Effective Vaccine Management (EVM)

Manager Guide

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Contents

Glossary

Term	Definition
Administrative Unit (AU)	A portion of a country or other region delineated for administrative purposes.
Assessee	A person helping the Assessor to conduct an assessment, for example, by answering questions.
Assessment	EVM assessments are conducted to assess the performance of an immunisation supply chain. In EVM2, an assessment can be customised to meet the exact needs of the national or facility manager by specifying the type, range, and scope of the assessment.
Assessment Range	The range of an EVM assessment can be national or sub-national. A national assessment can include locations from the whole country. A sub-national assessment can only include locations from specified Administrative Units (AUs).
Assessment Scope	Determines what is being assessed. By default, an EVM assessment will assess all EVM requirements. However, a partial assessment will assess only a subset of these requirements, determined by criteria and category.
Assessment Type	There are two types of EVM assessment - full or targeted. A full assessment assesses an entire country, with locations to assess chosen at random based on the EVM site sampling methodology. A targeted assessment assesses one or more location chosen by the National Manager.
Assessor	A person who assesses a location.
Assign	A questionnaire can be allocated to one or more Assessor.
Category	Determines the necessary inputs, outputs, and performance of the location.
comprehensive Multi-Year Plan (cMYP)	Countries are encouraged to develop their own comprehensive multi-year plans (cMYP) for immunisation. The cMYP process streamlines the immunisation planning process at national level into a single comprehensive and costed plan.
Comment	For each question in a questionnaire, an Assessor can add a comment. This can be used to provide further details on the answer provided.
continuous Improvement Plan (cIP)	Helps countries to build a case for supply chain investments and develop an improvement plan that engages relevant stakeholders, which sets the immunisation programme on a path for successful implementation.
Criteria	Determines the operational and management functions the location must perform.
Dashboard	A collection of reports used to present data from an EVM assessment.
Essential Programme on Immunization (EPI)	The Essential Programme on Immunization (EPI) works in synergy with other public health programmes to control infectious disease and achieve better health for all populations everywhere. To learn more about the EPI: https://www.who.int/teams/immunization-vaccines-and-biologicals/essential-programme-on-immunization
Flag	An Assessor can add a flag to any question in a questionnaire. This can be used to keep track of questions that need to be reviewed later, either by the Assessor or the National Manager.
Gavi	Gavi is an international organisation – a global Vaccine Alliance, bringing together public and private sectors with the shared goal of saving lives and protecting people's health by increasing equitable and sustainable use of vaccines. To learn more about Gavi, please refer to: https://www.gavi.org/
Location	A health facility that stores vaccines or provide immunisation services.

Term	Definition
Lowest Distribution point level (LD)	Vaccine stores that receive vaccine from a primary level or a sub-national store and supply vaccine to one or more health facilities.
Manager	The EVM Manager for a country, in charge of creating and managing assessments. Also known as the National Manager.
Performance, Quality, Safety (PQS)	The WHO Performance, Quality and Safety (PQS) process prequalifies products and devices so that member states and UN purchasing agencies are assured of their suitability for use in their immunisation programs.
Primary level (PR)	Vaccine stores that receive vaccine direct from an international vaccine manufacturer or distributors or a local vaccine manufacturer.
Programme Questionnaire	A programme questionnaire is automatically created as part of any national assessment (excluding a targeted assessment). It assesses the national immunisation programme in the country as a whole. The questionnaire can be assigned and completed in the same as for a location questionnaire.
Question	Used to determine whether a requirement has been met.
Question Type	Questions are classified into four types, according to how they should be answered: Interview: asked by the Assessor directly to the Assessee. Verification: require the Assessor to verify that the Assessee knows or does something. Observation: answered by directly observing something. Calculation: a calculation made by the Assessor.
Questionnaire	Completed by an Assessor to assess a single location as part of an EVM assessment.
Range	An assessment attribute that determines how many locations will be included in the assessment. Can be: • National: a random sample of locations from the entire country are assessed. • Sub-national: a random sample of locations from one or more sub-national areas are assessed. • Targeted: locations to be assessed are chosen by the National Manager. • Standalone: a single location is assessed.
Requirement	EVM is an assessment tool that sets the standard for vaccine management and immunisation supply chain systems. The standard set by EVM is defined by requirements, organised into categories, that a well-functioning immunisation supply chain must meet.
Scope	An assessment attribute that determines the requirements that will be assessed. Can be: • Full: requirements in all categories and criteria. • Partial: requirements in selected categories and criterion only.
Section	A questionnaire is divided into sections. Each section contains questions.
Service Point level (SP)	Facilities that receive vaccine from any higher-level store and supply immunisation services.
Standard Operating Procedure (SOP)	Step-by-step instructions designed to help people carry out routine operation.
Standalone	An EVM assessment of a single location. A standalone assessment assesses all requirements.
Sub-National level (SN)	Vaccine stores that receive vaccine from a primary store or higher level sub-national store. There may be 0, 1, or more SN levels.

Introduction

Effective Vaccine Management (EVM) is a national Essential Program on Immunisation (EPI) planning process endorsed and supported by WHO and UNICEF to assess and prioritise improvements in the immunisation supply chain. EVM is embedded within the Immunisation Supply Chain (ISC) continuous improvement planning process (see page 103).

EVM was launched in 2009. Drawing on lessons learnt conducting EVM assessments in more than 80 countries, and by leveraging developments in mobile and cloud-based computing, EVM2, released in 2019, builds upon the original EVM assessment tool to provide countries with a broader, more powerful, more agile, and more sustainable solution for improving iSC systems.

This guide provides national, sub-national, and independent EVM Managers with comprehensive guidance on how to use the EVM website to create and deliver EVM assessments.

> For guidance on how EVM Assessors can use the EVM Assessor mobile app to conduct health facility assessments as part of an EVM assessment, please refer to the EVM Assessor Guide:
>
> https://www.technet-21.org/en/library/main/6094

This user guide is organised into the following chapters:

Chapter	Description	See Page
Introduction	This chapter.	6
EVM in a nutshell	The EVM tool, the assessment process in general, and how to customise assessments to meet your needs.	8
Understanding the EVM assessment framework	How EVM is structured and performance is measured.	13
Getting started with EVM	How to become an EVM Manager.	20
Setting up EVM	How to configure EVM for your country.	26
Managing accounts	How to control access to your EVM system.	43
Customising and creating assessments	How to create new assessments.	46
Assigning locations to Assessors	How to assign locations to assessors so that they can perform assessments.	58
Managing submitted questionnaires	How to manage submitted questionnaires.	64
Analysing assessment results	How to complete the assessment and analyse the results.	74
Completing an assessment	How to submit an assessment for validation by the EVM Secretariat and generate a template EVM report.	101
Developing a continuous Improvement Plan (cIP)	How the EVM assessment supports the development of a cIP.	103
Troubleshooting	Answers to frequently encountered problems.	104

This guide does not provide guidance to countries on preliminary planning activities, such as: training EVM Managers and Assessors, arranging site assessment logistics, and continuous improvement planning activities based on EVM findings.

To share feedback on this guide or to resolve any technical problem, please contact the WHO-UNICEF EVM Secretariat (evmadmin@who.int).

TechNet-21 is a global network of immunisation professionals committed to strengthening immunisation services by sharing experiences, coordinating activities, and helping to formulate optimal policies.

www.technet-21.org

The WHO-UNICEF EVM Secretariat has created a group has on the TechNet-21 website to support the growing community of EVM practitioners around the world. The group is for all EVM users, from Managers at national, sub-national, and independent levels, to global partners and facility Assessors. It provides everyone with an interest in EVM to come together, ask questions, resolve problems, and coordinate EVM learning.

Join the group today:

www.technet-21.org/network/groups/401-evma2

EVM in a nutshell

This chapter provides an overview of the most important aspects of the EVM initiative. It is organised into the following sections:

Section	Description	See Page
The EVM2 Tool	An overview of how the EVM tool operates and the advantages of the EVM2 architecture over the EVM system.	8
The assessment process	An overview of the EVM assessment process.	9
Customising assessments	An overview of how EVM assessments can be customised.	11
Controlling access	An overview of how access to the EVM system is controlled.	11
Validating assessments	An overview of how EVM assessments are validated for integrity and reliability.	11

The EVM tool

EVM assessments are created and delivered using a sophisticated yet practical set of online and offline tools. Each country in the world has been assigned its own private area of the EVM website to manage its EVM environment and create and deliver assessments. Data collection is conducted using the EVM Assessor mobile app:

EVM Secretariat **Manager or Observer** **Assessor**

WHO Database **EVM Website** **EVM App**
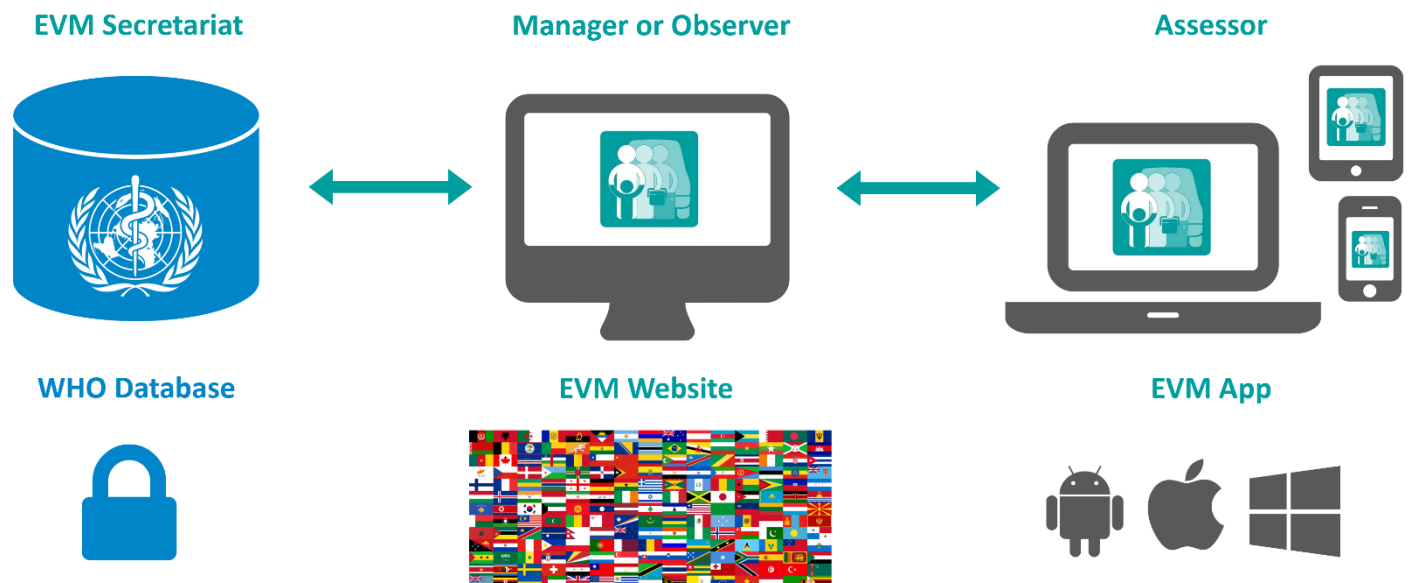
The key advantages of the EVM2 architecture over the EVM system are:

- Management of a country's entire EVM2 environment can be performed by a single National Manager, reducing the need for external support.

- Setting up an EVM assessment no longer needs to be completed for every assessment. Once a country has configured EVM2 with their current vaccine schedule and list of health facilities, any number of EVM assessments can be created.

- Using the EVM app on mobile devices makes data collection easier and quicker and ensures that the data collected is complete and error-free.

- Role-based access to the EVM system means that countries retain full control of who can do what. Managers can have national or sub-national access, with full or read-only permissions and Assessors are designated on a per-country basis and are assigned only relevant facilities to assess.

- Integration with the PQS Cold Chain Equipment (CCE) Devices Catalogue reduces the need for assessors to complete complex calculations such as gross and net storage capacity of refrigerators and cold rooms. The WHO Performance, Quality and Safety (PQS) process prequalifies products and devices so that member states and UN purchasing agencies are assured of their suitability for use in their immunisation programs.

- By hosting the EVM2 software and database, WHO shoulders the burden of IT support, reducing the administrative overhead placed on countries.

The assessment process

An EVM assessment can include every health facility in a country, a representative sample, or even just a single facility.), as well as an assessment of the country's immunisation programme as a whole (the programme questionnaire). Anyone with an EVM account can assess their own facilities (see My Facilities on page 24) but only National Managers can create country assessments.

This section provides an overview of the four key steps that need to be followed once a country decides to conduct an EVM2 assessment for the first time.

Step	Description	See Page
1. Getting started	The roles in EVM that must be assigned before assessments can be created.	9
2. Completing setup	The setup tasks that are required before assessments can be created.	10
3. Managing country accounts	The account tasks that must be completed before assessments can be created.	10
4. Conducting the assessment	The steps required to conduct an assessment.	11

Subsequent assessments conducted by a country will be simpler as steps 1 to 3 only need to be completed once.

Getting started

The first step in conducting a national EVM assessment is to designate at least one national EVM manager (hereafter referred to as the 'National Manager'). This user will be the EVM focal point for that country and responsible for managing all other roles in EVM for that country. To conduct an EVM assessment, the following roles must be assigned. Each role can be combined in a single person or divided amongst many people.

Role	Description
Manager (National)	An EVM user with permission to manage every aspect of a country's EVM environment, from country setup to creating and finalising assessments. There are often two sub-types of manager: • Strategic Manager: a decision-maker within the Ministry of Health with the authority to decide whether and how to conduct one or more EVM assessment based on specific needs. Typically, the national EPI Manager or other representative. • Administrative Manager: a Ministry of Health staff member or country partner able to manage the EVM setup and assessment creation process. Typically, someone with good IT skills working in the Ministry of Health. In some countries, these two sub-types may be combined in a single person but in others there may be several users of each type.
Manager (Sub-National)	An EVM user with permission to manage locations and create assessments for specified Administrative Units (AUs) in a country. For example, in the United States of America a Sub-National Manger may be granted access to manage California only, not the entire country.
Assessor	A Ministry of Health staff member or country partner with good knowledge of immunisation service delivery in the country. Typically, a store manager or healthcare worker wishing to learn

Role	Description
	more about vaccine management practices.
Observer	A Ministry of Health staff member or country partner with whom the National Manager wishes to share access to EVM with but does not wish to give National Manager access to. Typically, a senior Ministry of Health staff member.

The National Manager must decide who will perform each of these roles. Once done, everyone involved must create an EVM account for themselves and request the relevant access (see Requesting an EVM account on page 20 for instructions).

Completing setup

Once the National Manager has been granted access, they must perform the following key setup tasks.

❗ These tasks must be completed **before** any assessment can be created.

Task	Purpose	See Page
1. Add Administrative Units (AUs)	To organise the country into at least two sub-national levels for reporting purposes, and to assign sub-national access (if required).	26
2. Add locations	To add health facilities to the EVM database so that they can be included in assessments.	33
3. Add vaccines	To add every vaccine used in the country's immunisation schedule, both at national and sub-national levels, so that the required storage capacity requirements can be calculated.	36
4. Choose tracers	To specify which of the vaccines in the country's immunisation schedule should be used as tracer products during the assessment.	40
5. Update ISC parameters (optional)	To update the default values for the vaccine and dry goods supply interval, safety stock, and maximum stock level for each supply chain level.	41
6. Customise the country EVM home screen (optional)	To customise the default home screen shown to National Managers and Assessors when signing in to the EVM website.	42

Managing country accounts

The National Manager can manage every aspect of the country's EVM environment and performance – from adding Administrative Units (AUs) and locations, vaccines, and supply chain parameters to creating assessments and analysing results. The National Manager also controls who has access to the country's EVM data. This is achieved by administering the various roles (Manager, Assessor, Observer) that can be assigned to EVM accounts.

Before an assessment is created, the National Manager must ensure that everyone who will be involved in the assessment has an EVM account with the relevant roles. For example, an assessment may require 20 Assessors, 2 Managers and 5 Observers. Each of these 27 people must create an EVM account for themselves and request (or be assigned directly by the National Manager) the correct role for the country. See Managing accounts on page 43 for more guidance.

In addition to assigning roles at the national level, the National Manager can also assign roles at the sub-national level. Access is based on the first-level AUs that are created for the country. For example, the United States of America may be organised into 50 first level AUs (in this case, states) and each state may be assigned their own Sub-National Manager.

Sub-National management includes:

- Ability to add/edit/delete AUs and locations within that AU (but not those in other AUs).
- Ability to create and manage sub-national assessments for locations in AUs they manage.
- Ability to conduct site selections for AUs they manage when part of national assessments with multiple samples.

Sub-National Managers cannot create national assessments or edit the vaccines or tracers for the country.

Conducting the assessment

To conduct an assessment, the following steps must be completed by the National Manager:

Task	Purpose	See Page
1. Create the assessment	To initiate the assessment by specifying the most appropriate assessment parameters to meet the country's needs.	46
2. Assign locations	To ensure that the programme questionnaire and every health facility included in an assessment is assigned to one or more Assessor.	58
3. Review and approve submitted questionnaires	To ensure that the questionnaires submitted by Assessors are complete and correct, so can be included in the assessment scoring.	58
4. Analyse the results	To understand the results of the assessment.	74
5. Complete the assessment and generate an EVM report	To ensure no further changes can be made.	101

Customising assessments

EVM2 assessments can be customised to meet the needs of a country. The following table provides a list of the assessment parameters that can be configured by the National Manager when creating an assessment:

Parameter	Description	Values
Type	Determines whether to make a random site selection or pick individual locations.	• Full: use random site selection • Targeted: pick individual locations
Range	Determines whether to include locations from the entire country or only those in specific AUs in the random site selection.	• National: include all locations in site selection • Sub-National: only include locations in specific AUs
Sample	Determines whether to make a single random site selection for the entire country or make individual ones for each AU.	• Single: make a single site selection • Multiple: make separate site selections for each AU
Scope	Determines whether to assess all EVM requirements or only a subset. For example, only E5 Maintenance and repair.	• All: all EVM requirements • Partial: a subset of EVM requirements

For more information on EVM assessment customisation, see Customising and creating assessments on page 46.

Controlling access

Access to the EVM system is controlled by one or more designated National Managers, who manage every aspect of the country's EVM environment and performance – from adding Administrative Units (AUs) and locations, vaccines, and supply chain parameters to creating assessments and analysing results. They also control who has access to the country's EVM data by administering the various roles that can be assigned to EVM accounts. The following country-specific roles can be assigned to a user:

Role	The user can…
Assessor (locations)	• Be assigned questionnaires as part of an EVM assessment. • Download and upload location questionnaires.
Manager (national)	• Manage every aspect of the country's EVM setup and assessments.
Manager (sub-national)	• Manage locations and create assessments for specified AUs in a country.
Observer	• View every aspect of the country's EVM setup and performance. • Only view, they cannot edit.

By assigning roles on a sub-national as well as national level, larger countries with devolved administrative structures (such as autonomous or semi-autonomous regions) can assign appropriate levels of permissions to enable sub-national EVM management within the broader national framework. For example, the USA National Manager may assign subnational permissions at state level, so that each state has its own Sub-National Manager – Texas Manager, California Manager, etc. – who can create and deliver sub-national EVM assessments, manage subnational facilities and setup data, and even perform site selections for their AUs in national EVM assessments with multiple sampling.

> One user can have several different roles for different counties. For example, the same user can be an assessor for Angola, a National Manager for Bangladesh, a Sub-National Manager for California (USA), and an Observer for Tajikistan.

For more information on EVM account management, see Managing accounts on page 43.

Validating assessments

The EVM Secretariat, managed by WHO and UNICEF, works to ensure the integrity and reliability of EVM assessment scores. Where a country's national EVM assessment score will be referenced by WHO, UNICEF, and core immunisation partners for reporting purposes, specific rules apply as to the assessment parameters that must be used. For validation by the EVM Secretariat, the following assessment parameters must be selected:

Parameter	Value
Type	Full
Range	National
Sample	Multiple OR Single
Scope	All

Once an assessment that meets the above criteria has been completed, the National Manager can choose to mark the assessment as complete. It can then be validated by the EVM Secretariat. Validation is dependent on the following factors:

1. All facilities included in the random site selection have been fully assessed and are included in the assessment scores.
2. No discrepancies in the site selection are observed, for example, excluding large numbers of health facilities or AUs.
3. No excessive editing of uploaded location questionnaires by managers is observed.

Once an assessment is validated, it is marked as complete by the EVM Secretariat.

> Assessments that are not marked as complete are considered as being for the country's internal use only and are therefore not reviewed in any way by the EVM Secretariat.

For more information on EVM assessment validation, see Completing an assessment on page 101.

Understanding the EVM assessment framework

This chapter describes the EVM structure and how performance is measured. It is organised into the following sections:

Section	Description	See Page
The framework	An overview of how the framework is organised.	13
Supply chain levels	The four levels of an immunisation supply chain.	13
Requirements	The attributes that a well-functioning immunisation supply chain must have.	14
Criteria	The operational or management functions health facilities must perform.	14
Categories	The necessary inputs, outputs and performance of health facilities.	16
Questions	The means of ascertaining whether requirements have been met.	17
Assessment scoring	The required inputs, expected outputs, and performance of EVM functions.	18

The framework

The EVM assessment framework defines the way in which vaccine supply chain systems are assessed. It is organised by:

- Criteria: the operational or management functions that health facilities must perform.
- Categories: the necessary inputs, outputs and performance of health facilities.
- Requirements: the attributes that a well-functioning immunisation supply chain must have.
- Questions: the means of ascertaining whether requirements have been met.

Requirements and questions are also organised according to their applicability at the supply chain level of the health facility being assessed. Scoring in EVM is determined by this assessment framework.

Supply chain levels

EVM assesses four levels of a supply chain:

Level	Description
Primary level (PR)	Vaccine stores that receive vaccine direct from an international vaccine manufacturer or distributors or a local vaccine manufacturer.
Sub-National level (SN)	Vaccine stores that receive vaccine from a primary store or higher level sub-national store. There may be 0, 1, or more SN levels.
Lowest Distribution level (LD)	Vaccine stores that receive vaccine from a primary level or a sub-national store and supply vaccine to one or more health facilities.
Service Point level (SP)	Facilities that receive vaccine from any higher-level store and supply immunisation services.

Some countries may have a supply chain that corresponds exactly to these four levels. However, many others may employ a different system, i.e. either fewer or greater levels than four. To standardise assessment of supply chain levels across countries, EVM enables countries to define up to eight levels in their supply chain:

- Primary
  - Primary (1)
  - Primary (2)

- Sub-National
  - Sub-National (1)
  - Sub-National (2)
  - Sub-National (3)
- Lowest Distribution
- Service Point
  - Service Point (1)
  - Service Point (2)

ℹ️ For reporting purposes, where there are more than four levels these are aggregated.

Requirements

The standard set by EVM is defined by requirements, organised into categories, that a well-functioning immunisation supply chain must meet. There are over 300 requirements and more than 500 sub-requirements. The applicability of a requirement at a health facility is determined by its level in the supply chain and the immunisation services it provides.

To assess whether a health facility meets an applicable requirement, an EVM Assessor visits a facility and answers questions using the EVM app. The EVM Assessor:

- Inspects records and equipment,
- Assesses staff knowledge,
- Checks if systems for routine monitoring and evaluation are in place and operational,
- Promotes and supports quality management principles, and
- Is supported by in-app guidance, supporting documents, and supplementary tools.

There are over one thousand questions in EVM. However, no single facility will encounter this number, because only applicable questions are asked. Question applicability is determined by supply chain level and answers to previous questions.

In summary, the EVM framework is defined by criterion, categories, requirements, and questions:

- Criteria determine the operational and management functions the health facility must perform.

- Categories determine the necessary inputs, outputs, and performance of the health facility's operational and management functions.

- Requirements define the minimum standards for each input, output and performance category of the health facility's operational and management functions.

- Questions are asked to assess whether a requirement has been met.

Criteria

EVM assesses supply chain functions at each level. These supply chain functions represent EVM criteria. The assessment by criteria is conducted as follows:

- A representative sample of sites is selected at each level of the supply chain.
- EVM criteria is assessed at each supply chain level by observation, infrastructure and records inspection, and staff interviews.
- Inputs, process and performance indicators are evaluated in each area at each level.
- Indicator scores are combined to give criterion scores for each area at each level.
- An area of vaccine management is considered 'Effective' if its criterion score is greater than or equal to 80%.

EVM criteria are organised into three groups:

- Facility operations (E1-9)
- Facility management (M1-4)
- Immunisation programme management (ST & R1-R6)

The EVM criteria for facility operations and facility management are listed in the following tables.

Facility operations criteria (E1-E9)

Code	Criteria	Sub-Criteria
E1	Vaccine arrivals	E1.1 Inspection of shipments E1.2 Custom clearance & transition facilities E1.3 Transport from port of entry to primary store
E2	Temperature management	E2.1 Temperature management in storage E2.2 Temperature management during transportation
E3	Storage and transport capacity	E3.1 Capacity of infrastructure and equipment E3.2 Utilisation of available capacity
E4	Facility infrastructure and equipment	E4.1 Quality of infrastructure E4.2 Quality of equipment
E5	Maintenance	E5.1 Maintenance & repair of buildings E5.2 Maintenance & repair of cold chain equipment E5.3 Maintenance & repair of vehicles
E6	Stock management	E6.1 Replenishment E6.2 Receipt and put-away E6.3 Inventory management E6.4 Release and dispatch E6.5 Managing returns, damaged & expired stock
E7	Distribution of vaccines and dry goods	E7.1 Distribution planning E7.2 Transportation of vaccines
E8	Vaccine management	E8.1 The shake test E8.2 Use of freeze-dried vaccines E8.3 Multi-dose vial policy
E9	Waste management	E9.1 Handling of syringes after use E9.2 Storage of immunisation waste E9.3 Disposal of immunisation waste

Facility management criteria (M1-M4)

Code	Criteria	Sub-criteria
M1	Annual needs forecasting	M1.1 Forecasting vaccine needs M1.2 Forecasting dry goods needs
M2	Annual work planning	M2.1 Preparing an annual work plan M2.2 Budgeting activities of the plan M2.3 Recording income and expenditure M2.4 Monitoring the implementation of the annual work plan
M3	Supportive supervision	M3.1 Planning supervision visits M3.2 Recording supervision visits M3.3 Providing supportive feedback

Code	Criteria	Sub-criteria
M4	ISC performance monitoring	M4.1 Monitoring ISC key performance indicators M4.2 Reporting ISC performance data M4.3 Monitoring reporting rates M4.4 Reviewing ISC performance

The EVM criteria for immunisation programme management are only assessed at the national level and therefore are not relevant to individual health facilities.

Immunisation programme management (ST, R1-R6)

Code	Name	Description
ST	Strategic planning	Developing a strategic ISC improvement plan and monitoring its implementation
R1	Infrastructure management	Providing and procuring utilities and services, constructing vaccine storage buildings and immunisation locations
R2	Equipment management	Procuring, installing and decommissioning cold chain equipment
R3	IT systems management	Providing and managing basic IT equipment, procuring and installing data management systems
R4	Human resources management	Recruitment and training
R5	Knowledge management	Gathering evidence to inform policy development and supply chain strategy, policy development, developing and managing SOPs - Developing training materials - Managing private service provider contracts
R6	Financial resources management	Funding supply chain operations and development, recording funds received and expenditure

Categories

EVM criteria are organised into the following categories:

- Inputs (C1 to C6): what is required
- Outputs (O): what is done
- Performance (P): what are the key outcomes of the input and output

There are six input categories:

Code	Category	Sub-categories
C1	Infrastructure	C1.1 Utilities & services C1.2 Buildings & amenities
C2	Equipment	C2.1 Storage equipment (cold & other storage equipment) C2.2 Transportation equipment (vehicles & Insulated containers) C2.3 Waste management equipment
C3	Information technology	C3.1 General IT equipment (telephone, computers, printers) C3.2 Data management technology (standard data collection forms, software, reporting forms)

Code	Category	Sub-categories
C4	Human resources	C4.1 Staffing (availability and quality) C4.2 Training C4.3 Knowledge & understanding
C5	Policies & procedures	C5.1 Evidence generation (studies, reviews and assessments) C5.2 Policies/Strategies C5.3 SOPs/guidance C5.4 Contracts
C6	Financial resources	C6.1 Salaries C6.2 Funds for operations C6.3 Funds for new equipment C6.4 Funds for training

The O (Output) category cover deliverables dues from the staff in the implementation of each EVM function/criterion. These outputs include, records, charts, or reports produced by staff while implementing the supply chain functions and provide traceability to the root causes of supply chain performance.

The P (Performance) category cover the outcome from proper implementation of supply chain functions (e.g. no stock out, no close vial wastage, full functionality of the CCE, no injury from immunisation waste).

System indicators

The EVM P (Performance) category aligns with the achievement of the three supply chain objectives: availability of vaccines, quality of vaccines, and efficiency of the vaccine supply chain.

- Availability: ensuring that vaccines and dry goods are available where and when required.

- Quality: ensuring that any damaged vaccine is not being administered to recipient; this implies the ability of identifying and removing any damage vaccine from the supply chain.

- Efficiency: eliminating wastage (vaccines and dry goods) in the supply chain (e.g. close vials wastage, damaged vaccines due to expiry, physical damage, temperature damage).

Questions

An EVM questionnaire is composed of 36 sections. To make data collection easier, many sections relate to a physical location or asset in a health facility, such as the store manager's office, the electricity generator, the refrigerated vehicle, and the cold room. However, some sections may be inapplicable for certain health facilities. To address this, the EVM questionnaire is presented dynamically based on your responses to questions. For example, you may be asked the following question:

16. Does the facility have any vaccine refrigerators and/or freezers?

Yes	No

If you answer 'No', then the section on refrigerators and freezers will be marked as inapplicable and all questions relating to refrigerators and/or freezers will be disabled (hidden) from the questionnaire. Inapplicable sections will still be shown in the questionnaire menu; however, they are not given a percentage completion score as they do not contain any questions:

If you return to the same question and change your answer to 'Yes', all related questions will be re-enabled (displayed).

Assessment scoring

EVM assesses the required inputs, the expected outputs and the performance of EVM functions (criteria). Inputs, outputs, and performance of the EVM criteria are organised into categories.

EVM defines minimum requirements (standards) for each category, applicable to particular criteria. Each EVM requirement is given a weighting (1 or 5), depending on the supply chain level. EVM questions are used to assess whether a requirement has been met. If a requirement is met, it scores one (1), otherwise it scores zero (0). EVM scoring is then based on a multilayer aggregation of the requirement scores to the scores for categories, criteria and finally to the composite score for the EVM assessment.

Non-applicable requirements are not scored and do not affect the composite scoring of the correspondent category and criterion. The applicability defines whether the requirement is relevant to given level and location.

There are two type of requirement scores:

- The maximum score possible = weight x applicability
- The total score recorded = weight x applicability x binary score

Category scores

A category score = the total score recorded / maximum score possible, where:

- The total score recorded = sum over requirements (maximum score x applicability x binary score)
- The maximum score possible = sum over requirements (maximum score x applicability)

> **ⓘ** The sum over requirements = sum over requirements for the selected category, including sub-categories (Cn.1, Cn.2, etc.).

Criterion scores

A criterion score = the total score recorded / maximum score possible, where:

- The total score recorded = sum over requirements (maximum score x applicability x binary score)
- The maximum score possible = sum over requirements (maximum score x applicability)

> **ⓘ** The sum over requirements = sum over requirements for the selected criterion, including its sub-criteria (En.1, En.2, …).

Composite requirement scores

This is a single percentage score that:

- For a location questionnaire is obtained by aggregating E1-9 and M1-4 criteria scores.

- For an EVM assessment is obtained by aggregating E1-9, M1-4 and R1-6 criteria scores.

If you want a single indicator to reflect location or assessment performance, this is it.

A composite requirement score = the total score recorded / maximum score possible, where:

- The total score recorded = sum over requirements (maximum score x applicability x binary score)
- The maximum score possible = sum over requirements (maximum score x applicability)

A composite requirement score is applicable if any of its sub-requirements are applicable, and that composite requirement applicability = maximum of sub-requirement applicability.

Getting started with EVM

This chapter describes how to get started with EVM. Before you can create an EVM assessment in your country, you must first complete the following tasks:

Task	Purpose	See Page
1. Request an EVM account	To gain access to EVM.	20
2. Sign into your EVM account	To view the EVM dashboard.	20
3. Request Manager access	To manage assessments for countries that you manage.	21

Once you have an EVM account, you can perform the following tasks on the EVM website as a National Manager:

Task	Purpose	See Page
Manage your general settings	To change the country you want to manage, change the language, and edit your profile.	22
Navigate the country settings	To perform the setup tasks and manage the assessments for a country that you manage.	24
Use My Facilities	To explore, test, and learn about the features of EVM and conduct EVM assessments that are not part of a national EVM setup.	24

Requesting an EVM account

To request an EVM account, contact the EVM Global Administrator at evmadmin@who.int with the following details:

- Name
- Email address
- Organisation
- Job title
- Telephone number
- Address

The EVM Global Administrator will review your request and notify you once it is approved.

Signing into your EVM account

1. Open the EVM website:

   https://extranet.who.int/evm2/web/Public

   ✓   Add the website to your browser bookmarks.

2. Select the menu in the top left of the screen, then select **Sign in**:
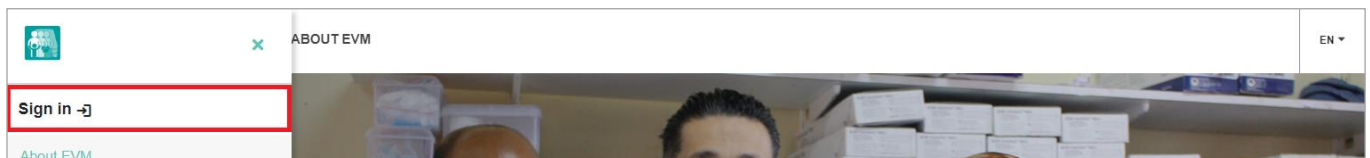
3. If you have more than one Microsoft account, select the email address that you used to request EVM access or select Use another account to enter the email address.

4. Enter and confirm your authentication details. The EVM home screen is displayed. The country you are currently managing and the language that EVM is currently using is shown in the top right of the screen and your username and role are shown in the menu (to manage your general settings, see Managing your general settings on page 22):
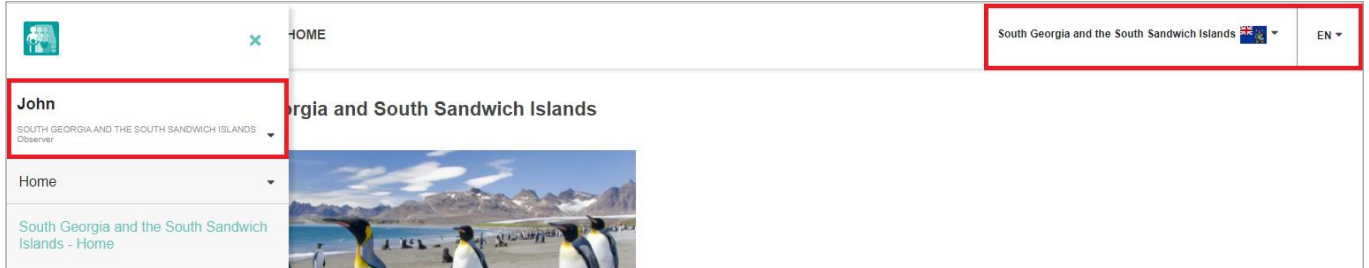
Requesting Manager access

Once you have an EVM account, you need to request Manager access for the country that you will be managing.

1. Sign into your EVM account (see page 20).

2. Select the menu in the top left of the screen, then select *<your name>* > **Profile**:
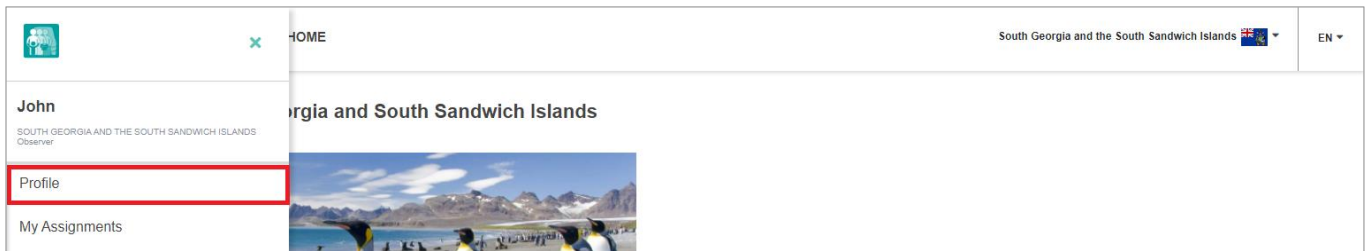


3. The **User details** tab is displayed by default. Select the **Permissions** tab to display it:

4. Select **Request permission**. The *Request permission* screen is displayed:

| i | Fields marked with a ***** are mandatory. |

5. In the **Role*** field, select *Manager*.

6. In the **Country*** field, select the country you want to manage.

7. In the **Please explain why you require access** field, enter an explanation of why you require manager access.

8. Select **Save**. The EVM Global Administrator will review and approve your request.

Once your request has been approved, you will be able to sign into the EVM website and set up your country's EVM environment. You will be able to manage the accounts of other EVM users for your country. For example, you can grant another user manager access, or make someone an assessor for your country.

Managing your general settings

Changing country

If you are a National Manager for more than one country, you can select the country you wish to manage.

1. Sign into your EVM account (see page 20).

2. Select the down arrow next to the country name in the top right of the screen.

3. Select the country you wish to manage:
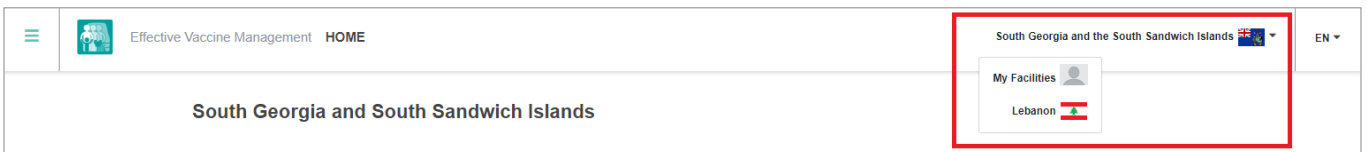
Changing language

By default, the website is displayed in English, but you can change it to a different language.

1. Sign into your EVM account (see page 20).

2. Select the down arrow next to **EN** in the top right of the screen to display the *Select language* screen:
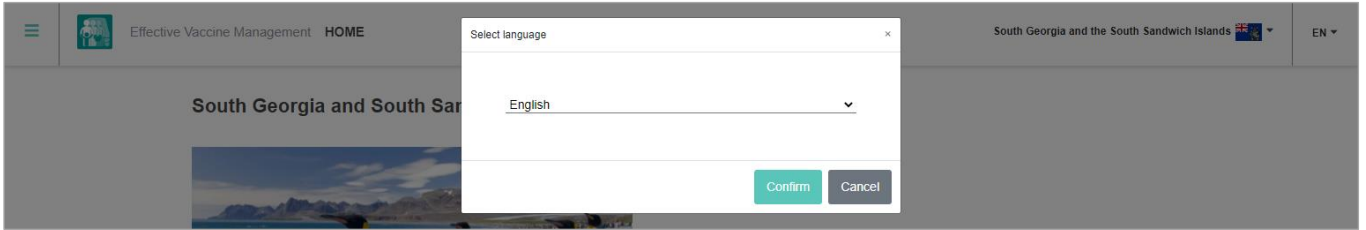
3. Select your preferred language.
4. Select **Confirm**.

Editing your profile

You can update your account settings, as well as request new permissions for a country (see page 21). To edit your profile:

1. Sign into your EVM account (see page 20).
2. Select the menu in the top left of the screen, then select **<*your name*> > Profile**. The **User details** tab is displayed by default:

3. Update the fields as required.

4.   Select **Save**.

ⓘ   You cannot change your email address using the **User details** tab. If your email address has changed or is due to change and you need it to be updated for access to EVM, please contact the EVM Global Administrator at evmadmin@who.int.

Navigating the country settings

Once you have signed in and selected the country you are managing (see page 22), the country menu will be displayed:
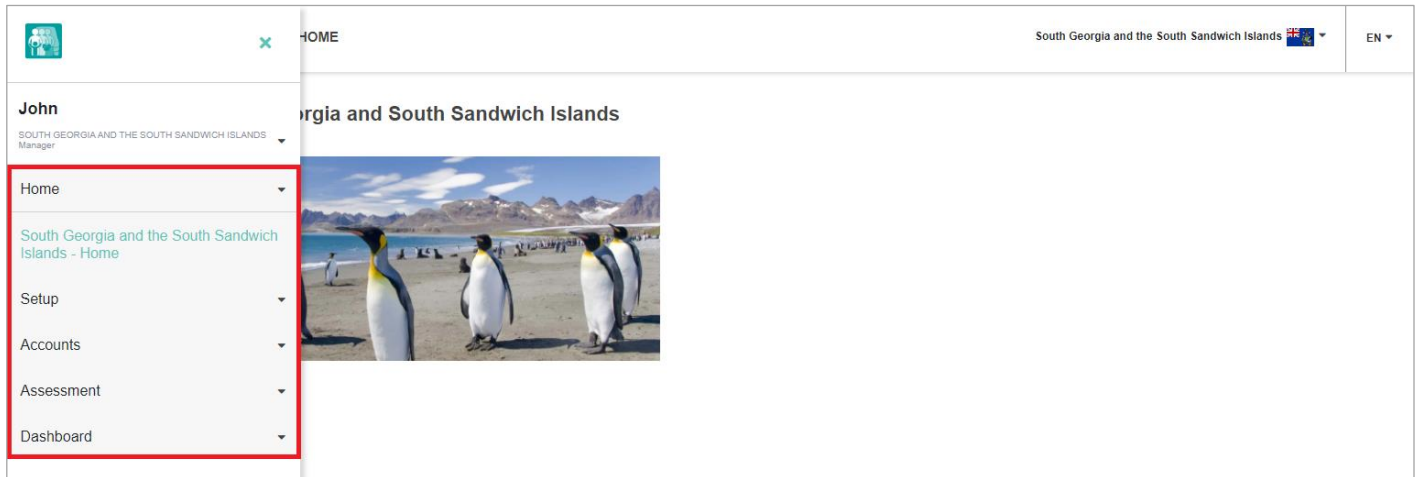
This menu contains the following options:

Option	Description
Home	The screen you see after signing in for a country.
Setup	For setting up your country's EVM environment.
Accounts	For managing user access to your country's EVM environment.
Assessment	For creating and managing your country's EVM assessments.
Dashboard	For analysing your country's EVM performance.

Using 'My Facilities'

Every EVM user, regardless of their role, has access to an area of the EVM website called 'My Facilities'. EVM users can take advantage of 'My Facilities' in two important ways:

• For learning: as a private environment in which to explore, test, and learn about the features of EVM.
• For real: for conducting EVM assessments that are not part of a country's national EVM setup.

'My Facilities' provides you with your own personal 'country' to manage in the same way that real countries are managed in EVM. You can create and deliver your own EVM assessments, for as many or as few health facilities as you wish and customise them according to your needs, in the same way as national EVM assessments can be managed for countries. All setup and assessment activity undertaken in 'My Facilities' remains entirely private to you. It does not affect anyone else or any country.

To use 'My Facilities', select the down arrow next to the country name in the top right of the screen, then select 'My Facilities':
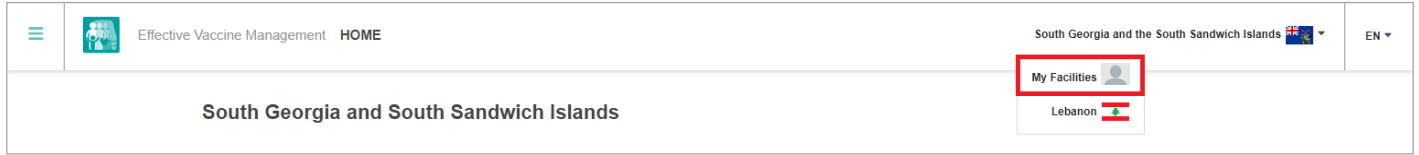
You will then be able to follow the instructions in this guide but instead apply them to your facilities without any impact on the countries that you are managing.

ℹ️ Whilst within 'My Facilities', you hold the role of both Manager and Assessor. This means that you cannot manage accounts for 'My Facilities' because there is only one account for each user.

Setting up EVM

This chapter describes the tasks that you need to perform before you can conduct an EVM assessment for a country. Before you can conduct an EVM assessment, the following country setup tasks need to be completed:

Task	Purpose	See Page
Add Administrative Units (AUs)	To organise the country into at least two sub-national levels for reporting purposes, and to assign sub-national access (if required).	26
Add locations	To add health facilities to the EVM database so that they can be included in assessments.	33
Add vaccines	To add every vaccine used in the country's immunisation schedule, both at national and sub-national levels, so that the required storage capacity requirements can be calculated.	36
Choose tracers	To specify which of the vaccines in the country's immunisation schedule should be used as tracer products during the assessment.	40
Update ISC parameters (optional)	To update the default values for the vaccine and dry goods supply interval, safety stock, and maximum stock level for each supply chain level.	41
Customise the country home screen (optional)	To customise the default home screen shown to National Managers and Assessors when signing in to the EVM website.	42

Adding Administrative Units (AUs)

An Administrative Unit (AU), also referred to as a sub-national entity, constituent unit, or country subdivision, is a portion of a country or other region delineated for administrative purposes. For example, in the United States of America the primary first-level AU (division) is the 'state' – California, Texas, Florida, etc. The various states are then typically subdivided into 'counties'. For example, there are 67 counties (second-level AU) in the state of Florida. There may be two, three, four or even more levels of AU in a country. Every country in the world is subdivided into a unique set of AUs.

EVM assessment scores can be analysed in many ways, for example, by supply chain level (see page 13), criterion, or category. EVM can also assess performance by administrative unit, for example by comparing the performance of California and Texas. For this to be possible, at least two levels of AU must be created and every health facility in the country must be associated with one.

In general, EVM expects the first-level AU (AU1) to represent the state and the second-level AU (AU2) to represent the district. However, in some countries (especially larger ones) one or more additional levels may be defined. For example, in China the following AUs may be used:

Level	Description
AU1	Province
AU2	Prefecture
AU3	County
AU4	Town
AU5	Village

Alternatively, the National Manager for China may choose not to create the Township and Village levels and use only the first three (Province, Prefecture, and County). It is up to the National Manager to decide how many levels of AU to create in EVM, although the minimum number is two. When choosing what AUs to create, the National Manager should always bear in mind

what performance comparisons would be most beneficial to make and create the AUs accordingly.

You can add AUs for a country in two ways:

- Manually one-by-one
- Import all at the same time

> ✅ We recommend that you use the import tool to create the AUs and locations at the same time. You can then create, edit, or remove your AUs manually. See Exporting and Importing AUs and locations on page 28.

> ❗ You must add at least two levels of AU before you can create an EVM assessment. If you create only one level of AU (typically, the state), you will not be able to compare second-level AUs (typically, the district).

Viewing AUs

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Units**. The *Units* screen is displayed:

	Level	Code	Name	Contains	
>	AU1	S-03	East State	3	✏️ ✕
>	AU1	S-01	North State	3	✏️ ✕
>	AU1	S-02	South State	3	✏️ ✕
>	AU1	S-04	West State	3	✏️ ✕

4. The *Units* screen shows a list of all AUs for the country, organised by hierarchy:

- To navigate the list of AUs, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To change the number of AUs shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific AU, enter its name or code in the field in the top right of the list.
- To view the child units of a specific AU, select **>** next to it.

Adding an AU manually

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Units**. The *Units* screen is displayed.

4. Select **Create**. The *Create* screen is displayed:

> ℹ Fields marked with a ***** are mandatory.

5. In the **Code*** field, enter the unique code for the AU being created, for example, *S-01-C-01*.

> ❗ Once created, this code cannot be changed, and the code must be unique.

6. In the **Name*** field, enter the name of the AU being created, for example, *Apple County*.

7. In the **Parent unit** field, enter the parent AU of the AU being created, for example, *S-01*. Leave this field blank if the AU has no parent, that is, is a first-level AU, typically a province or state.

8. Select **Save**.

Exporting and Importing AUs and locations

You can add hundreds or even thousands of AUs and locations to your country setup using a single Microsoft Excel file. To get started, export a copy of the Excel file. You can then add your AUs and locations to the file before importing it back into EVM.

Exporting a list of AUs and locations

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Units**. The *Units* screen is displayed.

4. Select **Export**. A Microsoft Excel file called 'LocationsExport.xlsx' that lists all the AUs and locations currently defined for the country will be downloaded.

Creating an AUs and locations import file

Open the downloaded 'LocationsExport.xlsx' file (see above). The file contains two worksheets – **Units** and **Locations**. Use the corresponding worksheet to add your AUs and locations.

Adding AUs to the AUs and locations import file

In the **Units** worksheet, add one row per AU. You need to enter the following values for each AU:

Field	Description	Example
Code*	The unique code for the AU being created (mandatory). Once created, this code cannot be changed, and the code must be unique.	*S-01-C-01*
Name*	The name of the AU being created.	*Apple County*
Parent Unit	The parent AU of the AU being created. Leave this field blank if the AU has no parent, that is, is a first-level AU, typically a province or state.	*S-01*

> **!** **Adding AUs to the LocationsExport file example**
>
> In our example country, there are four states: North State, East State, South State, and West State. Each state contains three counties. In the following example, we will create a two-level set of AUs. The first level (AU1) represents the state, while the second level (AU2) represents the counties:

	A	B	C
1	Code	Name	Parent Unit
2	S-01	North State	
3	S-01-C-01	Apple County	S-01
4	S-01-C-02	Lemon County	S-01
5	S-01-C-03	Banana County	S-01
6	S-02	South State	
7	S-02-C-01	Lychee County	S-02
8	S-02-C-02	Mango County	S-02
9	S-02-C-03	Orange County	S-02
10	S-03	East State	
11	S-03-C-01	Pomegranate County	S-03
12	S-03-C-02	Pear County	S-03
13	S-03-C-03	Pineapple County	S-03
14	S-04	West State	
15	S-04-C-01	Tomato County	S-04
16	S-04-C-02	Guava County	S-04
17	S-04-C-03	Watermelon County	S-04

> Each state (AU1) is given a standardised code STATE-<n>, where n is the number of the state. For example, North State has the code STATE-01. The parent unit for each state is empty because these are first-level AUs. Each county (AU2) is also given a standardised code that, for convenience, references the parent unit. For example, Apple County has the code STATE-01-COUNTY-01. The parent code for each county specifies the state (AU1) in which each county is located.
>
> If we upload this file into an empty country and then view the *Units* screen, we can see the AUs have been added. Shown in [square brackets] are the child AUs each AU contains. If we click **+** next to an AU, its child AUs will be shown.

	Level	Code	Name	Contains	
>	AU1	S-03	East State	3	✏ ✕
>	AU1	S-01	North State	3	✏ ✕
>	AU1	S-02	South State	3	✏ ✕
>	AU1	S-04	West State	3	✏ ✕

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Adding locations to the AU import file

In the **Locations** worksheet, add one row per location. You need to enter the following values for each location:

Field	Description	Example
Administrative Unit Code*	The AU to which the location is assigned, i.e. in which the location is physically located.	S-01
Parent Facility Code	The code of the supplying store from which the facility collects or receives its vaccines.	00001
Parent Facility Name*	The name of the supplying store from which the facility collects or receives its vaccines. Note that this value is included for reference purposes only and is not considered by the import tool.	Apple County PR
Facility Code*	The unique code for the facility. Note that once the location is created, this code cannot be changed.	L-PR
Facility Name*	The name of the facility.	North State Vaccine Store
Supply Chain Level*	The supply chain level of the location. Can be: • Primary 1 = PR1 • Primary 2 = PR2 • Sub-National 1 = SN1 • Sub-National 2 = SN2 • Sub-National 3 = SN3 • Lowest Distribution = LD • Service Point 1 = SP1 • Service Point 2 = SP2	PR1
Primary contact	The name of the point of contact for the facility.	David Brown
Telephone	The telephone number of the primary contact. Include the country code in the number and prefix the country code with a plus sign, but do not enclose the country code in brackets.	+1 206 555 0001
Fax	The fax number of the primary contact. Include the country code in the number and prefix the country code with a plus sign, but do not enclose the country code in brackets.	+1 206 555 0002
Email	The email address of the primary contact.	david.brown@example.com
Target Population	The total population served by the facility. Note that for LD level locations, this value must be entered, or it will not be possible to create an assessment.	10000
Latitude	The GPS latitude of the location in decimal degrees format.	-54.281151
Longitude	The GPS longitude of the location in decimal degrees format.	-36.508739
Order	The level at which the location sits within the locations hierarchy. You can leave this field blank as it will be completed by the EVM system automatically.	2
Active	Indicates whether the location is currently in use and can therefore be included in new assessments. Can be: • No = 0 • Yes = 1	1

Field	Description	Example
Sector	Indicates whether the location is operated as part of the country's public sector services or is run by the private sector. Can be: • Public = 1 • Non Public = 2 If the field is left blank, *1* will be selected for the location by default.	*1*
VaccineStorage	Indicates whether the location has vaccine storage facilities. Can be: • No vaccine storage = 0 • Vaccine storage available = 1 If the field is left blank, *0* will be selected for the location by default.	*1*

Adding locations to the LocationsExport file example

In our example country, there are four states: North State, East State, South State, and West State.

Each state contains three counties. These AUs were added in the previous example. There are 28 locations: one National Vaccine Store (PR), three state stores (SN), 12 district stores (LD) and 12 service-points (SP).

One of the states (East State) does not have its own state store; its district stores are supplied by the South State Vaccine Store. Each district stores serves one health centre (SP). The supply chain hierarchy is therefore as follows:

National Store	State Store	District Store	Service Point
PR – National Vaccine Store	SN – North State Vaccine Store	LD – Apple County District Store	SP – Apple County Health Centre
		LD – Lemon County District Store	SP – Lemon County Health Centre
		LD – Banana County District Store	SP – Banana County Health Centre
	SN – South State Vaccine Store	LD – Lychee County District Store	SP – Lychee County Health Centre
		LD – Mango County District Store	SP – Mango County Health Centre
		LD – Orange County District Store	SP – Orange County Health Centre
		LD – Pomegranate County] *(East State)*	SP – Pomegranate County Health Centre
		LD – Pear County *(East State)*	SP – Pear County Health Centre
		LD – Pineapple County *(East State)*	SP – Pineapple County Health Centre
	SN – West State Vaccine Store	LD – Tomato County District Store	SP – Tomato County Health Centre
		LD – Guava County District Store	SP – Guava County Health Centre
		LD – Watermelon County District Store	SP – Watermelon County Health Centre

To add these locations to the import file, we must first decide what codes to assign each facility (ideally, there will be facility code list that can be used). We then add each facility on a separate row, as shown in the following example:

	A	B	C	D	E	F
1	Administrative Unit Code	Parent Facility Code	Parent Facility Name	Facility Code	Facility Name	Supply Chain Level Code
2	S-01-C-01			L-PR	National Vaccine Store	PR
3	S-01-C-02	L-PR	National Vaccine Store	L-S01	North State Vaccine Store	SN
4	S-01-C-01	L-S01	North State Vaccine Store	L-S01-01	Apple County District Store	LD
5	S-01-C-01	L-S01-01	Apple County District Store	L-S01-01-01	Apple County Health Centre	SP
6	S-01-C-02	L-S01	North State Vaccine Store	L-S01-02	Lemon County District Store	LD
7	S-01-C-02	L-S01-02	Lemon County District Store	L-S01-02-01	Lemon County Health Centre	SP
8	S-01-C-03	L-S01	North State Vaccine Store	L-S01-03	Banana County District Store	LD
9	S-01-C-03	L-S01-03	Banana County District Store	L-S01-03-01	Banana County Health Centre	SP
10	S-02-C-01	L-PR	National Vaccine Store	L-S02	South State Vaccine Store	SN
11	S-02-C-01	L-S02	South State Vaccine Store	L-S02-01	Lychee County District Store	LD
12	S-02-C-01	L-S02-01	Lychee County District Store	L-S02-01-01	Lychee County Health Centre	SP
13	S-02-C-02	L-S02	South State Vaccine Store	L-S02-02	Mango County District Store	LD
14	S-02-C-02	L-S02-02	Mango County District Store	L-S02-0201	Mango County Health Centre	SP

If we upload the file shown above into an empty country and then view the Locations screen, we can see that all 28 locations have been added. Shown in [square brackets] are the child locations that each contains.
If we click **+** next to a location, its child locations will be shown:

	Level	Facility code	Facility name	Contains	Active	
⌄	PR	L-PR	National Vaccine Store	3	No	✏ ✕
⌄	SN	L-S01	North State Vaccine Store	3	No	✏ ✕
⌄	LD	L-S01-01	Apple County District Store	1	No	✏ ✕
	SP	L-S01-01-01	Apple County Health Centre	-	No	✏ ✕
›	LD	L-S01-03	Banana County District Store	1	No	✏ ✕
›	LD	L-S01-02	Lemon County District Store	1	No	✏ ✕
›	SN	L-S02	South State Vaccine Store	6	No	✏ ✕
›	SN	L-S04	West State Vaccine Store	3	No	✏ ✕

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Importing a list of AUs and locations

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Either:

   a. Select the menu in the top left of the screen, then select **Setup > Units**. The *Units* screen is displayed.

   b. Select **Upload Units**:

      - If you want to add to or edit existing AUs and locations, select **Add/Edit existing units**.
      - If you want to overwrite any existing AUs and locations, select **Overwrite existing units**.

   c. Browse to and select the Microsoft Excel file containing the AUs and locations that you want to import.

   d. If you selected to **Overwrite existing units**, select **OK** to confirm that you want to overwrite all existing units and locations and proceed with the import.

   Or:

   a. Select the menu in the top left of the screen, then select **Setup > Locations**. The *Locations* screen is displayed.

   b. Select **Upload file**:

      - If you want to add to or edit existing AUs and locations, select **Add/Edit existing units and locations**.
      - If you want to overwrite any existing AUs and locations, select **Overwrite existing units and locations**.

   c. Browse to and select the Microsoft Excel file containing the AUs and locations that you want to import.

   d. If you selected to **Overwrite existing units and locations**, select **OK** to confirm that you want to overwrite all existing units and locations and proceed with the import.

Editing an AU

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Units**. The *Units* screen is displayed.

4. Select **Edit** ( ) next to the AU you want to edit.

5. Update the fields as required.

> Only the **Name** and **Parent unit** fields can be updated. The **Code** cannot be changed after the AU is created.

6. Select **Save**.

Deleting an AU

> You cannot delete an AU if one or more locations in the country have been assigned to it. You must first assign these locations to a different AU before the AU can be deleted.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Units**. The *Units* screen is displayed.

4. Select **Delete** ( ) next to the AU you want to delete.

Adding locations

A location is a health facility that stores vaccines or provides immunisation services. Before you can conduct an EVM assessment, all locations in the country must be added. You can do this in two ways:

- Add locations manually (one-by-one)
- Add all locations using the import-export tool

> We recommend that you use the import-export tool to create AUs and locations at the same time. You can then create, remove, or edit your locations manually. See Exporting and Importing AUs and locations on page 28.

Viewing locations

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Locations**. The *Locations* screen is displayed:

| | Create | Export | Upload file ▾ | Delete all |

Locations: 28
Active: 0 (PR 0, SN 0, LD 0, SP 0)
Inactive: 28 (PR 1, SN 3, LD 12, SP 12)

50 ▾

	Level	Facility code	Facility name	Contains	Active	
>	PR	L-PR	National Vaccine Store	3	No	✏ ✕

Previous | 1 | Next

4. The *Locations* screen shows a list of all locations for the country, organised by hierarchy:

    - To navigate the list of locations, select **Previous**, **Next**, or the page number in the bottom right of the list.
    - To change the number of locations shown, select the number or **ALL** from the drop-down in the top left of the list.
    - To search for a specific location, enter its name or code in the field in the top right of the list.
    - To view the child units of a specific location, select **>** next to it.

Adding a location manually

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Locations**. The *Locations* screen is displayed.

4. Select **Create**. The *Create* screen is displayed:

> ℹ️ Fields marked with a ***** are mandatory.

5. Using the **Administrative unit*** drop-down list, select the AU to which the location is assigned (in which the location is physically located), for example, *S-01*.

6. Use the **Parent location** drop-down list to select the supplying store from which the facility collects or receives its vaccines, for example, *National Vaccine Store*.

7. In the **Facility code*** field, enter the unique code for the facility, for example, *L-PR*.

> ⓘ Once the location is created, the code cannot be changed.

8. In the **Facility name*** field, enter the name of the facility, for example, *North State Vaccine Store*.

9. Using the **Level*** drop-down list, select the supply chain level of the location. Can be:

    - Primary 1
    - Primary 2
    - Subnational 1

- Subnational 2
- Subnational 3
- Lowest distribution
- Service-point
- Service-point 2

10. In the **Primary contact** field, enter the name of the point of contact for the facility, if known, for example, *David Brown*.

11. In the **Telephone** field, enter the telephone number of the primary contact, if known. Include the country code in the number and prefix the country code with a plus sign, but do not enclose the country code in brackets, for example, *+1 206 555 0001*.

12. In the **Fax** field, enter the fax number of the primary contact, if known. Include the country code in the number and prefix the country code with a plus sign, but do not enclose the country code in brackets, for example, *+1 206 555 0001*.

13. In the **Email** field, enter the email address of the primary contact, if known, for example, *+1 206 555 0002*.

14. In the **Target population** field, enter the total population served by the facility, for example, *10000*.

> ❗ For locations at the Lowest Distribution (LD) level, this value must be entered. Otherwise, it will not be possible to create an assessment.

15. In the **GPS latitude** field, enter the GPS latitude of the location in decimal degrees format, for example, *-54.281151*.

16. In the **GPS longitude** field, enter the GPS longitude of the location in decimal degrees format, for example, *-36.508739*.

17. Using the **Sector** drop-down list, select whether the location is operated as part of the country's public sector services or is run by the private sector. Can be:

- Public = public sector service
- NonPublic= private sector service

> ℹ If the field is left blank, Public will be selected for the location by default.

18. Using the **Vaccine storage** drop-down list, select whether the location has vaccine storage facilities. Can be:

- 0 = no vaccine storage
- 1 = vaccine storage available

> ℹ If the field is left blank, 0 will be selected for the location by default.

19. Tick the **Active** box if the location is currently in use and can therefore be included in new assessments.

> ℹ If not ticked, the location will not be included in new assessments; if it is already included in an assessment, it will not be removed if it becomes inactive.

20. Select **Save**.

Editing a location

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Locations**. The *Locations* screen is displayed.

4. Select **Edit** (🖊) next to the location you want to edit.

5. Update the fields as required.

> ! You cannot edit the supply chain level of a location if it has already been included in an assessment. In this case, you must first delete the assessment before you can make the change.

6. Select **Save**.

Deleting a location

> ! You cannot delete a location if it has already been included in an assessment. You must either delete the assessment or else mark the location as inactive before you can delete it.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Locations**. The *Locations* screen is displayed.

4. Select **Delete** (✕) next to the location you want to delete.

Adding vaccines

Before you create an assessment, you must specify every vaccine used in the country's immunisation schedule, both at the national and sub-national levels. This is necessary to calculate the required vaccine storage capacity requirements for each facility and then compare this with the actual vaccine storage capacity at the facility. When an assessment is created, a copy of the vaccines entered for the country are added to the assessment and included in all location questionnaires assigned to assessors.

> ! If you create an assessment and then update the vaccine list (for example, by adding or editing a vaccine), the changes will not be updated in the assessment. This is because the assessment makes a copy of the vaccine list when it is created and is not updated subsequently. This means it is critical to ensure the vaccine list is complete **before** the assessment is created.

Viewing vaccines

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Vaccines**. The *Vaccines* screen is displayed:

4. The *Vaccines* screen shows a list of all vaccines for the country:

- To navigate the list of vaccines, select **Previous**, **Next**, or the page number in the bottom right of the list.

- To sort the list of vaccines, select the arrows next to the name of the column that you want to sort the list by.
- To change the number of vaccines shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific vaccine, enter its name or code in the field in the top right of the list.

Adding a vaccine manually

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Vaccines**. The *Vaccines* screen is displayed.

4. Either:

   - Select **Add PQS** to add a WHO PQS-prequalified vaccine, or
   - Select **Add Generic** to add a vaccine that is not WHO PQS-prequalified.

   The *Create* screen is displayed:

> **i** Fields marked with a ***** are mandatory.

5. The following fields must be completed, regardless of whether you selected **Add PQS** or **Add Generic**:

   a. Using the **Vaccine*** drop-down list, enter or select the type of vaccine, for example, *DtaP*.

   b. Using the **Manufacturer*** drop-down list, enter or select the name of the vaccine manufacturer, for example, *GlaxoSmithKline Biologicals SA*.

   c. Using the **Commercial name*** drop-down list, enter or select the vaccine's commercial name, for example, *Boostrix*.

   d. Using the **Formulation*** drop-down list, enter or select the vaccine's pharmaceutical form, for example, *Liquid: ready to use*.

   e. Using the **Presentation*** drop-down list, enter or select the vaccine presentation, for example, *Vial*.

   f. Using the **Doses per primary container*** drop-down list, enter or select the number of vaccine doses contained in the primary container, for example, *1*.

6. If you are adding a PQS vaccine, the remaining fields will be automatically populated from WHO PQS Vaccine database records (https://extranet.who.int/gavi/PQ_Web/). If you are adding a generic vaccine, you will need to fill them in manually:

a. In the **Multi-Dose Vial Policy (MDVP) discard time (days)*** field, enter the time in days after which an opened multi-dose vaccine vial must be discarded, according to the national multi-dose vial policy (MDVP), for example, *28*.

b. In the **Administration route*** field, enter the route by which the vaccine is administered, for example, *Intradermal*.

c. In the **Vaccine storage temperature (°C)** field, enter the temperature in degrees Celsius at which the vaccine must be stored, e.g. *2-8°C*.

d. In the **Diluent storage temperature (°C)** field, enter the temperature in degrees Celsius at which the vaccine diluent must be stored, if applicable, for example, *2-8°C*.

e. In the **Vaccine secondary volume (cm3)*** field, enter the volume in cubic centimetres of the vaccine's secondary packaging per dose. For example, a carton contains 50 two-dose vials. The carton dimensions are 6.0cm x 9.5cm x 18.5cm with total volume 1,054.5cm3. Divided by the total number of doses (100), the vaccine secondary volume is *10.545 cm3*.

f. In the **Vaccine tertiary volume (cm3)*** field, enter the volume in cubic centimetres of the vaccine's tertiary packaging per dose. For example, the tertiary packaging contains 24 cartons of 50 two-dose vials. The tertiary packaging dimensions are 41cm x 48cm x 60cm with total volume 118,080cm3. Divided by the total number of doses (2,400), the vaccine tertiary volume is *49.2cm3*.

g. In the **Diluent secondary volume (cm3)** field, enter the volume in cubic centimetres of the vaccine diluent's secondary packaging, if applicable, for example, *0.63*.

h. In the **Diluent tertiary volume (cm3)** field, enter the volume in cubic centimetres of the vaccine diluent's tertiary packaging, if applicable, for example, *0.63*.

7. Enter the following country-specific information for the vaccine:

a. In the **Target group (%)*** field, enter the percentage of the total population that will receive the vaccine; this is typically the national birth rate, for example, *3*.

b. Using the **Vaccine introduction date** drop-down list, enter or select the year in which the vaccine was introduced into the national schedule, for example, *2021*.

> ℹ️   If no value is specified, the current year will be used.

c. In the **Wastage rate (%)** field, enter the predicted wastage rate for the vaccine, for example, *5*.

d. In the **Doses per recipient*** field, enter the number of vaccine doses each recipient will receive, for example, *1*.

e. In the **Coverage rate (%)** field, enter the target vaccination coverage rate, expressed as a percentage, for the antigen, for example, *90*.

f. Using the **Active** drop-down list, select whether the vaccine is currently being used in the national immunisation schedule. Can be:

- Yes: if the vaccine is currently in use and therefore should be included in new assessments.
- No: if the vaccine is not currently in use and therefore should NOT be included in new assessments.

8. Once you have entered all data, select **Save**.

Editing a vaccine

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Vaccines**. The *Vaccines* screen is displayed.

4. Select **Edit** (🖊️) next to the location you want to edit.

5. Update the fields as required.

6. Select **Save**.

Deleting a vaccine

> ❗ You can only delete a vaccine if it has not yet been included in an assessment. If it has, you must either delete the assessment or else mark the vaccine as inactive so that it is not included in any further assessments (see below).

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Vaccines**. The *Vaccines* screen is displayed.

4. Select **Delete** (✕) next to the location you want to delete.

Marking a vaccine as inactive

Marking a vaccine as inactive means that it will not be included in any further assessments. If it has already been included in an assessment, marking a vaccine as inactive will have no effect.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Vaccines**. The *Vaccines* screen is displayed.

4. Select **Edit** (✏) next to the location you want to edit.

5. Using the **Active** drop-down list, select **No**.

6. Select **Save**.

Vaccine FAQs

The following table answers some Frequently Asked Questions (FAQs) relating to adding the national vaccine schedule in EVM.

Question	Answer
What do I do if I have more than one vaccine for the same antigen?	Enter the vaccine with the highest storage volumes.
We are introducing a new vaccine to the national schedule. At present, it is only introduced in the vaccine schedule for some parts of the country. Should we add this vaccine?	Yes. Add the vaccine, even if it is only in use in some parts of the country. In Section L4, assessors will be able to update the questionnaire for each location to specify which vaccines are in use.
When I download an assigned questionnaire, section L3 is empty. Why?	This could be caused by one of two things: 1. You have not added any vaccines to the vaccine list for your country, or 2. You created the assessment **before** you added the vaccines. In either case, if you want the assessment to include the correct (up-to-date) vaccine list, you must create a new assessment
When I download an assigned questionnaire, section L3 does not show the correct list of vaccines. Why?	You created the assessment **before** you update the vaccine list. If you want the assessment to include the correct (up-to-date) vaccine list, you must create a new assessment

Specifying vaccine tracers

When assessing a health facility, certain questions are asked regarding specific types of vaccine in use at the health facility. This is done for various reasons, for example to assess whether a vaccine is stored at the correct temperature, whether the vaccine stock records are correct, or whether the correct multi-dose vial policy is adhered to.

A National Manager must specify the tracer vaccines that will be used in EVM assessments for that country. This must be done at least once before an assessment can be created. For each of the following types of vaccine, any vaccines that have already been entered in the vaccine list for the country, and that match the applicability criteria shown the table below, can be selected in the corresponding tracer dropdown. Often, there will be only one matching vaccine; however, it may be that for some tracers there will be several to choose from. The manager should make an informed decision here on which tracer to specify, based on the consideration that the tracer should always be available in every health facility being assessed.

Editing vaccine tracers

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Tracers**. The *Tracers* screen is displayed:

Select the vaccine tracer to be used during the assessment

Freeze sensitive with aluminium adjuvant	DT
Liquid	DT
Multi-dose vial with discard time of 2 days or more	DTwP
Multi-dose vial with discard time of 6 hours or less	
Freeze dried	
Heat sensitive and freeze sensitive	
Heat sensitive but not freeze sensitive	(not currently used)
Freeze sensitive without aluminium adjuvant	(not currently used)
VVM	DT

Save

4. Update the vaccine tracers as required using the drop-down lists. The table below gives a list of each vaccine tracer and shows the applicability criteria that determines whether a vaccine can appear in the dropdown.

> 🛈 For PQS vaccines, this data is taken from the WHO PQS Vaccine database.

Vaccine Type	Applicability Formula	Example
Freeze sensitive with aluminium adjuvant	FreezeSensitive = Yes and AlAdjuvant = Yes	*DTwP*
Liquid	PharmaceuticalForm = Liquid: ready to use	*HPV*
Multi-dose vial with discard time of 2 days or more	DosesCount >1 and MultidoseVialPolicy = >2 days	*HepB*

Vaccine Type	Applicability Formula	Example
Multi-dose vial with discard time of 6 hours or less	DosesCount >1 and MultidoseVialPolicy =<0.25 days (6 hours)	*MR*
Freeze dried	PharmaceuticalForm = Lyophilised active component to be reconstituted with excipient diluent or liquid active component before use	*MR*
Heat sensitive and freeze sensitive	FreezeSensitive = Yes and VaccineVialMonitor <= 7	*DTwP*
Heat sensitive but not freeze sensitive	FreezeSensitive = No and VaccineVialMonitor <= 7	*bOPV*
Freeze sensitive without aluminium adjuvant	FreezeSensitive = Yes and AlAdjuvant = No	
VVM	VaccineVialMonitor != none	*bOPV*

5. Once you have finished editing the vaccine tracers, select **Save**.

Tracer FAQs

The following table answers some Frequently Asked Questions (FAQs) relating to choosing the vaccine tracers.

Question	Answer
One or more tracer drop-down list is empty. Why?	The vaccines listed in the dropdown are taken from the vaccines list for the country. If there are no applicable vaccines in the list, then the dropdown will be empty

Adding ISC parameters (optional)

A National Manager can adjust the default values displayed in the questionnaire for certain supply chain parameters if required. You do not need to adjust the default values already given and the assessor will have the option to select an alternative to the default suggested.

Editing ISC parameters

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > ISC parameters**. The *ISC Parameters* screen is displayed:

ISC parameters

			Supply interval (months)			
Vaccine code	Manufacturer	Commercial name	PR	SN	LD	SP
DT	PT Bio Farma (Persero)	Adsorbed DT Vaccine	0.25	0.25	0.25	1
DTwP	PT Bio Farma (Persero)	DTP Vaccine	0.25	1.50	0.25	0.25

Tabs: Supply interval (months) | Safety stock (months) | Maximum stock

4. Select the tab containing the parameters that you want to change, then update the parameters as required using the drop-down lists. The table below summarises the parameters that can be changed:

Parameter	Specifies
Supply interval	The supply interval for each vaccine in the country's vaccine list, as well as dry goods, per supply chain level. Expressed in months.
Safety stock	The parameters define the safety stock level for each vaccine in the country's vaccine list, as well as dry goods, per supply chain level. Expressed in months of supply. It should be less than or equal to the supply interval (not greater than).
Maximum stock	The parameters define the maximum stock level for each vaccine in the country's vaccine list, as well as dry goods, per supply chain level; expressed in months of supply.

5. Once you have finished editing the parameters, select **Save**.

Customising the EVM country home screen (optional)

National Managers can customise the home screen of their country on the EVM Manager website. This is the screen that is presented to you after you log in as a National Manager.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Setup > Manage country customization**. The *Manage Country Customization* screen is displayed:

4. In the **Main text title** field, enter a title for the home screen.

5. In the **Main text body** field, add some content for the home screen body, for example, the Ministry of Health logo and some welcome text.

6. Select **Save**.

Managing accounts

The National Manager controls who has access to the country's EVM data. This is achieved by administering the various roles that can be assigned to EVM accounts. The following country-specific roles can be assigned to a user:

Role	The user can…
Assessor (locations)	• Be assigned questionnaires as part of an EVM assessment. • Download and upload location questionnaires.
Manager (national)	• Manage every aspect of the country's EVM setup and assessments.
Manager (sub-national)	• Manage locations and create assessments for specified AUs in a country.
Observer	• View every aspect of the country's EVM setup and performance. • Only view, they cannot edit.

> ℹ One user can have a number of different roles for different counties. For example, the same user can be an assessor for Angola, a National Manager for Bangladesh, a Sub-National manager for California (USA), and an Observer for Tajikistan.

Viewing accounts

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Accounts > Manage Accounts**. The *Manage Accounts* screen is displayed. The **Approved** tab displays a list of all accounts that have roles for the country:

Approved			Pending

Surname	Name	Company	Role	
Brown	David	Department of Health	Assessor (locations)	✏
Smith	John	Department of Health	Manager	✏

Showing 1 to 2 of 2 entries   Previous 1 Next

The **Pending tab** displays a list of all requests that have not yet been approved or rejected by the National Manager:

Approved		Pending			

Surname	Name	Company	Unit	Role	Reception date	
			No data available in table			

Showing 0 to 0 of 0 entries   Previous Next

Adding a role to an existing user

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Accounts > Manage Accounts**. The *Manage Accounts* screen is displayed, showing the **Approved** tab by default.

4. In the **Approved** tab, select **Edit** (✏️) for the user to whom you want to add the role. The *Roles* screen is displayed, showing the **Current permissions** tab by default:

Current permissions			Request permission	

Role ▲	Country	Unit ⬍	Status ⬍	⬍
Observer	South Georgia and the South Sandwich Islands	-	Approved	✕

Showing 1 to 1 of 1 entries
Previous 1 Next

The **Current permissions** tab lists the roles that the user currently holds in EVM.

5. Select the **Request permissions** tab to display it:

Role *

Please explain why you require access

Create

ℹ️ Fields marked with a ***** are mandatory.

6. Using the **Role*** drop-down list, select the role that you want to add to the user, for example *Assessor (locations)*.

7. Using the **Country*** drop-down list, select the country that you manage.

8. In the **Please explain why you require access** field, enter the reason why the user requires the selected role for the country.

9. Select **Create**. You are returned to the *Manage Accounts* screen and the request is automatically approved.

ℹ️ Once a user's request for the *Assessor (locations)* role has been created, that user can download and upload assigned questionnaires.

Adding a role to a new user

Accounts that do not yet have a role for the country do not appear on the *Accounts* screen. To assign a role to user who does not yet have a role for the country (for example, *Assessor* or *Manager*), you will need to locate the user in a different way.

1. Sign into your EVM account (see page 20).
2. Ensure that you are viewing the country that you wish to manage (see page 22).
3. Select the menu in the top left of the screen, then select **Accounts > Manage Accounts**. The *Manage Accounts* screen is displayed, showing the **Approved** tab by default.
4. Select **Create Assignment**. The *Create assignment* screen is displayed:

> **User** *
>
> _____ ▾
>
> **Role** *
>
> Assessor (locations)   ▾
>
> **Country** *
>
> _____ ▾
>
> **Please explain why you require access**
>
> _____
>
>   Create   Cancel

ℹ️   Fields marked with a ***** are mandatory.

5. Using the **User*** drop-down list, enter or select the name of the user to whom you want to assign a role.
6. Using the **Role*** drop-down list, select the role that you to assign to the user.
7. Using the **Country*** drop-down list, select the country that you manage.
8. In the **Please explain why you require access** field, enter the reason why the user requires the selected role for the country.
9. Select **Create**. You are returned to the *Manage Accounts* screen and the request is automatically approved.

ℹ️   Once a new user with the *Assessor (locations)* role has been created, that user can download and upload assigned questionnaires.

Customising and creating assessments

This chapter describes how to create and customise EVM assessments. It is organised into the following sections:

Section	Description	See Page
Customising assessments	How to customise EVM assessments to meet the needs of your country.	56
Creating assessments	How to create new EVM assessments for your country.	46

Before creating an EVM assessment, you must first ensure that you have completed the EVM setup (described in Setting up EVM on page 26). This is because when the assessment is created, a copy of the setup data is made and included within the assessment. This means that any subsequent changes to the setup will not be reflected in the assessment.

For example, if you create an assessment and then update the vaccine list (such as by adding or editing a vaccine), the changes to the vaccine list will not be made in the assessment. This is because the assessment makes a copy of the vaccine list when it is created and is not updated subsequently. It is therefore critical to ensure the vaccine list is complete **before** the assessment is created.

Customising Assessments

EVM assessments can be customised to meet the needs of a country. The overall process of specifying the assessment parameters is shown in the following diagram and explained in more detail in the following sections.
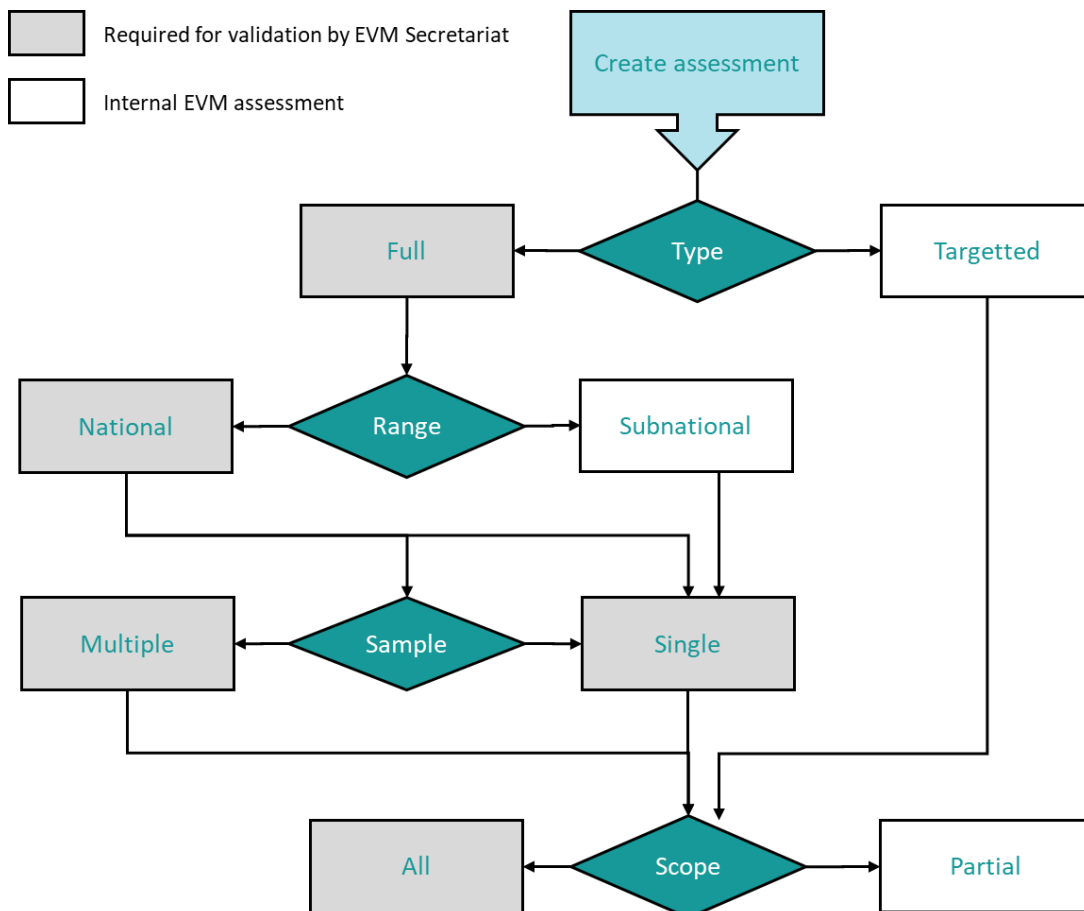
The following table provides a list of the assessment parameters that can be configured by the National Manager:

Parameter	Description	Values
Type	Determines whether to make a random site selection or pick individual locations.	• Full: use random site selection • Targeted: pick individual locations
Range	Determines whether to include locations from the entire country or only those in specific AUs in the random site selection.	• National: include all locations in site selection • Sub-National: only include locations in specific AUs
Sample	Determines whether to make a single random site selection for the entire country or make individual ones for each AU.	• Single: make a single site selection • Multiple: make separate site selections for each AU
Scope	Determines whether to assess all EVM requirements or only a subset. For example, only E5 Maintenance and repair.	• All: all EVM requirements • Partial: a subset of EVM requirements

Type

The Type parameter determines whether the assessment will make a random site selection or whether the National Manager will choose the locations to assess. The possible values are:

• Full: the assessment will select sites randomly using the EVM site selection methodology.
• Targeted: the National Manage can choose locations.

The site selection methodology used in EVM2 is the same as that used in EVM1. The only difference is that in EVM1 the tool was an Excel file, whereas in EVM2 the same logic is embedded in the EVM website.

> For more information on the site selection methodology, please refer to the EVM Site Selection Tool User Guide:
>
> https://www.who.int/immunization/programmes_systems/supply_chain/EVM-site-selection-userguide-V1.7.pdf

Range

The Range parameter determines whether to include locations from the entire country or only those in specific AUs in the random site selection. The possible values are:

• National: include all locations in the country in the random site selection.
• Sub-National: only include locations in specific AUs.

For example, if 'Sub-National' is selected in the United States of America, the National Manager can choose to create a sub-national assessment for California and Oregon only.

Sample

The Sample parameter determines whether to make a single random site selection for the entire country or make individual ones for each AU. This parameter is only available if 'Range' is 'National' and 'Type' is 'Full'. The possible values are:

• Single: make a single site selection.
• Multiple: make separate site selections for each AU.

If 'Multiple' is selected, the National Manager can specify the inputs for the site selection (confidence, precision, and number of Service Point (SP) facilities to assess for each Lowest Distribution (LD) facility selected) as normal. However, instead of making a single random site selection for the entire country, a separate random site selection can be made for every top-level AU in the

country. Each random site selection, specific to each top-level AU in the country, will use the site selection inputs specified by the National Manager and apply those inputs to randomly select the locations in that AU.

> ℹ️ Sub-National Managers can make the random site selection for their AUs, even though they cannot change the inputs for the site selection or make/view the site selection for AUs they do not manage.

If 'Multiple' is selected, many more sites will be included in the assessment than if 'Single' is selected. However, the benefit of doing so is that a representative sample is drawn for each AU, and therefore direct comparisons can be drawn individual AUs or groups of AUs. For example, in the United States of America, the National Manager can choose to compare the performance of California and Oregon in the EVM assessment. If 'Single' is selected, this is not possible because the sample is only representative at the national level. Comparison of sub-national performance in this way can enable richer analysis of the strengths and weaknesses of a national supply chain and provide a tool to investigate discrepancies in equity across geographical areas.

Scope

The Scope parameter determines whether to assess all EVM requirements or only a subset. The possible values are:

- All: all EVM requirements will be assessed.
- Partial: not all EVM requirements will be assessed.

If 'Partial' is selected, the National Manager can specify which EVM requirements to assess. This is done by selecting the EVM criteria and categories to include (see Understanding the EVM assessment framework on page 13). For example, if only the criterion 'E5 Maintenance and repair' is selected, the assessment will only assess requirements in this criterion.

Example assessments

The following table provides a list of EVM assessments that can be created according to the needs of the country:

Assessment	Type	Range	Sample	Scope
An assessment covering the whole country, assessing everything	Full	National	Single	All
An assessment of two states only, assessing everything	Full	Sub-national (California and Oregon only)	Single	All
An assessment of all private-sector health clinics at SP level, assessing everything	Targeted	N/A	N/A	All
An assessment of temperature management at facilities where poor temperature management is suspected	Targeted	N/A	N/A	Partial (E2 Temperature management only)
An assessment of waste management equipment in California	Full	Sub-national (California only)	N/A	Partial (E9 Waste management and C2 Equipment only)

Creating assessments

Creating a new assessment

1. Sign into your EVM account (see page 20).
2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed:
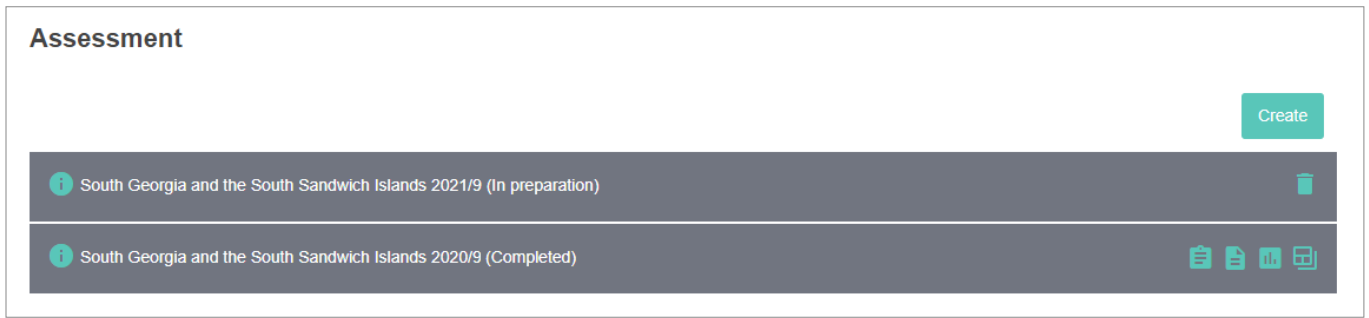
4. Select **Create** to open the Create Assessment wizard. The Create Assessment wizard contains four tabs that are described in the following sections:

- Assessment details. See page 49.
- Scope. See page 50.
- Select locations / Selection parameters. See page 51.
- Review. See page 56.

Assessment details

5. In the **Assessment details** tab, enter the following information:

ℹ️   Fields marked with a ***** are mandatory.

a. Using the **Type*** drop-down list, select whether the assessment will make a random site selection or whether you as the National Manager will choose the locations to assess. Can be:

- Full: select sites randomly using the EVM site selection methodology.
- Targetted: the National Manager will choose locations.

b. Using the **Range*** drop-down list, select whether to include locations from the entire country or only those in specific Administrative Units (AUs) in the random site selection. Can be:

- National: include all locations in the country in the random site selection.
- Sub-national: only include locations in specific AUs.

For validation by the EVM Secretariat, the **Type** must be *Full* and the **Range** must be *National*. See Editing an assessment

> You should only edit an assessment if it has not been fully created, that is, it has a status of 'In preparatio
> been created but none of the locations have been assigned to Assessors.
>
> Once you select **Create assessment**, it will not be possible to make any changes to the assessment param
> example, you will not be able to add, remove, or replace locations in the sample; and you will not be able
> changes to the vaccines or tracers in the assessment.
>
> If locations have been assigned and you want to edit the assessment and re-create it to generate new qu
> you should clear the assignments (see Assigning locations to Assessors on page 58) and reassign them on
> edited the assessment and fully created it.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage assessments* screen is displayed.

4. Select the assessment you want to edit.

5. Update the fields as required.

6. Select **Save**.

Deleting an assessment

> You can only delete an assessment if none of the locations have been assigned to Assessors. If locations
> assigned, you must clear the assignments (see Assigning locations to Assessors on page 58).

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage assessments* screen is displayed.

4. Select **Delete** (▮) next to the assessment you want to delete.

on page 56 for more details.

c. Using the **Sample** drop-down list, select whether to make a single random site selection for the entire country or make individual ones for each AU.

- Single: make a single site selection.
- Multiple: make separate site selections for each AU.

> This parameter is only available if the **Range** is *National* and the **Type** is *Full*.

d. In the **Name** field, enter the name of the assessment. By default, the name will be *<country> <year/month>*, for example, *Iraq 2019/04*.

e. In the **Planned date** field, enter or select using the calendar the planned start date for the assessment data-collection. By default, the current date will be used.

f. In the **Description** field, enter a description for the assessment. This may be useful if you are creating more than one assessment at the same time.

5. Select **Create** to display the **Scope** tab.

Scope

6. In the **Scope** tab, you can specify whether to assess all EVM requirements or only a subset. By default, all categories and criteria will be ticked. If you wish to assess only a subset of EVM requirements, ensure that only the criteria and categories you wish to assess are ticked. For example, if only the criterion *E2 -Temperature management* is selected, and only the category *C2 - Equipment* is selected, the assessment will assess only requirements in E2 and C2:

UnSelectToExcludeFromAssessment

Criteria
- [ ] All
- [ ] E1 - Vaccine arrivals
- [x] E2 - Temperature management
- [ ] E3 - Storage and transportation capacity
- [ ] E4 - Facility infrastructure and equipment
- [ ] E5 - Maintenance and repair
- [ ] E6 - Stock management
- [ ] E7 - Distribution of vaccines and dry goods
- [ ] E8 - Vaccine management
- [ ] E9 - Waste management
- [ ] M1 - Annual needs forecasting
- [ ] M2 - Annual work planning
- [ ] M3 - Supportive supervision
- [ ] M4 - iSC performance monitoring
- [ ] R1 - Infrastructure management
- [ ] R2 - Equipment management
- [ ] R3 - IT systems management

Categories
- [ ] All
- [ ] C1 - Infrastructure
- [x] C2 - Equipment
- [ ] C3 - Information technology
- [ ] C4 - Human resources
- [ ] C5 - Policies & procedures
- [ ] C6 - Financial resources
- [ ] O - Output
- [ ] P - Performance

For validation by the EVM Secretariat, all categories and criteria must be ticked. See Editing an assessment

You should only edit an assessment if it has not been fully created, that is, it has a status of 'In preparation' or been created but none of the locations have been assigned to Assessors.

Once you select **Create assessment**, it will not be possible to make any changes to the assessment parameter example, you will not be able to add, remove, or replace locations in the sample; and you will not be able to changes to the vaccines or tracers in the assessment.

If locations have been assigned and you want to edit the assessment and re-create it to generate new questic you should clear the assignments (see Assigning locations to Assessors on page 58) and reassign them once y edited the assessment and fully created it.

7. Sign into your EVM account (see page 20).

8. Ensure that you are viewing the country that you wish to manage (see page 22).

9. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage assessments* screen is displayed.

10. Select the assessment you want to edit.

11. Update the fields as required.

12. Select **Save**.

Deleting an assessment

! You can only delete an assessment if none of the locations have been assigned to Assessors. If locations have assigned, you must clear the assignments (see Assigning locations to Assessors on page 58).

13. Sign into your EVM account (see page 20).

14. Ensure that you are viewing the country that you wish to manage (see page 22).

15. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage assessments* screen is displayed.

16. Select **Delete** ( ) next to the assessment you want to delete.

on page 56 for more details.

17. Once you have made your selections, select **Next** to display the **Select locations** or **Selection parameters** tab, depending on the assessment parameters already selected.

Select locations / Selection parameters

18. The tab displayed and options you see will depend on the assessment parameters you have selected:

* If the **Type** is *Full* and the **Sample** is *Single*, see Select locations (Full Type, Single Sample) on page 51.
* If the **Type** is *Full* and the **Sample** is *Multiple*, see Selection parameters (Full Type, Multiple Sample) on page 53.
* If the **Type** is *Targetted*, see Select locations (Targetted Type) on page 55.

Select locations (*Full* Type, *Single* Sample)

In the **Select locations** tab, you can choose the locations to be included in the assessment. Enter the following information:

a. Use the **Precision** radio buttons to select the desired level of precision for the assessment, expressed as a percentage that the precision level is desired to be within. Can be:

- 5% (highest precision)
- 10%
- 15%

b. Using the **Confidence** radio buttons, select the level of confidence required for the assessment score, expressed as a percentage. Can be:

- 80%
- 85%
- 90%
- 100% (highest confidence)

c. Using the **Service point locations** radio buttons, select the number of facilities at the Service Point (SP) level to be assessed for each facility at Lowest Distribution (LD) level that will be assessed.

d. If you wish to exclude any locations from the sample that will be generated, do the following:

   i. Using the **Locations to exclude** tick boxes, both select and tick the locations to be excluded from the sample that will be generated. By default, all active locations for the selected range (national or sub-national) will be included in the assessment. If you wish to exclude one or more active locations from the assessment, select and tick the relevant boxes. You can exclude all locations in specific administrative units, or else exclude only specific locations.

   > **Excluding locations from the sample example**
   >
   > In the following example, we have excluded both locations in Pear Country, which is a second-level Administrative Unit (AU2) of East State (AU1):
   >
   >

   ii. In the **Please explain why it is necessary to exclude these locations** field, provide a reason why it is necessary to exclude the locations. This is used for auditing purposes. For assessments with a **Type** of *Full* and a **Range** of *National*, a record is automatically generated of excluded locations and AUs and included in the EVM Report template that is generated.

e. Select **Generate sample** to randomly generate the list of locations to assess, based on the parameters provided:

Sample result

PR - National Vaccine Store
  SN - North State Vaccine Store
    LD - Apple County District Store
    LD - Banana County District Store
      SP - Banana County Health Centre
    LD - Lemon County District Store
      SP - Lemon County Health Centre
  SN - South State Vaccine Store
    LD - Lychee County District Store
      SP - Lychee County Health Centre
    LD - Orange County District Store
      SP - Orange County Health Centre
    LD - Pineapple County District Store
      SP - Pineapple County Health Centre
    LD - Pomegranate County District Store
      SP - Pomegranate County Health Centre

> ℹ️ You can download a copy of the list generated in Microsoft Excel format by selecting **Export**.

f. If the sample is acceptable, select **Accept sample**. If the sample is **not** acceptable, select **Reject sample**. There are various reasons why a sample may not be acceptable, for example, the geographic distribution of the locations may present logistical challenges for assessors to reach. Consequently, the sample may be generated and rejected as many times as required until a satisfactory sample is drawn.

> ℹ️ For assessments with a **Type** of *Full* and a **Range** of *National*, the number of samples drawn is included in the EVM Report template that is generated.

g. Select **Next** to display the **Review** tab.

Selection parameters (*Full* Type, *Multiple* Sample)

In the **Selection parameters** tab, you can specify the selection parameters will be used when making a random site selection for each AU (all site selections will use these same selection parameters). Enter the following information:

Precision *

5% ○   10% ◉   15% ○

Confidence *

80% ◉   85% ○   90% ○   100% ○

Service point locations *

1 ◉   2 ○

a. Using the **Precision** radio buttons, select the desired level of precision for the assessment, expressed as a percentage that the precision level is desired to be within. Can be:

- 5% (highest precision)
- 10%
- 15%

b. Using the **Confidence** radio buttons, select the level of confidence required for the assessment score, expressed as a percentage. Can be:

- 80%
- 85%
- 90%
- 100% (highest confidence)

c. Using the **Service point locations** radio buttons, select the number of facilities at SP level to be assessed for each facility at the Lowest Distribution (LD) level that will be assessed.

d. Select **Select locations**. The selection parameters being used and a summary of the site selection progress is displayed:

Site selection in process. 0 of 63 AUs have completed the site selection. 0 out of 11798 sites have been selected

Selection parameters	Units
Precision: 10%	**An Giang Province** 0 out of 168 sites selected Select locations
Confidence: 80%	**Ba Ria Vung Tau Province** 0 out of 92 sites selected Select locations
Service point locations: 1	**Bac Can Province** 0 out of 131 sites selected Select locations
	Bac giang Province 0 out of 241 sites selected Select locations
	Bac Lieu Province 0 out of 72 sites selected Select locations
	Bac Ninh Province 0 out of 135 sites selected Select locations

> ℹ️ A Sub-National Manager of an AU included in a multiple sample assessment can perform the random site selection for that AU, even though they cannot do so for other AUs.

e. To exclude locations from the assessment:

i. Select **Select locations** next to an AU:

Locations to exclude

- ☐ An Phu [15]
- ☐ Chau Doc city [8]
- ☐ Chau Phu [14]
- ☐ Chau Thanh [14]
- ☐ Cho Moi [19]
- ☐ Long Xuyen city [15]
- ☐ Phu Tan [19]
- ☐ Tan Chau town [15]
- ☐ Thoai Son [18]
- ☐ Tinh Bien [15]
- ☐ Tri Ton [16]

ii. Using the **Locations to exclude** tick boxes, both select and tick the locations to be excluded from the sample that will be generated. By default, all active locations for the selected range (national or sub-national) will be included in the assessment. If you wish to exclude one or more active locations from the assessment, select and tick the relevant boxes. You can exclude all locations in specific administrative units, or else exclude only specific locations.

iii. In the **Please explain why it is necessary to exclude these locations** field, provide a reason why it is necessary to exclude the locations. This is used for auditing purposes.

f. Select **Generate sample** to randomly generate the list of locations to assess, based on the parameters provided:

Sample result

SN2 - Yen Bai Province Store
   LD - Luc Yen
      SP - Muong Lai
   LD - Mu Cang Chai
      SP - Cao Pha
   LD - Van Chan
      SP - Gia Hoi
   LD - Van Yen
      SP - Chau Que Thuong
      SP - Mau A
   LD - Yen Binh
      SP - Dai Minh
   LD - Nghia Lo town
      SP - Cau Thia
   LD - Yen Bai city
      SP - Minh Bao

> ℹ️ You can download a copy of the list generated in Microsoft Excel format by selecting **Export**.

g. If the sample is acceptable, select **Accept sample** If the sample is **not** acceptable, select **Reject sample**. There are various reasons why a sample may not be acceptable, for example, the geographic distribution of the locations may present logistical challenges for assessors to reach. Consequently, the sample may be generated and rejected as many times as required until a satisfactory sample is drawn.

h. Once the site selection has been completed for each AU in the country, select **Create assessment**.

> ❗ When you select **Create assessment**, only the locations selected will be included in the assessment. If you have not completed a site selection for an AU, you will not be able to do so later.

Select locations (*Targetted* Type)

In the **Select locations** tab you can choose the locations that will be included in the assessment. The information displayed in this tab will vary depending on the type of assessment you are creating. Enter the following information:

Locations to be assessed

☐ East State [3]

☐ North State [5]

☐ South State [4]

☐ West State [4]

Preview selection

a. Using the **Locations to be assessed** tick boxes, both select and tick the locations to be included in the assessment. If you wish to exclude one or more active locations from the assessment, select and tick the relevant boxes. You can include all locations in specific administrative units, or else include only specific locations.

b. Select **Preview selection** to generate the list of locations to be assessed, based on the parameters provided:

Locations to be assessed

Mango County
    LD - Mango Country District Store
    SP - Mango Country Health Centre
Orange County
    LD - Orange County District Store
    SP - Orange County Health Centre
Lychee County
    LD - Lychee County District Store
    SP - Lychee County Health Centre

ℹ️   You can download a copy of the list generated in Microsoft Excel format by selecting **Export**.

c.   If the selection is acceptable, select **Confirm**. If the selection is **not** acceptable, select **Reject selection**. There are various reasons why a selection may not be acceptable, for example, the geographic distribution of the locations may present logistical challenges for assessors to reach. Consequently, the selection may be generated and rejected as many times as required until a satisfactory selection is made.

d.   Select **Next** to display the **Review** tab.

Review

19. In the **Review** tab, you can review all the details of the assessment to be created:

Global information | Locations to be assessed
Version: v1.12 | **Precision:** 10%
Type: Full | **Confidence:** 80%
Range: National | **Service point locations:** 1
Sample: Single | **Sample:** Show| Export
Name: South Georgia and the South Sandwich Islands 2021/9 | **Locations to exclude:** Show| Export
Description: This is a test assessment | **Excluded reason:** This location will be assessed separately
Planned date: 09/09/2021 |

Requirements to be assessed
Criteria | Categories

These details should be reviewed carefully to ensure that everything is correct. If anything is incorrect, either select **Previous** or select the name of the tab containing the details that you want to change to go back in the wizard and make the necessary corrections.

20. Once you have confirmed that everything is correct, select **Create assessment**.

⚠️   Once you select **Create assessment**, it will not be possible to make any changes to the assessment parameters. For example, you will not be able to add, remove, or replace locations in the sample; and you will not be able to make changes to the vaccines or tracers in the assessment.

Once the assessment has been created, you can begin assigning locations to assessors. See Assigning locations to Assessors on page 58.

Editing an assessment

You should only edit an assessment if it has not been fully created, that is, it has a status of 'In preparation' or it has been created but none of the locations have been assigned to Assessors.

Once you select **Create assessment**, it will not be possible to make any changes to the assessment parameters. For example, you will not be able to add, remove, or replace locations in the sample; and you will not be able to make changes to the vaccines or tracers in the assessment.

If locations have been assigned and you want to edit the assessment and re-create it to generate new questionnaires, you should clear the assignments (see Assigning locations to Assessors on page 58) and reassign them once you have edited the assessment and fully created it.

21. Sign into your EVM account (see page 20).

22. Ensure that you are viewing the country that you wish to manage (see page 22).

23. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage assessments* screen is displayed.

24. Select the assessment you want to edit.

25. Update the fields as required.

26. Select **Save**.

Deleting an assessment

You can only delete an assessment if none of the locations have been assigned to Assessors. If locations have been assigned, you must clear the assignments (see Assigning locations to Assessors on page 58).

27. Sign into your EVM account (see page 20).

28. Ensure that you are viewing the country that you wish to manage (see page 22).

29. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage assessments* screen is displayed.

30. Select **Delete** ( ) next to the assessment you want to delete.

Assigning locations to Assessors

This chapter describes how to assign locations to Assessors. This chapter is organised into the following sections:

Section	Description	See Page
Assigning ungrouped locations to Assessors	How to assign a single location to one or more Assessors.	58
Assigning grouped locations to Assessors	How to assign a of locations to one or more Assessors.	60

Once an assessment has been created, the locations and programme questionnaire if applicable can be assigned to one or more Assessors to assess. A programme questionnaire is automatically created as part of any national assessment (excluding a targeted assessment). It assesses the national immunisation programme in the country as a whole. The questionnaire can be assigned and completed in the same as for a location questionnaire.

You may wish to assign each location to one or more Assessors, for example, if the locations are widely spread out across the country and it would be difficult for a single Assessor to visit more than a single location. Alternatively, you may wish to assign a group of locations to one or more Assessors, for example, if you want a specific group of Assessors to assess all locations in one part of the country.

As soon as the location has been assigned, the Assessor it has been assigned to can download it in the EVM mobile app and begin the assessment.

For guidance on how EVM Assessors can use the EVM Assessor mobile app to conduct health facility assessments as part of an EVM assessment, please refer to the EVM Assessor Guide:

https://www.technet-21.org/en/library/main/6094-evm-assessor-user-guide

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Assigning ungrouped locations to Assessors

Viewing ungrouped assignments

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country:

4. Select **Assign questionnaires** (👤) next to the assessment whose locations you want to assign. The *Assignment Manager* screen is displayed, showing a list of all the locations in assessment:

5. The *Assignment Manager* screen displays the **Ungrouped** tab by default, showing a list of all locations in the assessment:

- To navigate the list of locations, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To sort the list of locations, select the arrows next to the name of the column that you want to sort the list by.
- To change the number of locations shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific location, enter its name in the field in the top right of the list.

Assigning a single location to Assessors

ℹ️ You can assign a single location to a single Assessor or multiple Assessors.

1. Sign into your EVM account (see page 20).
2. Ensure that you are viewing the country that you wish to manage (see page 22).
3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country.
4. Select **Assign questionnaires** (👤) next to the assessment whose locations you want to assign. The *Assignment Manager* screen is displayed, showing a list of all the locations in assessment.
5. To assign a questionnaire for a location to an Assessor, select 👤 next to the location. The *Users* screen is displayed:

6. In the field provided, start typing to filter the list of Assessors for the country.

7. Select the name of the Assessor to which you want to assign the location.

8. If you want more than one Assessor for the location, repeat steps 6 and 7.

> **ℹ** If you accidentally select an Assessor, select **x** next to their name to remove them.

9. Select **Save**. The location is assigned to the Assessor(s) and its questionnaire is available for the Assessor(s) to download in their EVM mobile app.

Clearing all ungrouped assignments

If required, you can clear all ungrouped location assignments to Assessors that you have made at the same time.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country.

4. Select **Assign questionnaires** (👤) next to the assessment whose locations you want to assign. The *Assignment Manager* screen is displayed, showing a list of all the locations in assessment.

5. Select **Clear assignments**.

6. A message is displayed, asking you to confirm whether you want to proceed with clearing all assignment. Select **Confirm** to clear all assignments.

Assigning grouped locations to Assessors

Viewing grouped assignments

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country:

4. Select **Assign questionnaires** (👤) next to the assessment whose locations you want to assign. The *Assignment Manager* screen is displayed, showing a list of all the locations in assessment.

5. The *Assignment Manager* screen displays the **Ungrouped** tab by default. Select the group tab that you want to view.

> **ℹ** If no groups have been created for the assessment, only the **Ungrouped** tab will be displayed.

6. The *<Group Name>* tab shows a list of all locations in the group:

- To navigate the list of locations, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To sort the list of locations, select the arrows next to the name of the column that you want to sort the list by.
- To change the number of locations shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific location, enter its name in the field in the top right of the list.

Creating a group

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country.

4. Select **Assign questionnaires** (👤) next to the assessment whose locations you want to assign. The Assignment Manager screen is displayed, showing a list of all the locations in assessment.

5. Tick the boxes next to the locations that you want as part of the group.

6. Select **Group**. The *Group* screen is displayed:
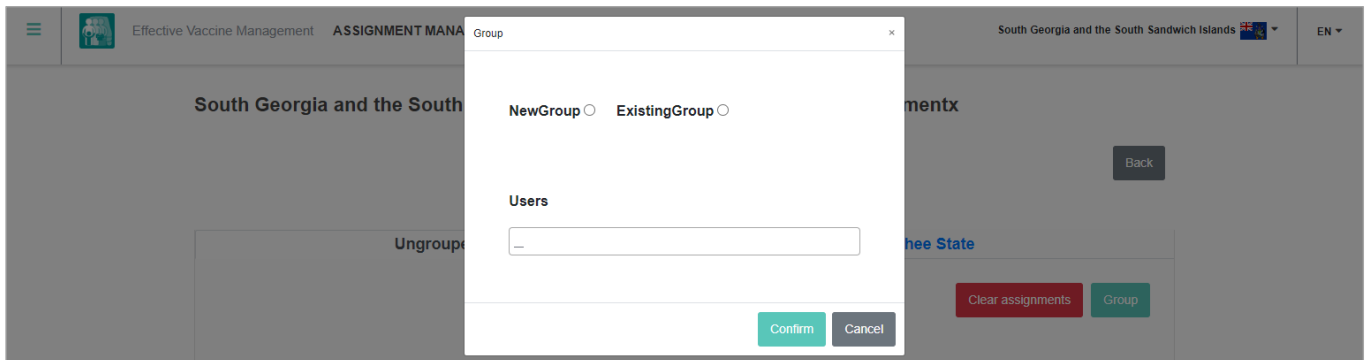
7. Select **NewGroup**.

ℹ️ You can also edit an existing group from this screen by selecting **ExistingGroup**, then selecting the name of the group that you want to edit from the **Group** drop-down list displayed.

---

8. In the **GroupName** field, enter a name for the group.

9. In the **Users** field, start typing to filter the list of Assessors for the country.

10. Select the name of the Assessor to which you want to assign the group of locations.

11. If you want more than one Assessor for the location, repeat steps 9 and 10.

> **ℹ** If you accidentally select an Assessor, select **x** next to their name to remove them.

12. Select **Confirm**. The group of location(s) is assigned to the Assessor(s) and their questionnaires are available for the Assessor(s) to download in their EVM mobile app.

Editing a group

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country.

4. Select **Assign questionnaires** (👤) next to the assessment whose locations you want to assign. The Assignment Manager screen is displayed, showing a list of all the locations in assessment.

5. Select the group tab that you want to edit.

6. Select **Edit**. The *Group* screen is displayed:
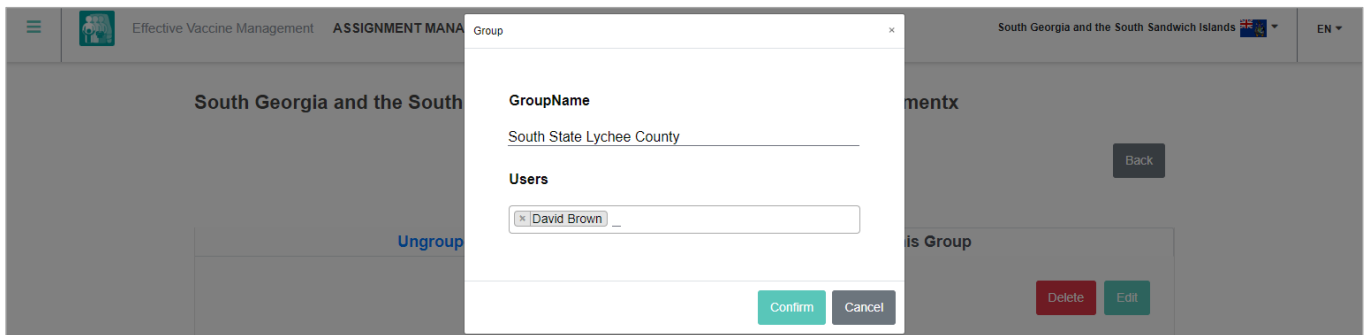
7. Edit the name of the group and the Assessors to which the group of locations is assigned as required.

8. Select **Confirm**. The group of location(s) is assigned to the Assessor(s) and their questionnaires are available for the Assessor(s) to download in their EVM mobile app.

Removing a location from a group

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country.

4. Select **Assign questionnaires** (👤) next to the assessment whose locations you want to assign. The Assignment Manager screen is displayed, showing a list of all the locations in assessment.

5. Select the group tab whose locations you want to remove from the group.

6. Select 🗑 next to the name of the location that you want to remove from the group.

7. A message is displayed, asking you to confirm whether you want to proceed with removing the location from the group. Select **Confirm** to remove the location from the group.

Deleting a group

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country.

4. Select **Assign questionnaires** ( ) next to the assessment whose locations you want to assign. The Assignment Manager screen is displayed, showing a list of all the locations in assessment.

5. Select the group that you want to delete.

6. Select **Delete**.

7. A message is displayed, asking you to confirm whether you want to proceed with deleting the group. Select **Confirm** to delete the group.

Managing submitted questionnaires

This chapter describes how to manage questionnaires submitted by Assessors . It is organised into the following sections:

Section	Description	See Page
Managing submitted assessment questionnaires	How to view, edit, and approve assessment questionnaires submitted by Assessors.	64
Managing submitted standalone questionnaires	How to view and edit standalone questionnaires submitted by Assessors.	72

Before an EVM assessment can be completed, a questionnaire for every location in the assessment must be:

- Completed and uploaded by the Assessor using the EVM mobile app.
- Reviewed and approved by the National Manager using the EVM website.

National Managers can use the EVM website to review and edit programme and location questionnaires submitted by Assessors as part of an assessment. Once reviewed, they can then be approved for inclusion in the assessment.

National Managers can also use the EVM website to review and edit standalone location questionnaires submitted by Assessors, but as these are not part of any assessment they cannot be approved.

Managing submitted assessment questionnaires

1. Sign into your EVM account (see page 20).
2. Ensure that you are viewing the country that you wish to manage (see page 22).
3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country:
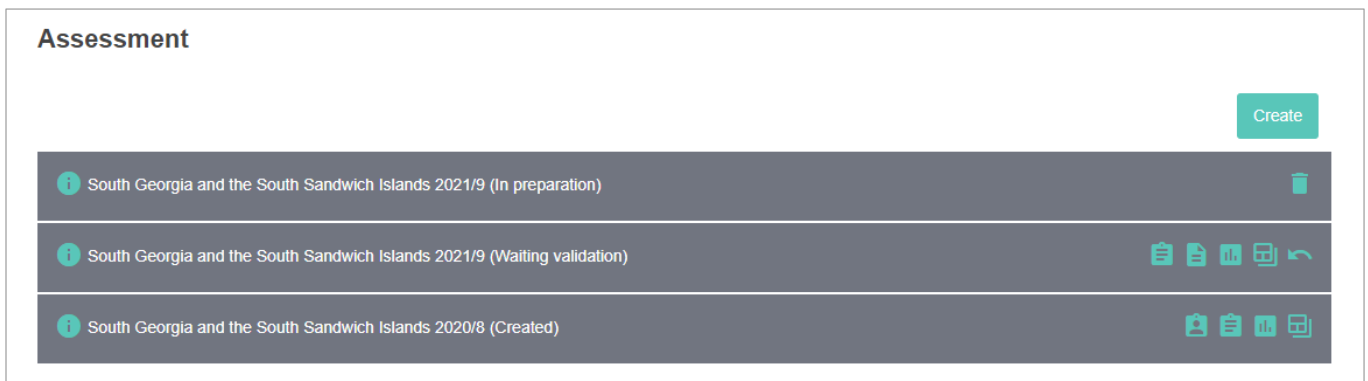
4. Select **Manage questionnaires** (▤) in the row containing the assessment you want to manage. The *Assessment Questionnaires* screen is displayed.

Five tabs are available:

Tab	Purpose	See Page
Locations	Shows all locations in the assessment.	65
Dropped	Shows locations dropped (excluded) from the assessment.	67

Tab	Purpose	See Page
Not downloaded	Shows locations where the questionnaires have not been downloaded by their Assessors.	**Error! Bookmark not defined.**
Pending approval	Shows locations where the questionnaires that have been submitted by Assessors but not yet approved by the National Manager.	67
Approved	Shows locations where the questionnaires that have been approved by the National Manager.	70

Managing assessment locations

To view a list of all locations in the selected assessment, select the **Locations** tab:

Admin unit 1	Admin unit 2	Level	Location	Status		Assignees
South State	Lychee County	LD	Lychee County District Store	In Progress		-
South State	Mango County	LD	Mango Country District Store	In Progress		-
South State	Orange County	LD	Orange County District Store	In Progress		-
South State	-	SN	South State Vaccine Store	In Progress		-
South State	Mango County	SP	Mango Country Health Centre	In Progress		-
South State	Orange County	SP	Orange County Health Centre	In Progress		-
South State	Lychee County	SP	Lychee County Health Centre	In Progress		-
West State	Tomato County	LD	Tomato County District Store	In Progress		-
West State	Watermelon County	LD	Watermelon County District Store	In Progress		-
West State	Tomato County	SP	Tomato County Health Centre	In Progress		-
West State	Watermelon County	SP	Watermelon County	In Progress		-
West State	Guava County	LD	Guava County District Store	In Progress		-
West State	Guava County	SP	Guava County Health Centre	In Progress		-
West State	-	SN	West State Vaccine Store	In Progress		-

Showing 1 to 14 of 14 entries

Previous 1 Next

- To navigate the list of locations, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To sort the list of locations, select the arrows next to the name of the column that you want to sort the list by.
- To change the number of locations shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific location, enter its name in the field in the top right of the list.
- To return to the *Manage Assessments* screen, select **Back**.

The following buttons are available for each submitted questionnaire:

Button	Purpose	See Page
📋	Allows you to assign a location's questionnaire to an Assessor.	66
🔄	Allows you to 'drop' a location for another if you want to exclude a location from an assessment.	66

Assigning a location questionnaire

1. Select 📋 next to the location. The *Users* screen is displayed:
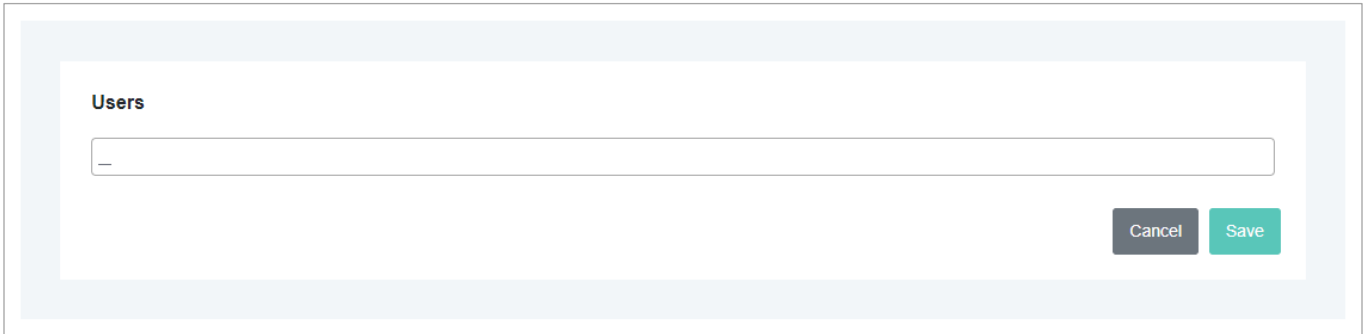
2. In the field provided, start typing to filter the list of Assessors for the country.

3. Select the name of the Assessor to which you want to assign the location.

4. If you want more than one Assessor for the location, repeat steps 2 and 3.

> ℹ️ If you accidentally select an Assessor, select **x** next to their name to remove them.

5. Select **Save**. The location is assigned to the Assessor(s) and its questionnaire is available for the Assessor(s) to download in their EVM mobile app.

Dropping a location

1. Select 🔄 next to the location. The *Swap Location* screen is displayed:
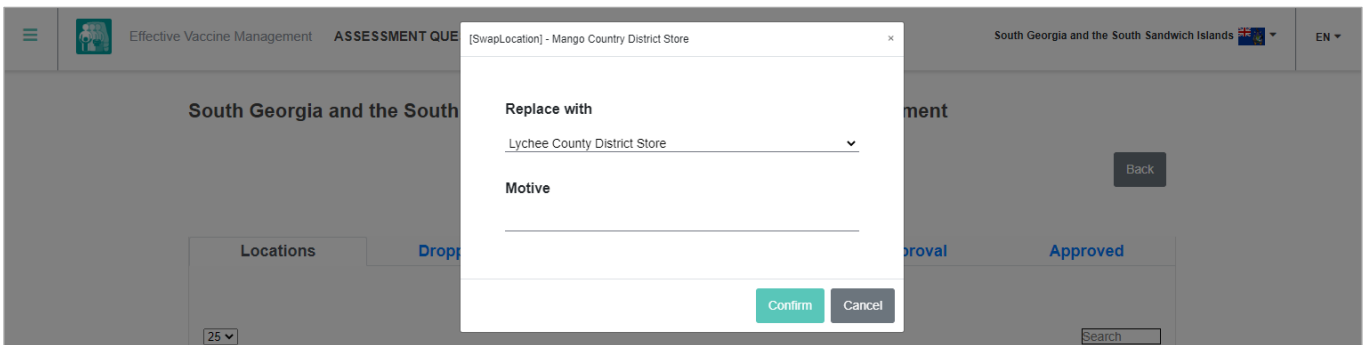
2. Using the **Replace with** drop-down list, select the location that you want to swap the location with.

3. In the **Motive** field, enter the reason for the swap.

4. Select **Confirm**. The old location is swapped with the newly selected location. The status of the old location changes to 'Dropped' in the **Locations** tab and it is listed in the **Dropped** tab (see below).

Managing dropped locations

To view a list of all locations dropped (excluded) from the selected assessment, select the **Dropped** tab:

- To navigate the list of locations, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To sort the list of locations, select the arrows next to the name of the column that you want to sort the list by.
- To change the number of locations shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific location, enter its name in the field in the top right of the list.
- To return to the *Manage Assessments* screen, select **Back**.

The following buttons are available for each standalone questionnaire:

Button	Purpose	See Page
⬇	Allows you to download a blank dropped location questionnaire for importing into the EVM app.	67

Downloading a blank dropped questionnaire

Select ⬇ next to the name of the questionnaire that you want to download. A blank version of the questionnaire is automatically downloaded as a text file.

Managing submitted questionnaires

To view a list of all questionnaires submitted by Assessors for review and approval, select the **Pending approval** tab:

- To navigate the list of questionnaires, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To sort the list of questionnaires, select the arrows next to the name of the column that you want to sort the list by.
- To change the number of questionnaires shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific questionnaire, enter its name in the field in the top right of the list.
- To return to the *Manage Assessments* screen, select **Back**.

The following buttons are available for each submitted questionnaire:

Button	Purpose	See Page
⤓	Downloads a blank version of the submitted questionnaire that can be imported into the EVM app.	68
👤	Downloads the Assessor's completed submitted questionnaire that can be imported into the EVM app.	68
⊟	Downloads the submitted questionnaire answers and scores for review away from the EVM website.	68
📊	Opens the heat-map report for the submitted questionnaire.	68
✏	Opens the submitted questionnaire for editing.	69
✓	Approves the submitted questionnaire for inclusion in the assessment scoring.	70

Downloading a blank submitted questionnaire

Select ⤓ next to the name of the questionnaire that you want to download. A blank version of the submitted questionnaire is automatically downloaded as a text file.

Downloading a completed and submitted questionnaire

Select 👤 next to the name of the questionnaire that you want to download. The completed and submitted questionnaire is automatically downloaded as a text file.

Downloading a submitted questionnaire's responses and requirement scores

Select ⊟ next to the name of the questionnaire whose responses and scores you want to download. The submitted responses and calculated scores are automatically downloaded as a Microsoft Excel file.

Reviewing a submitted questionnaire's heat-map

The simplest way to review the submitted questionnaire is by viewing its heat-map. This can reveal immediately any surprisingly low or high scores when compared to similar health facilities. These scores may indicate an error in the questionnaire, such as incorrect storage capacity or target population, or simply unanswered questions.

Select 📊 next to the name of the questionnaire in which you are interested. The heat-map for the questionnaire is displayed:

		Infrastructure	Equipment	Information technology	Human resources	Policies & procedures	Financial resources	OUTPUTS	PERFORMANCE	TOTAL
		C1	C2	C3	C4	C5	C6			
Vaccine arrivals	E1									
Temperature management	E2			73	65	63		45	60	59
Storage and transportation capacity	E3	100	62		96	45	100	72	100	67
Facility infrastructure and equipment	E4	73	71	85			100	80		76
Maintenance and repair	E5			26	50	36	100	54	82	54
Stock management	E6			79	66	54		68	17	64
Distribution of vaccines and dry goods	E7		96	0	58	28	100	71	94	64
Vaccine management	E8				87	50		79		76
Waste management	E9		78		50	68	100	36	92	57

ℹ You can filter the heat-map and drill down further to view the requirement scores, as well as the answers submitted by the Assessor. See Using the *Heat-map* report on page 75.

Editing a submitted questionnaire

Select 🖊 next to the name of the questionnaire that you want to edit. A list of the questionnaire sections is displayed:

Select a section to edit it, for example:

When you answer a question, further questions may be presented, depending on your answer. For example, if you answer **Yes** to "Are vaccines distributed from this facility", two further questions are presented for answering.

For some questions, you can add or edit a comment by selecting 📋 to display the *Comment* screen:

In the field provided, enter or edit the comment as required, then select **Confirm** to save the comment.

Once a section is displayed, you can navigate between the sections by selecting the section buttons at the bottom of the section:

When you have finished answering questions in a section, select **Save** at the bottom of the section to save your answers.

ⓘ   You can return to the main list of sections at any time by selecting **Sections** at the bottom of the section.

Approving a submitted questionnaire

Select ✓ next to the name of the questionnaire that you want to approve. The questionnaire moves the **Approved** tab (see below).

> ℹ️ If more than one questionnaire has been submitted for a single location, you can view each submitted questionnaire by selecting the Assessor from the **Assessor** drop-down list. In such a situation, it is the responsibility of the National Manager to decide which questionnaire to approve.

Managing approved questionnaires

To view a list of all questionnaires approved by the National Manager in the selected assessment, select the **Approved** tab:

Locations	Dropped		Not downloaded	Pending approval	Approved

Admin unit 1	Admin unit 2	Level	Location	Assessor	Uploaded	
South State	Mango County	SP	Mango Country Health Centre	David Brown	2021/09/15 07:45	⬇️👤🗗✏️✕
South State	-	SN	South State Vaccine Store	David Brown	2021/09/15 08:00	⬇️👤🗗✏️✕
South State	Lychee County	LD	Lychee County District Store	David Brown	2021/09/15 08:03	⬇️👤🗗✏️✕

Showing 1 to 3 of 3 entries

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- To navigate the list of questionnaires, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To sort the list of questionnaires, select the arrows next to the name of the column that you want to sort the list by.
- To change the number of questionnaires shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific questionnaire, enter its name in the field in the top right of the list.
- To return to the *Manage Assessments* screen, select **Back**.

The following buttons are available for each approved questionnaire:

Button	Purpose	See Page
⬇️	Downloads a blank version of the approved questionnaire that can be imported into the EVM app.	70
👤	Downloads the Assessor's completed approved questionnaire that can be imported into the EVM app.	70
🗗	Downloads the approved questionnaire answers and scores for review away from the EVM website.	71
✏️	Opens the approved questionnaire for editing.	71
✕	Unapproves the approved questionnaire for exclusion from the assessment scoring.	71

Downloading a blank approved questionnaire

Select ⬇️ next to the name of the questionnaire that you want to download. A blank version of the approved questionnaire is automatically downloaded as a text file.

Downloading a completed and approved questionnaire

Select 👤 next to the name of the questionnaire that you want to download. The completed and approved questionnaire is automatically downloaded as a text file.

Downloading an approved questionnaire's responses and requirement scores

Select ⊞ next to the name of the questionnaire whose responses and scores you want to download. The approved responses and calculated scores are automatically downloaded as a Microsoft Excel file.

Editing an approved questionnaire

Select ✏ next to the name of the questionnaire that you want to edit. A list of the questionnaire sections is displayed:

Select a section to edit it, for example:

When you answer a question, further questions may be presented, depending on your answer. For example, if you answer **Yes** to "Are vaccines distributed from this facility", two further questions are presented for answering.

For some questions, you can add or edit a comment by selecting 📄 to display the *Comment* screen:

In the field provided, enter or edit the comment as required, then select **Confirm** to save the comment.

Once a section is displayed, you can navigate between the sections by selecting the section buttons at the bottom of the section:

When you have finished answering questions in a section, select **Save** at the bottom of the section to save your answers.

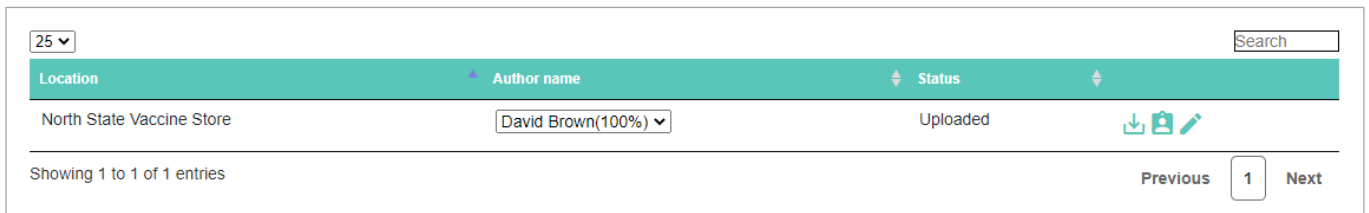> ℹ️ You can return to the main list of sections at any time by selecting **Sections** at the bottom of the section.

Unapproving an approved questionnaire

Select ✕ next to the name of the questionnaire that you want to approve. The questionnaire moves back to the **Pending approval** tab (see page 67).

Managing submitted standalone questionnaires

Using the EVM mobile app, an Assessor can create, complete, and upload standalone questionnaires for a country. Although not part of an assessment, these standalone questionnaires can be reviewed by National Manager.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Standalone** . The *Manage orphan questionnaires* screen is displayed, showing a list of all standalone questionnaires created and uploaded for the country by Assessors:

Location	Author name	Status	
North State Vaccine Store	David Brown(100%) ▾	Uploaded	⬇️ 🪪 ✏️

Showing 1 to 1 of 1 entries

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4. The *Manage orphan questionnaires* screen shows a list of all vaccines for the country:

- To navigate the list of questionnaires, select **Previous**, **Next**, or the page number in the bottom right of the list.
- To change the number of questionnaires shown, select the number or **ALL** from the drop-down in the top left of the list.
- To search for a specific questionnaire, enter its name in the field in the top right of the list.

The following buttons are available for each standalone questionnaire:

Button	Purpose	See Page
⬇️	Downloads a blank version of the standalone questionnaire that can be imported into the EVM app.	72
🪪	Downloads the Assessor's completed standalone questionnaire that can be imported into the EVM app.	72
✏️	Opens the submitted standalone questionnaire for editing.	73

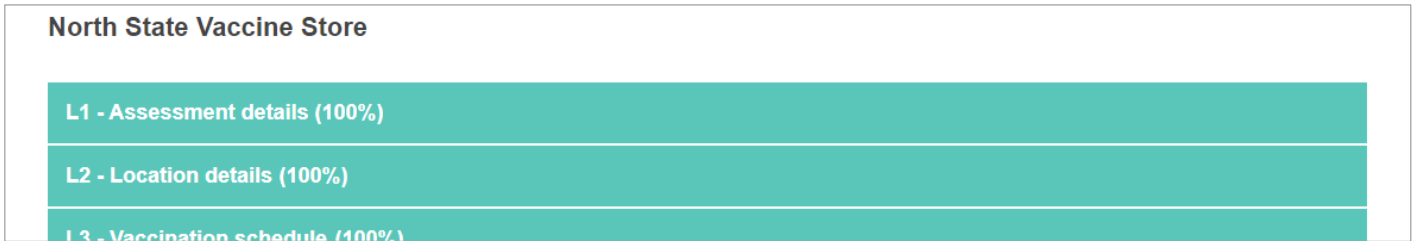## Downloading a blank standalone questionnaire

Select ⬇️ next to the name of the questionnaire that you want to download. A blank version of the standalone questionnaire is automatically downloaded as a text file.
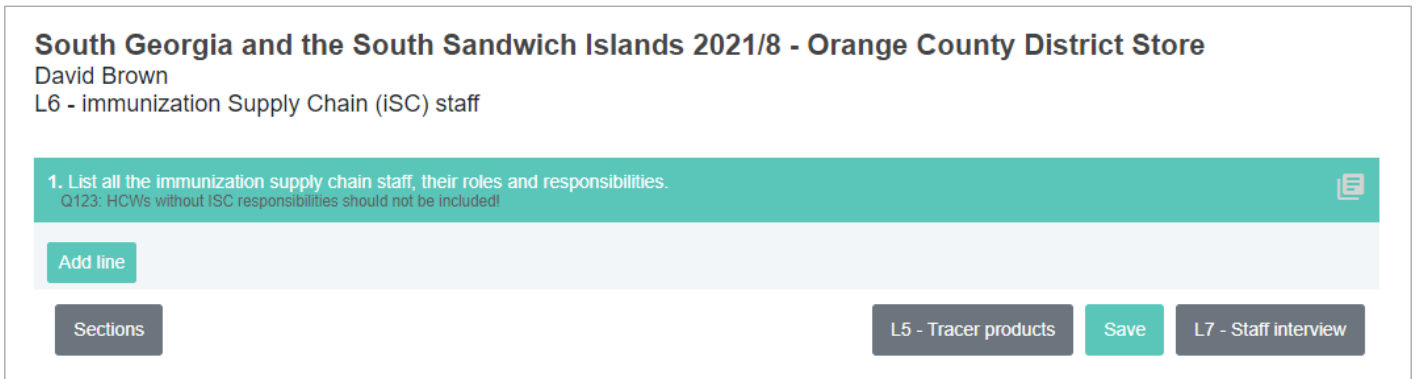
Downloading a completed standalone questionnaire

Select 🪪 next to the name of the questionnaire that you want to download. The completed standalone questionnaire is automatically downloaded as a text file.

Editing a standalone questionnaire

Select ✏ next to the name of the questionnaire that you want to edit. A list of the questionnaire sections is displayed:
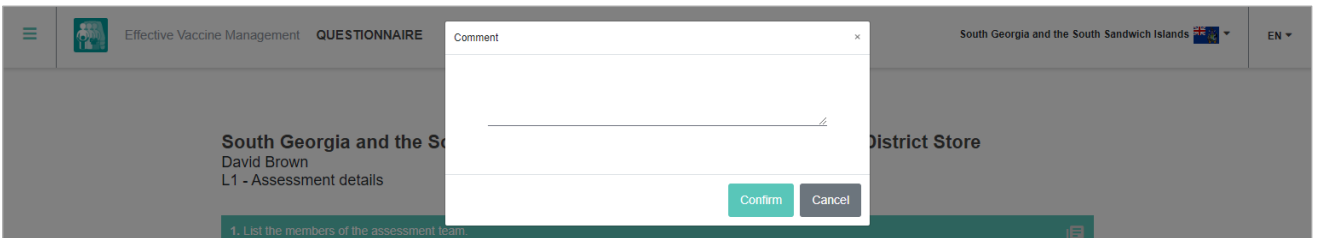

Select a section to edit it, for example:

When you answer a question, further questions may be presented, depending on your answer. For example, if you answer **Yes** to "Are vaccines distributed from this facility", two further questions are presented for answering.

For some questions, you can add or edit a comment by selecting 📋 to display the *Comment* screen:

In the field provided, enter or edit the comment as required, then select **Confirm** to save the comment.

Once a section is displayed, you can navigate between the sections by selecting the section buttons at the bottom of the section:

When you have finished answering questions in a section, select **Save** at the bottom of the section to save your answers.

🛈 You can return to the main list of sections at any time by selecting **Sections** at the bottom of the section.

Analysing assessment results

You can review how a country has scored in its assessment from the *Manage Assessments* screen by viewing its *Heat-map* report or by downloading its responses and scores as a Microsoft Excel file:

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed, showing a list of all assessments created for the country.

   - To display the heat-map for the assessment, select ⬛ next to the name of the assessment in which you are interested.

   - To automatically download the submitted responses and calculated scores as a Microsoft Excel file, select ⬛ next to the name of the questionnaire whose responses and scores you want to download.

You can also review how a country has scored in its assessment by reviewing the reports on the EVM website's Dashboard.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Dashboard**.

You can then select any of the following reports:

Report	Description	See Page
Heat-map	Shows the criteria and category scores for selected locations or an entire country.	75
Criteria	Shows the criteria scores for a selected assessment, state, supply chain level, or location.	78
Categories	Shows the category scores for a selected assessment, state, supply chain level, or location.	81
AQE	Shows the system indicator scores (Availability, Quality, Efficiency) for a selected assessment, state, supply chain level, or location.	84
Progress	Shows the yearly progress for a selected assessment, state, supply chain level, or location.	87
Comparison	Shows a comparison of the criteria and category scores of two selected assessments.	89
Compare overall	Shows a comparison of the criteria and category scores for a selected assessment, state, or location.	90
Compare two	Shows a comparison of the criteria and category scores of two Administrative Units (AUs) in an assessment.	95
Scores	Shows a map of locations covered by assessment, state, and/or supply chain level, with their criterion and/or category scores.	95
Capacity	Shows the available and required storage capacity by assessment, state, location, and/or supply chain level.	97
Stock Status	Shows the available doses supplied per surviving infant by assessment or location.	98
Comparison Heat map	Shows a comparison of the criteria and category scores for two selected assessments.	99

Using the *Heat-map* report

		Infrastructure	Equipment	Information technology	Human resources	Policies & procedures	Financial resources			TOTAL
		C1	C2	C3	C4	C5	C6	OUTPUTS	PERFORMANCE	
Vaccine arrivals	E1									
Temperature management	E2			73	65	63		45	60	59
Storage and transportation capacity	E3	100	62		96	45	100	72	100	67
Facility infrastructure and equipment	E4	73	71	85			100	80		76
Maintenance and repair	E5			26	50	36	100	54	82	54
Stock management	E6			79	66	54		68	17	64
Distribution of vaccines and dry goods	E7		96	0	58	28	100	71	94	64
Vaccine management	E8				87	50		79		76
Waste management	E9		78		50	68	100	36	92	57
Annual needs forecasting	M1				78	33		73	42	63
Annual work planning	M2				41	24	79	39	91	46
Supportive supervision	M3	85	92	68	50	38	100	53		57
iSC performance monitoring	M4			87	47	53		54		54
TOTAL		74	72	76	59	45	80	62	62	**63**

The *Heat-map* report Shows the criteria and category scores for selected locations or an entire country. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by supply chain level, Administrative Unit (AU), location, assessment, and/or criterion type.	75
Export the report	Exports the report to a Microsoft Excel file.	76
View a criterion definition	Allows you to view the definition of a select criterion.	76
View a category definition	Allows you to view the definition of a select category.	76
View requirements details	Allows you to drill down into the requirement scores, the requirement definitions, and the questions that cover each requirement.	76

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- **Supply Chain Level:** select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- **Administrative Unit (AU):** select the AU(s) in which you are interested from the **AU** drop-down lists.
- **Location:** select the location in which you are interested from the **Location** drop-down list.
- **Assessment:** select the assessment in which you are interested from the **Assessment** drop-down list.
- **Criterion type:** select the type of criteria in which you are interested from the **Criterion** type drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.

Viewing a criterion definition

Mouseover the criterion cell in which you are interested. A pop-up box is displayed showing the definition:

Viewing a category definition

Mouseover the category cell in which you are interested. A pop-up box is displayed showing the definition:

Viewing requirements details

Select a criterion score to display the requirements scores for that criterion:

ℹ️ You can export the scores presented in this graph to a Microsoft Excel file by selecting **Export**. You can return to the main chart at any time by selecting **Back**. To view a requirement's definition and assessment requirement score, mouseover the requirement. A pop-up box is displayed showing the definition and score.

Select a requirement score to display any sub-requirements for that requirement and their scores:
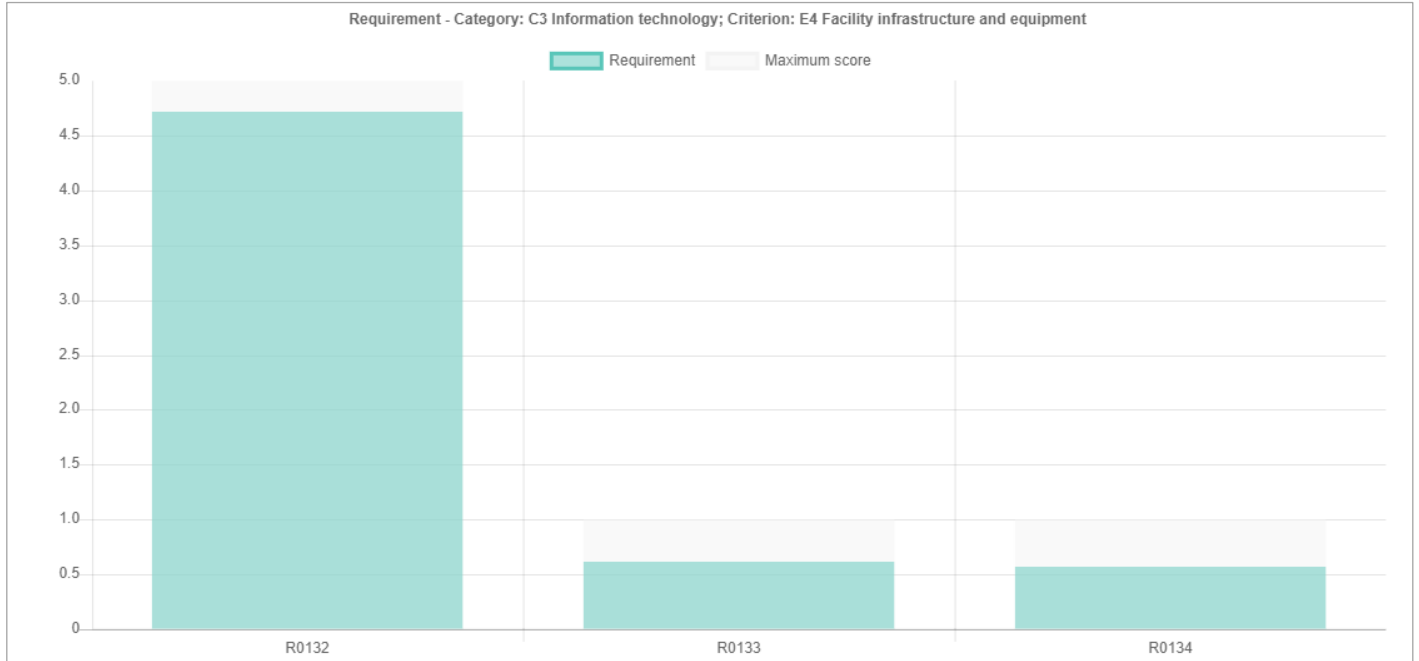
ℹ️ You can export the scores presented in this graph to a Microsoft Excel file by selecting **Export**. You can return to the previous graph at any time by selecting **Back**. To view a sub-requirement's assessment requirement or maximum assessment score, mouseover the sub-requirement. A pop-up box is displayed showing the definition.

Select a requirement or sub-requirement score to view its details, including the questions used to assess whether the requirement has been met and its score:

> **R0134 - The computer is connected to an uninterruptible power supply (UPS). - 0.57/1**
>
> Category: C3.1 - General IT equipment; Criteria: E4 - Facility infrastructure and equipment
>
> **Questions**
>
> L8.2 - Information technology - Q156 Is the computer a desktop computer? [a]
> L8.2 - Information technology - Q160 Is the desktop computer connected to an uninterruptible power supply (UPS)? [s]
> L9.2 - Electricity - Q169 In the past 12 months, were there any power cuts? [a]
>
> Total number of locations included: 18

ℹ️ You can return to the previous graph at any time by selecting **Back**.

Using the *Criteria* report
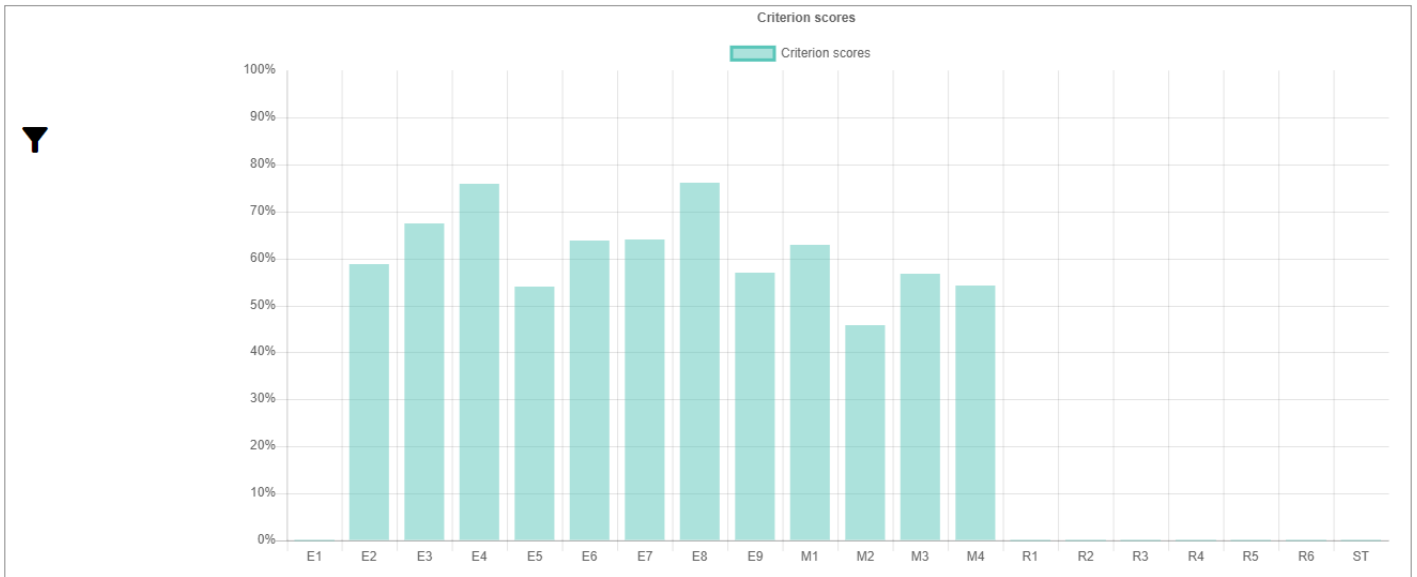
The *Criteria* report shows the criteria scores for a selected assessment, state, supply chain level, or location. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by supply chain level, Administrative Unit (AU), location, criterion, category, assessment, and/or year.	78
Change the chart style	Allows you to change the style of the report chart presented.	79
Export the report	Exports the report to a Microsoft Excel file.	79
View score details	Allows you to view the definition of a selected criterion and its score.	79
View sub-criterion details	Allows you to drill down into the scores for any sub-criteria and view their definitions.	79
View requirements details	Allows you to drill down into the requirement scores, the requirement definitions, and the questions that cover each requirement.	80

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- Supply Chain Level: select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- Administrative Unit (AU): select the AU(s) in which you are interested from the **AU** drop-down lists.
- Location: select the location in which you are interested from the **Location** drop-down list.
- Category: select the category in which you are interested from the **Category** drop-down list.
- Assessment: select the assessment in which you are interested from the **Assessment** drop-down list.
- Year: select the location in which you are interested from the **Latest year** drop-down list.
- Criterion type: select the type of criteria in which you are interested from the **Criterion** type drop-down list.

To apply the filters that you have selected to the heat-map, select **Apply**.

> ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.
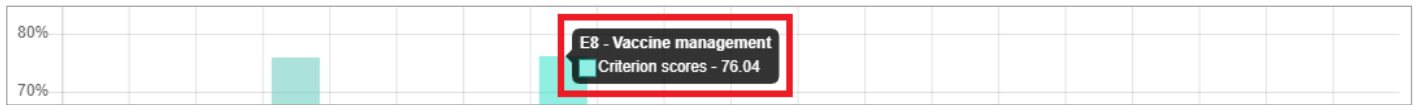
Changing the report chart style

Select ▼ in the top left of the report to display the filter options, then select the style of report that you want to view from the chart type drop-down list and select **Apply**. The chart automatically updates to the selected style.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.
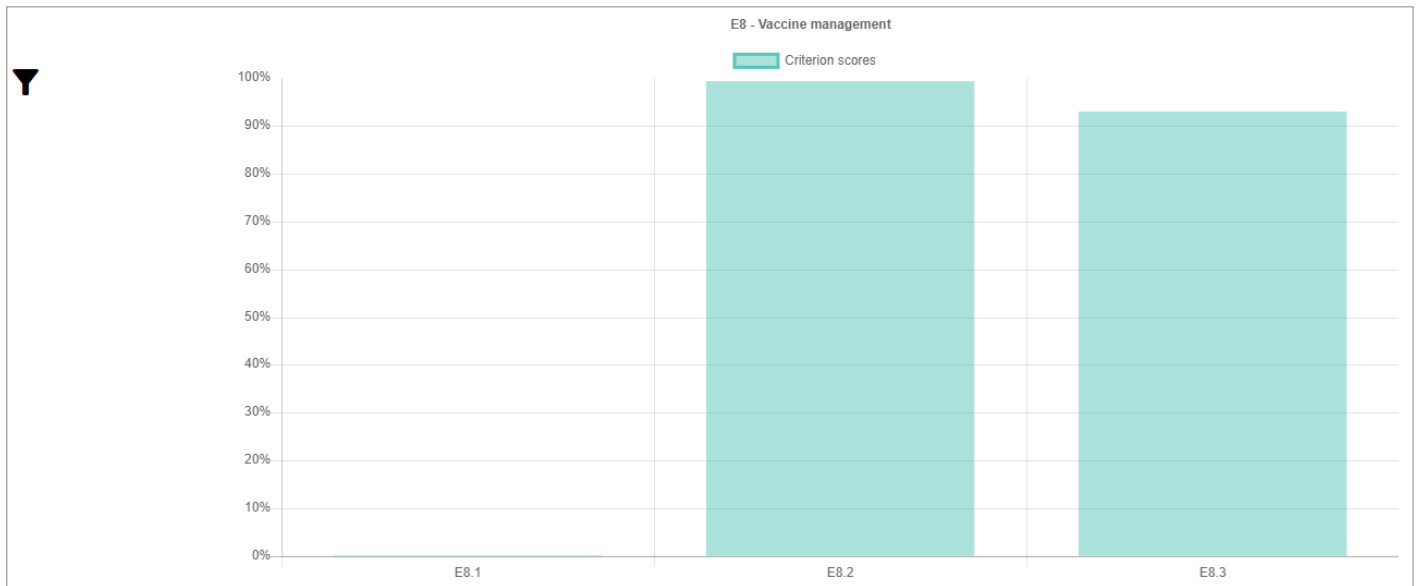
Viewing score details

Mouseover the criterion in which you are interested. A pop-up box is displayed showing the definition and criterion score:

Viewing sub-criterion details

Select the criterion score in which you are interested to display any sub-criterion for that criterion and their scores:
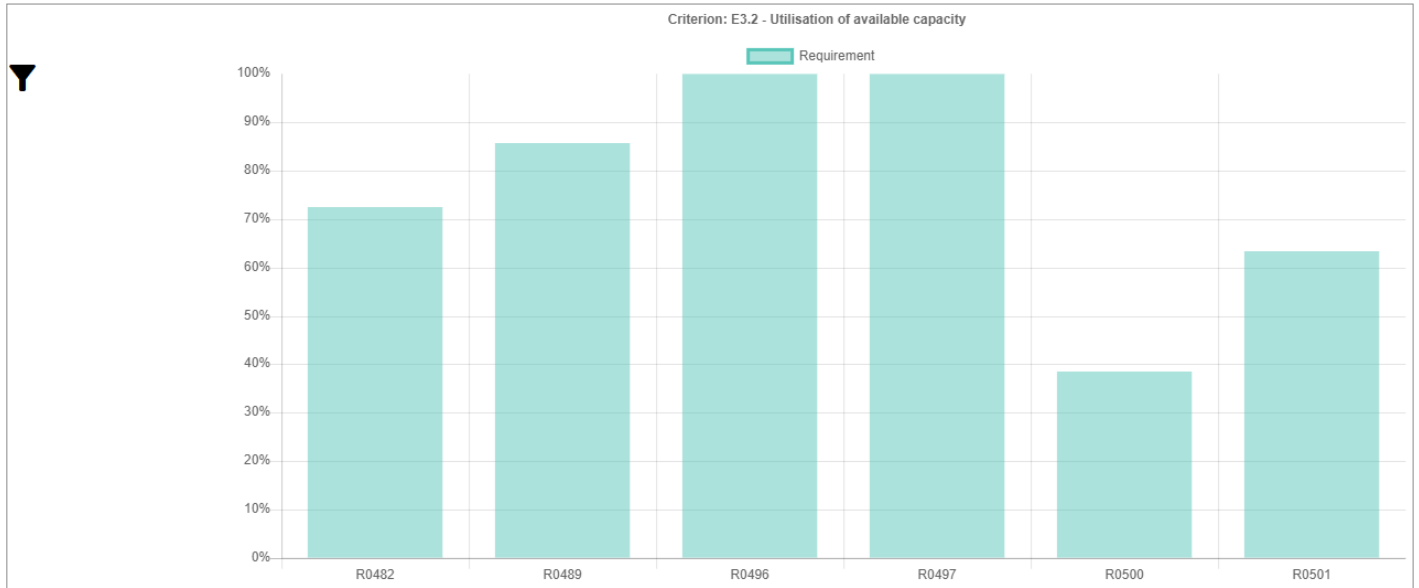

ⓘ   You can filter, change the chart style, export, and view a sub-criterion's definition and score using this chart in the same way as for the main chart. You can return to the main chart at any time by selecting **Back**.
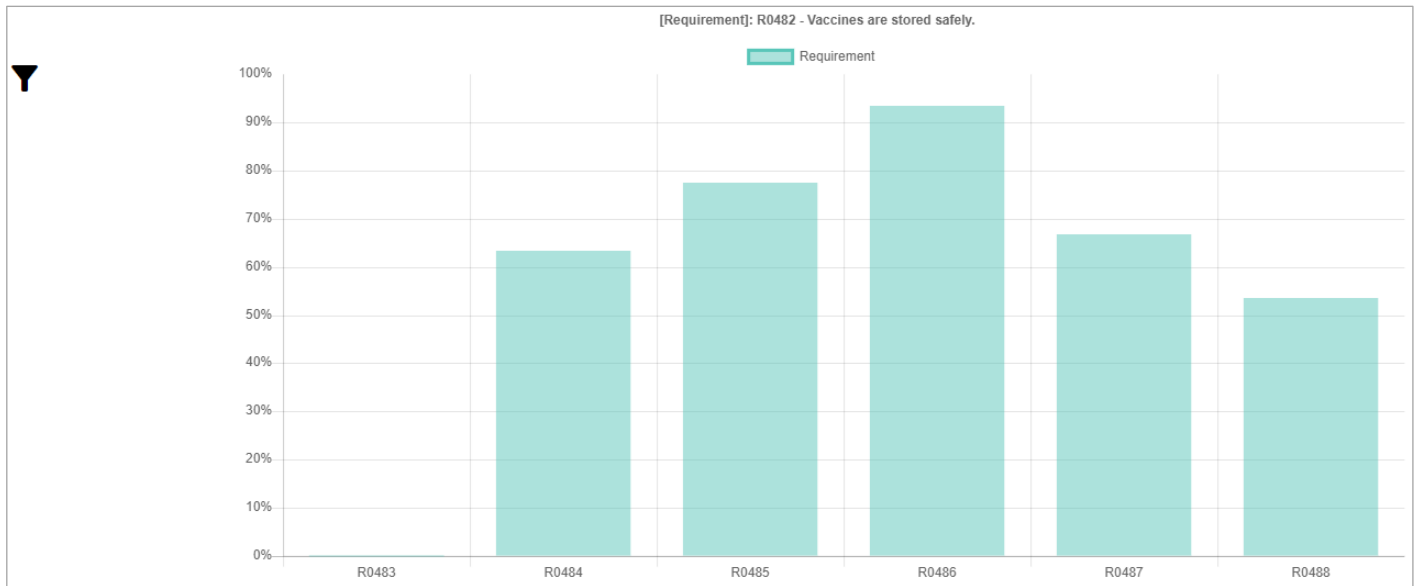
Viewing requirements details

Select a criterion/sub-criterion score to display the requirements for that criterion/sub-criterion and their scores:

> You can filter, change the chart style, export, and view a requirement's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.

Select a requirement score to display any sub-requirements for that requirement and their scores:

> You can filter, change the chart style, export, and view a sub-requirement's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.

Select a requirement or sub-requirement score to view its details, including the questions used to assess whether the requirement has been met and its score:

> ### R0486 - Vaccines in refrigerators are stored away from walls and off floors. - 94%
>
> Category: O - Output; Criteria: E3.2 - Utilisation of available capacity
>
> **Questions**
>
> L2 - Location details - Q22 Does the facility have any vaccine refrigerators and/or freezers? [a]
> L15.5 - Contents - Q498 Are any vaccines placed in the door of the refrigerators? [s]
> L15.5 - Contents - Q499 Are any vaccines placed directly on the floor of the refrigerators? [s]
> L15.5 - Contents - Q500 Are any vaccine packages placed against the walls of the refrigerators? [s]

ℹ️ You can return to the previous graph at any time by selecting **Back**.

Using the *Categories* report
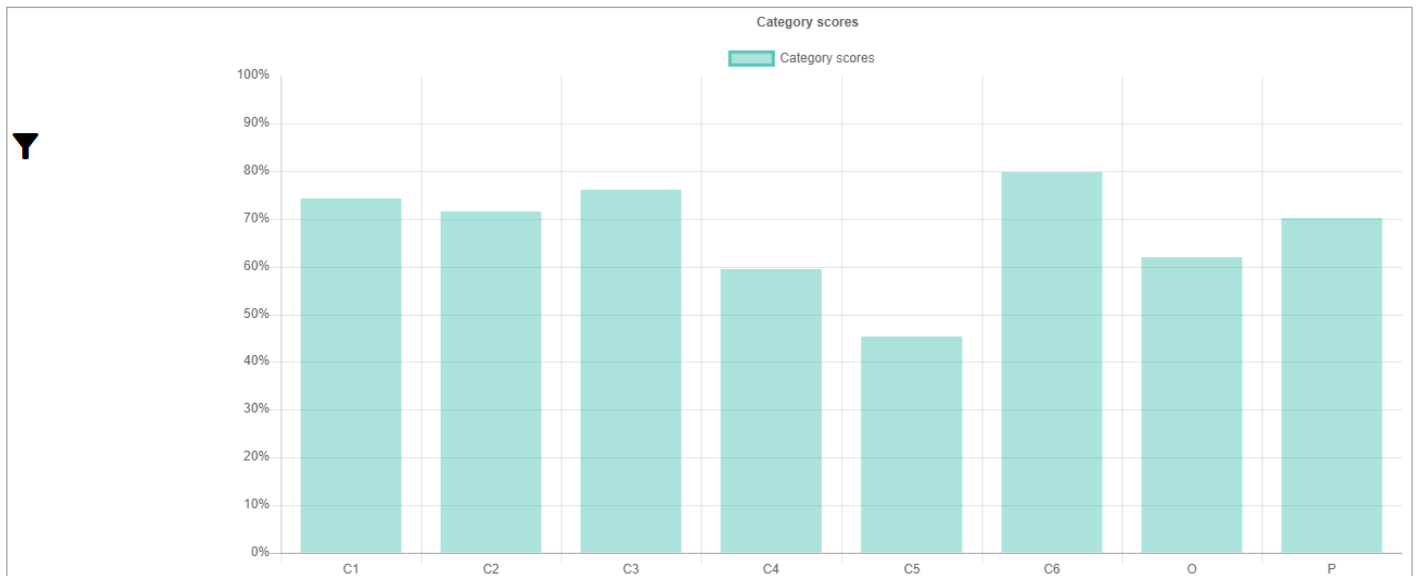
The *Categories* report shows the category scores for a selected assessment, state, supply chain level, or location. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by supply chain level, Administrative Unit (AU), location, criterion, category, assessment, and/or year.	81
Change the chart style	Allows you to change the style of the report chart presented.	82
Export the report	Allows you to export the report to a Microsoft Excel file.	82
View score details	Allows you to view the definition of a selected category and its score.	82
View sub-category details	Allows you to drill down into the scores for any sub-category and view their definitions.	82
View requirements details	Allows you to drill down into the requirement scores, the requirement definitions, and the questions that cover each requirement.	83

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- **Supply Chain Level:** select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- **Administrative Unit (AU):** select the first-level AU (the state) in which you are interested from the **AU1** drop-down list.
- **Location:** select the location in which you are interested from the **Location** drop-down list.
- **Criterion:** select the criterion in which you are interested from the **Criterion** drop-down list.
- **Category:** select the category in which you are interested from the **Category** drop-down list.
- **Assessment:** select the assessment in which you are interested from the **Assessment** drop-down list.
- **Year:** select the year in which you are interested from the **Latest year** drop-down list.

To apply the filters that you have selected to the heat-map, select **Apply**.

ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Changing the report chart style

Select ▼ in the top left of the report to display the filter options, then select the style of report that you want to view from the chart type drop-down list and select **Apply**. The chart automatically updates to the selected style.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.
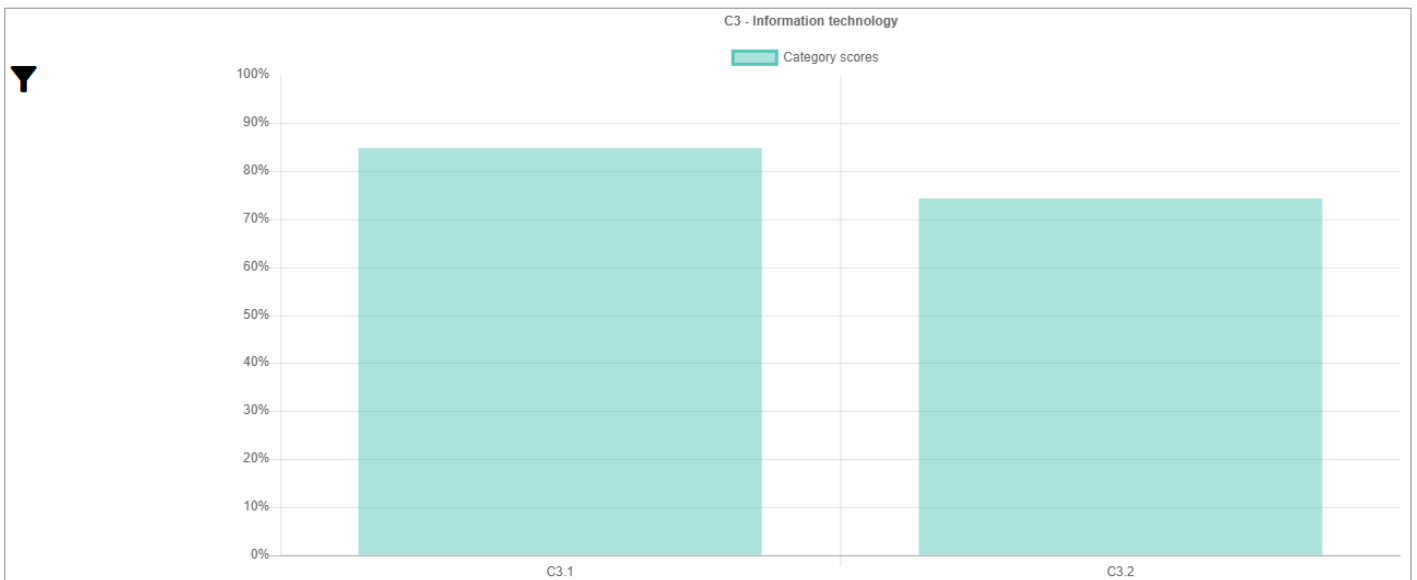
Viewing score details

Mouseover the category in which you are interested. A pop-up box is displayed showing the category definition and score:

Viewing sub-category details

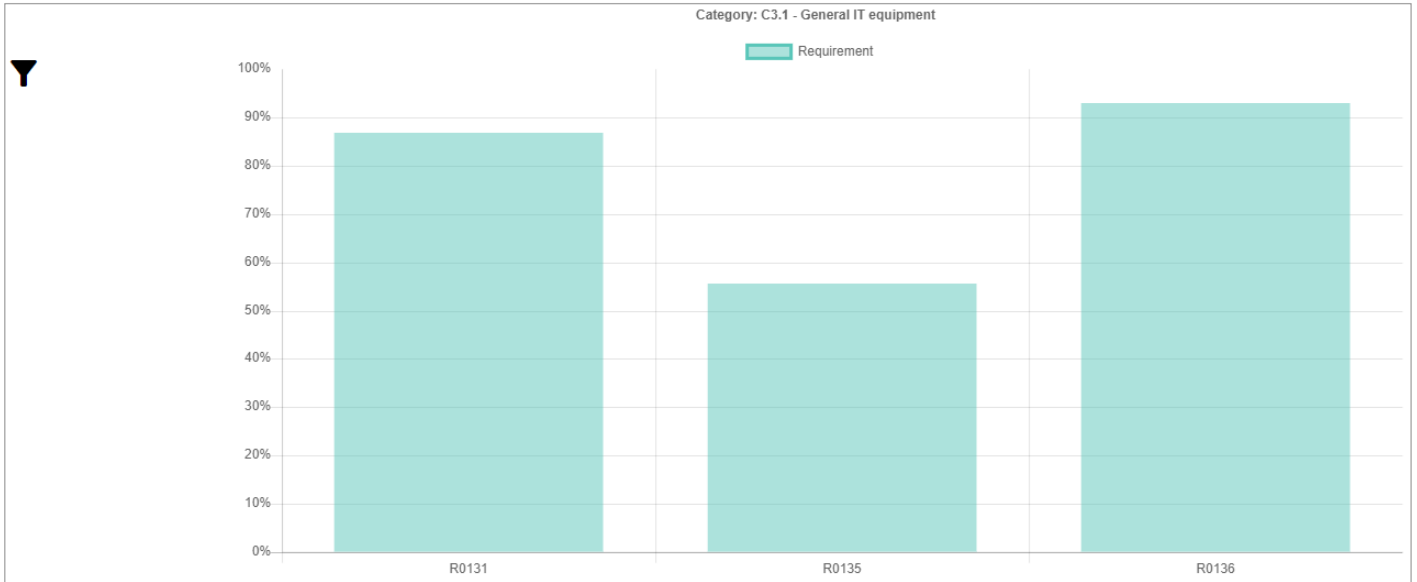Select a category to display any sub-categories for that category and their scores:

ℹ️ You can filter, change the chart style, export, and view a sub-category's definition and score using this chart in the same way as for the main chart. You can return to the main chart at any time by selecting **Back**.

Viewing requirements details

Select a category/sub-category to display the requirements for that category/sub-category and their scores:

ℹ️ You can filter, change the chart style, export, and view a requirement's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.

Select a requirement score to display any sub-requirements for that requirement and their scores:
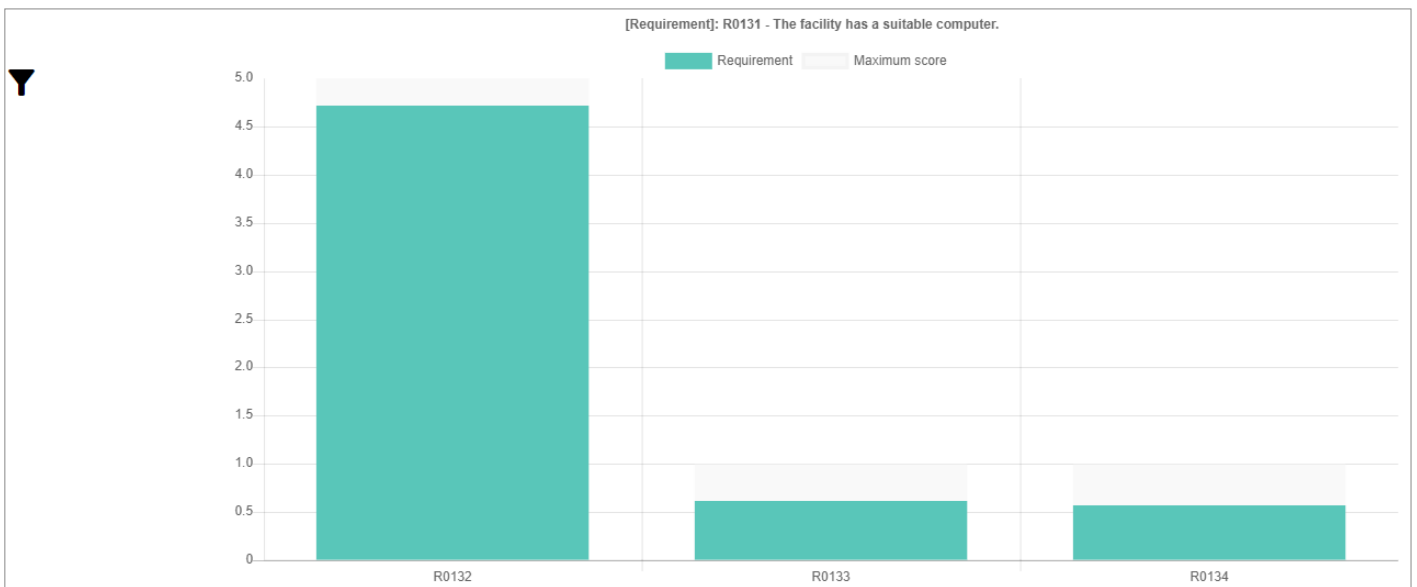
ℹ️ You can filter, change the chart style, export, and view a sub-requirement's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.

Select a requirement or sub-requirement score to view its details, including the questions used to assess whether the requirement has been met and its score:

R0132 - **The facility has a functional computer.** - 4.7222222222222222222222222222/5

Category: C3.1 - General IT equipment; Criteria: E4 - Facility infrastructure and equipment

Questions

L8.2 - Information technology - Q154 Does the office have a functional computer? [s]

ℹ️ You can return to the previous graph at any time by selecting **Back**.

Using the *AQE* report

The *AQE* report shows the system indicator scores (Availability, Quality, Efficiency) for a selected assessment, state, supply chain level, or location. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by supply chain level, Administrative Unit (AU), location, category, assessment, year, and/or criterion type.	84
Change the chart style	Allows you to change the style of the report chart presented.	85
Export the report	Allows you to export the report to a Microsoft Excel file.	85
View score details	Allows you to view the score for a selected indicator.	85
View requirements details	Allows you to drill down into the requirement scores, the requirement definitions, and the questions that cover each requirement.	85

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- **Supply Chain Level:** select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.

- **Administrative Unit (AU):** select the first-level AU (the state) in which you are interested from the **AU1** drop-down list.
- **Location:** select the location in which you are interested from the **Location** drop-down list.
- **Category:** select the category in which you are interested from the **Latest year** drop-down list.
- **Assessment:** select the assessment in which you are interested from the **Assessment** drop-down list.
- **Year:** select the year in which you are interested from the **Latest year** drop-down list.
- **Criterion type:** select the type of criteria in which you are interested from the **Criterion** type drop-down list.

To apply the filters that you have selected to the heat-map, select **Apply**.

> ⓘ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Changing the report chart style

Select ▼ in the top left of the report to display the filter options, then select the style of report that you want to view from the **Chart type** drop-down list and select **Apply**. The chart automatically updates to the selected style.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.
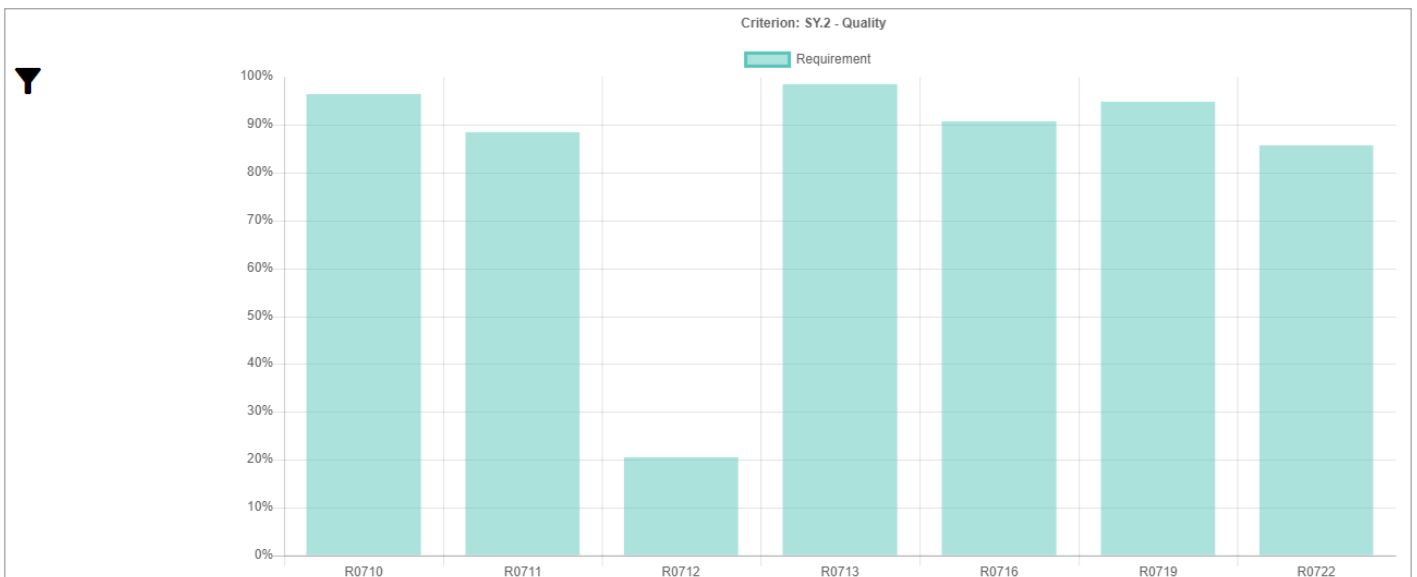
Viewing score details

Mouseover the indicator in which you are interested. A pop-up box is displayed showing the definition and performance score:
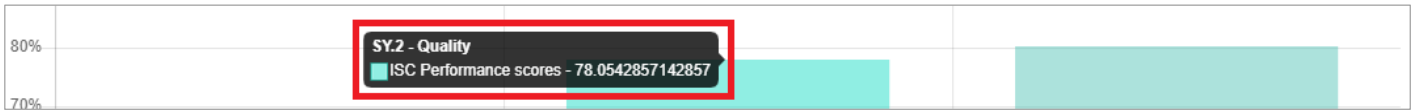
## Viewing requirements details

Select a performance indicator to display the requirements scores for that indicator:

ℹ️ You can filter, change the chart style, export, and view a requirement's definition and score using this chart in the same way as for the main chart. You can return to the main chart at any time by selecting **Back**.

Select a requirement score to display any sub-requirements for that requirement and their scores:
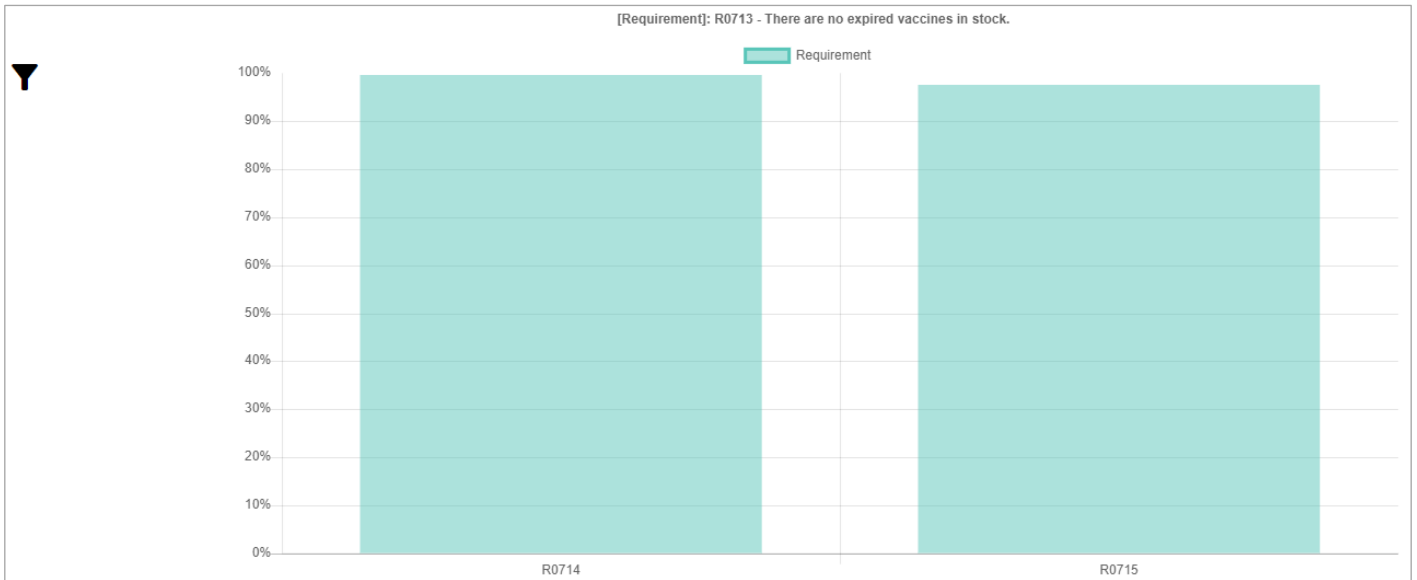
ℹ️ You can filter, change the chart style, export, and view a sub-requirement's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.

Select a requirement or sub-requirement score to view its details, including the questions used to assess whether the requirement has been met and its score:

R0714 - There are no expired vaccines in the cold/freezer rooms. - 100%
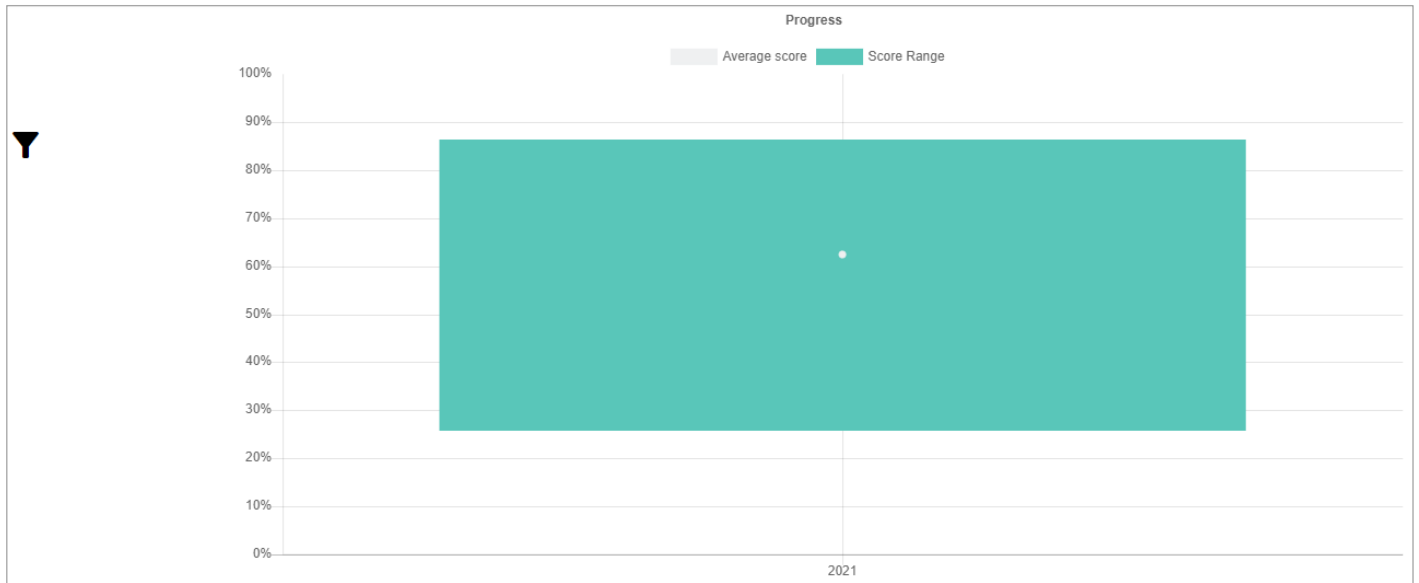
Category: P - Performance; Criteria: SY.2 - Quality

Questions

L2 - Location details - Q21 Does the facility have any vaccine cold rooms and/or freezer rooms?
L14.5 - Contents - Q434 Are there any expired vials in the cold/freezer rooms? [s]

ℹ️ You can return to the previous graph at any time by selecting **Back**.

Using the *Progress* report

The *Progress* report shows the progress over a year for a selected assessment, state, supply chain level, or location. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by supply chain level, Administrative Unit (AU), location, criterion, and/or category.	87
Export the report	Allows you to export the report to a Microsoft Excel file.	87
View score details	Allows you to view the range and average scores.	88
View a year heat-map	Allows you display a Heat-map showing the criteria and category scores the year.	88

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- **Supply Chain Level:** select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- **Administrative Unit (AU):** select the first-level AU (the state) in which you are interested from the **AU1** drop-down list.
- **Location:** select the location in which you are interested from the **Location** drop-down list.
- **Category:** select the year in which you are interested from the **Latest year** drop-down list.
- **Category:** select the year in which you are interested from the **Latest year** drop-down list.

To apply the filters that you have selected to the heat-map, select **Apply**.

ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.

Viewing score details

Mouseover the range score or average score point. A pop-up box is displayed showing the score:

| 60% | | 2021
■ Average score - 62.54328 | |

Viewing a year Heat-map

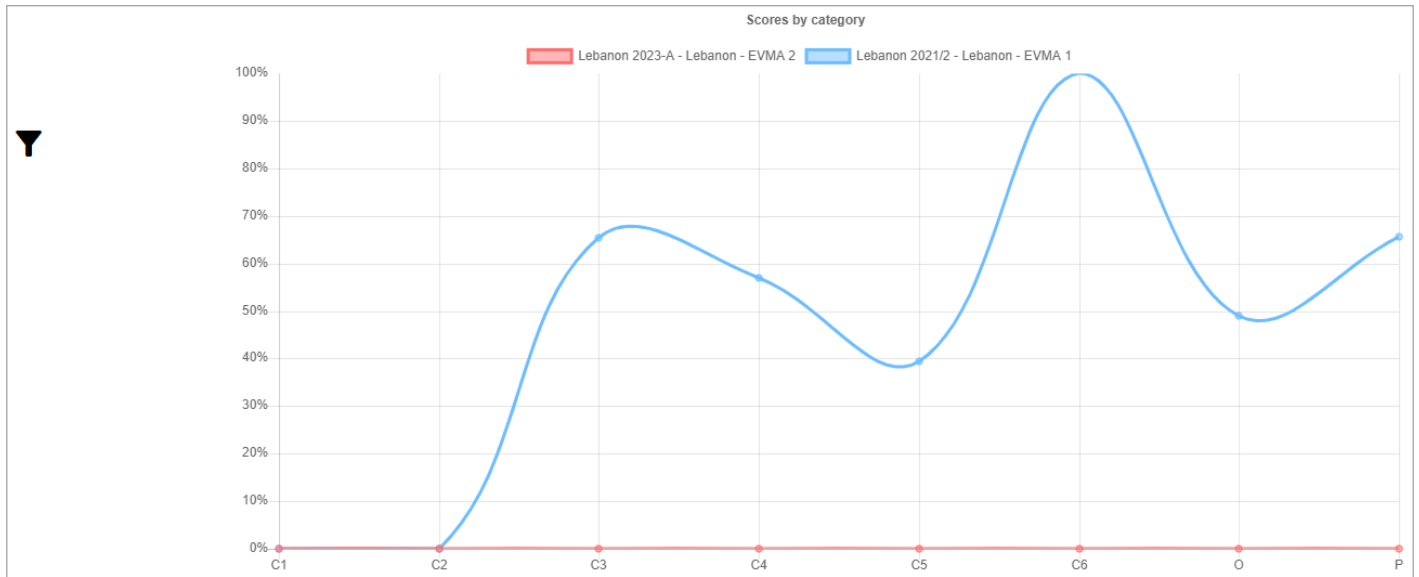Select the score range or average score in the graph. The Heat-map is displayed:

Total number of locations included: 125

		Infrastructure	Equipment	Information technology	Human resources	Policies & procedures	Financial resources			TOTAL
		C1	C2	C3	C4	C5	C6	OUTPUTS	PERFORMANCE	
Vaccine arrivals	E1									
Temperature management	E2			73	65	63		45	60	59
Storage and transportation capacity	E3	100	62		96	45	100	72	100	67
Facility infrastructure and equipment	E4	73	71	85			100	80		76
Maintenance and repair	E5			26	50	36	100	54	82	54
Stock management	E6			79	66	54		68	17	64
Distribution of vaccines and dry goods	E7		96	0	58	28	100	71	94	64
Vaccine management	E8				87	50		79		76
Waste management	E9		78		50	68	100	36	92	57
Annual needs forecasting	M1				78	33		73	42	63
Annual work planning	M2				41	24	79	39	91	46
Supportive supervision	M3	85	92	68	50	38	100	53		57
iSC performance monitoring	M4			87	47	53		54		54
TOTAL		74	72	76	59	45	80	62	62	63

ℹ️ You can use the Heat-map in the same way as the *Heat-map* report (see page 75). You can return to the main chart at any time by selecting **Back**.

Using the *Comparison* report

The *Comparison* report shows a comparison of the criteria and category scores of two selected assessments. You can:

Action	Description	See Page
Filter the report	Allows you to select the assessments that you want to compare and to filter the report by supply chain level, state, location, criterion, category, and/or criterion type.	89
Export the report	Allows you to export the report to a Microsoft Excel file.	89
View score details	Allows you to view the score for a specific criterion or category.	90

Filtering the report

Select ▼ in the top left of the report to display the filter options. First, define the scope of the report by selecting the assessments that you want to compare using the two **Assessment** drop-down lists in the filter box.

You can also filter the report by:

- Supply Chain Level: select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- Administrative Unit (AU): select the first-level AU (the state) in which you are interested from the **AU1** drop-down list.
- Location: select the location in which you are interested from the **Location** drop-down list.
- Criterion: select the criterion in which you are interested from the **Location** drop-down list.
- Category: select the category in which you are interested from the **Location** drop-down list.
- Criterion type: select the type of criteria in which you are interested from the **Criterion type** drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

> ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.

Viewing the score details

Mouseover point in the graph that represents the criterion or category in which you are interested. A pop-up box is displayed showing the score details:
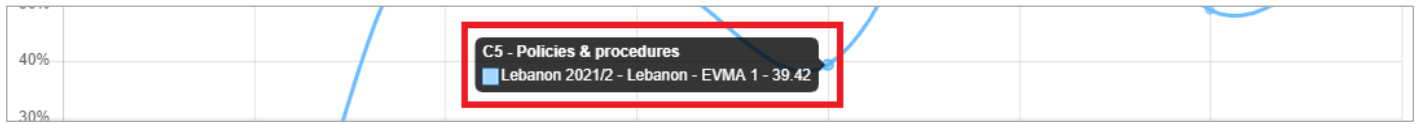
Using the *Compare overall* report

The *Compare overall* report shows a comparison of the criteria and category scores in a selected assessment, state, or location. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by supply chain level, state, location, assessment, year, and/or criterion type.	90
Export the report	Allows you to export the report to a Microsoft Excel file.	91
View score details	Allows you to view the score for a specific Administrative Unit (AU).	91
View criterion details	Allows you to view the definition of a selected criterion and its score.	91
View sub-criterion details	Allows you to drill down into the scores for any sub-criteria and view their definitions.	92
View requirements details	Allows you to drill down into the requirement scores, the requirement definitions, and the questions that cover each requirement.	92

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- Supply Chain Level: select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- Administrative Unit (AU): select the first-level AU (the state) in which you are interested from the **AU1** drop-down list.
- Location: select the location in which you are interested from the **Location** drop-down list.

- Criterion: select the criterion in which you are interested from the **Criterion** drop-down list.
- Category: select the category in which you are interested from the **Category** drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Exporting the report

Select 🔻 in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.
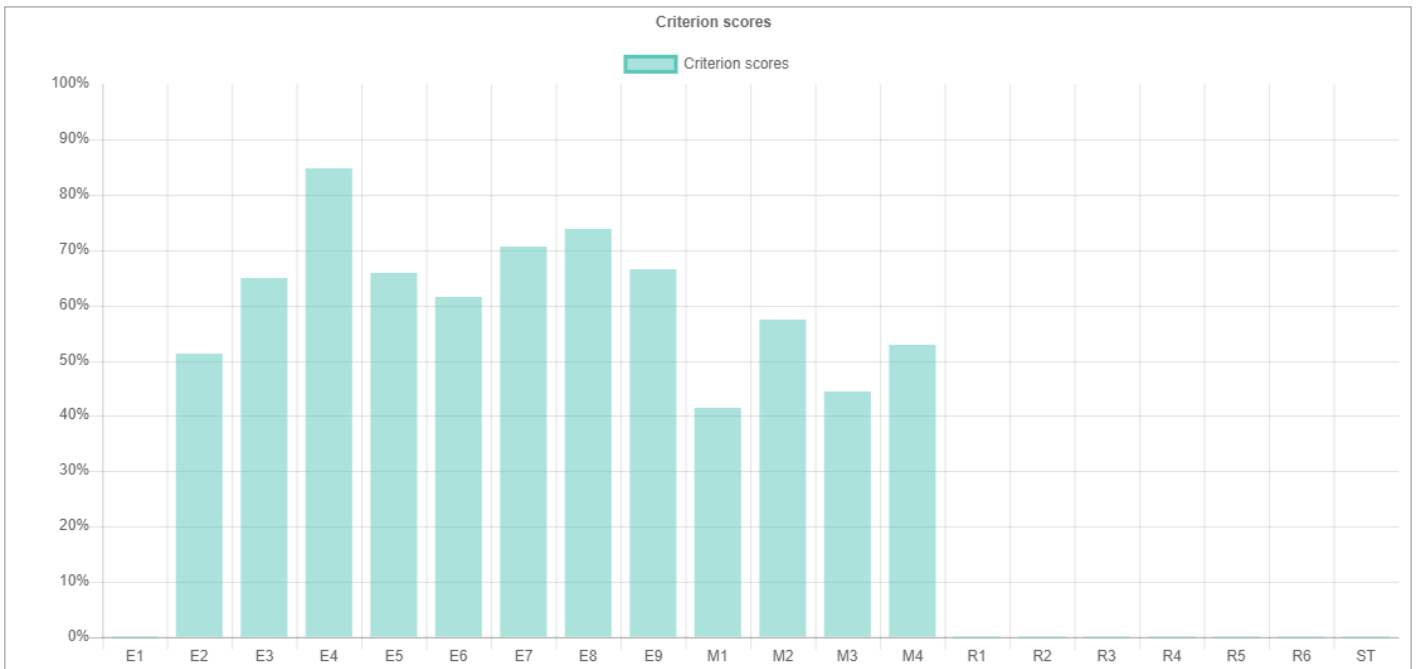
Viewing score details

Mouseover the Administrative Unit (AU) in which you are interested. A pop-up box is displayed showing the overall score:
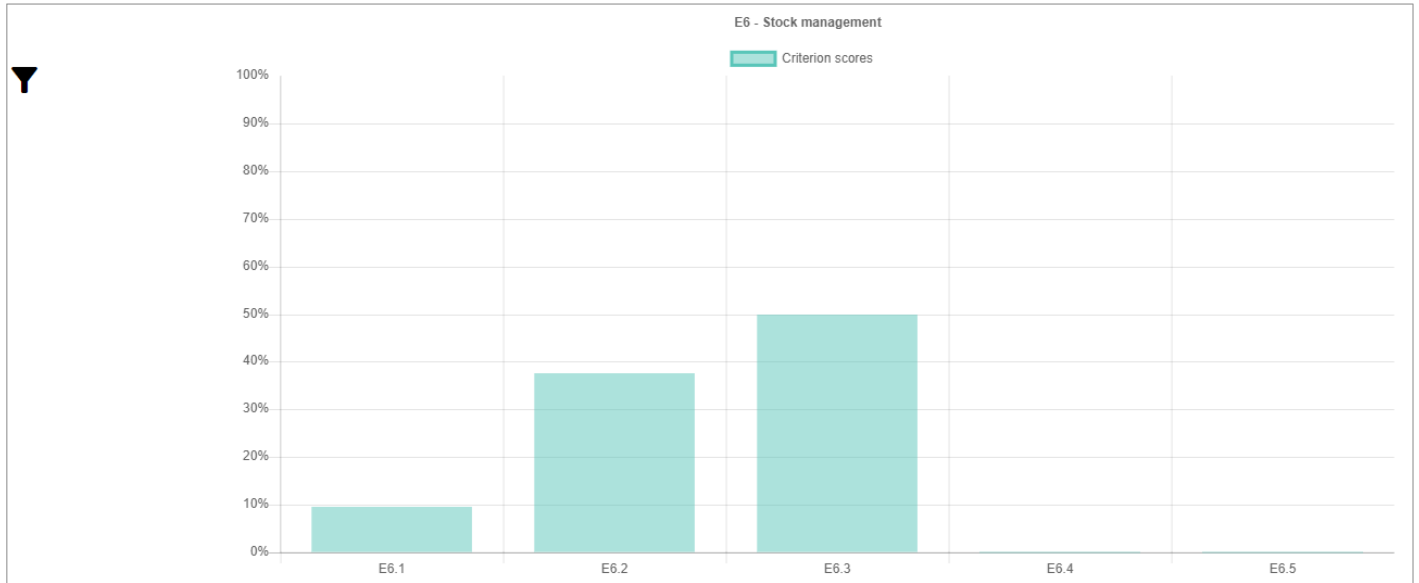

Viewing criterion details

Select an overall score to display the criterion scores for that overall score:

ℹ️ You can filter, export, and view a criterion's definition and score using this chart in the same way as for the main chart. You can return to the main chart at any time by selecting **Back**.
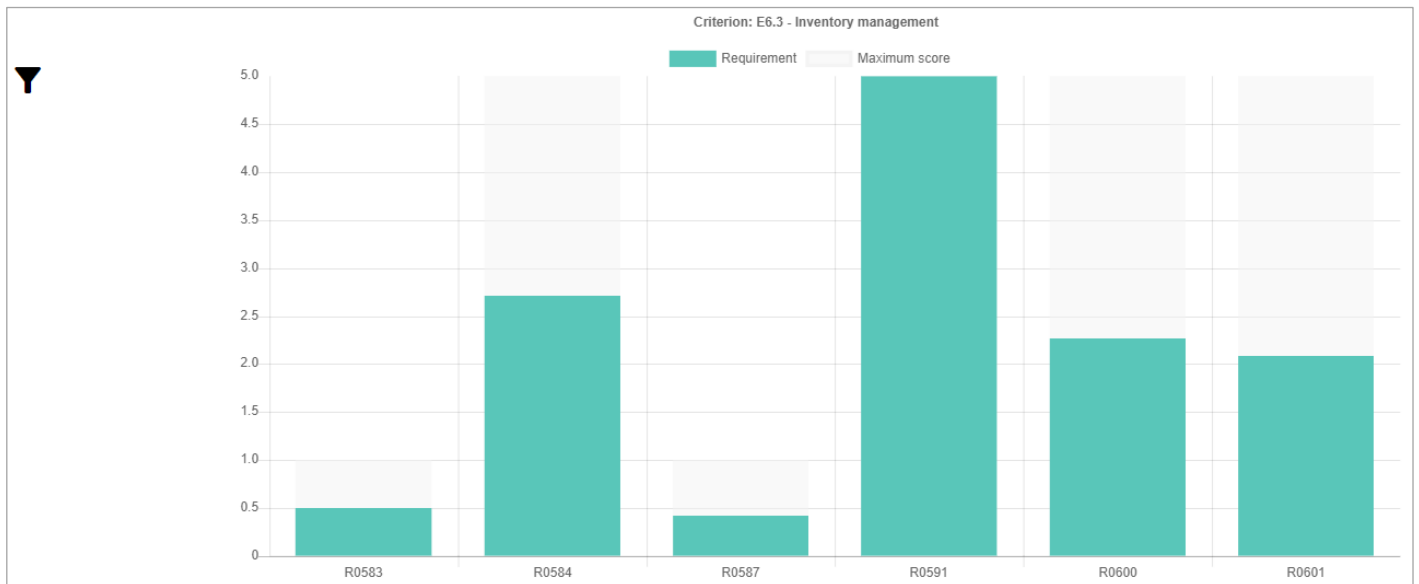
Viewing sub-criterion details

Select the criterion score in which you are interested to display any sub-criterion for that criterion and their scores:

ℹ️ You can filter, export, and view a sub-criterion's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.
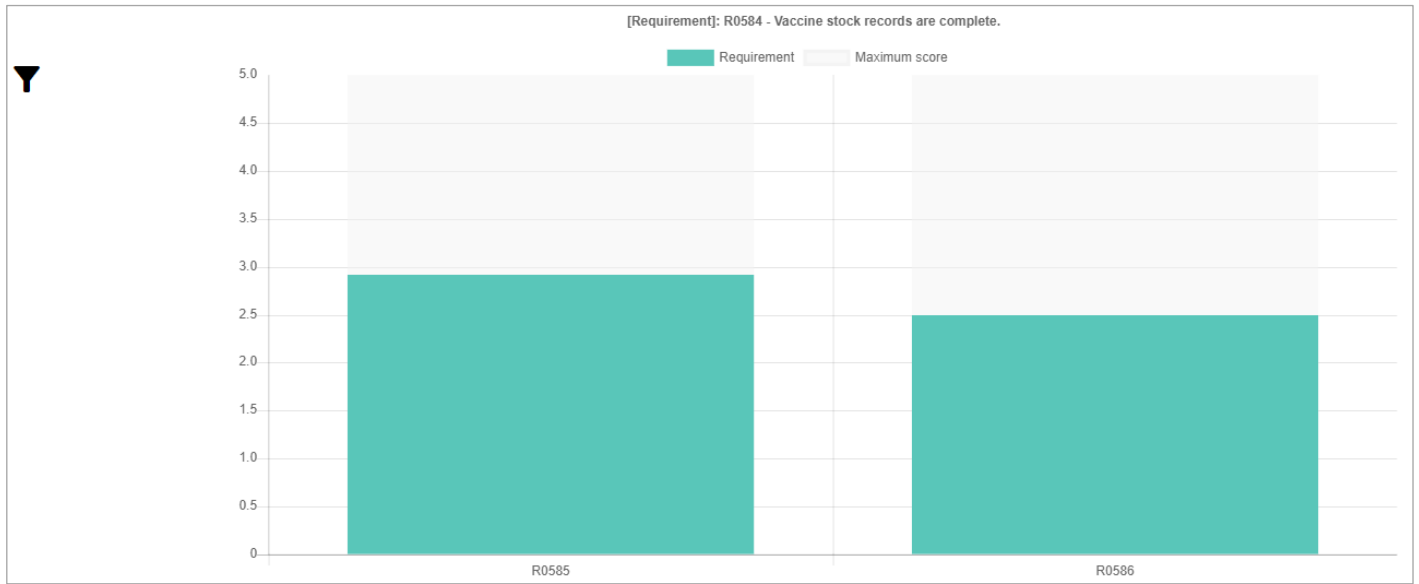
Viewing requirements details

Select a criterion/sub-criterion score to display the requirements for that criterion/sub-criterion and their scores:

ℹ️ You can filter, export, and view a requirement's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.

Select a requirement score to display any sub-requirements for that requirement and their scores:

ℹ️ You can filter, export, and view a sub-requirement's definition and score using this chart in the same way as for the main chart. You can return to the previous chart at any time by selecting **Back**.

Select a requirement or sub-requirement score to view its details, including the questions used to assess whether the requirement has been met and its score:

ℹ️ You can return to the previous graph at any time by selecting **Back**.

Using the *Compare two* report

The *Compare two* report shows a comparison of the criteria and category scores of two Administrative Units (AUs) in an assessment. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by assessment and/or location.	94
Export the report	Allows you to export the report to a Microsoft Excel file.	94
View score details	Allows you to view the score for a specific criterion or category.	95

Filtering the report

Select ▼ in the top left of the report to display the filter options. Select the following to define the scope of the report:

- Scope: select the Administrative Unit level that you want to compare from the **Scope** drop-down list.
- Administrative Unit (AU): select the AUs that you want to compare from the two **AU** drop-down lists.

You can also filter the report by:

- Supply Chain Level: select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- Location: select the location in which you are interested from the **Location** drop-down list.
- Criterion: select the criterion in which you are interested from the **Criterion** drop-down list.
- Category: select the category in which you are interested from the **Category** drop-down list.
- Assessment: select the assessment in which you are interested from the **Assessment** drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

> ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a

Microsoft Excel file.

Viewing score details

Mouseover the point in the graph that represents the criterion or category in which you are interested. A pop-up box is displayed showing the score details:

Using the *Scores* report
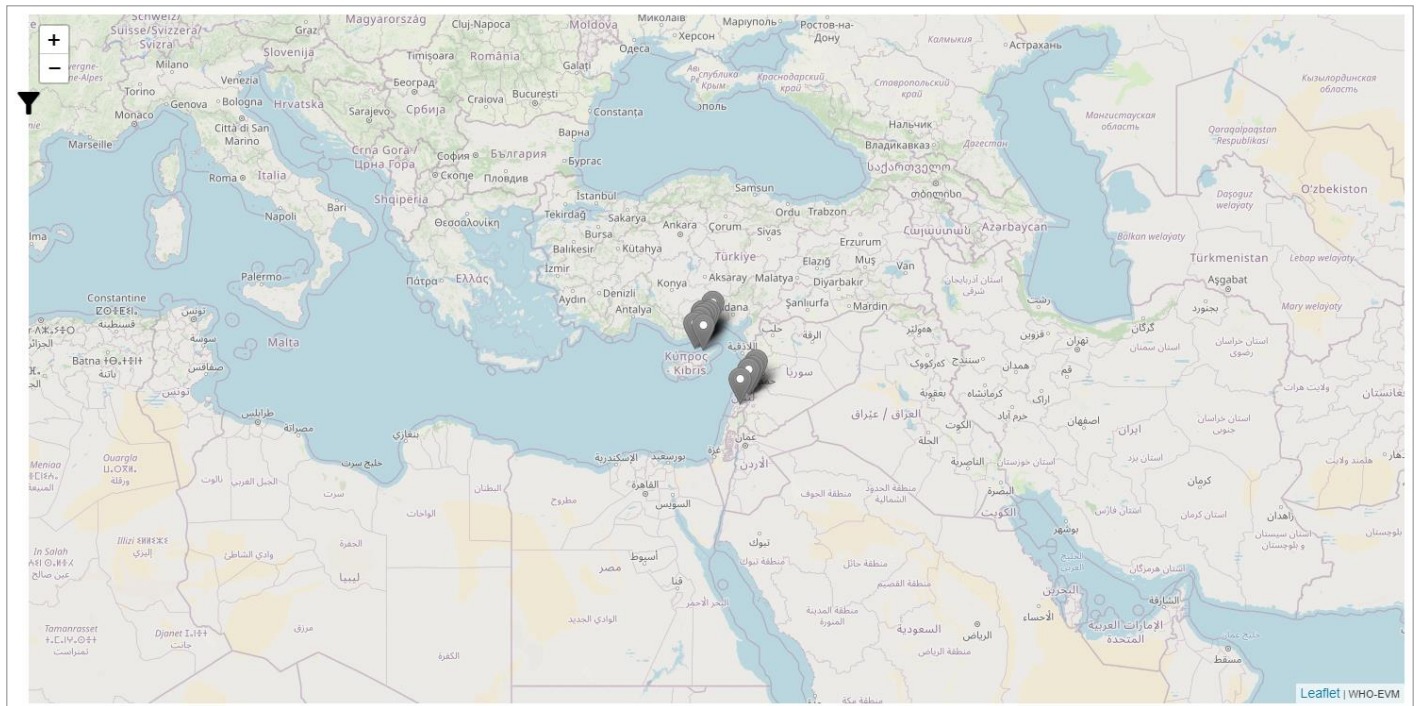
The *Scores* report shows a map of locations covered by assessment, state, and/or supply chain level, with their criterion and/or category scores. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by assessment and/or location.	95
View score details	Allows you to view the criteria and category scores for a specific location.	96
View a location Heat-map	Allows you display a Heat-map showing the criteria and category scores for a specific location.	96

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- Supply Chain Level: select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- Administrative Unit (AU): select the first-level AU (the state) in which you are interested from the **AU1** drop-down list.

- **Location:** select the location in which you are interested from the **Location** drop-down list.
- **Criterion:** select the criterion in which you are interested from the **Criterion** drop-down list.
- **Category:** select the category in which you are interested from the **Category** drop-down list.
- **Assessment:** select the assessment in which you are interested from the **Assessment** drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

> ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Viewing score details

Mouseover the pin in the map that represents the location in which you are interested. A pop-up box is displayed showing the score details:

## Viewing a location Heat-map

Select the pin in the map that represents the location in which you are interested. The Heat-map is displayed:

		Infrastructure	Equipment	Information technology	Human resources	Policies & procedures	Financial resources			TOTAL
		C1	C2	C3	C4	C5	C6	OUTPUTS	PERFORMANCE	
Vaccine arrivals	E1									
Temperature management	E2			73	65	63		45	60	59
Storage and transportation capacity	E3	100	62		96	45	100	72	100	67
Facility infrastructure and equipment	E4	73	71	85			100	80		76
Maintenance and repair	E5			26	50	36	100	54	82	54
Stock management	E6			79	66	54		68	17	64
Distribution of vaccines and dry goods	E7		96	0	58	28	100	71	94	64
Vaccine management	E8				87	50		79		76
Waste management	E9		78		50	68	100	36	92	57
Annual needs forecasting	M1				78	33		73	42	63
Annual work planning	M2				41	24	79	39	91	46
Supportive supervision	M3	85	92	68	50	38	100	53		57
iSC performance monitoring	M4			87	47	53		54		54
TOTAL		74	72	76	59	45	80	62	62	**63**

> ℹ️ You can use the Heat-map in the same way as the *Heat-map* report (see page 75). You can return to the map at any time by selecting **Back**.

Using the *Capacity* report
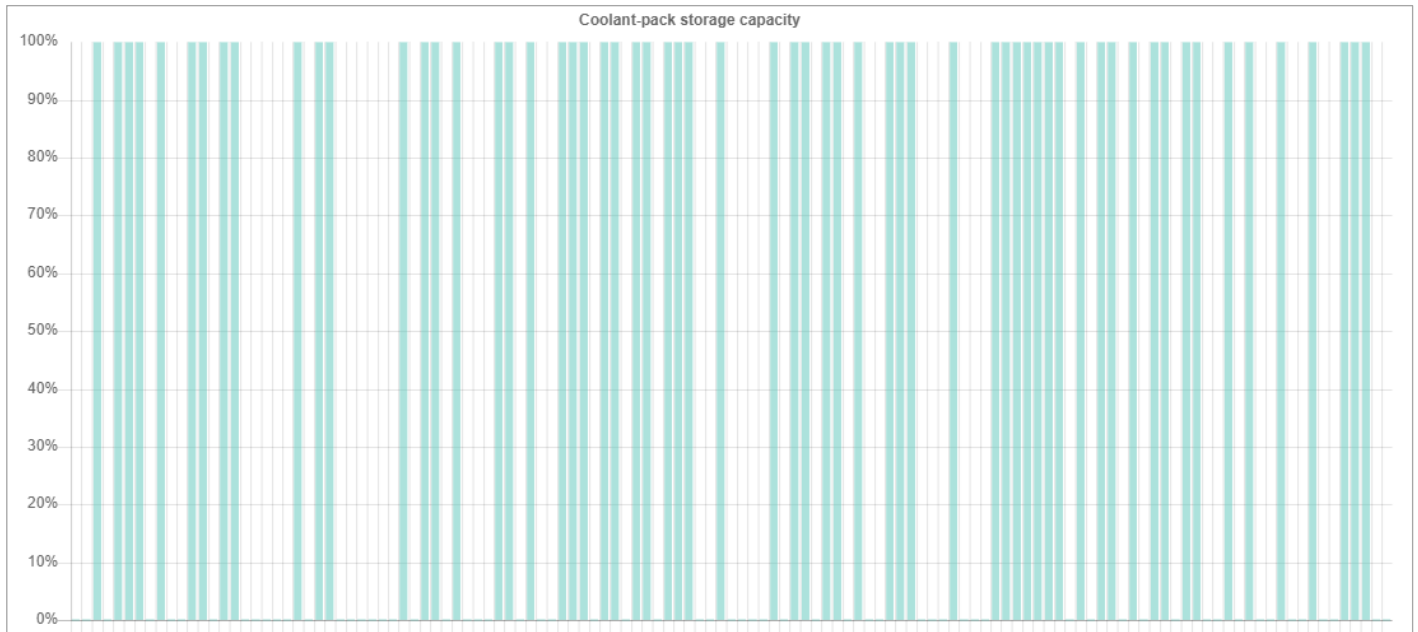
The *Capacity* report shows the available and required storage capacity by assessment, state, location, and/or supply chain level, broken down by:

- Positive storage
- Negative storage
- Dry goods storage
- Coolant-pack storage
- Refrigerated transport
- Non-refrigerated transport

You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by state, location, and/or assessment.	97
Export the report	Allows you to export the report to a Microsoft Excel file.	98
View score details	Allows you to view the score for a specific capacity.	98

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- Supply Chain Level: select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- Administrative Unit (AU): select the first-level AU (the state) in which you are interested from the **AU1** drop-down list.
- Location: select the location in which you are interested from the **Location** drop-down list.
- Assessment: select the assessment in which you are interested from the **Assessment** drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

ⓘ   You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Exporting the report

Select ▼ in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.

Viewing score details

Mouseover the location capacity in which you are interested. A pop-up box is displayed showing the score details:
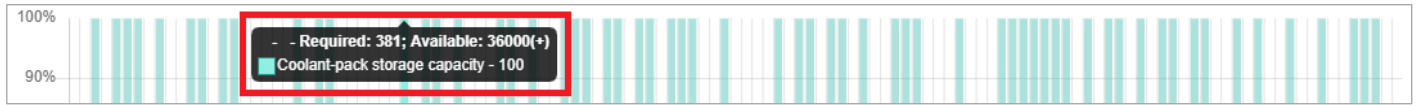
Using the *Stock Status* report

The *Stock Status* report shows the available doses supplied per surviving infant by assessment or location. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by assessment and/or location.	98
Export the report	Allows you to export the report to a Microsoft Excel file.	99
View score details	Allows you to view the score for a specific vaccine.	99

Filtering the report

Select ▼ in the top left of the report to display the filter options. You can filter the report by:

- Assessment: select the assessment in which you are interested from the **Assessment** drop-down list.
- Location: select the location in which you are interested from the **Location** drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

ℹ️ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box.

Exporting the report

Select 🔻 in the top left of the report to display the filter options, then select **Export**. The report is automatically downloaded as a Microsoft Excel file.

Viewing score details

Mouseover the bar that represents the vaccine in which you are interested. A pop-up box is displayed showing the score details:
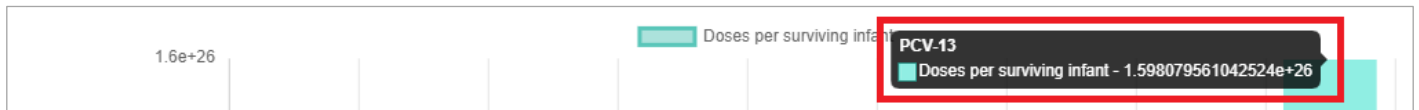
1.6e+26   Doses per surviving infant

PCV-13
Doses per surviving infant - 1.598079561042524e+26

Using the *Comparison Heat map* report

Comparison Heat map:

		Infrastructure	Equipment	Information technology	Human resources	Policies & procedures	Financial resources			TOTAL
		C1	C2	C3	C4	C5	C6	OUTPUTS	PERFORMANCE	
Vaccine arrivals	E1									
Temperature management	E2									
Storage and transportation capacity	E3									
Facility infrastructure and equipment	E4									
Maintenance and repair	E5									
Stock management	E6									
Distribution of vaccines and dry goods	E7									
Vaccine management	E8									
Waste management	E9									
Annual needs forecasting	M1									
Annual work planning	M2									
Supportive supervision	M3									
iSC performance monitoring	M4									
Infrastructure management	R1									
Equipment management	R2									
IT systems management	R3									
Human resources management	R4									
Knowledge management	R5									
Financial resources management	R6									
Strategic planning	ST									
TOTAL										

The *Comparison Heat map* report shows a comparison of the criteria and category scores for two selected assessments. You can:

Action	Description	See Page
Filter the report	Allows you to filter the report by supply chain level, Administrative Unit (AU), location, assessment, and/or criterion type.	100

Filtering the report

Select ▼ in the top left of the report to display the filter options. First, define the scope of the report by selecting the following for each assessment that you want to compare:

- Assessment: select the assessment in which you are interested from the **Assessment** drop-down list.
- Administrative Unit (AU): select the AU(s) in which you are interested from the **AU** drop-down lists.
- Location: select the location in which you are interested from the **Location** drop-down list.

You can also filter the report by:

- Supply Chain Level: select the **Level** drop-down list, then tick the boxes for level supply chain levels in which you are interested.
- Criterion type: select the type of criteria in which you are interested from the **Criterion type** drop-down list.

To apply the filters that you have selected to the report, select **Apply**.

> ℹ You can close the filter box without applying any filters at any time by selecting ✖ in the top right of the filter box and can use the Heat-map in the same way as the *Heat-map* report (see page 75).

Completing an assessment

This chapter describes how to complete EVM assessments. It is organised into the following sections:

Section	Description	See Page
Marking an assessment as complete	How to mark EVM assessments as 'complete' so that they can be validated by the EVM Secretariat.	101
Generating an EVM report	How to generate reports of the data captured by EVM assessments for future reference and review.	102

Marking an assessment as complete

The EVM Secretariat, managed by WHO and UNICEF, works to ensure the integrity and reliability of EVM assessment scores. Where a country's national EVM assessment score will be referenced by WHO, UNICEF and core immunisation partners for reporting purposes, specific rules apply as to the assessment parameters that must be used. For validation by the EVM Secretariat, the following assessment parameters must be selected when the assessment is created (see Customising and creating assessments on page 46):

- **The Type** is *Full*
- **The Range** is *National*
- **The Sample** is *Multiple* or *Single*
- **The Scope** is *All*

Once an assessment that meets the above criteria has been completed, the National Manager can choose to mark the assessment as complete. Once this has been done, it can then be validated by the EVM Secretariat. Validation is dependent on the following factors:

1. All facilities included in the random site selection have been fully assessed and are included in the assessment scores.
2. No discrepancies in the site selection are observed (for example, excluding large numbers of health facilities or AUs).
3. No excessive editing of uploaded location questionnaires by managers is observed.

Once an assessment has been validated, it is also marked as complete by the EVM Secretariat.

> ❗ Assessments that are not marked as complete are considered as being for the country's internal use only and are therefore not reviewed by the EVM Secretariat.

1. Sign into your EVM account (see page 20).
2. Ensure that you are viewing the country that you wish to manage (see page 22).
3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed:

4. Select **Mark as complete** (   ) in the row containing the assessment you want to mark as complete.

5. A message is displayed asking if you want to proceed with marking the assessment as complete. Select **Yes** to close the message and mark the assessment as complete.

Marking an assessment as incomplete

If you have accidentally marked an assessment as complete and want to revert it, you can mark the assessment as incomplete.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed.

4. Select **Mark as incomplete** (   ) in the row containing the assessment you want to mark as incomplete.

5. A message is displayed asking if you want to proceed with marking the assessment as incomplete. Select **Yes** to close the message and mark the assessment as incomplete.

Generating an EVM report

Once an assessment has been marked as complete, an EVM report template can be generated for future reference and review.

1. Sign into your EVM account (see page 20).

2. Ensure that you are viewing the country that you wish to manage (see page 22).

3. Select the menu in the top left of the screen, then select **Assessment > Manage Assessments**. The *Manage Assessments* screen is displayed.

4. Select **Generate report** (   ). The *Choose report* screen is displayed:
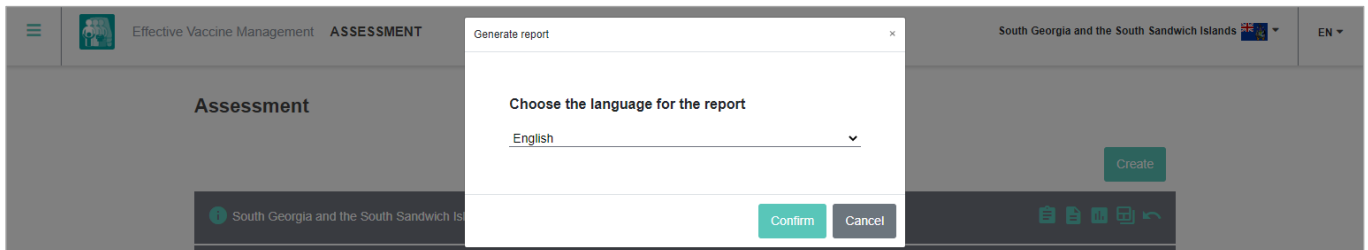
5. Using the **Choose the language for the report** drop-down list. Select the language in which you want to generate the report.

6. Select **Confirm**. The EVM report template is automatically downloaded as a Microsoft Word file.

Developing a continuous Improvement Plan (cIP)

For guidance to countries on how to develop a continuous Immunisation Supply Chain (ISC) improvement plan, refer to the WHO-UNICEF Guidance Note on How to Develop a Continuous Improvement Plan (cIP):

https://www.who.int/immunization/documents/WHO_IVB_18.10

Its purpose is to help countries build a case for supply chain investments and develop an improvement plan that engages relevant stakeholders, thus setting the immunisation programme on a path for successful implementation. The Guidance Note includes:

- An overview of the cIP development process, including who should be involved, when the plan should be drafted, and how best to gather the required inputs and feedback.

- Strategies for aligning EVM assessment outputs with national immunisation and health sector planning and financing mechanisms, such as the comprehensive Multi-Year Plan for immunisation (cMYP), application for support from Gavi (a global vaccine alliance that brings together public and private sectors with the shared goal of saving lives and protecting people's health by increasing equitable and sustainable use of vaccines) for health system strengthening, the national health sector improvement strategy, and other health sector strategies and plans.

- Guidance on preparing a cIP, to include a five-year strategy and a yearly operational plan that can be used to allocate responsibilities and map progress towards a common vision.

- Suggestions on how to develop a budget and finance the cIP to ensure sustainability and identify resource gaps.

Countries may be familiar with the previous EVM improvement plan process that immediately followed an EVM assessment. Whereas the previous EVM improvement plan was designed to address certain short-term supply chain deficiencies, the continuous EVM improvement plan described in the Guidance Note is designed to be more strategic and inclusive of a wider set of stakeholders who can help reveal the root causes of supply chain problems and mobilise human and financial resources to address them.

There are four steps to the comprehensive EVM approach: assess, plan, implement and monitor, which repeat in a cycle of continuous learning and innovation:
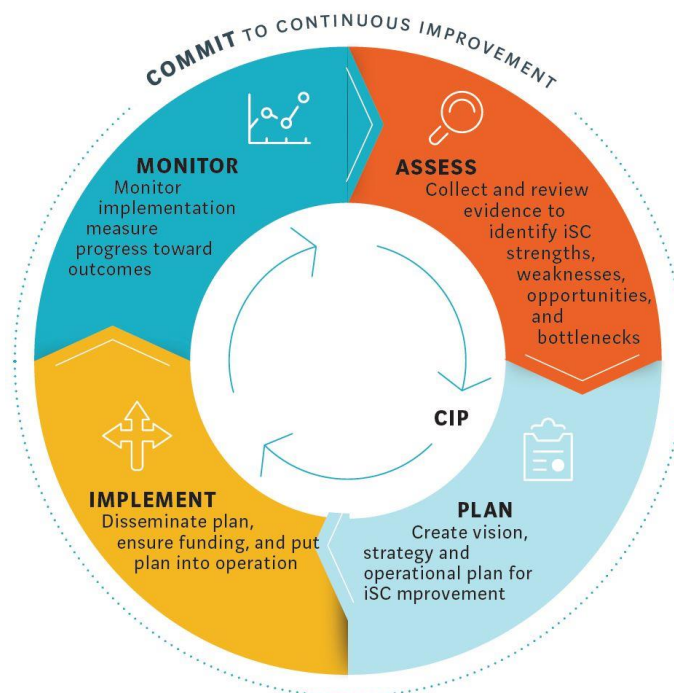
Troubleshooting

This chapter provides solutions for common Manager issues. The following issues are covered:

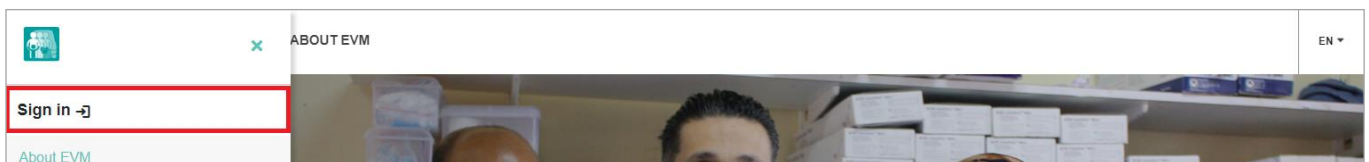| Issue	See Page
I've forgotten my EVM account email address	104
I've forgotten my EVM account password	104
Nothing happens when I import units and locations	105
An error message is displayed when I import units and locations	105
I cannot create an assessment	105
Sections L3 and L4 of the questionnaires are missing some or all vaccines	105

> ℹ️ If you are experiencing an issue not described here or the solution described does not work for you, please escalate the issue to the EVM Global Administrator by emailing them at evmadmin@who.int.

I've forgotten my EVM account email address

Contact the EVM Global Administrator at evmadmin@who.int with your name, organisation, and job title. The EVM Global Administrator will review your request and notify you of the email address registered for your EVM account.

I've forgotten my EVM account password

1. Open the EVM website:

   https://extranet.who.int/evm2/web/Public

2. Select the menu in the top left of the screen, then select **Sign in**:

3. If you have more than one Microsoft account, select the email address that you used to request EVM access or select **Use another account** to enter the email address.

4. Select **Forgotten my password**:
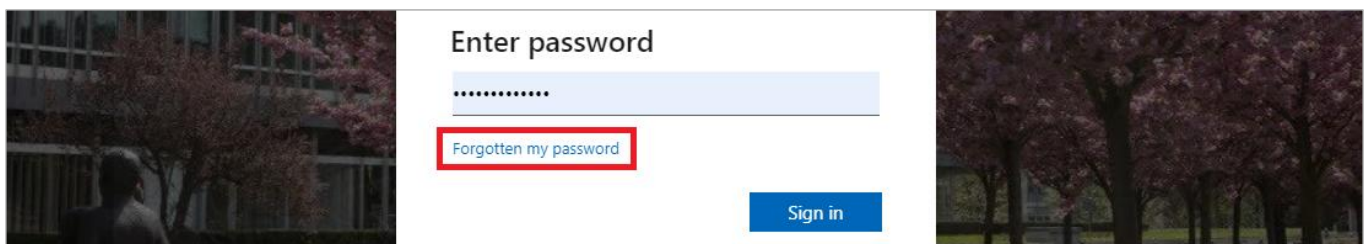
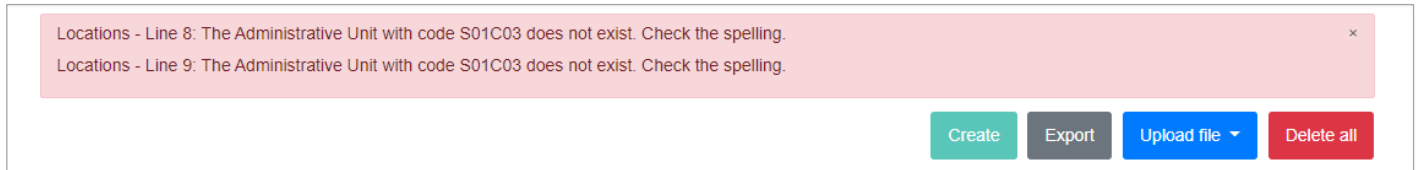5. Follow the on-screen instructions to reset your password.

Nothing happens when I import units and locations

Please checking the following:

- Ensure that you have followed the import instructions. See Exporting and Importing AUs and locations on page 28.
- Log out of your EVM account on the EVM website and sign in again. See Signing into your EVM account on page 20.

An error message is displayed when I import units and locations

If you see an error message similar to the following:

> Locations - Line 8: The Administrative Unit with code S01C03 does not exist. Check the spelling.
> Locations - Line 9: The Administrative Unit with code S01C03 does not exist. Check the spelling.
>
> Create   Export   Upload file ▾   Delete all

ensure that you have selected the values in the **Administrative Unit Code** column in the **Units** worksheet of the LocationsExport.xlsx file that you are importing using the drop-down lists after you have completed the **Code** column in the **Units** worksheet and that you have not manually entered the values.

If you see any other error message, the EVM website may be experiencing technical difficulties. Contact the EVM Global Administrator at evmadmin@who.int.

I cannot create an assessment

If the **Create assessment** button is missing from the **Review** tab of the Create Assessment wizard, you have not completed all of the requirements of the **Select locations** or **Selection parameters** tab, as appropriate to the type of assessment that you are creating. See Select locations / Selection parameters on page 51.

Sections L3 and L4 of the questionnaires are missing some or all vaccines

When you create an assessment, a copy of the vaccines and tracers for the country is made and included as part of the assessment. If you made changes to the vaccines and tracers after you created the assessment, the changes will not be made to the assessment, and therefore will not be included in downloaded questionnaires.

Check whether changes were made to the vaccines and tracers after you created the assessment. If they were, create a new assessment (see Customising and creating assessments on page 46) and reassign the questionnaires (see Assigning locations to Assessors on page 58).