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1. Scope

This guide outlines the procedures and best practices for the submission of a technical assistance request and supporting documents. This ensures streamlined processing, improved efficiency, and consistent quality control.

2. Prerequisites

Applications wizards are accessed via the ePQS Portal – <https://who.my.site.com/ePQS/s/login/>.

Therefore access to the ePQS portal must be granted first. To seek registration apply via the form on the Portal landing page above.

Some types of applications have prerequisite conditions. For instance, a post-prequalification change application can only be created if there exists in the ePQS system at least one accepted or prequalified product for the applicant account.

Many wizards include steps that require the applicant to select an account from within the ePQS database. For instance, when an applicant wishes to create a product site for a product, or nominate a reference authority. Users can verify these accounts exist before commencing an application by referring to the spreadsheet available from the “View ePQS Registered Accounts” tile, as indicated in figure 1.

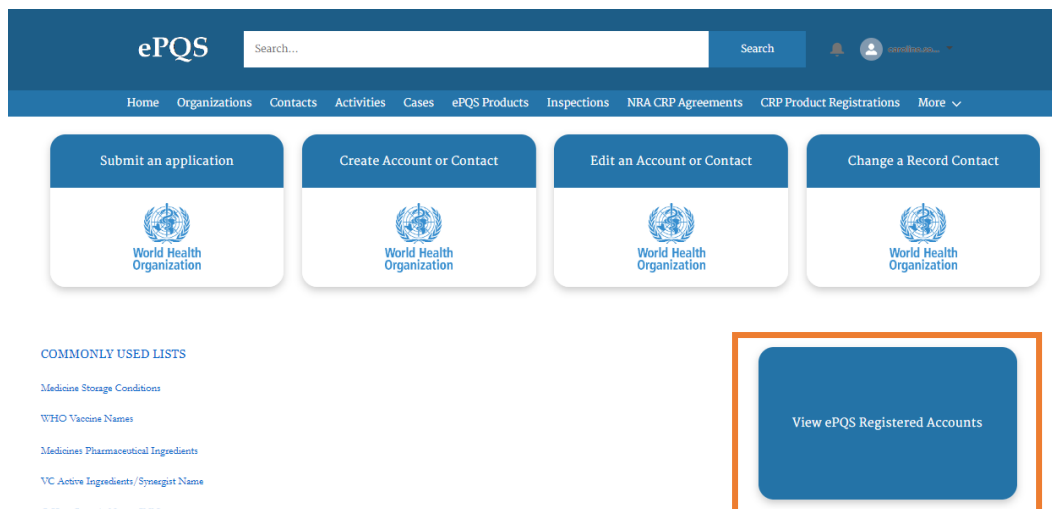


Figure 1: The existence of an Account within the ePQS system can be determined by selecting the indicate - “View ePQS Registered Accounts”

3. Accessing the Portal

Applications wizards are accessed via the ePQS Portal – <https://who.my.site.com/ePQS/s/login/>.

4. Wizard steps

Wizard commencement

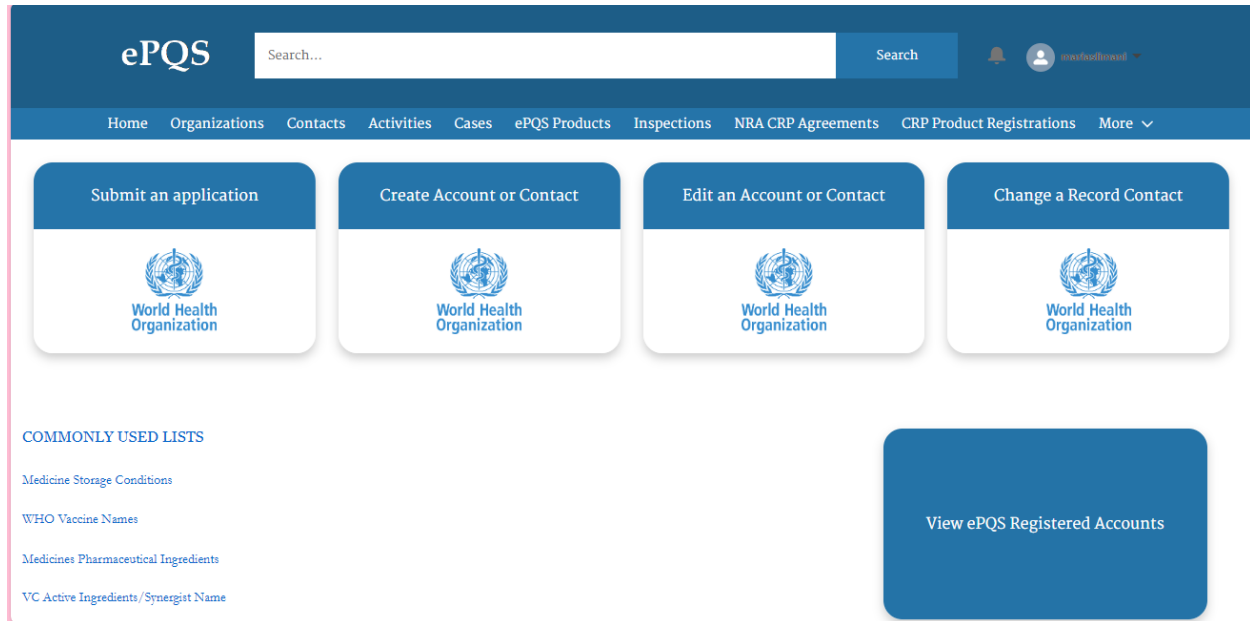


Figure 2: Commence the application process by selecting the Submit an application tile

An application can be initiated by selecting the Submit an application tile shown above, this opens up the “create a new application” page as shown below:

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

Figure 3: Create a new application page

Click next to open the “choose application type” page and select annual report as shown below.

Wizard Selection

Having passed the initial “Create a New Application screen”, the system will open the “choose a contact” page, use the drop-down arrow or search function to find and select the contact from the applicant organization, shown below:

Home
Organizations
Contacts
Activities
Cases
ePQS Products
Inspections
Archived Agreements
Application Wizard
More

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 ePQS Test Account 1 - NonStateActor, and also indicate if there are other secondary people involved.

* Primary Contact

ePQS External Applicant 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--

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Figure 4: You must first select the associated contact, before selecting the application type.

As part of the preliminary application steps, Applicants will be asked to nominate contacts for the application, and if applicable the product.

After choosing the contact, click next to open the “choose a product type” and select Quality Control Laboratory, as shown below:

The screenshot shows the 'ePQS Application Wizard' interface. The top navigation bar includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, Application Wizard, and More. The wizard progress bar shows five steps: Organization & Contacts (active), Application Info, Product Details, Documents, and Finalize. The main heading is 'Choose Product Type' with the instruction 'Select the product area to narrow down the list of application types.' Below this is a list of product types, each with a radio button. 'Quality Control Laboratory' is selected. At the bottom right are 'Previous' and 'Next' buttons. The footer contains links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

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

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Product Type

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

*Product Type

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

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Figure 5: You must first select the associated product type, before selecting the application type.

After selecting Quality Control Laboratory, click next to open the “choose application type” page, and select “technical assistance” option, as shown below:

The screenshot shows the 'ePQS Application Wizard' interface. The top navigation bar includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, Application Wizard, and More. The wizard progress bar shows five steps: Organization & Contacts, Application Info (active), Product Details, Documents, and Finalize. The main heading is 'Choose Application Type' with the instruction 'Based on the product type, here is the list of application types available.' Below this is a list of application types, each with a radio button. 'Technical Assistance' is selected. At the bottom right are 'Previous' and 'Next' buttons. The footer contains links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

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ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Application Type

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

*Application Type

- ☐ Prequalification
- ☐ Post-PQ Change
- ☐ Annual Report
- ☒ Technical Assistance

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Figure 6: Then you will offered the applicant application type and select annual report

Click next to open the “confirm application details” page, displaying:

- a) Application Type
- b) Product Type
- c) Organization
- d) Contact

As shown below:

The screenshot shows the ePQS Application Wizard interface. The top navigation bar includes the ePQS logo, a search bar, and a user profile icon labeled 'mydashboard'. Below the navigation bar, a horizontal menu contains links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, Application Wizard, and More. The main content area is titled 'ePQS Application Wizard' and features a progress bar with five steps: Organization & Contacts (active), Application Info, Product Details, Documents, and Finalize. The current step is 'Confirm Application Details'. Below the title, a message states: 'By proceeding to the next step you will be creating a draft QCLm Annual Report. This draft application will be available in your List View of Cases.' A bulleted list shows the application details: Application Type: Annual Report, Product Type: Quality Control Laboratory, Organization: ~~Health Services~~, and Primary Contact: ~~Maria Clement~~. At the bottom right of the main content area are 'Previous' and 'Next' buttons. The footer contains links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

Figure 8: Confirm application page

Click next to confirm the application details, a draft application is created, with a system assigned case number (TA-QCL-20XX-000X), as shown below:

The screenshot shows the ePQS Application Wizard interface after clicking 'Next'. The top navigation bar and menu are identical to the previous screenshot. The main content area is titled 'ePQS Application Wizard' and features the same progress bar. The current step is 'Continue Application'. Below the title, a message states: 'A draft application has been created.' Below this, a message says: 'For reference the new application has the case number TA-QCL-2024-0004. You can view the draft application details by following the link.' The case number 'TA-QCL-2024-0004' is circled in blue. At the bottom right of the main content area is a 'Next' button. The footer is identical to the previous screenshot.

Figure 9: A draft application record has now been created in the system and assigned a case number TA-QCL-20XX-000X

After clicking next, the “additional application info” page is opened, where information more information about the QCL is required:

- a) Product subtype (PQed or Non-PQed)
- b) Technical assistance type (peer audit, training, CAPA etc)
- c) Details of technical assistance
- d) If other type of technical assistance

The screenshot shows the 'ePQS Application Wizard' interface. At the top is a navigation bar with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, Application Wizard (selected), and More. Below the navigation bar is a progress bar with five steps: Organization & Contacts, Application Info (current step), Product Details, Documents, and Finalize. The main content area is titled 'Additional Application Info' and contains three sections:

- * Product Subtype:** A dropdown menu with 'Prequalified Lab' selected.
- * Type of Technical Assistance:** A note states 'To select multiple items, hold down the Ctrl (PC) or Command (Mac) key'. Below this is a list box containing 'Peer Audit', 'Gap Analysis', 'Training', 'CAPA', and 'General System'.
- * Details of TA:** A large text input field.

Below the 'Details of TA' field is a label 'If Other (Type of Technical Assistance)' followed by another text input field. At the bottom right of the form are 'Previous' and 'Next' buttons.

Figure 10: Link application to a QCL

Input the necessary details, and click next to open the “link to existing laboratory” page, and use the down arrow to select relevant QCL, as shown below:

The screenshot shows the ePQS Application Wizard interface. At the top 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, Application Wizard, and More. The main content area is titled 'ePQS Application Wizard' and features a progress bar with four steps: 'Organization & Contacts' (completed, green), 'Product Details' (active, blue), 'Documents' (disabled, grey), and 'Finalize' (disabled, grey). Below the progress bar, the section is titled 'Link to an Existing Laboratory'. There is a label '*Product' and a dropdown menu showing 'Morocco-LNCM - LNCM (Morocco) - LNCM (Morocco)'. At the bottom right of the form area are 'Previous' and 'Next' buttons. A footer contains links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

Figure 11: Upload Documents Page

Click next to open the “document page”, where the documents to support the technical assistance request are uploaded.

The screenshot shows the 'Upload Documents' page of the ePQS Application Wizard. The header and navigation menu are identical to Figure 11. The progress bar now shows 'Organization & Contacts' (completed, green), 'Product Details' (completed, green), 'Documents' (active, blue), and 'Finalize' (disabled, grey). The section is titled 'Upload Documents'. It contains two paragraphs of 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.' and 'You can review the folders for submission in the next page. There you can also rename, tag or remove documents. You can return to this screen to upload additional documents as part of this submission process. If you save the wizard as a draft, when you recommence the wizard you will have the opportunity to upload and review documents once again before final submission.' Below the text, it says 'When finished, click **Next**.' At the bottom center is a large blue icon of a document with an upward arrow, with the text 'Drag and drop files and folders' and 'Browse your device or Select Folders' below it.

Figure 12: Documents review page

Upload all the required documents, including the official letter requesting assistance and, any relevant QCL information to support the technical request application.

Click next to open the “document review” page, where documents can be:

- a) Previewed
- b) Deleted
- c) Renamed
- d) Downloaded

ePQS Application Wizard

Organization & Contacts Documents Finalize

Document Review

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

box Search files and folders

2024-09-11-06:07

Name	Modified	Size
42 EOI QC labs_June2011.pdf	Today by WHO_JWT	53.38 KB
8 QCL annual report template_Oct2016_1 (1).docx	Today by WHO_JWT	

- Preview
- Delete
- Download
- Rename

Click next to open the “review application” page, where links to the case (Application details) and product lab. i.d. (QCL/Applicant organization details) are provided for easy/quick access for review. After reviewing, there is the “ready to submit” section with three options, as shown below:

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there is a navigation bar with the ePQS logo, a search bar, and a user profile dropdown. Below this is a horizontal menu with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, Application Wizard, and More. The main content area is titled 'ePQS Application Wizard' and features a progress bar with four steps: 'Organization & Contacts' (active), a step with a checkmark, another with a checkmark, and 'Finalize'. Below the progress bar, the heading 'Review Application' is followed by a paragraph of instructions. The 'Case ID' is 'TA-QCL-2024-0004' and the 'Product or Laboratory ID' is 'Morocco-LNCM'. A section titled 'Submit, Save or Discard' asks the user to choose whether to submit, save a draft, or discard. Three radio buttons are provided: 'Yes', 'No, save existing draft application and product (if applicable)', and 'No, discard this draft application and product (if applicable)'. At the bottom right, there are 'Previous' and 'Next' buttons.

ePQS

Search...

Search

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

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: TA-QCL-2024-0004

Product or Laboratory ID: Morocco-LNCM

Submit, Save or Discard

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

• Ready to submit?

☐ Yes

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

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

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Figure 13: Review application page

Click Yes and next to submit the application, the “application submitted” page is opened and click finish to complete the application process, as shown below:

The screenshot shows the 'ePQS Application Wizard' interface after submission. The progress bar now shows 'Organization & Contacts' (active), two steps with checkmarks, and 'Finalize'. The heading 'Application Submitted' is followed by a paragraph of instructions. At the bottom right, there is a 'Finish' button. The footer contains links: About Us, Contact Us, Privacy Policy, and Legal Disclaimer.

ePQS

Search...

Search

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ePQS Application Wizard

Organization & Contacts ✓ ✓ ✓ Finalize

Application Submitted

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

Finish

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Figure 13: Application submitted page