



WHO e-Prequalification System (ePQS)

Learning materials 2025



Prequalification Applicants Prequalification Holders



**World Health
Organization**

January 2025

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

Key access links (for reference)

WHO ePQS Portal landing page:

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

ePQS login link:

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



Intended audiences of these learning materials

AUDIENCES

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

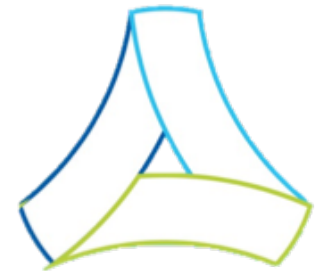


Purposes of these learning materials



Learning materials are 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. Presents the ePQS launch plan (for the pilot and universal launch phases)
2. Explains the role(s) of ePQS in the IMD-PQS prequalification process
3. Introduces ePQS navigation
4. Guides PQ Holders and new applicants through the ePQS prequalification and post-prequalification applications
5. Introduces key concepts and terminology
6. Provides links to all detailed technical guidance where they exist



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

Overview of these learning materials



SECTION A - SET-UP

- Introduction
- Pilot
- Registration
- Terminology

SECTION B – DISCOVERY

- Navigating ePQS features & functions

SECTION C – PROCEDURES

- Step-by-step instructions of the application procedures

SECTION D – SUPPORT

- Additional and forthcoming technical support

Contents



SECTION A – SET-UP

- 1. [ePQS portal introduction](#) 10
- 2. [Registration & access](#) 19
- 3. [Concepts & terminology](#) 22

SECTION B - DISCOVERY

- 5. [Navigating ePQS functions & features](#) 31

SECTION C – APPLICATION PROCEDURES

- 6. [Step-by-step guide](#) 54
 - a. [Verification of product data sheets](#) 58
 - b. [Accessing registered accounts](#) 65

- c. [Correct record visibility](#) 70
 - i. Record visibility - All
 - ii. Record visibility - Products
- d. [Personal use folder](#) 77
- e. [Application submission procedure](#) 81
- f. [Post-PQ variation submission](#) 99
- g. [Uploading of documents](#) 124
- h. [Downloading of documents](#) 130
- i. [Assigned activities](#) 134
- j. [Bell & email notifications](#) 137

SECTION D – TECHNICAL SUPPORT

- 7. [Links to further technical support](#) 141



SECTION A – SET-UP



1

ePQS Portal Introduction

1. ePQS Introduction – What is ePQS?



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

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

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



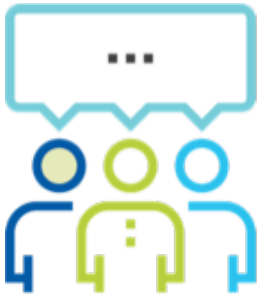
In addition to these processes, the ePQS platform **supports all communication between [applicants](#), [Prequalification Holders](#) and the WHO prequalification divisions** and external experts related to the workflows via a cloud file-sharing system integrated into ePQS system.

1. ePQS Introduction – Home page appearance

The screenshot displays the ePQS home page. At the top, there is a dark blue header with the ePQS logo on the left, a search bar with the placeholder text "Search...", and a "Search" button on the right. To the right of the search bar are icons for a notification bell 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 with white text and the WHO logo: "Submit an application", "Create Account or Contact", "Edit an Account or Contact", and "Change a Record Contact". Below these buttons, on the left, 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 list is a large blue button labeled "View ePQS Registered Accounts". At the bottom right, there is a "FEATURED" section with three dark blue boxes containing the text "FAQs", "Prequalificat... Information", and "EPQS Training Material". The footer contains links for "About Us", "Contact Us", "Privacy Policy", and "Legal Disclaimer".

1. ePQS Introduction

Communication with IMD-PQS



First contact with IMD-PQS – “offline”

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



Applications and post-PQ processes

- communication between applicants / Prequalification Holders and the IMD-PQS Secretariat will take place via:
 - the 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 prequalification, as well as submissions for post-prequalification product variations, take place via the “Application Wizard” tool.



Cloud file-sharing facility (“Box”)

A cloud file-sharing facility manages the uploading, storage and sharing of documents between external applicants, WHO prequalification divisions and external experts. (The 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.

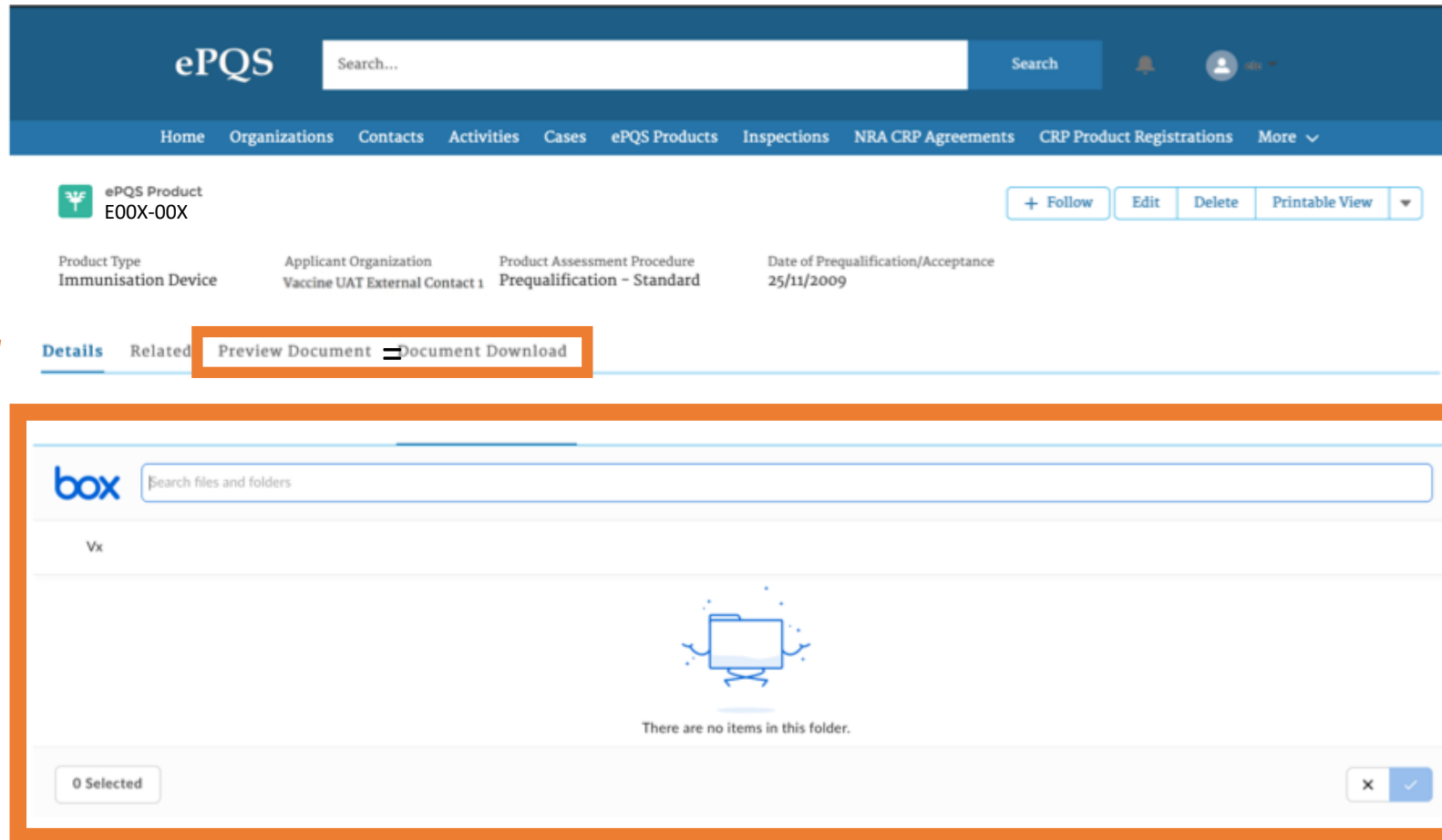
If you do not submit your application at the end of the wizard process, draft records will appear in the applicable List Views on your homepage.

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 search bar and a navigation menu with items like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation, the product details for 'ePQS Product E00X-00X' are shown, including fields for Product Type (Immunisation Device), Applicant Organization (Vaccine UAT External Contact 1), Product Assessment Procedure (Prequalification - Standard), and Date of Prequalification/Acceptance (25/11/2009). A toolbar contains buttons for '+ Follow', 'Edit', 'Delete', and 'Printable View'. A tabbed interface below the details shows 'Details', 'Related', 'Preview Document', and 'Document Download', with the latter being highlighted by an orange box. An orange arrow points from this box to an inset window. The inset window shows a 'box' file manager interface with a search bar, a folder icon, and a message: 'There are no items in this folder.' At the bottom of the inset, it shows '0 Selected' and a close button.

1. ePQS Introduction

Quick view - Data change request forms

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 the following items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area features four large blue buttons with the World Health Organization logo: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Change a Record Contact'. The 'Create Account or Contact', 'Edit an Account or Contact', and 'Change a Record Contact' buttons are highlighted with an orange border. Below these buttons, there is a section titled 'COMMONLY USED LISTS' with links to 'Medicine Storage Conditions', 'WHO Vaccine Names', 'Medicines Pharmaceutical Ingredients', 'VC Active Ingredients/Synergist Name', 'QCLm Genetic Name (INN)', and 'Post-Prequalification Changes'. To the right of this section is a blue button labeled 'View ePQS Registered Accounts'. Below the 'COMMONLY USED LISTS' section is a 'FEATURED' section with three dark blue boxes containing the text 'FAQs', 'Prequalificat... Information', and 'EPQS Training Material'. At the bottom of the page, there is a footer with links to 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

1. ePQS Introduction - ALL Features & functions overview

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

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



2

Registration & Access

3. Registration

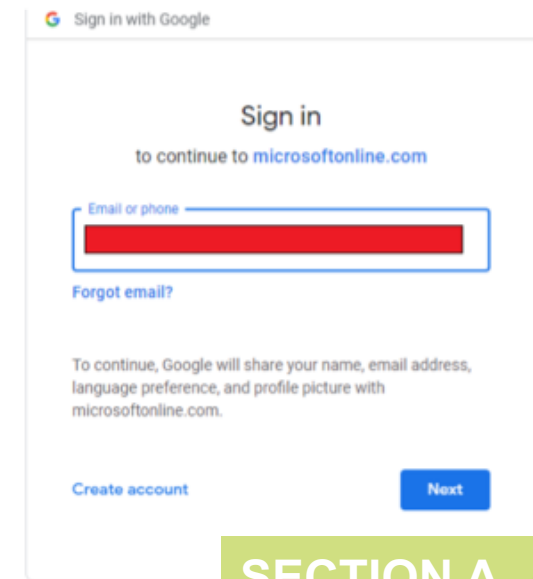
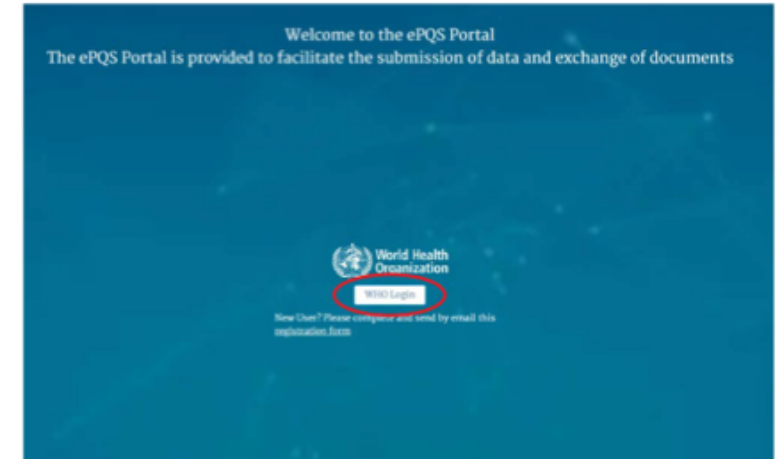
1. Account contacts have already been created for all IMD-PQS Prequalification Holders
2. Prequalification Holders must **verify their account and contact** details prior to registration. The IMD-PQS Secretariat will reach out individually to users with the required forms for this stage.
3. Contacts need to “register” to gain access to the the system.
Registration is via the:
“External Form – New ePQS User” linked here.
5. You must **complete the “External Form – New ePQS User”** and return it to epqs@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. Clicking the “WHO Login” button. The user will be directed to WHO Microsoft identity platform where they will be required to enter their username and click on the “Next” button.
3. OR, depending on which authentication mechanism is being used by their email address service, WHO’s identity platform will direct the user to provide the password the user uses for the email service.





3

Concepts & terminology

3. Concepts & terminology



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

It is intended as an ongoing reference guide throughout the training and your pilot activities.

3. Concepts & terminology – two critical terms

“Records” and “Cases”

Record

A single instance of object data. Records types include:

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

Case

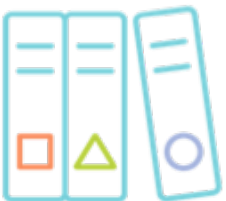
Every prequalification application or associated application (E.g. Inspection, post-prequalification product variant) begins with the creation of a *case*.



3. Concepts & terminology – other key terms

“Records” and “Cases”

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



3. Concepts & terminology – other key terms

IMD-PQS processes on ePQS

Vx IMD Application

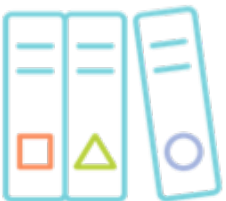
IMD-PQS ePQS Application type meaning: “New application for product prequalification”.

Vx IMD Post-PQ change

IMD-PQS ePQS Application type meaning: “Post-prequalification variation, a change to product or manufacturing process”.

Vx IMD Reassessment

IMD-PQS ePQS Application type meaning: “IMD Annual Review of prequalified products”.



3. Concepts & terminology – other key terms

Terms related to applications

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



3. Concepts & terminology – other key terms

Terms related to products

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





SECTION B – DISCOVERY

ePQS navigation & features - Discovery



This “discovery” section of the learning materials guides you through the different features and functions of ePQS and where you can find them.

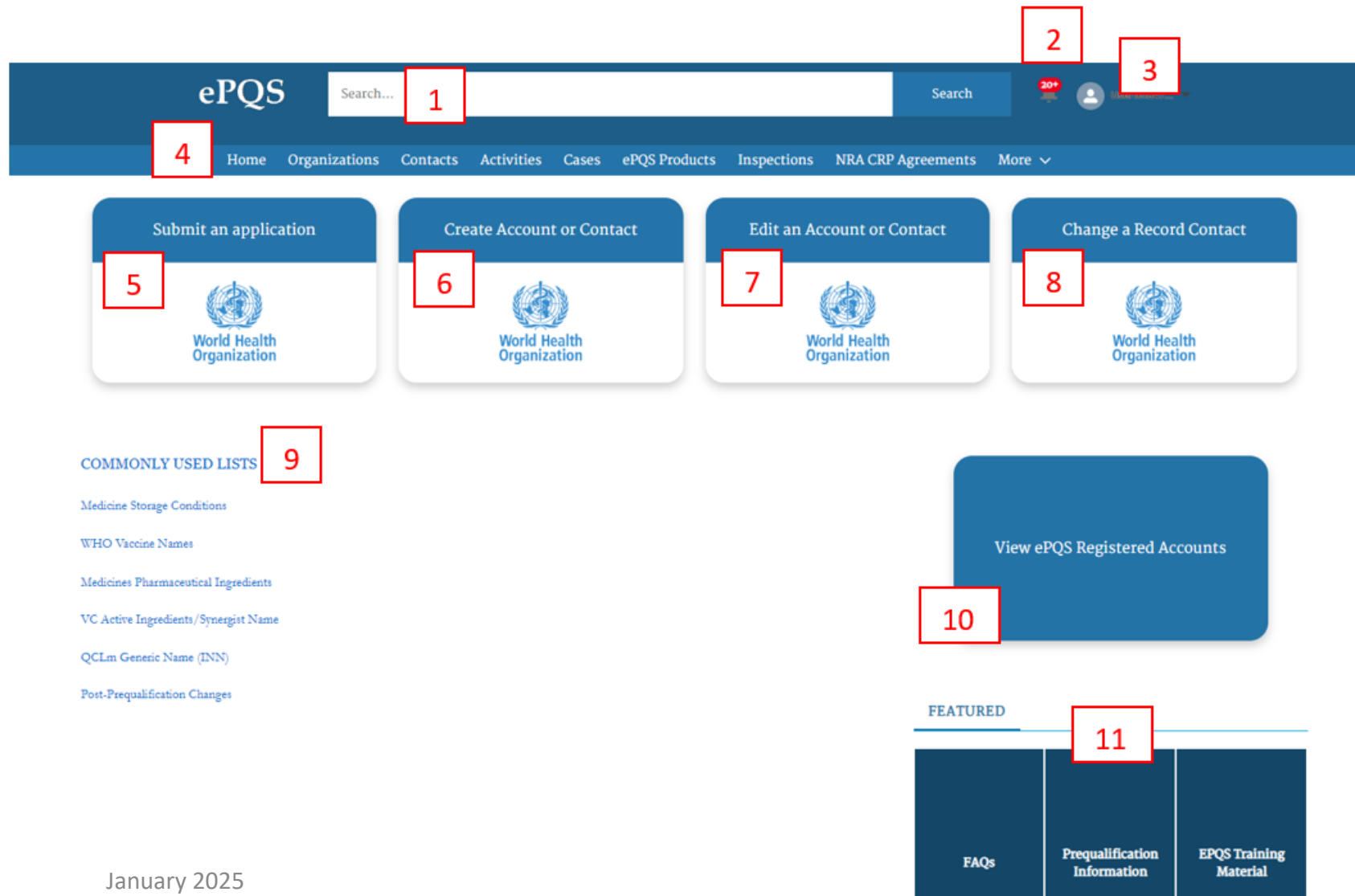
It is intended as a learning aid and ongoing reference guide.



4

Navigating ePQS – General guide

4. ePQS navigation – Homepage map



1) Global search facility

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

2) Notification “Bell” Icon

System generated notifications will be recorded here.

3) Personal Settings and Profile

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

4) Object Menu Bar

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

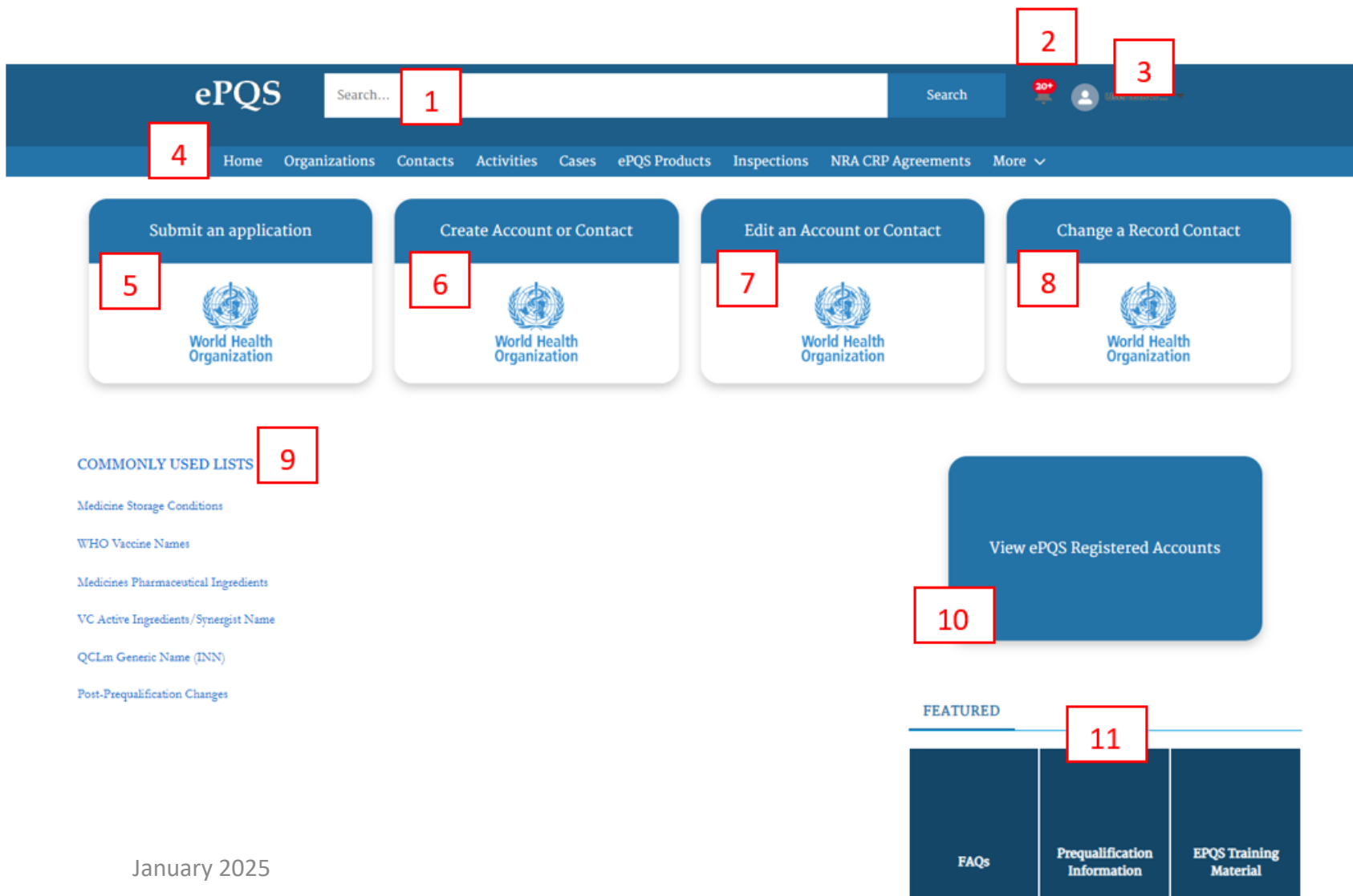
5) Application wizard

This initiates the creation of a new application

6 to 8) Contacts and Accounts

These menu items download the relevant forms for completion.

4. ePQS navigation – Homepage map



9) Commonly Used Lists

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

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

10) View ePQS Registered Accounts

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

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

11) FAQ and training materials

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

4. ePQS navigation – My profile



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

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

The screenshot displays the ePQS user interface. At the top left, the 'ePQS' logo is visible next to a search bar containing the text 'Search...'. To the right of the search bar is a 'Search' button. Further right, there is a notification bell icon and a user profile icon (a person silhouette) which is highlighted with an orange box. Below the search bar 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 blue buttons, each with a white header and a white body containing the World Health Organization logo. The buttons are labeled: '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 (highlighted with an orange box), My Account, and Logout. The World Health Organization logo is also visible at the bottom of the dropdown menu.

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	Manager
Title	Company Name
	Active <input checked="" type="checkbox"/>
Email	Contact
Address	Phone
	Mobile

About Me
January 2025

4. ePQS navigation – My account



The “My account” icon provide you 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. The top navigation bar is dark blue with the 'ePQS' logo on the left, a search bar in the center, and a user profile icon on the right. Below the navigation bar is a horizontal menu with items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. Below this 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 'My Account'. The 'My Account' button is highlighted with an orange border. A dropdown menu is open from the user profile icon, showing options: Home, My Profile, My Account (highlighted with an orange border), and Logout. The World Health Organization logo is visible at the bottom of the 'My Account' button and the dropdown menu.

4. ePQS navigation – My account



“My account” appearance.

5 sub-tabs appear:
Details; Related;
Preview documents;
Document download;
Download submission.

“Details” displays the information that is stored in ePQS related to the manufacturing company (or other supplier entity) you are linked to.

ePQS Search... Search

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

Account Account Owner + Follow New Note DocuSign Arms Tobacco Disclosure Update Published Information

Account Record Type Address (2) Email

Home My Profile My Account Logout

Details Related Preview Documents Document Download Document Submission

Account Information

Organization UID	Account Owner
Legal Name	Primary Contact
Account Name	Phone
Parent Account	Email
Account Record Type	
Description	

Address Information

WHO Country Information

General Details

Related Links

PQT Information

Account Usage - Collaborators

System Information

4. ePQS navigation – Related



”Related” provides a list of all records in ePQS related to your account.

This includes:

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

The screenshot displays the ePQS interface. At the top, there is a search bar and a navigation menu. The 'My Account' option in the navigation menu is highlighted with an orange box. Below the navigation menu, there are several sections for account-related information. The 'Related' tab is highlighted in the top navigation bar. The main content area shows a list of related records, including:

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

4. ePQS navigation – Documents



“Preview documents” is a reference library of all documents related to your account.

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

‘Submitted documents’ contains the documents uploaded to the account or as part of an application wizard process.

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo 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. On the right side of the header, there is a user profile icon and a dropdown menu with options: Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the navigation menu, there is an 'Account' section with a grid icon and a '+ Follow' button. To the right of the 'Account' section, there are buttons for 'New Note' and 'DocuSign Arms Tobacco Disclosure'. Below these buttons, there are fields for 'Account Record Type', 'Address (2)', and 'Email'. The main content area has a tabbed interface with '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'. At the bottom, there 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 you to download and save locally 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 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 tabs for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registrations. A dropdown menu is open for the user profile, showing options for Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the navigation menu, there is a section for 'Account' with a grid of filters for Account Record Type, Address (2), and Email. To the right of this section are buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. Below the account section, there is a tabbed interface with tabs for Details, Related, Preview Documents, Document Download (highlighted with an orange border), and Document Submission. The 'Document Download' tab is active, showing a 'box' search bar and a list of folders: 'External correspondence' and 'Submitted Documents', both modified on Fri Apr 12 2024. At the bottom of the interface, there is a footer with links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer, and a green banner on the right that reads 'SECTION B – DISCOVERY'.

4. ePQS navigation – Documents



“Document submission” enables you to upload documents to your account.

Instructions on following page



The screenshot displays the ePQS website interface. At the top, there is a search bar and a navigation menu with items like Home, Organizations, and ePQS Products. A user profile dropdown menu is open, showing options like Home, My Profile, My Account (highlighted with an orange box), and Logout. Below the navigation, there are buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. The main content area shows a breadcrumb trail: Details > Related > Preview Documents > Document Download > Document Submission (highlighted with an orange box). The 'Document Submission' page contains the heading 'Upload to Account Submission' and a message: 'Welcome to Document Submission Wizard. Please click on **Next** to proceed for Account#Vestfrost Solutions'. A blue 'Next' button is located at the bottom right of the content area. The footer contains 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 prequalification applications and post-PQ variations submissions.

The screenshot shows the ePQS application interface. At the top, there is a dark blue header with the 'ePQS' logo on the left, a search bar with 'Search...' text, 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). Below the navigation menu are four main action buttons, each featuring the World Health Organization logo: 'Submit an application' (highlighted with an orange border), '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 the following 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 section is a large blue button labeled '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 your account or associated contact details.

The screenshot shows the ePQS homepage. At the top is a dark blue header with the 'ePQS' logo, a search bar, and a 'Search' button. To the right of the search bar are notification and user profile icons. 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. The main content area features four large blue buttons with the WHO logo: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Change a Record Contact'. The 'Create Account or Contact', 'Edit an Account or Contact', and 'Change a Record Contact' buttons are highlighted with an orange border. 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'.

4. ePQS navigation – Notes



Under your “account” interface, you may also create “notes”.

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

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile icon. Below the header is a navigation menu with various options: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. A dropdown menu is open for the user profile, showing options: Home, My Profile, My Account (highlighted with an orange box), and Logout. In the main content area, there is a 'New Note' button (highlighted with an orange box) and a '+ Follow' button. Below this, a 'New Note' form is shown, featuring a text input field with a placeholder 'Enter a note...', a rich text editor toolbar, and a 'Share' button (highlighted with an orange box) at the bottom right. The form also includes a 'Related to' dropdown menu set to 'Current Record' and a 'Visibility Set by Record' option.

4. ePQS navigation – Organisations



Via the main tab “Organisations” you can access a list of all organisation accounts associated with your own.

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

4. ePQS navigation – Contacts



Via the main tab “Contacts” you can access a list of all organisation accounts associated with your own.

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

The screenshot shows the ePQS web application interface. At the top, there is a dark blue header with the ePQS logo, a search bar, and a user profile icon. Below the header is a navigation menu with tabs for Home, Organization, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The Contacts tab is highlighted with an orange box. Below the navigation menu, the Contacts page is displayed. It features a purple icon, the text "Contacts", and a dropdown menu for "All ePQS Contacts (Portal)". The dropdown menu is open, showing three options: "All ePQS Contacts (Portal)", "Recently Viewed (Pinned list)", and "Recently Viewed Contacts". The "All ePQS Contacts (Portal)" option is selected. Below the dropdown menu, there is a table with two columns: "Account Name" and "Account: Legal Name". The table contains two rows of data, both for "Vestfrost Solutions".

	Account Name	Account: Legal Name	
1	Vestfrost Solutions	Vestfrost Solutions	▼
2	Vestfrost Solutions	Vestfrost Solutions	▼

4. ePQS navigation – Activities



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

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

4. ePQS navigation – Cases



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

Available list views include “Open cases”, “closed cases”, “all” and “recently viewed”.

The screenshot shows the ePQS application interface. The navigation bar includes 'Home', 'Organizations', 'Contacts', 'Activities', 'Cases', 'PQS Products', 'Inspections', 'NRA CRP Agreements', 'CRP Product Registrations', and 'More'. The 'Cases' tab is highlighted. A dropdown menu for 'All Cases (Portal)' is open, showing the following list views:

- ✓ All Cases (Portal)
- 1 All Closed Cases (Portal)
- 2 All Open Cases (Portal)
- 3 Recently Viewed (Pinned list)
- 4 Recently Viewed Cases

The background shows a table of case data with the following columns: Application S..., WHO Pro..., Date Appl..., Date Appl..., and Date of Pr... The table contains four rows of data, all with 'Standard' in the 'Application S...' column and '01/01/1900' in the 'Date Appl...' columns.

4. ePQS navigation – Products



Likewise, a list of all “products” related to your account is available via the main tab.

ePQS

Search... Search

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

ePQS Products

All Products (Portal) [dropdown arrow]

29 items LIST VIEWS

- All Active Products (Portal)
- 1 All Closed Products (Portal)
- 2 All Products (Portal)
- 3 Recently Viewed (Pinned list)

Search this list...

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

4. ePQS navigation – Inspections



And a list of all “Inspections” related to your product sites is available via the main tab.

The screenshot shows the ePQS application interface. At the top, there is a dark blue navigation bar with the ePQS logo, a search bar, and a user profile icon. Below this is a lighter blue navigation menu with tabs for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections (highlighted with an orange box), NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, the 'Inspections' section is active. It features a dropdown menu for 'All Inspections (Portal)' (highlighted with an orange box) and a search bar. The dropdown menu shows two options: 'All Inspections (Portal)' (selected) and 'Recently Viewed (Pinned list)'. To the right of the dropdown menu, there is a search bar and a table with columns for 'Site Contact', 'Manner of Inspection', and 'Inspection Type'.

4. ePQS navigation – Bell



And finally, the bell notification provides an overview of all the outstanding notifications and actions relevant to 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 bell icon for notifications, which is highlighted with an orange box. Next to the bell icon is a user profile icon with the text 'edc'. Below the navigation bar is a horizontal menu with links for 'Home', 'Organizations', 'Contacts', 'Activities', 'Cases', 'ePQS Products', 'Inspections', and 'NRA'. Below the menu are four white cards with blue headers and the World Health Organization logo. The cards are labeled 'Submit an application', 'Create Account or Contact', 'Edit an Account', and 'World Health Organization'. A 'Notifications' pop-up window is overlaid on the right side of the cards, containing the text 'You don't have any notifications right now.' and a close button (X).



SECTION C

– APPLICATION PROCEDURES



5

Step-by-step guide

5. Step-by-step guide



ePQS activities that will be required to set-up your account and to process application submissions are:

- a. Verification of product data sheets
- b. Access, accounts and contact details
- c. Correct record visibility and correct product list visibility
- d. Access and functionality of personal user folder
- e. Application submission (if applicable)
- f. Post-PQ variation submission (if applicable)
- g. Uploading of documents (related to the submission)
- h. Downloading of documents shared with the applicant
- i. Assignment of activities to applicants
- j. Bell and email notifications associations with actions





5a

Verification of product data sheets

5a. Verification of product data sheets



TASK

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



Communicate any omissions or errors to:
pqsinfo@who.int & huckerbyg@who.int

5a. Verification of product data sheets



Where to find your product data sheets for verification:

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

The screenshot shows the ePQS application interface. The navigation menu at the top includes 'ePQS', 'Home', 'Accounts', 'Contacts', 'ePQS Products', 'Cases', 'Inspections', 'Reports', 'Dashboards', 'Application Wizard', 'NRA CRP Participations', and 'More'. The 'ePQS Products' menu item is highlighted with a red box and the number 1. Below the navigation menu, the 'ePQS Products' section is visible, with the 'IMDs (All)' filter selected, highlighted with a red box and the number 2. The main content area displays a list of products with the following columns: WHO Product ID, Applicant Organization, Product Status, Date of Application, Date of Prequalification, and Date of Product Cancellation. The first row of the list is highlighted with a red box and the number 3, showing a WHO Product ID of E001- and a Product Status of Prequalified.

WHO Product ID	Applicant Organization	Product Status	Date of Application ...	Date of Prequalificat...	Date of Product Can...
E001-		Prequalified	01/01/1900	17/08/2010	
2 E001-		Prequalified	01/01/1900	20/04/2011	
3 E001-		Prequalified	01/01/1900	25/10/2011	

5a. Verification of product data sheets



When you click on the product, you will see this “Product page” for the one product selected.

However you need to go to the “**Product Variant page**” to see product’s technical specifications.

So, click on the “Related” sub-tab.

The screenshot shows the ePQS Product page for E001-001. The page includes a navigation menu with options like Home, Accounts, Contacts, ePQS Products, Cases, Inspections, Reports, Dashboards, Application Wizard, and NRA CRP Participations. The product details are as follows:

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

The page also features sub-tabs: Details, Related, Document, Activity, Chatter, and Audit Trail. The 'Related' sub-tab is highlighted with a red box. Below the sub-tabs is a 'Comments' section and an 'Information' section with the following details:

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

5a. Verification of product data sheets



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

Select the record displayed under “IMD Product Variant”



ePQS Product E001-005

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

Details | **Related** | Document | Activity | Chatter | Audit Trail

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

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

View All

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

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

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

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

View All

Commitments/Established Conditions (0) [New]

Fees (0) [New]

Files (0) [Add Files]

5a. Verification of product data sheets



This brings you to the “**product variant page**” (eg here for E001)

With its organised data fields/values.



YOUR TASK →

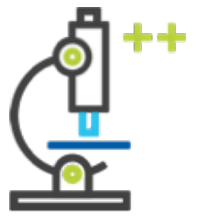
- Review all data fields
- Report any errors or issues to the IMD-PQS Secretariat: pqsinfo@who.int

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



The screenshot displays a web-based form for product verification. The form is organized into several sections, each with a dropdown arrow. The sections include: 'Product identification' (with fields for Name, Manufacturer, etc.), 'Product specifications - Main' (with fields for Temperature zones, Humidity, etc.), 'Product specifications - Equipment options' (with fields for Refrigeration, Lighting, etc.), 'Product specifications - Temperature monitoring & alarm options' (with fields for Alarm system, etc.), 'Warranty, installation and maintenance' (with fields for Warranty period, etc.), 'Quality standard' (with fields for Quality Standard, etc.), 'Verification' (with fields for Verification Laboratory, etc.), and 'Records' (with fields for Created by, Last Modified by, etc.). A magnifying glass icon is overlaid on the right side of the form, indicating a search or verification function.

5a. Verification of product data sheets



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



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

There you will find a feedback forms for each category:

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



5b

Accessing registered accounts

5b. Accessing registered accounts



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

ePQS Search... Search

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

Submit an application
World Health Organization

Create Account or Contact
World Health Organization

Edit an Account or Contact
World Health Organization

Change a Record Contact
World Health Organization

COMMONLY USED LISTS

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

View ePQS Registered Accounts

5b. Accessing registered accounts



You may select different list views.

Recommended: “ePQS Accounts”.

Then please review each record that appears in the list:

Account types include:

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



*** In your case as an IMD-PQS prequalified manufacturer or reseller, most likely the only account to which you are associated is your own company.

5b. Accessing registered accounts



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

The screenshot shows the ePQS web application interface. At the top, there is a search bar and a navigation menu with items like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. A user profile dropdown menu is open, showing options: Home, My Profile, My Account, and Logout. Below the navigation, there is an 'Account' section with a '+ Follow' button, 'New Note', and 'DocuSign Arms Tobacco Dis' button. The main content area shows 'Account Record Type: Non-State Actor', 'Address (2)', and 'Email'. Below this, there are tabs for 'Details', 'Related', 'Preview Documents', 'Document Download', and 'Document Submission'. A list of expandable sections is shown on the left, each with an orange arrow icon: Account Information, Address Information, WHO Country Information, General Details, Related Links, PQT Information, Account Usage - Collaborators, and System Information.



5c

Correct record visibility

5ci. Correct record visibility



1. Click on your profile icon, and select “My Account”.

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

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a user profile icon. A dropdown menu is open from the profile icon, with 'My Account' highlighted. Below the header is a navigation bar with various menu items. The main content area shows an 'Account' page for a 'Non-State Actor' with fields for 'Account Record Type', 'Address (2)', and 'Email'. A 'Details' tab is active, and the 'Related' sub-tab is highlighted. A list of expandable sections is visible below the tabs, including 'Account Information', 'Address Information', 'WHO Country Information', 'General Details', 'Related Links', 'PQT Information', 'Account Usage - Collaborators', and 'System Information'. Two orange callout boxes with numbers '1' and '2' highlight the 'My Account' menu item and the 'Related' sub-tab, respectively.

5ci. Correct record visibility



The “Related” sub-tab displays all records of all types related to your account.

Open and view each type of record.

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

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



The screenshot shows the ePQS interface with the 'Related' sub-tab selected. The page displays a list of record types and their counts:

- Notes (0)
- Related Contacts (2) - Includes a table with columns: Contact Name, Direct, Active, Start Date
- Product Sites (5+)
- Case (Applications) (5+)
- Products (Applicant Organization) (5+) - Includes a 'New' button and a table with columns: WHO Product ID, Product Name, Vaccine Abbreviated Name, Product Status
- Inspections (0)
- CRP Product Registrations (0)
- CRP Product Registrations (NRA Organisation) (0)
- NRA CRP Participations (NRA Organization) (0)
- Files (0) - Includes an 'Add Files' button and an 'Upload Files' button with the text 'Or drop files'
- Account History (0)

At the bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

5cii. Correct record visibility - *Products*



Products

Expand or click directly on the Products sub-tab.

The screenshot shows 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' sub-tab is highlighted in orange. Below the navigation bar, there is an 'Account' section with a '+ Follow' button and a 'New Note' button. The main content area shows a list of related items, including 'Notes (0)', 'Related Contacts (2)', 'Product Sites (6+)', 'Case (Applications) (6+)', 'Products (Applicant Organization) (6+)', 'Inspections (0)', 'CRP Product Registrations (0)', 'CRP Product Registrations (NRA Organisation) (0)', 'NRA CRP Participations (NRA Organization) (0)', 'Files (0)', and 'Account History (0)'. The 'Products (Applicant Organization) (6+)' section is highlighted in orange and contains a table with columns: WHO Product ID, Product Name, Vaccine Abbreviated Name, and Product Status. A 'New' button is visible in the top right corner of this section.

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

5cii. Correct record visibility - Products



Products

Please review the list of products that is displayed:

1. Verify that ALL of your previously and currently prequalified products, and/or products currently under review are present in the list.
2. Verify that your account displays ONLY products from your organisation and NOT products of any other organisation.

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 the breadcrumb 'Accounts > Vestfrost Solutions' and the title 'Products (Applicant Organization)'. It indicates '29 items - Updated a few seconds ago' and includes a 'New' button and icons for settings, refresh, and filter. A table lists products with columns: WHO Produc..., Product Name, Vaccine ..., Product Status, Product Type, and Product Subtype. The table contains 10 rows, each with a number and a 'Product listing details ...' link. An orange border highlights the table content. At the bottom, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.



5d

Personal use folder

5d. Personal use folder



ePQS offers external users a “Personal folder”, in which you may upload/house documents you are working on, before submitting them or sharing them with internal users.

To access the personal use folder go to “Contacts” and choose yourself from the list of contacts.

The screenshot shows the ePQS web application interface. At the top, there is a dark blue header with the ePQS logo, a search bar, and a user profile icon. Below the header is a navigation bar with several menu items: Home, Organizations, **Contacts** (highlighted with an orange box), Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, the 'Contacts' section is displayed, showing a search bar and a table with two items. The first item, 'YOUR NAME', is highlighted with an orange box. The table has columns for selection, name, and actions. The second item is partially visible below the first.

1	YOUR NAME			
2				

5d. Personal use folder



Once inside your own contact record, click the “Preview Documents” tab. You will see a folder with name conventions (YourName) “PersonalFolder”. Upload documents by clicking on the “+” icon.

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

The screenshot shows the ePQS web interface. At the top, there is a search bar and a navigation menu with items like Home, Organization, **Contacts**, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation, the contact details for Mr Bjarne Nielsen are displayed, including Job Title, Account Name (Vestfrost Solutions), Phone (+45 7914 2555), Email (clc@vestfrostolutions.com.invalid), and Contact Owner (Isaac GOBINA). There are buttons for '+ Follow', 'New Note', and 'Make Contact Info Private'. Below the contact details, there is a tabbed interface with 'Preview Documents' selected. Under this tab, there is a search bar for 'box' and a folder named 'YOUR Personal Folder' with a '+' icon in the top right corner. 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'.



5e

Application submission procedure

5e. Application submission procedure



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

ePQS Application Wizard

Start Organization & Contacts Application Info Product Details Documents Finalize

Create a New Application

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

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

Navigation

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

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

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

Draft Records

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

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

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

January 2025 Next

5e. Application submission procedure



Applicants will first be prompted to select the relevant contacts (yourself or your colleagues):

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Contact

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

* Primary Contact
Vaccine UAT External Contact 1

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

* Secondary Contact
--None--

* Alternative Secondary Contact Choice
--None--

Previous Next

5e. Application submission procedure



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

ePQS Application Wizard

Organization & Contacts | Application Info | Product Details | Documents | Finalize

Choose Product Type

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

* Product Type

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

Previous Next

5e. Application submission procedure



Next, select “Prequalification” as the application type:

ePQS Application Wizard

Organization & Contacts | Application Info | Product Details | Documents | Finalize

Choose Application Type

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

* Application Type

- Prequalification
- Post-PQ Change
- Reassessment

Previous Next

5e. Application submission procedure



The Wizard will ask for confirmation of the application details:

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

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Confirm Application Details

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

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

Previous Next

5e. Application submission procedure



The Wizard will provide you with your case number. Make a note of this reference number:

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Continue Application

A draft application has been created.

For reference the new application has the case number [PQ-IMD-2023-0040](#). You can view the draft application details by following the link.

Next

5e. Application submission procedure



Next, select the “Product Subtype” (the IMD-PQS Product Category) to which you wish to submit your product for prequalification assessment:

ePQS Application Wizard

Organization & Contacts | Application Info | Product Details | Documents | Finalize

Additional Application Info

* Product Subtype

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

5e. Application submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ Product Details Documents Finalize

Create a Product

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

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

It will be linked to your application PQ-IMD-2023-0040.

Previous Next

5e. Application submission procedure



Input a product name of your choice, a description, and the type of appliance (free text):

ePQS Application Wizard

Organization & Contacts ✓ Product Details Documents Finalize

Create a Product

Further Vx IMD Details
(Please fill out all required fields)

* Product Name

Product Description

Type of Appliance

Next

5e. Application submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ Product Details Documents Finalize

Create IMD Product Variants

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

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

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

Freezer room sizes (smallest, m3)

Freezer room sizes (largest, m3)

* Pre-qualified regions

* ISO 9001/13485 certified

* ISO 14001 certified

January 2025

**All fields are required unless not applicable for your product. There are multiple ‘Variant Information Detail Screens’ for each category of product.

5e. Application submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ Product Details Documents Finalize

Create IMD Product Variants

Success
IMD Product Variant Ref. IMDV-00033 created.

Next

5e. Application submission procedure



Next, you have the choice to provide information about the “product site” (the site of product manufacture). Please select “Product Site” if your product is being manufactured on a site that is different from the site already registered in ePQS (accessible under *Account* → *Related* → *Product sites*)

Otherwise, select “I don’t want to add any more product related information at this time”:

The screenshot shows the 'ePQS Application Wizard' interface. At the top, a progress bar indicates the current step: 'Organization & Contacts' (completed, green), 'Product-Related Info' (current step, blue), 'Documents' (grey), and 'Finalize' (grey). Below the progress bar, the section is titled 'Add Product Related Information'. A red asterisk indicates a required field: '* Choose Product Related Information to Add to Application'. There are two radio button options: 'Product Site' (unselected) and 'I don't want to add any more product related information at this time' (selected). At the bottom right of the form, there are 'Previous' and 'Next' buttons.

5e. Application submission procedure



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

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



ePQS Application Wizard


Organization & Contacts ✓ ✓ ✓ Documents Finalize

Upload Documents

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

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

When finished, click **Next**.


Drag and drop files and folders
Browse your device or Select Folders

Cancel Upload

5e. Application submission procedure



List of mandatory documents.

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

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

Link in full: <https://extranet.who.int/prequal/key-resources/documents/imd-pqs-guidelines-prequalification-applicants-prequalification-holders>

5e. Application submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ ✓ ✓ ✓ Finalize

Review Application

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

Case ID: [PQ-IMD-2023-0040](#)
Product or Laboratory ID: [P-15764](#)

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

* Ready to submit?

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

Previous Next

5e. Application submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ ✓ ✓ ✓ Finalize

Application Submitted

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

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

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

Next



6f

Post-PQ variation submission

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Start Organization & Contacts Application Info Product Details Documents Finalize

Create a New Application

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

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

Navigation

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

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

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

Draft Records

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

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

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

January 2025 Next

5f. Post-PQ variation submission procedure



Applicants will first be prompted to select the relevant contacts:

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Contact

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

* Primary Contact
Vaccine UAT External Contact 1

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

* Secondary Contact
--None--

* Alternative Secondary Contact Choice
--None--

Previous Next

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Organization & Contacts | Application Info | Product Details | Documents | Finalize

Choose Product Type

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

* Product Type

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

Previous Next

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Choose Application Type

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

* Application Type

- Prequalification
- Post-PQ Change
- Reassessment

Previous Next

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

5f. Post-PQ variation submission procedure



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

- **Type A - Administration** → Select for administrative variations that do not impact product specifications
- **Type B – Technical** → Select for administrative variations that do not impact product specifications

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

A screenshot of 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 heading 'Choose Application Subtype' is displayed. Underneath, the text 'Please enter the following additional information:' is followed by a red asterisk and the label '* Application Subtype'. A dropdown menu is open, showing two options: 'Type A (Administration)' and 'Type B (Technical)'. At the bottom right of the form, there are 'PREVIOUS' and 'NEXT' buttons.

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Organization & Contacts | Application Info | Product Details | Documents | Finalize

Relevant Products Found

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

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

5f. Post-PQ variation submission procedure



The next screen summarizes the application details you have inputted so far, and asks you to confirm them.

ePQS Application Wizard

Organization & Contacts Application Info Product Details Documents Finalize

Confirm Application Details

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

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

Previous Next

5f. Post-PQ variation submission procedure



Then the application informs you that the draft application has now been created and asks you to confirm your wish to continue.

It provides you with an application case number. It is recommended to make a note of this "offline", for your records.

ePQS Application Wizard

Organization & Contacts | Application Info | Product Details | Documents | Finalize

Continue Application

A draft application has been created.

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

Next

5f. Post-PQ variation submission procedure



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

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

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Information

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

Either

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

Next

5f. Post-PQ variation submission procedure



The application will provide you with a list of products currently related to your account. Select the product for which you wish to submit a post-PQ variation.

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

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Select Products

Choose a product that is the subject of a change
Only those with a status of Prequalified or Acceptable are available.

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

- Eoo
- Eoo
- Eoo
- Eoo
- Eoo

Previous Next

5f. Post-PQ variation submission procedure



The next slide confirms your product selection.

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Products

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

Next

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

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Information

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

Either

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

Next

5f. Post-PQ variation submission procedure



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

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

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Info

* Change Type

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

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Info

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

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

Change Description

Previous Next

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Info

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

Next

5f. Post-PQ variation submission procedure



Next you are linked back to the “Add change information” screen for a third time.

Note - If you wish to report changes to additional products, you may begin to add the additional or next product(s) here by re-selecting the second option. You will be prompted to add the change details for that additional product on the screen that follow.

If you do not wish to add additional products, select “No more at this time”.

ePQS Application Wizard

Organization & Contacts ✓ ✓ Post-PQ Changes Documents Finalize

Add Change Information

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

Either

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

Next

5f. Post-PQ variation submission procedure



Assuming you have selected “No more at this time”, you will be moved onto the start of the document upload procedure. Click “Next”.

ePQS Application Wizard

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

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

5f. Post-PQ variation submission procedure



Select the type of document you will upload (CTD or eCTD).

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

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

ePQS Application Wizard

* Select Document Type

eCTD

Non-eCTD

Previous Next

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard


Organization & Contacts ✓ ✓ ✓ Documents Finalize

Upload Documents

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

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

When finished, click **Next**.



Drag and drop files and folders
Browse your device or Select Folders

Cancel Upload

Previous Next

5f. Post-PQ variation submission procedure



On the subsequent screen you will see a display list of all the documents you have uploaded.

The screenshot shows the 'ePQS Application Wizard' interface. At the top, a progress bar indicates four steps: 'Organization & Contacts', two unnamed steps (both with checkmarks), 'Documents', and 'Finalize'. The 'Documents' step is currently active. Below the progress bar, the section is titled 'Document Review'. It contains a paragraph of 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.' Below this text is a search bar with the 'box' logo and the placeholder text 'Search files and folders'. Underneath the search bar, the timestamp '2024-08-23-16:29' is displayed. The main content area is empty, featuring a blue folder icon with a sad face and the text 'There are no items in this folder.' At the bottom right of the wizard, there are 'Previous' and 'Next' buttons.

5f. Post-PQ variation submission procedure



You are now at the review and submit stage. On this screen you can opt to use the generated ePQS case number or link provided earlier to review the application. Otherwise, select “Yes” to submit, or else “No save draft” if you wish to come back later to complete or update the submissions, or “No discard”.

ePQS Application Wizard

Organization & Contacts ✓ ✓ ✓ ✓ Finalize

Review Application

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

Case ID: PQC-IMD-2024-0007

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

* Ready to submit?

Yes

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

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

Previous Next

5f. Post-PQ variation submission procedure



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

ePQS Application Wizard

Organization & Contacts ✓ ✓ ✓ ✓ Finalize

Application Submitted

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

Finish

5f. Post-PQ variation submission procedure



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

The status will be listed as "Under Screening".

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

The screenshot shows the ePQS system interface for case PQC-IMD-2024-0007. The status 'Under Screening' is highlighted with an orange box. The interface includes a navigation bar at the top with links like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, there are buttons for '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. The case information is displayed in a table-like format with fields for Case Record Type, Case Number, Status, Applicant Organization, Date of Prequalification/Acceptance, and Case Owner. Below this, there are tabs for 'Details', 'Related', 'Activities', 'Preview Document', 'Document Download', and 'Document Submission'. The 'Details' tab is active, showing sections for 'General Details', 'Case Progress', and 'System Information'. The 'General Details' section includes fields for WHO Application Number, ePQS Case ID, Product Type, Application Type, Application Subtype, and Product Assessment Procedure. The 'Case Progress' section includes fields for Date Application Submitted, Date Application Accepted For Assessment, Date Of Suspension, Date of Prequalification/Acceptance, Cancellation/Withdrawal/Rejection Reason, and Cancellation/Withdrawal/Rejection Date. The 'System Information' section includes fields for Created By, Last Modified By, Case Record Type, and Record Status.



5g

Uploading of documents

5g. Uploading of documents – account / organisation



Under “My Account” / “Document Submission” you 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 Registration. The main content area shows an 'Account' section with a '+ Follow' button, 'New Note', and 'DocuSign Arms Tobacco Disclosure' buttons. A table below shows account details: 'Account Record Type' is 'Non-State Actor' and 'Email' is blank. A secondary navigation bar includes 'Details', 'Related', 'Preview Documents', 'Document Download', and 'Document Submission' (highlighted with an orange box). Below this is a 'Document Submission' wizard box with the title 'Upload to Account Submission' and 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 the wizard box. At the bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

5g. Uploading of documents – account / organisation



Document submission interface →

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

A screenshot of a web application interface for document submission. At the top, there is a navigation bar with tabs: 'Details', 'Related', 'Preview Documents', 'Document Download', and 'Document Submission'. The 'Document Submission' tab is highlighted with an orange border. Below the navigation bar, the main content area is titled 'Upload to Account Submission'. In the center, there is a blue document icon with an upward arrow. Below the icon, the text reads 'Drag and drop files and folders' and 'Browse your device or Select Folders'. At the bottom right of the main content area, there are two buttons: 'Cancel' and 'Upload'. At the bottom right of the entire interface, there is a 'Next' button.

5g. Uploading of documents - cases



Documents related to cases (i.e. product applications) are available under the cases tab.

The screenshot shows the ePQS web application interface. The top navigation bar includes the ePQS logo, a search bar, and a user profile icon. The 'Cases' menu item is highlighted with an orange box. Below the navigation bar, the 'Cases' section is active, showing a dropdown menu with 'All Cases (Portal)' selected. The main content area displays a table of cases with columns for Application S..., WHO Pro..., Date Appl..., Date Appl..., and Date of Pr....

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

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.

Ensure you 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: 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 'Case Record Type' of 'Vx IMD Post-PQ Change' and a 'Status' of 'Under Screening'. The case owner is 'ePQS Vx IMD Queue'. Action buttons include '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. Below the case details, there are tabs for 'Details', 'Related', 'Activities', 'Preview Document', 'Document Download', and 'Document Submissi'. The 'Preview Document' tab is highlighted with an orange box. The interface then shows a 'box' file upload area 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 modification date of 'Yesterday' and a size of '0 Byte'.



5h

Downloading of documents

5h. Downloading of documents



TASK

Test-download documents from your “External correspondence” folder and “Submitted documents folder” and any other folders that appear on your account

Report any issues.



Communicate any omissions or errors via:
pqsinfo@who.int & huckerbyg@who.int



5h. Downloading of documents



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

Once you have submitted an application, open the folders and test-download the contents.

5h. Uploading of documents - cases



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

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

Ensure you 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 items: 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 folder icon and the case number highlighted in an orange box. To the right of the case record are buttons for '+ Follow', 'Edit', 'Resume Application Wizard', and 'New Component(s)'. Below the case record, there is a table with columns: Case Record Type (Vx IMD Post-PQ Change), Case Number, Status (Under Screening), Date of Prequalification/Acceptance, and Case Owner (ePQS Vx IMD Queue). Below the table, 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, there is a 'box' logo and a search bar for files and folders. Below the search bar, there is a table with columns: Name, Modified, and Size. The table contains one row: 'Correspondence (External)', 'Yesterday', and '0 Byte'.



5i

**Viewing
assigned
activities**

5i. Viewing of assigned activities



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

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 user interface. At the top, there is a search bar and a navigation menu with the 'Activities' tab highlighted. Below the navigation, the page title is 'External Activities' and the main heading is 'All Activities (Applications - Portal)'. There is a search box for the list and several control icons. Below this is a table with the following headers: Activity Name, Subject, Owner Last Na..., Related To (Case), Status, Start Date, Due Date, and End Date. The table body is currently empty, with an orange box highlighting the area where items would be listed.



5j

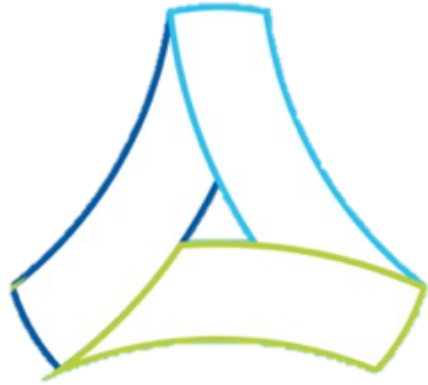
**Bell and email
notifications &
associations
with actions**

5j. Assignment of activities to applicants



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

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



SECTION D – TECHNICAL SUPPORT



6

Additional technical support

6i. IMD-PQS Technical support

IMD-PQS will provide the following additional support to pilot participants and on through the universal launch.



ePQS Personalised Coaching & Q&A Guide
SEPTEMBER / JANUARY



Email / chat support
SEPTEMBER/JANUARY



ePQS Training video
JANUARY



PQ Holder Guidelines*
Annex 7

6ii. General user guidance – specific training

General guidance is available on the ePQS landing page:

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

General Portal Information

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

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

[ePQS - Portal Introduction and Features](#)

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

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

ePQS Portal



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

Within the portal, users will have the ability to:

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

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

Registered users will be able to access the Portal at this link: <https://who.my.site.com/ePOS/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](#)

[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](#)