



WHO e-Prequalification System (ePQS)

Learning materials 2025



Laboratories accreditation applicants



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

Key access links (for reference)

WHO ePQS Portal landing page:

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

ePQS login link:

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



Intended audiences of these learning materials

AUDIENCES

- 1. Primarily:** Laboratories seeking accreditation or re-accreditation to test cold chain products for WHO pre-qualification
2. These learning materials may also be of interest to: IMD-PQS external experts engaged in the evaluation of 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. Explains the role(s) of ePQS in the Laboratory accreditation process
2. Introduces ePQS navigation
3. Guides Laboratory applicants through the ePQS accreditation process
4. Introduces key concepts and terminology
5. Provides links to all detailed technical guidance where they exist



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

SECTION D – SUPPORT

- Additional and forthcoming technical support

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SECTION A – SET-UP



1

ePQS Portal Introduction

January 2025

1. ePQS Introduction – What is ePQS?



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

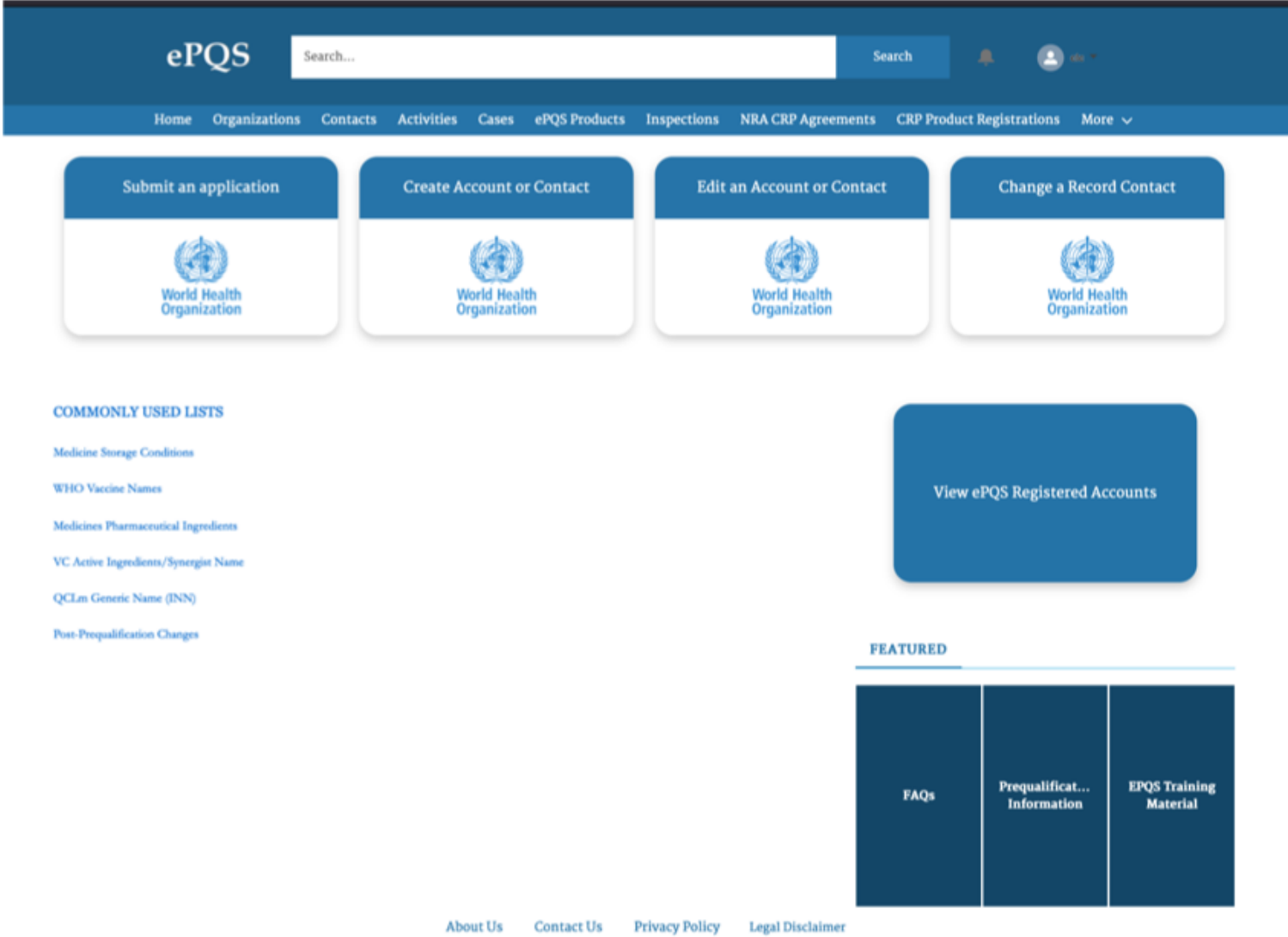
- submit & manage [accreditation applications](#)
- follow the [site inspections](#) process
- [view records](#) relevant to the user
- submit required changes to account, contact & product information
- upload and download [documents](#) securely
- view and monitor [notifications for pending activities](#)



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

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

1. ePQS Introduction – Home page appearance



January 2025

1. ePQS Introduction

Communication with IMD-PQS



First contact with IMD-PQS – “offline”

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

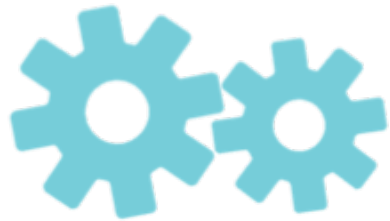


Applications in the ePQS system

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

1. ePQS Introduction

Key components of the ePQS platform



The two key components of the WHO ePQS platform

The “application wizard”

Applications for 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

The screenshot shows the ePQS Application Wizard 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, Application Wizard (highlighted with an orange box), and More. Below the navigation menu, the wizard is titled "ePQS Application Wizard" and has a progress bar with steps: Start (active), Organization & Contacts, Application Info, Product Details, Documents, and Finalize. The main content area is titled "Create a New Application" and contains the following text:

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.

At the bottom right of the content area, there is a "Next" button.

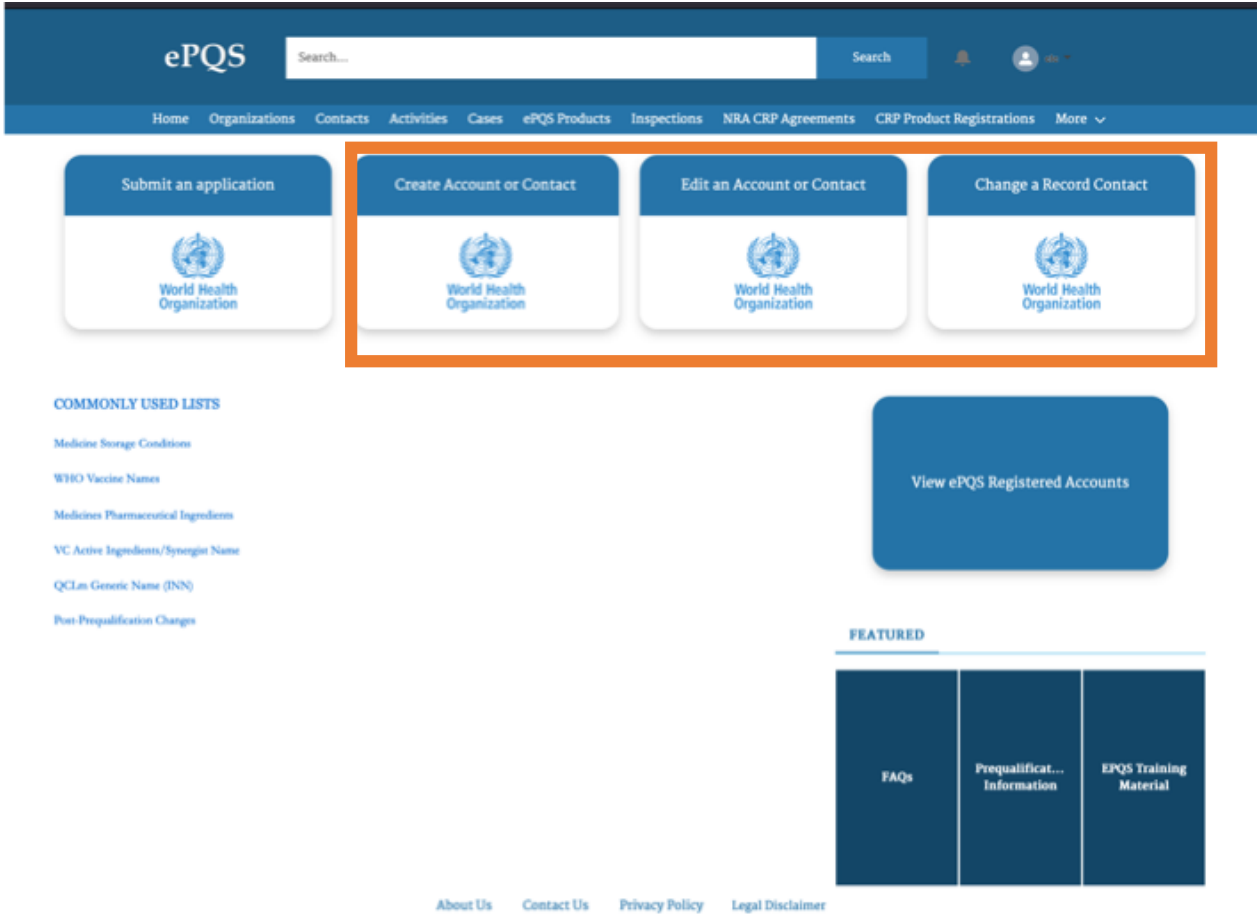
1. ePQS Introduction

Quick view - Document up/download

The screenshot displays the ePQS web application interface. At the top, there is a dark blue header with the 'ePQS' logo, a search bar, and a 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 shows an 'ePQS Product' entry for 'E00X-00X'. Below this, there are four columns of metadata: Product Type (Immunisation Device), Applicant Organization (Vaccine UAT External Contact 1), Product Assessment Procedure (Prequalification - Standard), and Date of Prequalification/Acceptance (25/11/2009). A row of action buttons includes '+ Follow', 'Edit', 'Delete', and 'Printable View'. Below the metadata, there are tabs for 'Details', 'Related', 'Preview Document', and 'Document Download'. The 'Document Download' tab is highlighted with an orange box. An orange arrow points from this tab to a larger, framed screenshot of a Box file manager interface. This framed screenshot shows a search bar, a folder named 'Vx', and a message stating 'There are no items in this folder.' at the bottom, along with a '0 Selected' indicator and a close button.

1. ePQS Introduction

Quick view - Data change request forms



1. ePQS Introduction - ALL Features & functions overview

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

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



2

Registration & Access

3. Registration

1. Account contacts have already been created for all currently-accredited laboratories.
2. Accredited laboratories must **verify their account and contact** details prior to registration. The IMD-PQS Secretariat will reach out individually to users with the required forms for this stage.

3. Contacts need to “register” to gain access to the the system.

Registration is via the:

“External Form – New ePQS User” linked here.

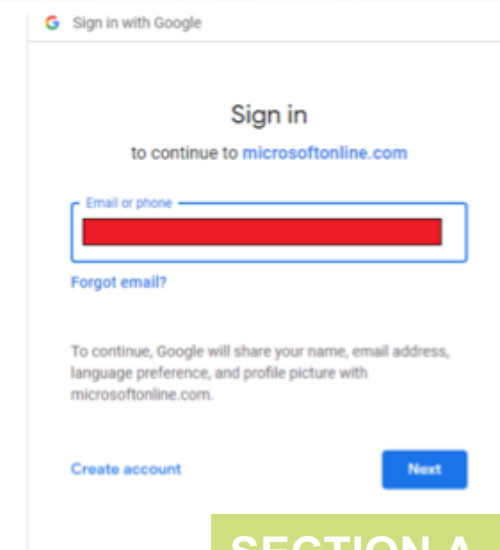
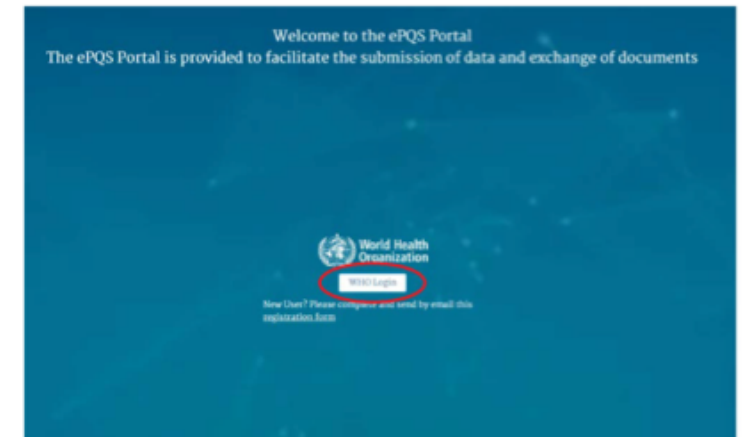


5. You must **complete the “External Form – New ePQS User”** and return it to epqs@who.int, with the **IMD-PQS Secretariat in copy.**

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”

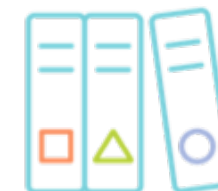
Record

A single instance of object data. Records types include:

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

Case

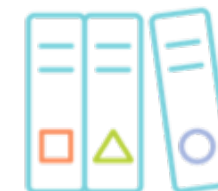
Every prequalification application or associated application (E.g. Inspection, post-prequalification product variant) begins with the creation of a *case*.



3. Concepts & terminology – other key terms

“Records” and “Cases”

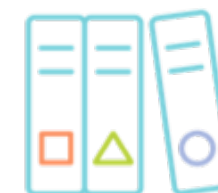
Activity	Any system activity taken in relation to an ePQS <i>case</i> .
Case record type	For each WHO IMD-PQS case, the record type will be either “Vx <i>IMD Application</i> ”, or “Vx <i>IMD Post-PQ change</i> ” or “Vx <i>IMD Reassessment</i> ”. These terms are defined below.
ePQS Case ID	Once opened,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

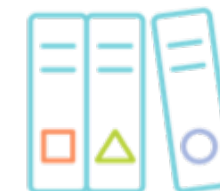
Vx IMD Application	IMD-PQS ePQS Application type meaning: “New application for product prequalification”.
Vx IMD Post-PQ change	IMD-PQS ePQS Application type meaning: “Post-prequalification variation, a change to product or manufacturing process”.
Vx IMD Reassessment	IMD-PQS ePQS Application type meaning: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



3. Concepts & terminology – other key terms

Terms related to applications

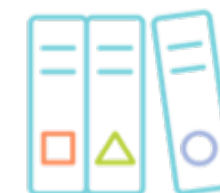
Application	New application for product prequalification, post-PQ variation or Reassessment. Submitted via the Application Wizard.
Applicant organization	The legal entity submitting a prequalification application or post-prequalification commitment.
Application number	Unique code assigned to each new 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.

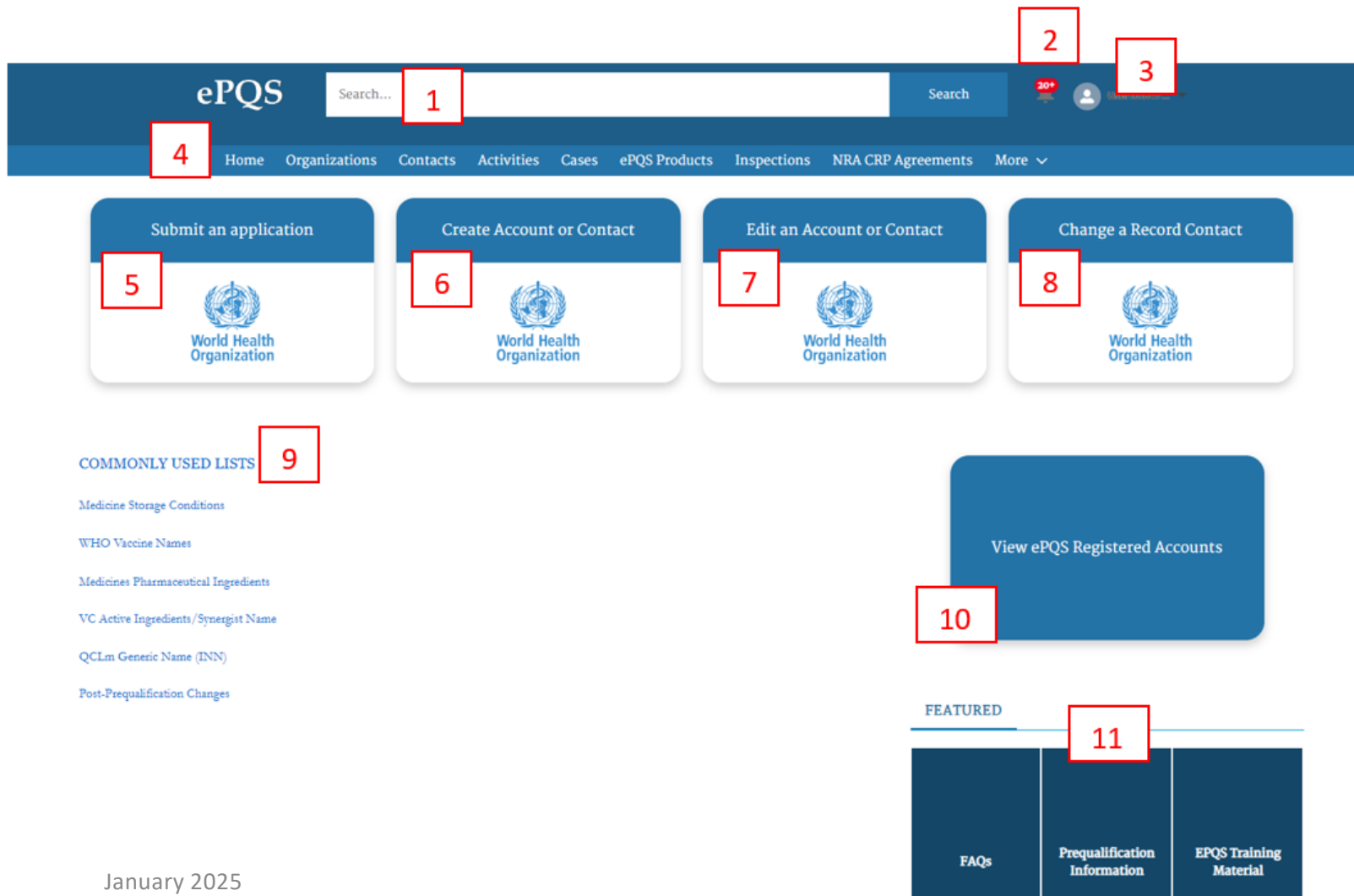
It is intended as a learning aid and ongoing reference guide.



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.

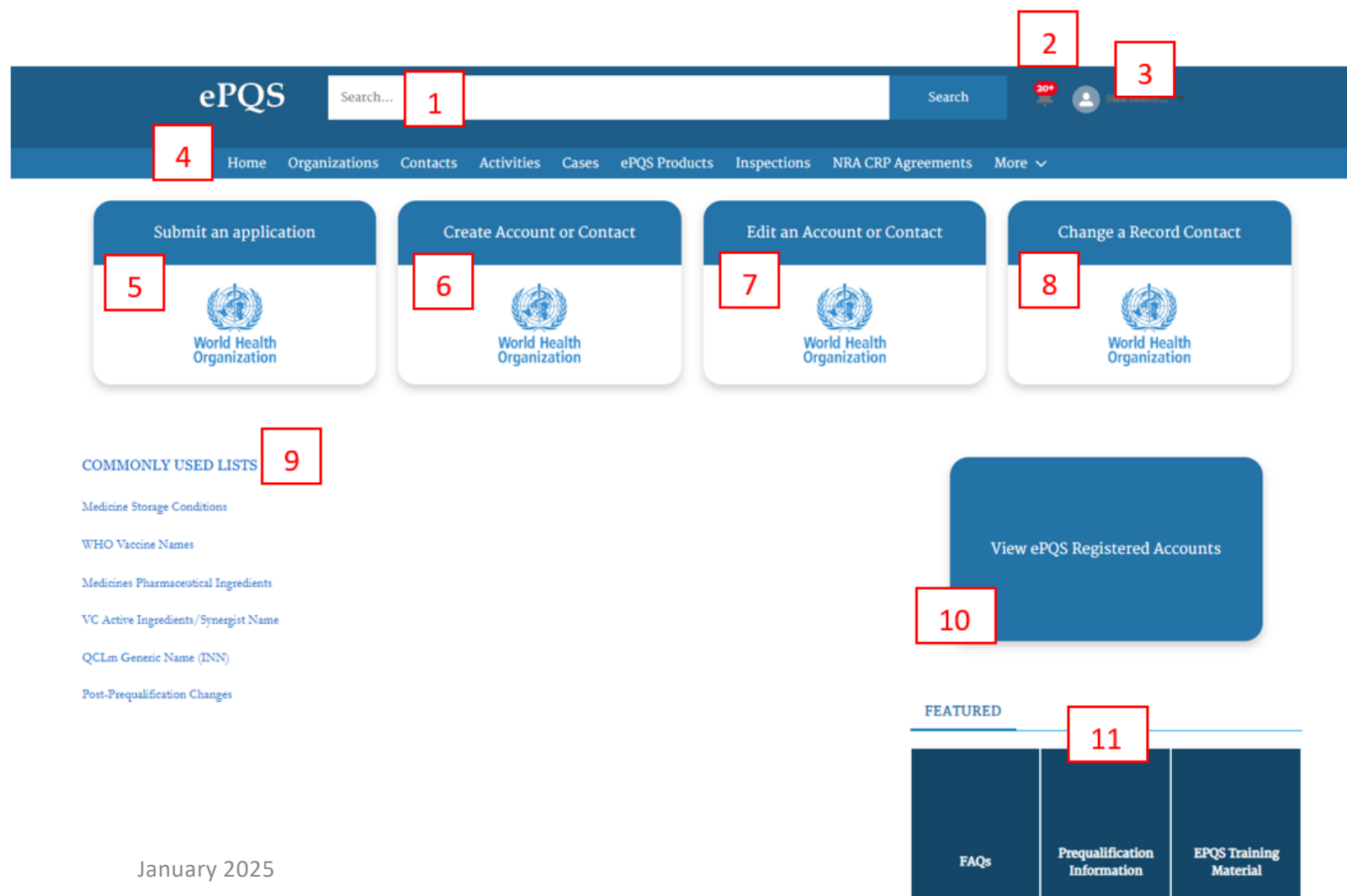
5) Application wizard

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. A search bar with the placeholder text 'Search...' and a 'Search' button is located to the right of the logo. 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. On the right side of the navigation menu, there is a user profile icon (a person silhouette) with the text 'c/c' next to it, which is highlighted with an orange box. A dropdown menu is open below the profile icon, containing the following options: Home, My Profile (highlighted with an orange box), My Account, and Logout. Below the navigation menu, there are four main action buttons, each featuring the World Health Organization logo and text: 'Submit an application', 'Create Account or Contact', 'Edit an Account or Contact', and 'Contact'. The 'Contact' button is partially obscured by 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
Title
Email
Address

Manager
Company Name
Active
Contact
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.

The screenshot shows 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 user profile icon on the right. Below the header is a navigation bar with the following menu items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. Below the navigation bar, there are four main action buttons, each featuring 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 the following options: Home, My Profile, My Account, and Logout. The 'My Account' option in the dropdown menu is also highlighted with an orange border.



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.

The screenshot displays the ePQS user 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 Product Registrations. A user profile dropdown menu is open on the right, showing options for Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the navigation, there are buttons for '+ Follow', 'New Note', 'DocuSign Arms Tobacco Disclosure', and 'Update Published Information'. The main content area features a sub-tab menu with 'Details' (highlighted in orange), 'Related', 'Preview Documents', 'Document Download', and 'Document Submission'. The 'Details' tab is active, showing a form with the following sections:

- Account Information** (expanded): Organization UID, Account Owner, Legal Name, Primary Contact, Account Name, Phone, Parent Account, Email, Account Record Type, and Description.
- Address Information** (collapsed)
- WHO Country Information** (collapsed)
- General Details** (collapsed)
- Related Links** (highlighted with an orange border)
- PQT Information** (collapsed)
- Account Usage - Collaborators** (collapsed)
- System Information** (collapsed)



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 shows the ePQS user interface. At the top, there is a search bar and navigation tabs: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. A user profile menu is visible on the right, with 'My Account' highlighted. Below the navigation, there is an 'Account' section with a table of account records. The 'Related' tab is selected, showing a list of related records:

- Notes (0)
- Related Contacts (2)

Contact Name	Direct	Active	Start Date
- Case (Applications) (6+)

Case Number	ePQS Case ID	Status	Last Modified Date/Time
- Products (Applicant Organization) (6+)

WHO Product ID	Product Name	Vaccine Abbreviated Name	Product Status
- Product Sites (6+)

Product Site ID	Product Site Status	Site Activity	Activity Type(s)
- Inspections (0)
- CRP Product Registrations (0)
- CRP Product Registrations (NRA Organisation) (0)
- NRA CRP Participations (NRA Organization) (0)
- Files (0)

Upload Files
Or drag files
- Account History (0)

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



4. ePQS navigation – Documents

“Preview documents” is a reference library of all documents related to 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, a search bar, and a user profile icon. Below the header is a navigation menu with links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. A user profile dropdown menu is open, showing options for Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the navigation menu, there is a section for 'Account' with a '+ Follow' button and a 'New Note' button. A 'DocuSign Arms Tobacco Disclosure' button is also visible. Below this, there is a table with columns for 'Account Record Type', 'Address (2)', and 'Email'. Below the table, there are tabs for 'Details', 'Related', 'Preview Documents' (highlighted with an orange border), 'Document Download', and 'Document Submission'. Below the tabs, there is a 'box' search bar with the text 'Search files and folders'. Below the search bar, 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, a search bar, and a user profile dropdown menu. The user profile menu is open, showing options: Home, My Profile, My Account (highlighted with an orange border), and Logout. Below the header is a navigation bar with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registrations. A secondary navigation bar contains buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. The main content area shows an 'Account' section with fields for 'Account Record Type', 'Address (2)', and 'Email'. Below this is a document viewer interface with tabs: 'Details', 'Related', 'Preview Documents', 'Document Download' (highlighted with an orange border), and 'Document Submission'. The 'Document Download' tab is active, showing a 'box' search bar and a list of folders: 'External correspondence' and 'Submitted Documents', both modified on 'Fri Apr 12 2024' and 0 Byte. At the bottom of the viewer, there is a selection bar showing '0 Selected' and a confirmation button with a checkmark.

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 dark blue header with the ePQS logo, a search bar, and a user profile icon. Below the header is a navigation menu with links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registration. A user account menu is open, showing options for Home, My Profile, My Account (highlighted with an orange box), and Logout. Below the navigation menu, there is an 'Account' section with a table of account records. The table has columns for Account Record Type, Address (2), and Email. To the right of the table are buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Disclosure'. Below the account section, there is a 'Document Submission' wizard. The wizard has a tabbed interface with 'Document Submission' selected and highlighted with an orange box. The wizard content includes the heading '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. At the bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.


4. ePQS navigation – Documents



“Document submission” interface.

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

Upload to Account Submission



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

Cancel Upload

Next



4. ePQS navigation – Wizard

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

The screenshot shows the ePQS website 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 the following items: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu are four main action buttons, each with 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 navigation bar with the following elements:

- Logo: ePQS
- Search bar: Search...
- Search button: Search
- Notifications icon: Notifications
- User profile icon: [User Name]
- Navigation menu: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, More

Below the navigation bar, there are four main action buttons, each featuring the World Health Organization logo:

- Submit an application
- Create Account or Contact
- Edit an Account or Contact
- Change a Record Contact

The last three buttons are highlighted with an orange border. Below these buttons, there 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)
- Post-Prequalification Changes

On the right side of the page, there is a 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 Registrations. A user profile dropdown menu is open, showing options: Home, My Profile, My Account (highlighted with an orange box), and Logout. In the main content area, there is a 'New Note' button (highlighted with an orange box) next to a '+ Follow' button and a document icon labeled 'DocuSign Arms Tobacco Disclosure'. Below this is a preview of the 'New Note' form, which includes a text area for entering a note and a 'Share' button (highlighted with an orange box) at the bottom right.



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”

The screenshot displays the ePQS web application 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 tabs: Home, Organizations (highlighted with an orange box), Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area shows a list of 'Accounts' with the title 'ePQS Accounts (Portal)' and a dropdown arrow (highlighted with an orange box). Below the title is a 'LIST VIEWS' section with four options: 'All Vx accounts', 'ePQS Accounts (Portal)' (selected with a blue checkmark), 'Recently Viewed (Pinned list)', and 'Recently Viewed Accounts'. To the right of the list views is a search bar labeled 'Search this list...' and a 'Country (Physical)' dropdown menu.



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 on the left, a search bar in the center, and a user profile icon on the right. Below the header is a navigation menu with several tabs: Home, Organization, Contacts, 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' section 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)' (selected), 'Recently Viewed (Pinned list)', and 'Recently Viewed Contacts'. 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 with the value 'Vestfrost Solutions'. The table has a search bar above it and several icons for filtering and sorting.

Account Name	Account: Legal Name
Vestfrost Solutions	Vestfrost Solutions
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”

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 several tabs: Home, Organizations, Contact, **Activities** (highlighted with an orange box), Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, the 'External Activities' section is visible, featuring a 'Recently Viewed' dropdown menu (also highlighted with an orange box) and a list of activities. The list includes options like 'All Activities (Applications - Portal)', 'All Activities (Inspections - Portal)', 'My Activities (Portal)', 'My Open Activities (portal)', and 'Recently Viewed (Pinned list)'. A search bar for the list is also present on the right side of the list view.



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 web application interface. At the top, there is a search bar and a navigation menu with the following items: Home, Organizations, Contacts, Activities, **Cases** (highlighted with an orange box), PQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, there is a section for 'Cases' with a dropdown menu for 'All Cases (Portal)' (also highlighted with an orange box). The dropdown menu shows 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 main content area displays a table of cases with columns: Application S..., WHO Pro..., Date Appli..., Date Appli..., and Date of Pr... The table shows several rows of data, including 'Standard' cases with dates of '01/01/1900'. A 'Printable View' button is visible in the top right corner of the table area.



4. ePQS navigation – Products

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

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

	Product Subtype	Date of Preq...	Date of ...	Date of Pro...
1	s	25/11/2009		
2	s	18/03/2010		
3	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 displays the ePQS web application interface. At the top, there is a dark blue navigation bar 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, a horizontal menu contains several tabs: Home, Organizations, Contacts, Activities, Cases, ePQS Product, **Inspections** (highlighted with an orange box), NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar, the 'Inspections' section is active, showing a dropdown menu for 'All Inspections (Portal)' (also highlighted with an orange box). The page includes a search bar, a user profile icon, 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 website interface. The top navigation bar is dark blue and contains the 'ePQS' logo, a search bar with 'Search...' text, a 'Search' button, a bell notification icon (highlighted with an orange box), and a user profile icon labeled 'edc'. Below the navigation bar is a horizontal menu with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, and NRA. The main content area features four white cards with blue headers and the World Health Organization logo. The cards are titled: 'Submit an application', 'Create Account or Contact', 'Edit an Account', and 'View My Profile'. A notification pop-up window is overlaid on the right side of the page, titled 'Notifications' and containing the text 'You don't have any notifications right now.' The pop-up window is also highlighted with an orange border.



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 accreditation application submissions are:

- a. Verification of laboratory 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. Accreditation application submission (if applicable)
- f. Post-accreditation change 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

Accessing registered accounts

5a. Accessing registered accounts



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

The screenshot shows the ePQS website interface. At the top, there is a search bar and a user profile icon. The navigation menu includes: Home, **Organizations**, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation bar are four buttons: "Submit an application", "Create Account or Contact", "Edit an Account or Contact", and "Change a Record Contact", each featuring the World Health Organization logo. On the left side, 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", and "QCLm Generic Name (INN)". On the right side, there is a button labeled "View ePQS Registered Accounts" which is highlighted with an orange border.



5a. 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.



5a. 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 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, and Logout. Below the header is a navigation bar with links: Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Products. The main content area shows an account record for 'Non-State Actor' with fields for 'Account Record Type', 'Address (2)', and 'Email'. There are buttons for '+ Follow', 'New Note', and 'DocuSign Arms Tobacco Dis'. Below the account record is a list of tabs: Details, Related, Preview Documents, Document Download, and Document Submission. The 'Details' tab is active, showing a list of expandable sections: Account Information, Address Information, WHO Country Information, General Details, Related Links, PQT Information, Account Usage - Collaborators, and System Information. Each section has a right-pointing chevron icon. At the bottom of the page, there are links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.



5b

**Correct record
visibility**



5bi. Correct record visibility

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

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

The screenshot shows the ePQS user 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 icon is highlighted with an orange box and labeled '1'. A dropdown menu is open, showing options: Home, My Profile, My Account (highlighted with an orange box and labeled '1'), and Logout. Below the navigation, there is an 'Account' section with a table of account records. The 'Details' tab is selected and highlighted with an orange box and labeled '2'. The 'Related' sub-tab is also highlighted with an orange box and labeled '2'. A list of account information categories is displayed, including Account Information, Address Information, WHO Country Information, General Details, Related Links, PQT Information, Account Usage - Collaborators, and System Information.



5bi. Correct record visibility

The “Related” sub-tab displays all records of all types related to 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 interface includes a search bar and navigation tabs. The 'Related' section lists various record types with their respective counts and associated data tables. An orange arrow points to the 'Related' tab area.



5bii. 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 search bar and a 'Search' button. The main content area displays a list of tabs: 'Details', 'Related', 'Preview Documents', 'Document Download', and 'Document Submission'. The 'Related' tab is active, showing a list of related records. The 'Products (Applicant Organization) (6+)' record is highlighted in orange. Below this, there is a table with columns: 'WHO Product ID', 'Product Name', 'Vaccine Abbreviated Name', and 'Product Status'. A 'New' button is visible next to the 'Products (Applicant Organization) (6+)' record. At the bottom, there is an 'Upload Files' section with a 'Drop Files' button and an 'Add Files' button.



5bii. 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 search button. Below the header is a navigation menu with links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The main content area displays a list of products for the organization 'Vestfrost Solutions'. The list is titled 'Products (Applicant Organization)' and shows 29 items. The list has columns for WHO Produc..., Product Name, Vaccine ..., Product Status, Product Type, and Product Subtype. The first 10 rows of the list are highlighted with an orange border. Each row contains a number (1-10) and a link to 'Product listing details ...'. At the bottom of the page, there are links for About Us, Contact Us, Privacy Policy, and Legal Disclaimer.



5c

Personal use folder



5c. Personal use folder

ePQS offers external users a “Personal folder”, in which 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 menu with the following items: Home, Organization, **Contacts** (highlighted with an orange box), Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. Below the navigation menu, the page title is "Contacts" and the sub-header is "All ePQS Contacts (Portal)". There is a search bar labeled "Search this list...". Below the search bar, there is a table with 2 items. The first item is highlighted with an orange box and contains the text "YOUR NAME". The second item is partially visible and contains the number "2".

2 items • Sorted by Name • Filtered by All contacts • Updated 2 minutes ago	
1	YOUR NAME
2	



5c. 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 displays the ePQS user interface. At the top, there is a navigation bar with the ePQS logo, a search bar, and a user profile icon. Below the navigation bar, the 'Contacts' tab is highlighted with an orange box. The contact record for 'Mr Bjarne Nielsen' is shown, with fields for Job Title, Account Name (Vestfrost Solutions), Phone (2) (+45 7914 2555), Email (clc@vestfrostolutions.com.invalid), and Contact Owner (Isaac GOBINA). Below the contact information, the 'Preview Documents' tab is highlighted with an orange box. Underneath the tab, there is a search bar for Box with the text 'Search files and folders'. A folder named 'YOUR Personal Folder' is highlighted with an orange box. In the bottom right corner of the folder area, there is a plus sign icon (+) also highlighted with an orange box. Below the folder area, there is a message that says 'There are no items in this folder.' At the bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.



5d

Accreditation application submission procedure



5d. Accreditation submission procedure

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

ePQS Application Wizard

Start Organization & Contacts Application Info Product Details Documents Finalize

Create a New Application

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

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

Navigation

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

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

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

Draft Records

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

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

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

January 2025 Next



5d. Accreditation submission procedure

Applicants will first be prompted to select the relevant contacts.
Select 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

5d. Accreditation submission procedure



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

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there is a header 'Application Wizard' with a green icon. Below it, the 'ePQS Application Wizard' title is followed by a progress bar with five steps: 'Organization & Contacts', 'Application Info', 'Product Details', 'Documents', and 'Finalize'. The 'Application Info' step is currently active. Underneath, the section 'Choose Product Type' is displayed with the instruction 'Select the product area to narrow down the list of application types.' Below this instruction, there is a list of radio button options under the heading 'Product Type': 'Finished Vaccine Product', 'Immunisation Device', and 'IMD Evaluating Laboratory'. The 'IMD Evaluating Laboratory' option is selected and highlighted with an orange border. At the bottom right of the form, there are two buttons: 'Previous' and 'Next'.

5d. Accreditation submission procedure



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

The screenshot shows the 'ePQS Application Wizard' interface. At the top, there is a header 'Application Wizard' with a green icon. Below it, the 'ePQS Application Wizard' title is displayed. A progress bar shows five steps: 'Organization & Contacts', 'Application Info', 'Product Details', 'Documents', and 'Finalize'. The 'Application Info' step is currently active. Underneath, the section 'Choose Application Type' is shown, with the text 'Based on the product type, here is the list of application types available.' Below this, there is a list of application types under the heading '* Application Type':

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

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



5d. Accreditation submission procedure

The Wizard will ask for confirmation of the application details:

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

The screenshot displays the 'Application Wizard' interface. At the top, it says 'Application Wizard'. Below that, the 'ePQS Application Wizard' title is shown. A progress bar contains five steps: 'Organization & Contacts' (highlighted in blue), 'Application Info', 'Product Details', 'Documents', and 'Finalize'. The main content area is titled 'Confirm Application Details' and includes a warning: 'By proceeding to the next step you will be creating a draft Vx IMD Lab New Accreditation. This draft application will be available in your List View of Cases.' Below this, a list of details is shown: 'Application Type: IMD Lab Accreditation', 'Product Type: IMD Evaluating Laboratory', 'Organization:', and 'Primary Contact:'. At the bottom right, there are 'Previous' and 'Next' buttons.



5d. Accreditation submission procedure

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

The screenshot shows the 'Application Wizard' interface. At the top, it says 'Application Wizard'. Below that, 'ePQS Application Wizard' is displayed. A progress bar shows four steps: 'Organization & Contacts' (completed, green), 'Product Details' (current step, white), 'Documents' (grey), and 'Finalize' (grey). The 'Product Details' step is titled 'Create a Product'. Underneath, it says 'New Product' and explains that since this is an IMD Lab Accreditation type application, a new product will be created of type: 'IMD Accredited Laboratory'. It also notes that the product will be linked to the application 'New-IMDLab-2024-0005'. At the bottom right, there are 'Previous' and 'Next' buttons.



5d. Accreditation submission procedure

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

The screenshot displays the 'Application Wizard' interface. At the top, it says 'Application Wizard' with a green icon. Below that, 'ePQS Application Wizard' is shown. A progress bar has five steps: 'Organization & Contacts' (dark blue), 'Product Details' (green with a checkmark), 'Documents' (light grey), and 'Finalize' (light grey). The main section is titled 'Create a Product' and contains 'Further IMD Laboratory Details 1a'. A note says 'Click 'Previous' if the site you require is not on the list.' Below this is a required field for 'Laboratory Site' with a dropdown menu. At the bottom right are 'Previous' and 'Next' buttons.



5d. Accreditation submission procedure

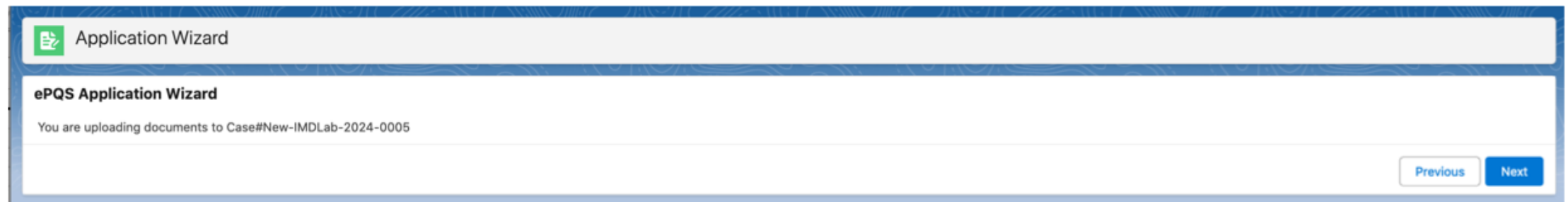
The Wizard will confirm the association of the chosen product site with your accreditation applicaton:

The screenshot shows the 'Application Wizard' interface. At the top, there is a header 'Application Wizard' with a green icon. Below it, the title 'ePQS Application Wizard' is displayed. A progress bar consists of four steps: 'Organization & Contacts' (highlighted in blue), 'Product Details' (highlighted in green with a checkmark), 'Documents', and 'Finalize'. Below the progress bar, the text 'Create a Product' is followed by a confirmation message: 'Laboratory Successfully Updated'. The message states: 'The details you have just entered have been updated on the new IMD Laboratory linked to your [New-IMDLab-2024-0005](#) application. By clicking on the link provided you can see the product record. The product record is also available in your Products' List View.' Below this, there is a bullet point: '• Product: [P-13220](#)'. At the bottom right, there are two buttons: 'Previous' and 'Next'.

5d. Accreditation submission procedure



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



5d. Accreditation submission procedure



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

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

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

5d. Accreditation submission procedure



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

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

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



5d. Accreditation submission procedure

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

The screenshot displays the 'Application Wizard' interface. At the top, a progress bar shows four steps: 'Organization & Contacts' (completed), 'Documents' (current step), and 'Finalize' (pending). Below the progress bar, the 'Document Review' section contains instructions: 'Please review the documents and folders you intend to upload. You may navigate through the folder structure, renaming and deleting folders as necessary. If you wish to upload further documents or folders please use the Previous button to return to the Upload document page. Document type meta-data may also be added to individual documents by opening these documents and adding the metadata value via the document menu that appears.' Below the text is a search bar with the 'box' logo and the placeholder text 'Search files and folders'. Underneath the search bar, the breadcrumb 'All Files > Error' is visible. The main content area is mostly empty, featuring a blue icon of a bucket with a wand and a network error message: 'A network error has occurred while trying to load.' At the bottom right, there are 'Previous' and 'Next' buttons.

5d. Accreditation submission procedure



You may then choose to submit, save as draft or discard this application.

The screenshot shows the 'Application Wizard' interface. At the top, it says 'Application Wizard' and 'ePQS Application Wizard'. Below this is a progress bar with five steps: 'Organization & Contacts', followed by four steps with checkmarks, and a final 'Finalize' step. The 'Review Application' section contains the following text: '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.' Below this, it lists 'Case ID: [New-IMDLab-2024-0005](#)' and 'Product or Laboratory ID: [P-13220](#)'. A section titled 'Submit, Save or Discard' asks the user to choose whether to submit, save as draft, or discard. The options are: 'Ready to submit?' (radio button), 'Yes' (radio button), 'No, save existing draft application and product (if applicable)' (radio button), and 'No, discard this draft application and product (if applicable)' (radio button). At the bottom right, there are 'Previous' and 'Next' buttons.



5d. Accreditation 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.

The screenshot displays the 'Application Wizard' interface. At the top, there is a header 'Application Wizard' with a small icon. Below this, the main content area is titled 'ePQS Application Wizard'. A progress bar is visible, consisting of four segments: the first is blue and labeled 'Organization & Contacts', the next three are green and each contains a white checkmark, and the final segment is white and labeled 'Finalize'. Below the progress bar, the text 'Application Submitted' is displayed, followed by a message: 'The application wizard has now finished - click on the **Finish** button to be redirected to the detailed page of your submitted application.' A blue button labeled 'Finish' is located in the bottom right corner of the interface.



5e

**Post-
accreditation
change
submission**

5e. Accreditation submission procedure



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

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



5f

Uploading of documents

5f. Uploading of documents – account / organisation



Under “My Account” / “Document Submission” 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 navigation menu. The navigation menu includes links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registrations. A user profile dropdown menu is open, showing options for Home, My Profile, My Account (highlighted with an orange box), and Logout. Below the header, there is a section for the user's account, labeled 'Account', with a 'Follow' button and a 'New Note' button. The account details show 'Account Record Type: Non-State Actor' and 'Email'. A 'DocuSign Arms Tobacco Disclosure' button is also visible. Below this, there is a tabbed interface with tabs for 'Details', 'Related', 'Preview Documents', 'Document Download', and 'Document Submission' (highlighted with an orange box). The 'Document Submission' tab is active, showing a 'Upload to Account Submission' section with the text: 'Welcome to Document Submission Wizard. Please click on **Next** to proceed for Account#Vestfrost Solutions'. A 'Next' button is located at the bottom right of this section. At the bottom of the page, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.

5f. Uploading of documents – account / organisation




Document submission interface →

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

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

Upload to Account Submission

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

Cancel Upload

Next



5f. Uploading of documents - cases

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

The screenshot shows the ePQS web application interface. The navigation menu at the top includes 'Home', 'Organizations', 'Contacts', 'Activities', 'Cases', 'PQS Products', 'Inspections', 'NRA CRP Agreements', 'CRP Product Registrations', and 'More'. The 'Cases' tab is highlighted with an orange box. Below the navigation menu, the 'Cases' section is displayed, showing a dropdown menu for 'LIST VIEWS' with the following options: 'All Cases (Portal)', 'All Closed Cases (Portal)', 'All Open Cases (Portal)', 'Recently Viewed (Pinned list)', and 'Recently Viewed Cases'. The main content area shows a table of cases with columns for 'Application S...', 'WHO Pro...', 'Date Appl...', 'Date Appl...', and 'Date of Pr...'. The table contains four rows of data, all with 'Standard' in the 'Application S...' column and '01/01/1900' in the 'Date Appl...' columns. A 'Printable View' button is visible in the top right corner of the table area.



5f. Uploading of documents - cases

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

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

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 like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, CRP Product Registrations, and More. The 'Cases' menu item is highlighted with an orange box. Below the navigation, a case card for 'Case PQC-IMD-2024-0007' is shown, also highlighted with an orange box. The case details include 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 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. Underneath, there is a 'box' logo and a search bar for files and folders. A table lists the files, with one entry: 'Correspondence (External)' modified 'Yesterday' and having a size of '0 Byte'.

Name	Modified	Size
Correspondence (External)	Yesterday	0 Byte



5g

Downloading of documents

5g. 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



5g. 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.

The screenshot displays the ePQS website interface. At the top, there is a search bar and a navigation menu with options like Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, NRA CRP Agreements, and CRP Product Registrations. A user profile dropdown menu is open, showing options for 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 'Document Download' tab (highlighted with an orange box) and a list of folders in a Box file manager interface. The folders are 'External correspondence' and 'Submitted Documents', both showing 'Modified Fri Apr 12 2024 • 0 Byte'. At the bottom of the screenshot, there are links for 'About Us', 'Contact Us', 'Privacy Policy', and 'Legal Disclaimer'.



5g. Uploading of documents - cases

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

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

Ensure you can download documents from this location.

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, CRP Product Registrations, and More. The 'Cases' menu item is highlighted with an orange box. Below the navigation, there is a case card for 'Case PQC-IMD-2024-0007' with a 'Preview Document' button also highlighted in orange. The case details show 'Case Record Type: Vx IMD Post-PQ Change', 'Case Number: PQC-IMD-2024-0007', 'Status: Under Screening', 'Date of Prequalification/Acceptance', and 'Case Owner: ePQS Vx IMD Queue'. Below the case details, there are tabs for 'Details', 'Related', 'Activities', 'Preview Document', 'Document Download', and 'Document Submissi'. The 'Preview Document' tab is active and highlighted. Underneath, there is a 'box' search bar and a file list table. 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'.

Name	Modified	Size
Correspondence (External)	Yesterday	0 Byte



5h

**Viewing
assigned
activities**



5h. Viewing of assigned activities

Clicking on the “Activities” tab will display a list of all pending activities related to your account. Clicking on each list item will take 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.

ePQS Search... Search

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

External Activities
All Activities (Applications - Portal)

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

Search this list... [Settings] [Refresh] [Edit] [Filter]

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

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SECTION C – PILOT



5i

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

5i. 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 dark blue header with the ePQS logo, a search bar, and a search button. A bell icon for notifications is highlighted with an orange box, and a notification pop-up is open, displaying the message: "Notifications" and "You don't have any notifications right now." Below the header is a navigation menu with links for Home, Organizations, Contacts, Activities, Cases, ePQS Products, Inspections, and NR. 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". Below this is a section titled "COMMONLY USED LISTS" with links for "Medicine Storage Conditions", "WHO Vaccine Names", "Medicines Pharmaceutical Ingredients", "VC Active Ingredients/Synergist Name", "QCLm Generic Name (INN)", and "Post-Prequalification Changes". To the right of this section is a large blue button labeled "View ePQS Registered Accounts". At the bottom of the page, there is a "FEATURED" section and a footer with links for "About Us", "Contact Us", "Privacy Policy", and "Legal Disclaimer".



SECTION D – TECHNICAL SUPPORT



6

Additional technical support

6ii. General user guidance – specific training

General guidance is available on the ePQS landing page:

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

General Portal Information

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

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

[ePQS - Portal Introduction and Features](#)

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

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

ePQS Portal



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

Within the portal, users will have the ability to:

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

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

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

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

Webinars will be announced soon and regular webinars 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](#)

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SECTION D – SUPPORT