDLab-2024-0005](#)'. At the bottom right, there are 'Previous' and 'Next' buttons.

# 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 'Application Wizard' interface. At the top, there is a header 'Application Wizard' with a green icon. Below it, the 'ePQS Application Wizard' title is displayed. A progress bar shows four steps: 'Organization & Contacts' (highlighted in green with a checkmark), 'Product Details', 'Documents', and 'Finalize'. The main content area is titled 'Create a Product' and contains a section 'Further IMD Laboratory Details 1a' with the instruction 'Click 'Previous' if the site you require is not on the list.' Below this is a required field for 'Laboratory Site' with a red asterisk and a drop-down menu. At the bottom right, there are 'Previous' and 'Next' buttons.

# 5d. Accreditation submission procedure



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

The screenshot displays the 'Application Wizard' interface. At the top, it says 'Application Wizard' with a green icon. Below that, 'ePQS Application Wizard' is shown. A progress bar has four steps: 'Organization & Contacts' (dark blue), 'Product Details' (green with a checkmark), 'Documents' (light grey), and 'Finalize' (light grey). Under the progress bar, the heading 'Create a Product' is followed by a message: 'Laboratory Successfully Updated'. The message text reads: 'The details you have just entered have been updated on the new IMD Laboratory linked to your [New-IMDLab-2024-0005](#) application. By clicking on the link provided you can see the product record. The product record is also available in your Products' List View.' Below this, a bullet point lists '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". The main content area is titled "ePQS Application Wizard" and displays the message "You are uploading documents to Case#New-IMDLab-2024-0005". At the bottom right of the window, there are two buttons: "Previous" (disabled) and "Next" (active).

# 5d. Accreditation submission procedure



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

A screenshot of a web application window titled "Application Wizard". The main content area is titled "ePQS Application Wizard" and contains a section labeled "Select Document Type". Under this section, there are 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".

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.

The screenshot shows the 'ePQS Application Wizard' interface. At the top, a progress bar indicates four steps: 'Organization & Contacts' (completed), two intermediate steps (completed), and 'Documents' (current step). 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.' A larger block of text explains that users can review folders on the next page and return to this screen to upload additional documents. A central area contains a file upload icon and the text 'Drag and drop files and folders. Browse your device or Select Folders'. At the bottom right, there are 'Cancel' and 'Upload' buttons, and at the very bottom, 'Previous' and 'Next' buttons.

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 'Organization &amp; 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 &gt; Error' is shown. The main content area is mostly empty, featuring a blue icon of a bucket with a wand 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?

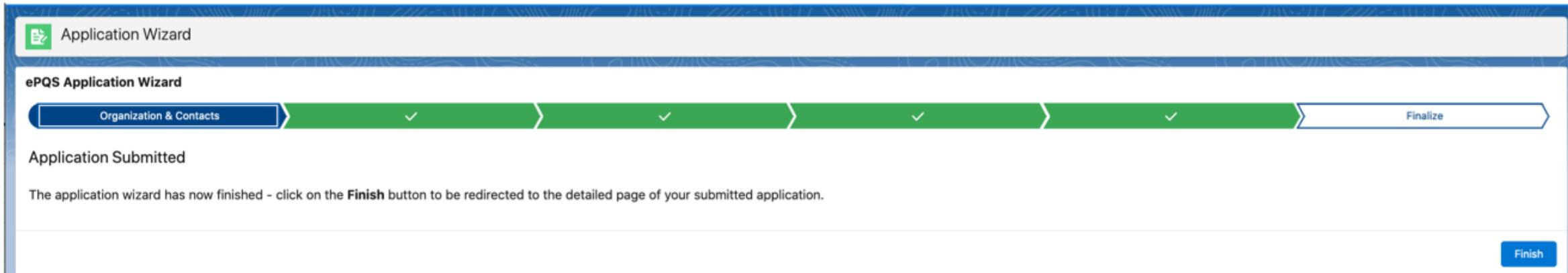
Yes  
 No, save existing draft application and product (if applicable)  
 No, discard this draft application and product (if applicable)

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.





# 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

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 box), 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 shows an 'Account' section with a '+ Follow' button and buttons for 'New Note' and 'DocuSign Arms Tobacco Disclosure'. Below this is a table with columns for 'Account Record Type', 'Address (2)', and 'Email'. A secondary navigation bar contains links for 'Details', 'Related', 'Preview Documents', 'Document Download', and 'Document Submission' (highlighted with an orange box). The 'Document Submission' wizard is active, displaying the title 'Upload to Account Submission' and the message: 'Welcome to Document Submission Wizard. Please click on **Next** to proceed for Account#Vestfrost Solutions'. A 'Next' button is located at the bottom right of the wizard. At the bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

# 5f. Uploading of documents – account / organisation



Document submission interface →

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

A screenshot of a web application interface for document submission. At the top, there are navigation tabs: 'Details', 'Related', 'Preview Documents', 'Document Download', and 'Document Submission'. The 'Document Submission' tab is highlighted with an orange border. Below the tabs, the main content area is titled 'Upload to Account Submission'. 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 area, there are two buttons: 'Cancel' and 'Upload'. At the bottom right of the entire interface, there is a 'Next' button.

# 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. At the top, there is a search bar and a navigation menu. The 'Cases' menu item is highlighted with an orange box. Below the navigation menu, there is a 'Cases' section with a dropdown menu for 'All Cases (Portal)'. The dropdown menu is open, showing four options: 'All Cases (Portal)', 'All Closed Cases (Portal)', 'All Open Cases (Portal)', and 'Recently Viewed (Pinned list)'. The 'All Cases (Portal)' option is selected. To the right of the dropdown menu, there is a table of cases. The table has columns for 'Application S...', 'WHO Pro...', 'Date Appl...', 'Date Appl...', and 'Date of Pr...'. The table contains four rows of data, each with a 'Standard' application, a date of '01/01/1900', and a dropdown arrow in the 'Date of Pr...' column. There are also icons for 'Printable View', search, and other actions.

# 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 search bar and a navigation menu with options like Home, Organizations, Contacts, Activities, Cases, PQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The 'Cases' menu item is highlighted with an orange box. Below the navigation, a case titled 'Case PQC-IMD-2024-0007' is shown, with a red box around its title. To the right of the case title are buttons for '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. Below this, a table lists case details with columns for Case Record Type, Case Number, Status, Date of Prequalification/Acceptance, and Case Owner. A secondary navigation bar includes 'Details', 'Related', 'Activities', 'Preview Document', 'Document Download', and 'Document Submiss', with 'Preview Document' highlighted by an orange box. Below this is a 'box' storage interface with a search bar and a table of files. The table has columns for Name, Modified, and Size. A folder named 'Correspondence (External)' is listed 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 menu with options like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Register. A dropdown menu for the user profile is open, showing options: Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the navigation, there are buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. The main content area shows a table with columns for 'Account Record Type', 'Address (2)', and 'Email'. Below this, there are tabs for 'Details', 'Related', 'Preview Documents', 'Document Download' (highlighted with an orange border), and 'Document Submission'. The 'Document Download' section features a 'box' logo and a search bar for files and folders. Two folders are listed: 'External correspondence' and 'Submitted Documents', both showing a modification date of 'Fri Apr 12 2024' and a size of '0 Byte'. At the bottom of the interface, there is a '0 Selected' button and a close button.

# 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 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 'Cases' menu item is highlighted with an orange box. Below the navigation, a case record for 'Case PQC-IMD-2024-0007' is shown, with a red box around the case ID. To the right of the case ID are buttons for '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. Below this, a table header lists 'Case Record Type', 'Case Number', 'Status', 'Date of Prequalification/Acceptance', and 'Case Owner'. Underneath, there are tabs for 'Details', 'Related', 'Activities', 'Preview Document', 'Document Download', and 'Document Submissi'. The 'Preview Document' tab is highlighted with an orange box. Below the tabs is a 'box' search bar for files and folders. The case ID 'PQC-IMD-2024-0007' is displayed above a table with columns for 'Name', 'Modified', and 'Size'. A folder named 'Correspondence (External)' is listed with a modified date of 'Yesterday' and a size of '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 navigation menu at the top includes Home, Organizations, Contacts, **Activities** (highlighted with an orange box), Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, the page title is "External Activities" and the main heading is "All Activities (Applications - Portal)". A search bar and utility icons are present above the table. 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 cell of the first row.



# 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 website interface. At the top, there is a dark blue navigation bar with the 'ePQS' logo, a search bar, and a bell notification icon highlighted with an orange box. A 'Notifications' pop-up window is open, showing the message 'You don't have any notifications right now.' Below the navigation bar, there are four main action buttons, each featuring the World Health Organization logo: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Change a Record Contact'. Below these buttons 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'. The footer contains 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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