THE GLOBAL FUND

Grant-making

How to
perform grant-making related steps
in the Partner Portal

Home Page

Definition of Key GED Terms in Partner Portal

End-to-end high level process

Additional resources

Before you begin

Click <u>here</u> for information on "The purpose of this guide"

Click <u>here</u> for instructions on "How to use this guide"

THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES
Purpose of this guide

The **grant-making** process translates the funding request into grants ready for implementation. The **Technical Review Panel (TRP)** reviews the funding request and, if it receives a TRP recommendation, the funding request proceeds to grant-making. Grants are negotiated between the Global Fund and the selected Principal Recipient (PR), in consultation with in-country stakeholders and communities. The specifics of the program are registered in documents and submitted for **Grant Approvals Committee (GAC)** review. Once these grant documents are recommended by the GAC and approved by the **Board**, the grant is signed by the Global Fund and the PR and acknowledged by the Country Coordination Mechanism (CCM).

A number of critical grant-making exchanges - including notifications and final document submissions - between PRs and the Global Fund are facilitated through the **Global Fund Partner Portal.**

This document is an interactive guide for **PRs** to understand the **process and system steps involved in receiving and submitting grant-making documents**.

Click [here](#) for instructions on how to use this guide

**THE GLOBAL FUND**

PARTNER PORTAL LEARNING SERIES
How to use this guide

1. To navigate the different sections of this document, click on the tabs to the right.
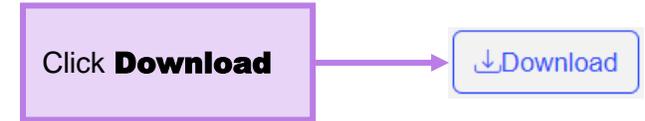
2. On the right side of this page, on the "End-to-end high-level process" tab, the highlighted boxes show the grant-making processes that involve the Partner Portal.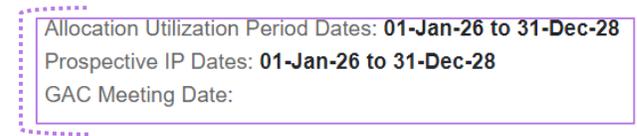 The highlighted boxes indicate PR is involved in this step. In-Portal icon (⧉) indicates this step is in the Portal. Click for system instructions.

Step 3
PR with access rights to the Portal update Grant Entity Data
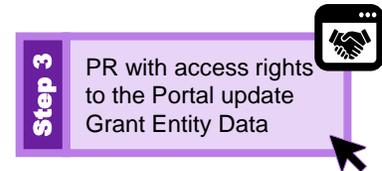
3. To advance to the next step, click on the buttons marked with a purple square

Click **Download** → ↓Download

4. The information in dotted brackets provides additional guidance

Allocation Utilization Period Dates: **01-Jan-26 to 31-Dec-28**
Prospective IP Dates: **01-Jan-26 to 31-Dec-28**
GAC Meeting Date:

5. On the right side of this page, the "Additional resources" tab provides access to extra grant-making resources

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Use of Global Fund Partner Portal for grant-making: Critical engagements between the PRs and Country Teams (CTs) during grant-making (such as notifications, document sharing and submission) are facilitated through the Global Fund Partner Portal. PRs nominate their contacts with grant deliverable access rights (editor or submitter) in the Partner Portal following the Grant Entity Data (GED) processes*.

Key GED Definitions:

Organization information: refers to information about the organization to be captured in the legally-binding documents for the successful execution of grant life cycle processes (such as official name, address and contacts).

Banking Information: provides details of the bank account that will be used to receive disbursements from the Global Fund (such as bank account number and account holder name).

Contacts with Signatory Rights: refer to persons that are duly authorized by the organization to sign or acknowledge legally-binding documents and/or to sign disbursement requests.

Contacts with Notice Rights: refer to the persons that will serve as the contact point for Global Fund notices regarding contractual matters (as per the terms of the relevant Grant Agreement) and/or grant or portfolio-specific correspondences.

Contacts with Access Rights: refers to the person that will have access to the Global Fund Partner Portal to manage GED

Contact with Grant Deliverables Access Rights – Editor: Contacts responsible for accessing, completing, and attaching grant deliverables (e.g., grant-making, pulse checks, PU/DRs) and any supporting documents through the Partner Portal. Editor rights are assigned per grant/portfolio, and one contact can be editor for either one or multiple grants/portfolios.

Contact with Grant Deliverables Access Rights – Submitter: Contacts responsible for submitting grant deliverables (e.g., grant-making, pulse checks, PU/DRs) to the Global Fund through the Partner Portal, in addition to having editor rights (access, complete and attach).

Note:
- At a **minimum,** each grant is required to have **one Submitter**. It is recommended having **two Submitters** per grant.
- Editors and Submitters have access to Grant-making, PU/DRs and Pulse Checks (where applicable). PRs must ensure the appropriate contacts are assigned these rights to be able to engage with one or more of these modules

*For further in-system instructions on GED, refer to the GED Interactive Guide
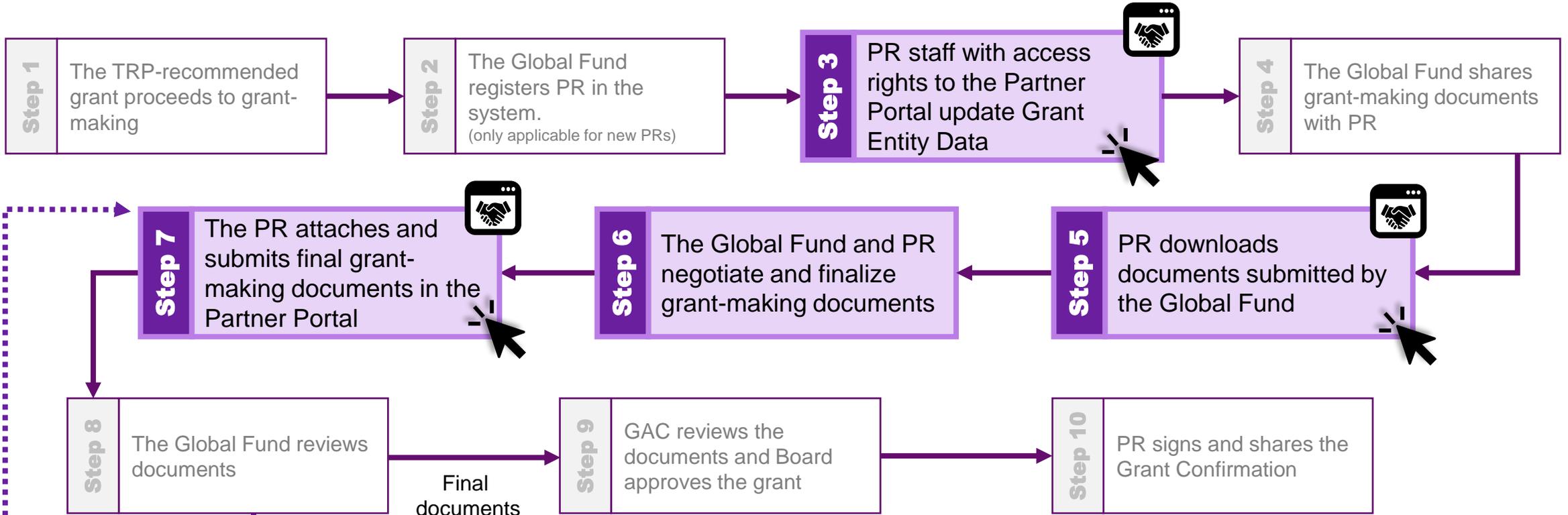
THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES
Grant-making: End-to-end High Level Process

Steps involving PR

Step takes place in Portal – click for instructions

Step 1 — The TRP-recommended grant proceeds to grant-making

Step 2 — The Global Fund registers PR in the system. (only applicable for new PRs)

Step 3 — PR staff with access rights to the Partner Portal update Grant Entity Data

Step 4 — The Global Fund shares grant-making documents with PR

Step 7 — The PR attaches and submits final grant-making documents in the Partner Portal

Step 6 — The Global Fund and PR negotiate and finalize grant-making documents

Step 5 — PR downloads documents submitted by the Global Fund

Step 8 — The Global Fund reviews documents

Final documents

Step 9 — GAC reviews the documents and Board approves the grant

Step 10 — PR signs and shares the Grant Confirmation

Documents to be updated/resubmitted

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Please ensure that the Editor and Submitter contacts have **Access to Grant Deliverables** selected for the relevant grant(s).

See the **GED Interactive Manual** for instructions on how to update Grant Entity Data.

To go back to the **end-to-end high-level process page**, click here or on the tab to the right.

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THE GLOBAL FUND

Home | Grant Making | PUDR | Pulse Check | Report Issue

1

Click **Grant-making**

Note:
- For a better user experience, please use the **zoom browser** at **90% or 100%**

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📶 Online

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Grant-making

Grant-making

Guidance ⓘ

ECU-H-SPU

IP Start Date:	**01-Jan-26**
IP End Date:	**31-Dec-28**
Grant-making Status:	
PR to Submit Grant Documents	
GAC Meeting Date:	**20-Jul-23**

1 In this field, the **Grant-making status** is shown.

2 Click on the relevant grant box

Note:
- The grant will not be visible on this page if the Global Fund has not yet shared the documents.
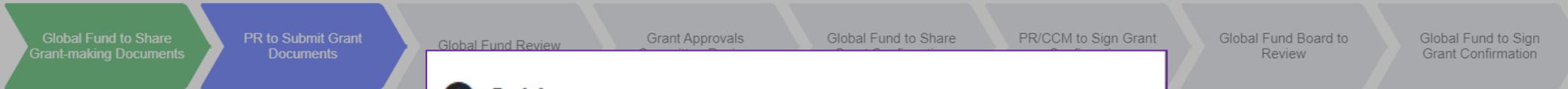- The PR won't be able to access the grant details if the GED setup is incomplete.

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English | Français | Español

🛜 Online

⟲ THE GLOBAL FUND Home **Grant-making** PUDR Pulse Check Report Issue

Global Fund to Share Grant-making Documents | PR to Submit Grant Documents | Global Fund Review | Grant Approvals | Global Fund to Share | PR/CCM to Sign Grant | Global Fund Board to Review | Global Fund to Sign Grant Confirmation

DOWNLOAD GRANT-MAKING FORMS ATTA

Grant-making Forms

Guidance ✕

For more information on grant making process, please consult the external website on Applying for funding: Grant-Making.

Please Download Documents Download All

Document Type

Cancel

Performance Framework GF Shared ECU-H-SPU_PT_30Jan23

Detailed Budget GF Shared ECU-H-SPU_DB_30Jan23 30-Jan-23 08:53 AM Cristina Melendez English ⬇Download

Health Product Management Template GF Shared fundingrequest_healthproductmanagement_template_aa 30-Jan-23 08:53 AM Cristina Melendez English ⬇Download

1 For more information on the grant-making process, access the highlighted link

2 Close the pop-up by clicking **Cancel**

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PARTNER PORTAL LEARNING SERIES
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1 At the top, key grant information is displayed.

2 Key GED contacts appear on the top of the page. Hovering over the box triggers a message with information on where to find GED guidance if GED roles or contacts need to be added or changed

Grant-making | ECU-S01 | Attach and Submit

...aking   PUDR   Pulse Check   Report Issue

TRP Window:
TRP Review Outcome:
Implementation Period Name   ECU-H-SPU
Implementation Period Currency: **USD**

Allocation Utilization Period Dates: **01-Jan-26 to 31-Dec-28**
Prospective IP Dates: **01-Jan-26 to 31-Dec-28**
GAC Meeting Date:

Key GED Contacts
Organization representative for notice:
Signatory for legal agreements:
Submitter: **Cristina Melendez / Anna Smith**

| Global Fund to Share Grant-making Documents | PR to Submit Grant Documents | Global Fund Review | Grant Approvals Committee Review | Global Fund to Share Grant Confirmation | PR/CCM to Sign Grant Confirmation | Global Fund Board to Review | Global Fund to Sign Grant Confirmation | Grant Fully Signed |

3 The chevron bar indicates the current status of the grant-making process and future steps

DOWNLOAD GRANT-MAKING FORMS   ATTACH & SUBMIT GRANT DOCUMENTS   Guidance ⓘ

Grant-making Forms

4 Under **Download grant-making forms**, click the button **Download** to access the forms individually or **Download All to** access all documents at the same time

Please Download Documents   Download All

Document Type	Original File Name	Attached Date	Attached By	Language	Action
Performance Framework GF Shared	ECU-H-SPU_PF_30Jan23	30-Jan-23 08:53 AM	Cristina Melendez	English	⤓Download
Detailed Budget GF Shared	ECU-H-SPU_DB_30Jan23	30-Jan-23 08:53 AM	Cristina Melendez	English	⤓Download
Health Product Management Template GF Shared	fundingrequest_healthproductmanagement_template_aa	30-Jan-23 08:53 AM	Cristina Melendez	English	⤓Download

ⓘ **Note:**
• Make sure **cookies are enabled** in the browser to ensure all buttons function correctly

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Global Fund to
Grant-making Do...

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DOWNLOAD G

Guidance

Grant-maki

Please Downloa

After downloading the documents, save them on your computer.

The links below provide instructions on how to complete the main documents:
• Guidance for Developing and Reviewing Performance Frameworks
• Instructions for Completing the Detailed Budget Template

After the documents are completed, send them back to the Global Fund by following these steps.

Download All

Document Type

Action

Performance Framework GF Shared   ECU-H-SPU_PF_30Jan23   30-Jan-23 08:53 AM   Cristina Melendez   English   ↓Download

Detailed Budget   ↓Download

**This completes Step 5 of the process,
"PR downloads documents submitted by the Global Fund"**

Health Product M   ↓Download

THE GLOBAL FUND

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THE GLOBAL FUND   Home   **Grant-making**   PUDR

Grant-making | ECU-H-SPU | Attach and Submit

DOWNLOAD GRANT-MAKING FORMS   ATTACH & SUBMIT GRANT DOCUMENTS

Guidance ⓘ

1 Under **Attach & Submit Grant Documents,** tab there is a list of documents required for this grant.

Attach Grant Documents

⚠ Please attach your Performance Framework before attaching your Detailed Budget. ✕

Attached and Selected Documents

(Please consult the Global Fund policy for the list of required documents for this grant)

- ✅ Performance Framework
- ✅ Detailed Budget
- ❌ Health Product Management Template
- ❌ Funding Landscape Table
- ❌ Implementation Arrangements Map

- ❌ List of Program Assets and Receivables
- ❌ Monitoring & Evaluation Plan*
- ❌ National Strategic Plan
- ❌ Other
- ❌ Programmatic Gap Table

*required only before grant signing

⬆ Attach Documents

2 To attach the documents for submission, click **Attach Documents**

Grant documents for submission to the Global Fund

Once attached, please select the final versions in order to submit. Note, only one Performance Framework and one Detailed Budget may be submitted

Download All

Document Type ↑	Original File Name	Attached Date	Attached By	Language	Version	Final PR	Action

Note:
- PRs only submit **the final versions of the documents for GAC review** after these are negotiated and agreed upon between the PR and the Global Fund.

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Grant-making | ECU-H-SPU | Attach

DOWNLOAD GRANT-MAKING FOR

Attached and Selected

(Please consult the Global Fu

*required only before grant signing

Grant documents for submi

Once attached, please select the final

Document Type	Or...
Funding Landscape Table	Br...
Other	space download.PNG

Open

> This PC > Desktop > Partner Portal - Grant Documents

Organize ▾   New folder

- Images and Vide
- Creative Cloud File
- OneDrive - The Glo
- This PC
- 3D Objects
- Desktop
- Documents
- Downloads
- Music
- Pictures

Name	Status
	⊘
	⊘
Performance Framework	

File name: [   ]   All Files

1 Select the document you want to attach and click **Open**.

Note that the Performance Framework must be attached before the Detailed Budget!

Open   Cancel

Note:

When attaching either a Performance Framework or a Detailed Budget please note that only one file of each type can be attached at a time. If changes or new versions of these documents are needed, these can be attached and they will supersede the prior version when selecting documents for submission.

31-Jan-23 11:17   Artur Correia   French   V1

Download

Download A

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Grant-making: System Steps

ECU-H-SPU

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Online   Eisa Hamid

THE GLC **Grant-making** Revision PUDR Pulse Check Report Issue

Grant-making | MMR-T-UNOPS | Attach and Submit

MMR-T-UNOPS

TRP Window: **Window 1 - March 2023**
TRP Review Outcome: **Grant Making**
Implementation Period Name: **MMR-T-UNOPSP06**
Implementation Period Currency: **USD**

Allocation Utilization Period Dates: **01-Ja...**
Prospective IP Dates: **01-Jan-24 to 31-D...**
GAC Meeting Date: **09-Nov-23**

notice: **Attila Molnar | Pabitra Bhandari**
Sanjay Mathur
Submitter: **Eisa Hamid | Frederic SUZANNE**

1 Select the **Document Type** and **Language** in the drop-down lists

Global Fund to Share Grant-making Documents → PR to Submit Grant Documents → Grant Approvals → Global Fund to Share → PR/CCM to Sign Grant → Global Fund Board to → Global Fund to Sign Confirmation → Grant Fully Signed

DOWNLOAD GRANT-MAKING FORMS   ATT...

Guidance ⓘ

Attach Grant Documents

You are attaching documents for MMR-T-UNOPS   ✕

Attached and Selected Documents

(Please consult the Global Fund policy for th...

AGO-H-UNDP_PF_11Oct22.xlsx

Document Type *
Select ▼

Language *
Select ▼

Remove

before attaching your Detailed Budget. ✕

Add Document(s)

2 Click **Save and Close**

⚠ Please attach your Performance Framework before attaching your Detailed Budget. ✕

✓ Performance Framework
✓ Detailed Budget
✗ Health Product Management Template
✗ Funding Landscape Table
✗ Implementation Arrangements Map

*required only before grant signing

*required field

Cancel   **Save and Close**

ⓘ **Note:**
- **The Performance Framework and Detailed Budget languages are preselected.** For other documents, it is necessary to select the language.
- The system will save only the **latest version of the attached Performance Framework and Detailed Budget**. Make sure you attach the most up-to-date versions.
- It is necessary to select the **Document type** and **Language** to enable the **Save and Close** button.

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Grant-making | ECU-H-SPU | Attach

DOWNLOAD GRANT-MAKING FOR

Attached and Selected

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Grant documents for submi

Once attached, please select the final

Document Type	Or
Funding Landscape Table	Bra
Other	space download.PNG

31-Jan-23 11:17   Artur Correia   French   V1

Download A

Open dialog box:

This PC > Desktop > Partner Portal - Grant Documents

Search Partner Portal - Grant ...

Organize ▾   New folder

Images and Vide

Creative Cloud File

OneDrive - The Glo

This PC

3D Objects

Desktop

Documents

Downloads

Music

Pictures

Name	Status
Detailed Budget	✓
	✓

File name: All Files

Open   Cancel

1 Follow the same process for the Detailed Budget. Select the document you want to attach and click **Open**.

*Note that the Performance Framework must be attached **before** the Detailed Budget!*

ℹ Note:

When attaching either a Performance Framework or a Detailed Budget please note that only one file of each type can be attached at a time. If changes or new versions of these documents are needed, these can be attached and they will supersede the prior version when selecting documents for submission.

Download   🗑

Download   🗑

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Grant-making | ECU-H-SPU | Attach and Submit

DOWNLOAD GRANT-MAKING FORMS   ATTACH & SUBMIT GRANT DOCUMENTS

Guidance ⓘ

1 Select the **Document Type** and **Language** in the drop-down lists

Attached and Selected

(Please consult the Global Fu...

⬆ Attach Documents

*required only before grant signing

You are attaching documents for ECU-H-test3   ✕

Detailed Budget.pdf

Document Type	Language	
Select ⌄	Select ⌄	✅ Attached

Grant documents for submi...

Once attached, please select the final...

2 Click **Save and Close**

Add Document(s)

Document Type ↑	O...	...R ssion	Action
Funding Landscape Table	B...		⬇Download 🗑
		Cancel	**Save and Close**
	...ch V1		⬇Download 🗑

v. 3.0.0

Note:
- **The Performance Framework and Detailed Budget languages are preselected.** For other documents, it is necessary to select the language.
- The system will save only the **latest version of the attached Performance Framework and Detailed Budget**. Make sure you attach the most up-to-date versions.
- It is necessary to select the **Document type** and **Language** to enable the **Save and Close** button.

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Grant-making | ECU-H-SPU | Attach and Submit

DOWNLOAD GRANT-MAKING FORMS	ATTACH & SUBMIT GRANT DOCUMENTS

Attach Grant Documents

Attached and Selected Documents

(Please consult the Global Fund policy for the list of required documents for this grant)

⊘ Performance Framework
⊘ Detailed Budget
⊗ Health Product Management Template
⊗ Co-financing Commitments
⊗ Funding Landscape Table
⊗ Implementation Arrangements Map

⊗ List of Program Assets and Receivables
⊗ Monitoring & Evaluation Plan*
⊗ National Strategic Plan
⊗ Other
⊗ Programmatic Gap Table

*required only before grant signing

⬆ Attach Documents

2 Check the boxes under **Final PR Submission**.

Note!
Documents selected below will have a green checkmark in the list above

Grant documents for submission to the Global Fund

Once attached, please select the final versions in order to submit. Note, only one Performance Framework and one Detailed Budget may be submitted

Download All

Document Type	↑	Original File Name	Attached Date	Attached By	Language	Version	Final PR Submission	Action
Detailed Budget		Detailed_Budget_31Jan23.xlx	31-Jan-23 10:56 AM	Artur Correia	Spanish	V1	☑	⬇Download 🗑
Performance Framework		Performance_Framework_31Jan23.xlx	31-Jan-23 11:17 AM	Artur Correia	French	V1	☑	⬇Download 🗑

Submit to the Global Fund

1 The documents are attached under the **Grant Documents for submission to the Global Fund** section

3 Click **Submit to the Global Fund** to complete the process

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Grant-making | ECU-H-SPU | Attach and Submit

DOWNLOAD GRANT-MAKING FORMS | ATTACH & SUBMIT GRANT DOCUMENTS

Attach Grant Documents

Attached and Selected Documents

(Please consult the Global Fund policy for the list of required

✅ Performance Framework
✅ Detailed Budget
❌ Health Product Management Template
❌ Co-financing Commitments
❌ Funding Landscape Table
❌ Implementation Arrangements Map

*required only before grant signing

Grant documents for submission to the Global Fund

Once attached, please select the final versions in order to submit. Note,

You are submitting documents for ECU-H-SPU ✕

One or more required documents have not been attached or selected, please confirm this is the final submission.

By clicking "Submit" you confirm these files have not been unprotected or tampered with and are the final documents for review by the Global Fund.

Cancel | **Submit**

Download All

1 A pop-up asks you to confirm this is your final submission.

2 To confirm, click **Submit**

Document Type ↑	Original File Name	Attached Date	Attached By	Language	Version	Final PR Submission	Action
Detailed Budget							
Performance Framework							

This completes Step 7 of the process, "PR attached GM documents in the Portal"

Submit to the Global Fund

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Additional resources

- **GED Interactive Manual** – This document provides instructions on to manage Grant Entity Data in the Partner Portal.

- **Guidance for Developing and Reviewing Performance Frameworks** – This document describes the process for developing and reviewing the Performance Framework prior to grant signing.

- **Instructions for Completing the Detailed Budget Template** – This document provides guidance for the development and review of a Global Fund grant budget (and budget revisions when applicable), using the detailed budget template.

- **Modular Framework Handbook 2023-2025** – This document details the standard modules, interventions and performance indicators to support in the development of funding requests and grant documents for the Global Fund.