



**EXTERNAL INFORMATION SESSION**

# **Health Product Management Template (HPMT)**

Grant Cycle 8 – Funding Request & Grant-making

April 2026

# Agenda

- 1 General Overview: HPMT in GC8 Funding Request & Grant-making
- 2 HP list for Focused Portfolios
- 3 Online HPMT for HI and Core portfolios
- 4 Steps in Partner Portal
- 5 Resources



# Thank you

IT

PRs

Finance

CT Council

Country Teams

Supply Operations

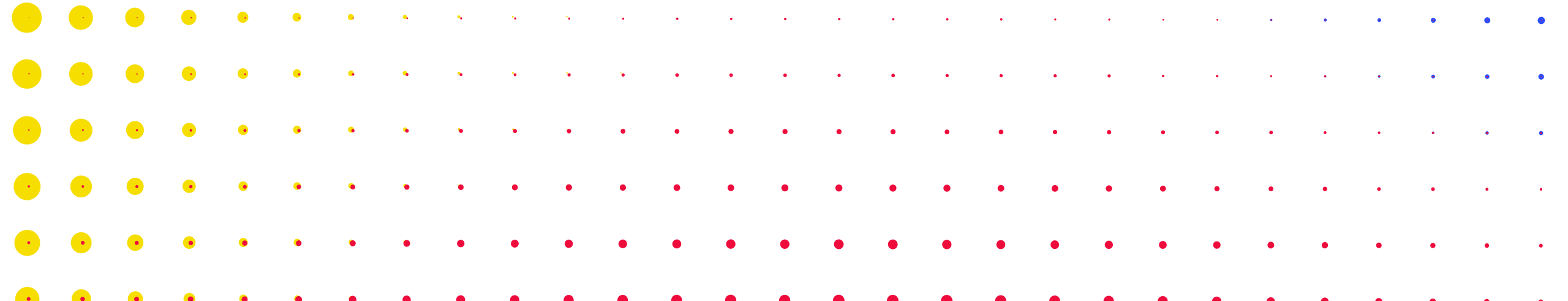
Operational Communications

Health Product Management Team



**1**

# **General Overview: HPMT in GC8 Funding Request & Grant-making**



# GC8 Funding Request & Grant-making – Objectives & Key Changes

1

Sustainable program design & effective transitions through strategic shifts

2

Strong applications & timely grant signing within compressed timelines

3

Online management and improved data quality through the Partner Portal

- Differentiated submission pathways

- Enhanced core documents, including online completion of the Health Product Management Template

Focus for today's information session

# GC8 Application Approaches & Submission Pathways

## Application Approaches

are the **required documents** and differentiated **reviews** used to access funding



- Which forms and documents are required
- How the TRP is involved

The GAC determines the most suitable application approach for each component. Changes to the application approach require Global Fund approval.

The application approach has been communicated in the allocation letter.

## Submission Pathways

are the **processes** and **stakeholder roles** for developing and submitting an application



- Which process steps are followed
- How the CCM, PR and CT are involved

The CCM (in consultation with the CT) determines the most appropriate submission pathway. The submission pathways reflect different levels of early PR engagement.

# Application Approaches define the available Submission Pathways

	High Impact / Core		Focused		
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Application approach	Program Continuation (invitation only)	Full Review	Tailored for Transition	Tailored for Focused	CCM Investment Priorities (invitation only)
Submission pathway	<p><b>Program Continuation Submission</b></p> <ul style="list-style-type: none"> <li>Existing PR develops &amp; negotiates GC8 grant documents with CT, leveraging GC7 grant design</li> <li>CCM reviews &amp; endorses grant documents prior to PR submission to Global Fund</li> </ul>	<p><b>Grant-ready Funding Request</b></p> <ul style="list-style-type: none"> <li>Recommended for existing PRs</li> <li>CCM endorses &amp; submits funding application, including grant-level documents prepared by PR</li> <li>Grant-making continues upon submission to the TRP</li> </ul>		<p><b>Investment Priorities Request</b></p> <ul style="list-style-type: none"> <li>CCM defines investment priorities &amp; shares with PR &amp; CT</li> <li>PR develops &amp; negotiates grant documents with CT</li> <li>CCM reviews &amp; endorses grant documents prior to PR submission to Global Fund</li> </ul>	
TRP engagement	<p><b>No TRP review</b>, unless there are material programmatic changes. TRP as GAC partner.</p>	<p><b>Regular</b> Comprehensive review of strategic priorities and investment approach</p>	<p><b>Tailored</b> Targeted/strategic feedback on proposed investments</p>		<p><b>TRP Oversight</b> Upfront TRP pre-shaping to provide guidance on priority investments. TRP as GAC partner</p>

CCMs are expected to ensure inclusive Country Dialogue takes place throughout Funding Request and Grant-making

# Understanding Health Product Management requirements during Funding Request & Grant-making



If not feasible

**Required**

Funding Request & Grant-making:  
**Required**

Funding Request: Online HPMT  
**Strongly recommended**  
Grant-making: **Required**

**1** during Funding Request, **CCMs complete:**

**Budget 'Non-HP' tab**

**2** during Grant-making

**PRs complete the online HPMT**

\* Completion of the online HPMT during Funding Request requires early PR selection. If this is not feasible, during Classic FR, Health Products (HP) information can be captured in the Budget, but the online HPMT is then required during Grant-making.

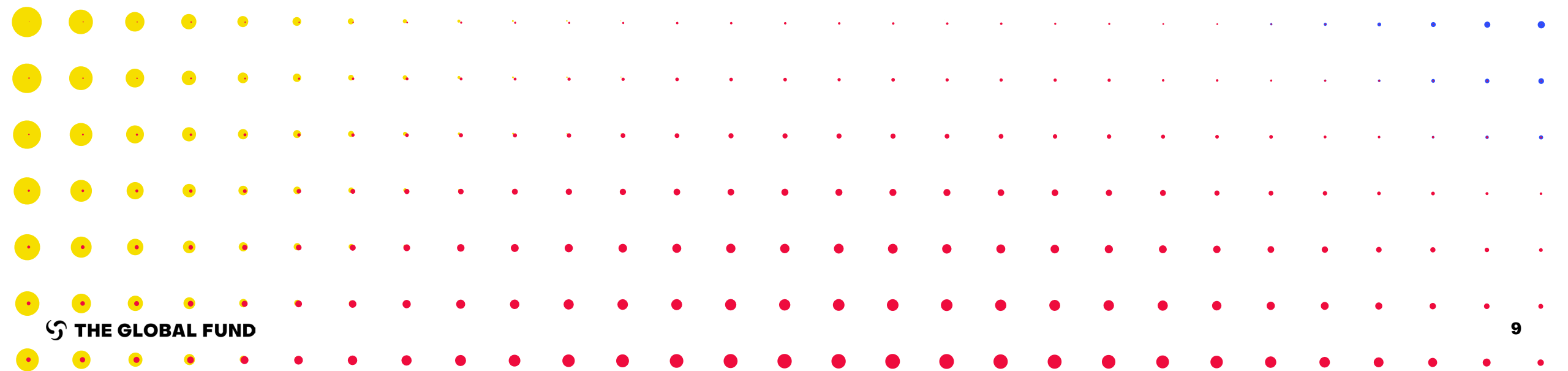
Focused

**Budget 'HP List - Focused' tab during Funding Request & Grant-making**



# 2

## HP list for Focused portfolios



# ‘HP List – Focused’: Key considerations

Designed to simplify\* health product information capture and budgeting for Focused grants.

When required\*\*, Focused portfolios complete the ‘HP List – Focused’ tab in the Budget for all submission pathways.



**Supporting documents:** PRs are required to submit necessary justifications and relevant documents. Supporting documentation is still required as usual to justify the assumptions used, where applicable, and PR can share the documents via email to the CT for review.

*\*More details on simplification of health product management for Focused portfolios and completing the ‘HP List - Focused’ are provided in the 'Instructions for Completing the Budget' (forthcoming).*

*\*\* Based on criteria depending on Focused management models. For more details, refer to Annex 2 of the [OPN on Design Funding Requests and Sign Quality Grants](#).*

# 'HP List – Focused': Completing the tab

- **Sections:** PRs enter health product information in the relevant section (HIV, TB and Malaria). A TB/HIV grant can use both HIV and TB sections.
- **Procurement channel:** PRs can choose the appropriate procurement channel from the dropdown menu.
- **HP data granularity:** discuss and agree with the Global Fund Country Team on the granularity of the HPs to be listed (essential vs lump sums)
- **PSM costs:** All the required PSM costs are lumped into one indicative percentage per procurement channel to cover upstream, in-country and QA/QC costs.
- **Budgeting:** The total cost in grant currency needs to be added to the 'Budget – Non- HP' tab under the related cost categories 4-7. No data is to be entered in the 'Budget – HP' tab.

One section per disease

The table includes additional columns for Year 1, 2 and 3

Free text comment field, e.g. details for lump sums.

Products for HIV/AIDS component						
Budget line	Product Description (INN, strengths, UoM/Pack size, as applicable)	Proc channel	Year 1			Comments
			Unit cost	quantity	total	
					0.00	
					0.00	
	Total Health Products				0.00	
Budget line	Description	Proc channel	HPM cost %	Total Prod cost per proc channel	Total HPM per proc channel	Comments
	PSM Costs (Proc Channel 1)	PR/SR		0	0	
	PSM Costs (Proc Channel 2)	PPM/Wambo		0	0	
	PSM Costs (Proc Channel 3)	UN/Int Agency		0	0	
	PSM Costs (Proc Channel 4)	GDF		0	0	
	Grant Total HP				-	

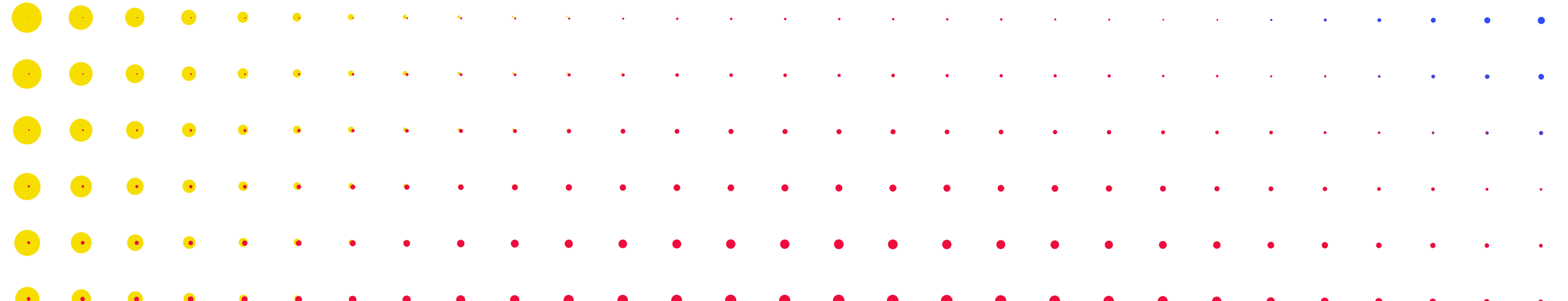
PSM costs are calculated per procurement channel using the applied %

Table columns are the same for TB and Malaria.



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# Online HPMT for High Impact and Core portfolios





**Online  
HPMT**  
for High Impact  
and Core

## Introducing the new Health Product Management Template (HPMT) for Grant Cycle 8

New online form replacing the previous Excel version.



Improved User  
Experience



Integrated with  
Global Fund  
Systems



Improved  
Visibility



Simplified  
Budget  
Calculation



Built-in Data  
Quality Checks



## Online HPMT for High Impact and Core

# Introducing the new Health Product Management Template (HPMT) for Grant Cycle 8

New online form replacing the previous Excel version.

Accessible by PRs online in the Partner Portal, upon CCM confirmation of nomination, for each grant.



### Improved User Experience

Online tool that is intuitive, allowing for easy product selection, and edits, upgrading from the previous Excel file format.



### Simplified Budget Calculation

Increased visibility for the PR as to how the budget lines are calculated. The PR allocates the budget amount against the selected interventions for each group of products.



### Integrated with Global Fund Systems

The online HPMT uses the most recent updated Global Fund product list, with reference prices and lead times thanks to data integration with the Product Data Hub.



### Improved Visibility

Increased data visibility for the Global Fund and PRs throughout the Grant Life Cycle, thanks to integration with Global Fund systems.



### Built-in Data Quality Checks

Automated data quality checks:

1. Provide guidance to the user on potential data quality issues and missing information
2. Enable users to validate entries and provide comments before submitting
3. Ensures overall quality of submission

# Improved User Experience



- **Online tool allowing for easy product selection. The tool is intuitive to navigate and includes different filtering options, quick edits, and automatic saving.**

The screenshot displays a user interface for product selection, divided into three main sections:

- Available Products (1,102):** This section features a search bar, a dropdown menu set to 'A-Z', and a scrollable list of products. The list includes items such as 'Abacavir sulfate/Lamivudine 600/300mg tablet', 'Abbott - Alinity Syphilis TP test', and 'Abbott - Hepatitis B - Elisa - HBsAg - 96 tests'.
- Selected (0):** This section is currently empty, indicating no products have been added to the selection.
- Selected Products (2):** This section shows two selected items: 'Abacavir sulfate 60mg dispersible tablet' and 'Female condom - latex - sponge - box of 100'.

Navigation controls are located between the 'Available Products' and 'Selected Products' panels, including buttons for '>', '<', and '<<', along with a larger empty rectangular box.

# Simplified Budget Calculation



- Increased visibility for the PR as to how budget lines are calculated.
- The PR allocates the budget amount against the selected interventions for each group of products.

Set up HPMT   Select Products   Enter Order Details   Review Orders   Add Logistics Cost   **Assign Budget**   Add Fixed Costs   Budget Overview   Review & Submit

#	Product Category	Intervention	Planned Health Products Cost (USD)	Percent of Planned Cost	Planned Cost per Intervention (USD)
4.1	Antiretroviral medicines	<ul style="list-style-type: none"> <li>Pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) programing for MSM</li> </ul> <p>+ Add/Remove Intervention</p>	1,000.00	100	1,000.00
5.14	Condoms	<ul style="list-style-type: none"> <li>Condom and lubricant programing for AGYW and their male sexual partners in settings with moderate and high HIV incidence</li> </ul>	300.00	50	150.00
		<ul style="list-style-type: none"> <li>Condom and lubricant programing for trans and gender-diverse people</li> </ul> <p>+ Add/Remove Intervention</p>		50	150.00

### Select Interventions for : Antiretroviral medicines

Suggested Interventions   
  Alternative Interventions

**Module Name :HIV Prevention**

- Pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) program...
- Pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) program...
- Pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) program...
- Pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) program...
- Pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) program...
- Pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) program...

**Module Name :Elimination of vertical transmission of HIV, syphilis and hepatitis B**

- Prevention of incident HIV among pregnant and breastfeeding women
- Post-natal infant prophylaxis

**Module Name :Treatment, care and support**

- HIV treatment and differentiated service delivery - adults (15 and above)
- HIV treatment and differentiated service delivery - children (under 15)

# Integrated with Global Fund systems



- The online HPMT uses the most recent updated product list, with reference prices and lead times thanks to data integration with the Product Data Hub.

Available Products (1,102) Selected (0)

Search A-Z

- Abacavir sulfate/Lamivudine 600/300mg tablet
- Abacavir sulfate/Lamivudine/Zidovudine 300/150/300mg tablet
- Abbott - Alinity Syphilis TP test
- Abbott - Hepatitis B - Elisa - HBsAg - 96 tests
- Abbott - RealTime CT test
- Abbott - Realtime CT/NG test
- Abbott Early Infant Diagnosis Test Kit and Consumable Bundle - 96 tests
- Abbott Viral Load Test Kit and Consumable Bundle - Plasma - 96 tests
- AccessCare Xpert enhanced Service and Maintenance

Abacavir sulfate 60mg dispersible tablet

	Quantity:	Total	Year 1	Year 2
		6,000	6,000	-
	Value (USD):	1,000.00	1,000.00	-

#	Order Details	Procurement Channel	Order Month	Need By	Lead Time (Months)
1	bottle of 60 dispersible tablets	PR/SR	Feb 2026	Sep 2026	8

+ Add Order  Specify Logistics Cost (%)

## Improved visibility



- Increased data visibility for the Global Fund and PRs throughout the Grant Life Cycle, thanks to integration with Global Fund systems.



Data Quality Checks are a set of automated controls that the system performs to:

- Improve data quality by flagging potentially incorrect data
- Prevent data entry errors
- Improve data integrity and consistency
- Speed up the review process of the submitted data by Global Fund

**There are 2 types of checks in the Partner Portal:**

## **Error**

- Alerts when data is missing or does not comply with validation rule
- Does not allow PR to submit until the error is corrected.
- Allows the system user to review and correct the data before submitting the form

## **Warning**

- Flags the system user to check if the data captured is correct or contains a potential error.
- Requires a justification comment if the warning is overruled.
- Allows PR to proceed and submit.

# Grant Entity Data required for PRs to complete and submit HPMT

For GC8, accurate and complete Grant Entity Data (GED) is critical to ensure all relevant PR staff have access to the Partner Portal to complete the online HPMT. This may require adding PR PSM/HPM staff to the Partner Portal.

Please work with your CT to ensure that all contacts are up to date in GED.



For step-by-step instructions on editing/adding new GED contacts, **PRs** can consult the **GED Interactive Guide** [EN](#) | [FR](#) | [ES](#)

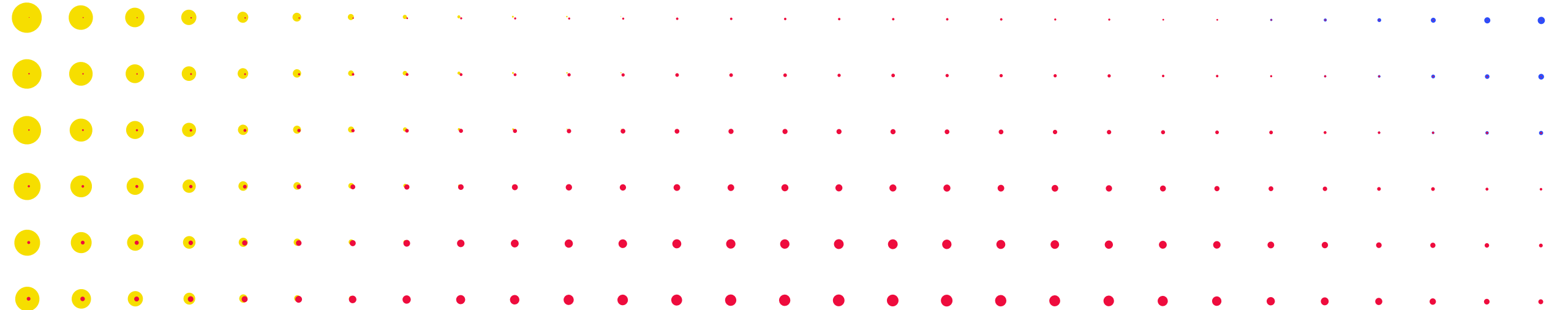
Available roles in GED:



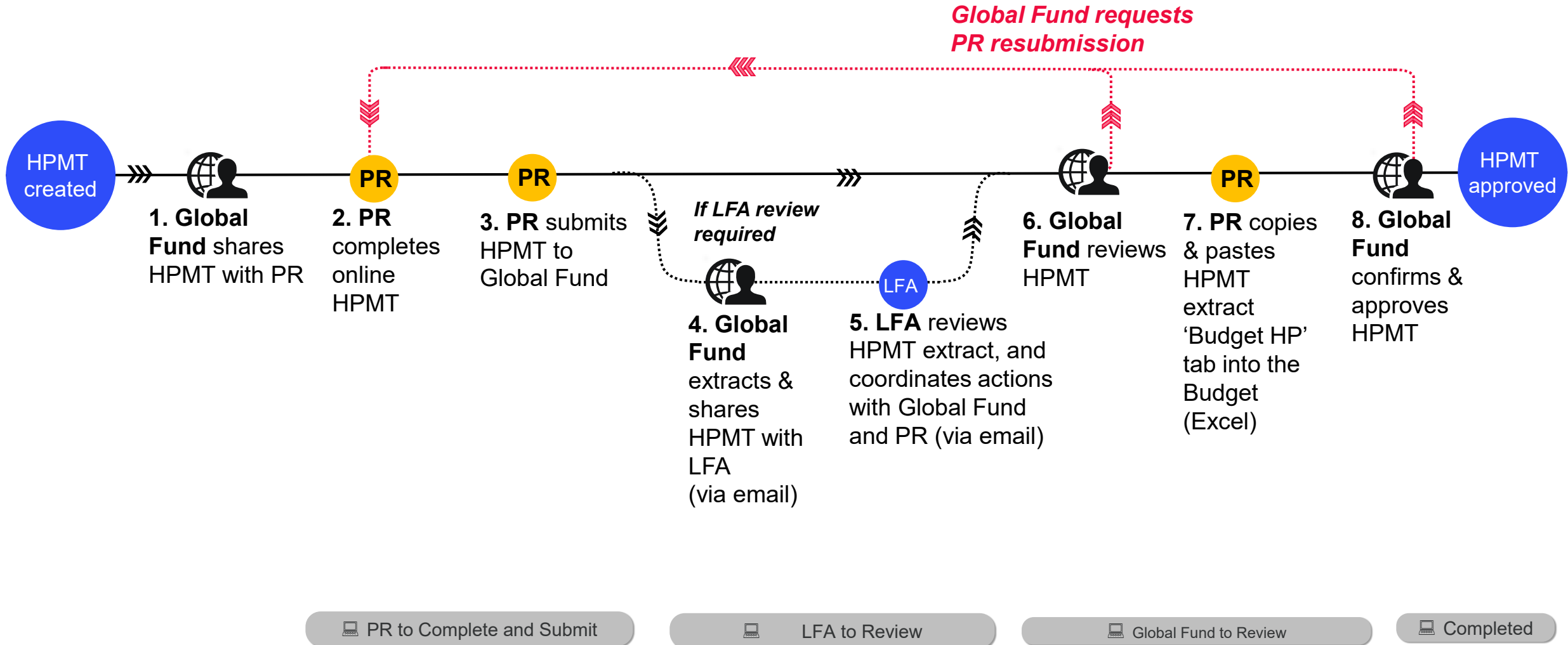


# 4

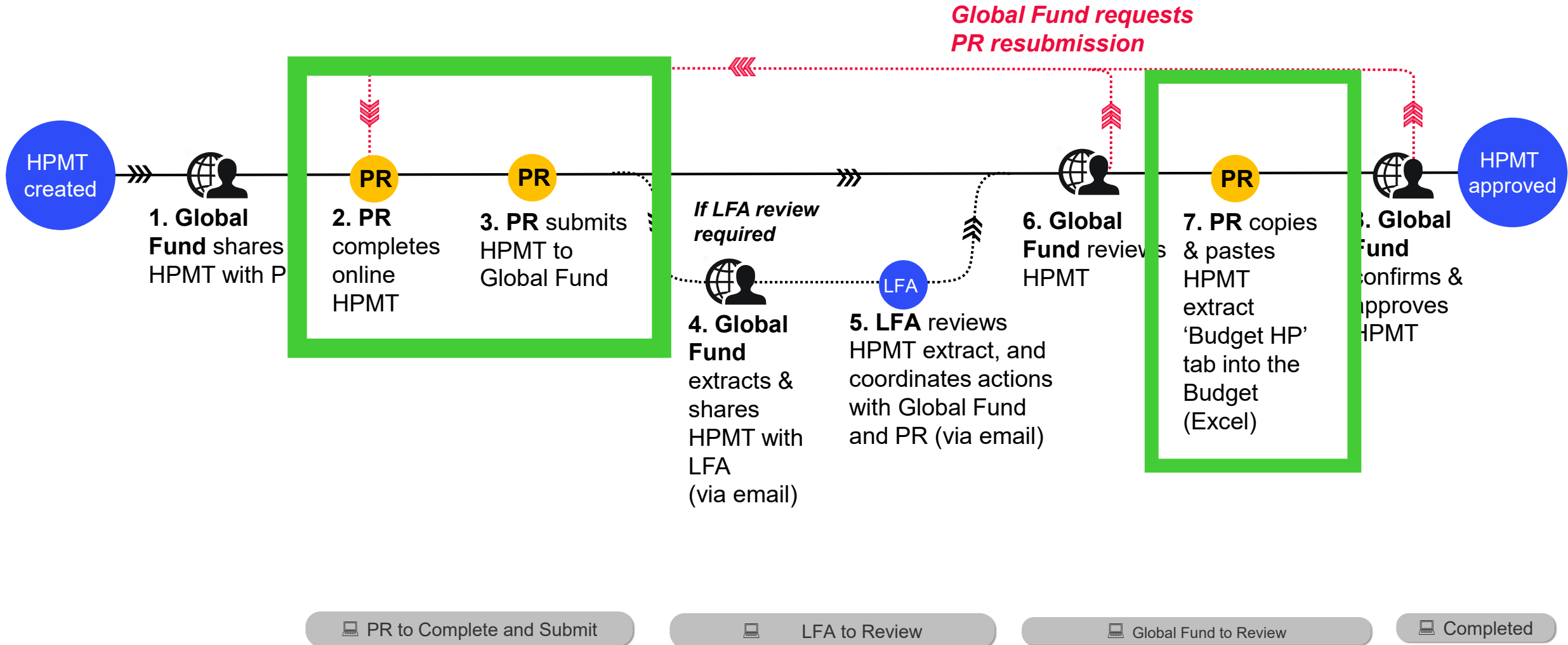
## Steps in Partner Portal



# Completing the online HPMT



# Completing the online HPMT – Partner Portal demo





# Key points to remember



## Automatic saving and editing from multiple users

Any data entered is automatically saved. The user can leave the HPMT and come back to it. It is not necessary to complete the entire template in one sitting.

Benefit: multiple PR users can access and edit the HPMT simultaneously. Please note that if two people are editing the same data, there is a risk of data overwrites and delay in calculations.



## HPMT completed in USD

All HPMTs are completed in USD. Euro grants will have Euro totals in the HPMT summary tables.



## Catalogue updates

Any updates to the PDH are automatically reflected in the HPMT. If an item has been removed, this is flagged via a Data Quality Check.



## HPMT extract

The HPMT Excel extract can be taken at any time by the PR in the Review & Submit tab reflecting the latest details in the HPMT. If edits in the Excel extract are made they need to be manually entered in the Partner Portal. The extract cannot be imported.



# Key points to remember



## HPMT visibility

When the HPMT being completed/updated by the PR, the Global Fund cannot see the HPMT until submission.

Once submitted, the PR can see a read-only version of the HPMT, including edits from the Global Fund



## Revising the approved HPMT

For GC8, an approved HPMT can be edited during the Grant Life Cycle. This can be initiated by the Global Fund who opens the HPMT for a new PR draft, based on the previous version. The already approved version is not replaced until the new, revised draft has been completed, submitted and approved.



## Supporting documents

The PRs are required to submit necessary justifications and relevant documents together with the HPMT. The supporting documentation is still required as usual to justify the assumptions used. The PR can choose to attach the documents in the Partner Portal or share the documents via email to the HPM for review.



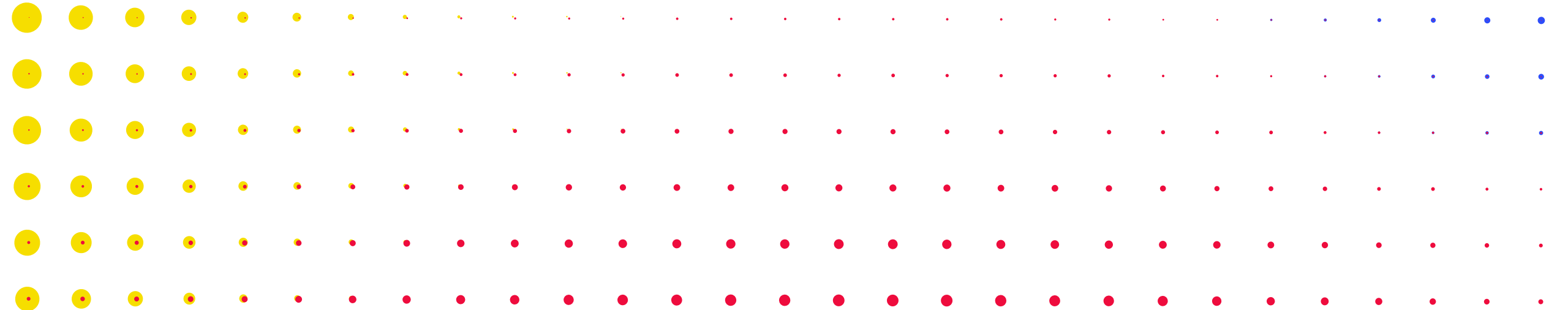
## Multi component grants

For multicomponent grants, one HPMT is completed, which provides the extract for the single Budget.



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# Resources

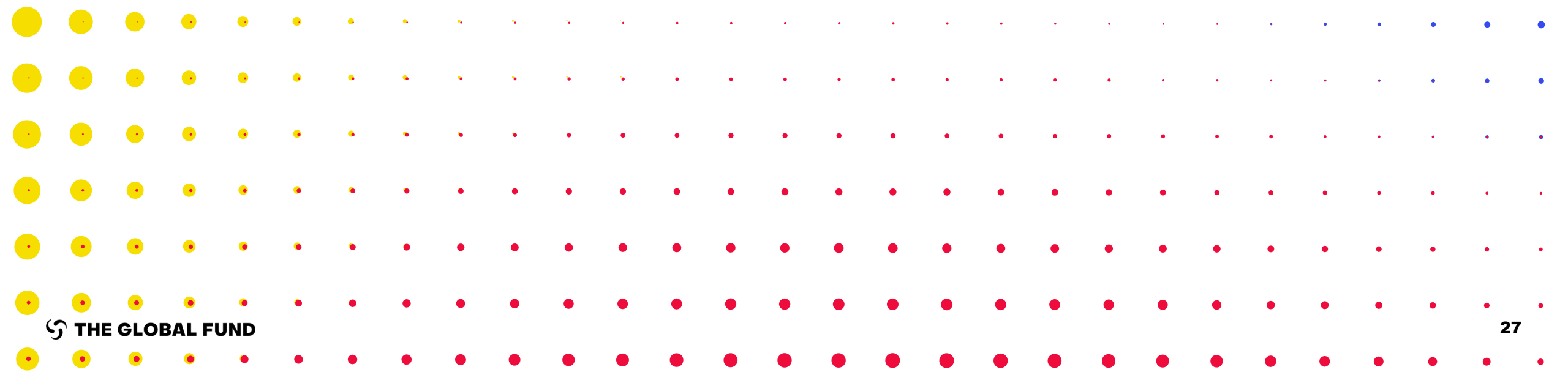


# Resources

Resources	Links
General	<ul style="list-style-type: none"><li>• HPMT section on the <a href="#">Global Fund website</a></li></ul>
Info sessions	<ul style="list-style-type: none"><li>• HPMT external info session <a href="#">slides &amp; recordings</a></li><li>• Previous GC8 FR/GM info sessions on the <a href="#">Global Fund website</a></li></ul>
System guidance	<ul style="list-style-type: none"><li>• <a href="#">HPMT Partner Portal manual</a></li><li>• <a href="#">Funding Request Partner Portal manual</a></li><li>• Grant-making Partner Portal manual (<i>forthcoming</i>)</li></ul>
Infographic & demo videos	<ul style="list-style-type: none"><li>• HPMT Partner Portal demo videos (<i>forthcoming</i>)</li></ul>
For more resources	<ul style="list-style-type: none"><li>• HPMT sections on the <a href="#">Global Fund website</a></li></ul>



# Annex









# Submission pathways in GC8 - HPMT

Note: After Classic FR and GRFR, as part of Grant-making, PRs can further edit the online HPMT



The Global Fund

Submission pathway

	 	<ul style="list-style-type: none"> <li>Completes the <b>online HPMT</b>, in the HPM app in Partner Portal, reviews the DQCs and submits to the Global Fund.</li> <li>The HPMT is not submitted to the TRP, but used to inform the Budget review by TRP and hence should be submitted before the TRP.</li> <li>Uses <b>HPMT Excel extract</b> to copy and paste the Budget- HP tab into the Budget. <b>Key steps:</b> <ol style="list-style-type: none"> <li>Select 'Yes' to 'HPMT required?' in the Budget.</li> <li>Paste the HPMT budget output into the 'Budget – HP' tab of the Budget.</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>Reviews the <b>online HPMT</b> and Data Quality Checks.</li> <li>Edits as needed, requests resubmission, or confirms the HPMT</li> </ul>
<p>HI/ Core</p>		<ul style="list-style-type: none"> <li>If (i) PR is selected early and (ii) requested by the CCM, the PR (i) completes the <b>online HPMT</b> in the HPM app in Partner Portal and (ii) provides the HPMT budget extract to the CCM to include in the Budget.</li> <li>If (i) PR is not selected early, or (ii) the CCM does not request the PR to complete the online HPMT as part of the Funding Request, the CCM uses the '<b>Budget – Non-HP</b>' tab <b>Key steps:</b> <ol style="list-style-type: none"> <li>PRs select 'No' to 'HPMT required?' in the Budget</li> <li>PRs provide lump-sum annual figures in the 'Non-HP' tab of the Budget using cost groupings 4 to 7.</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>If the online HPMT was completed, the Global Fund reviews the <b>HPMT</b> and data quality check outcomes.</li> <li>Edits as needed, requests resubmission, or confirms the HPMT</li> <li>If the Budget tab is completed, the Global Fund reviews the budget.</li> <li>Once Grant-making starts, the online HPMT is completed.</li> </ul>
<p>Focused</p>	  	<ul style="list-style-type: none"> <li>PRs enter health product information in the Budget 'HP List – Focused' tab &amp; link the total cost amounts to appear in the Budget 'Non-HP' tab under the related cost categories 4-7</li> <li>Completion of the online HPMT is not required</li> </ul>	

# Strategic reminder: why differentiated Focused Management Models

## Rationale

- Focused portfolios spend **disproportionate effort** on administrative requirements, limiting strategic value-add work
- Differentiated models ensure **oversight proportional to risk** and investment size, freeing CT/PR capacity for outcomes
- Models shift emphasis toward **country ownership** and alignment with **national priorities**

### Aligned – Simplest

### Targeted – Results-Based

### Light – Streamlined

### Legacy – Old

*Delivery-based; less GLC requirements*

*Input-based, more GLC requirements*

- Designed for portfolios with **small allocation**
- Investment focused on **1-2,-priority programmatic areas** fully aligned to country priorities and systems
- **Very limited grant requirements:** no detailed budget (total and annual budget defined in funding request and Grant Confirmation, which CTs then enter into GOS), Performance Framework with maximum 3 indicators per component.
- **Single funding decision** per implementation period (IP) with largely upfront disbursements
- **Minimal reporting:** reliance on national/partner reporting with results assessment once per IP
- Global Fund role shifts to **strategic engagement**, partner coordination, and **transition and co-financing support** (not on grant management)

- Uses **Payment for Results (PfR)** to focus on measurable outcomes rather than inputs
- Upfront effort to design PfR, with **limited oversight** during implementation
- **Disbursements linked to verified results**
- Reporting centers on **results achievement and verification**, potentially using national systems (e.g. DHIS2)
- Global Fund role focuses on **incentive design** and **outcome verification**

- Streamlined processes while retaining **input-based grant management** where Global Fund support is still needed
- Budget required only at module / intervention / **cost-group** level (no activity-level detail, except portfolios under sanction, to be agree upon)
- Standard GLC deliverables apply, but with **reduced granularity**
- **Annual funding decisions based on budget**, with flexibility for programmatic adjustments
- Global Fund role focuses on **implementation oversight**, problem-solving, and course correction

- **Old way of working** without additional simplification
- Full set of **standard GLC deliverables** required
- Regular funding decisions, disbursement conditions, and reporting requirements
- Used only where **higher risk** or capacity constraints require **intensive Secretariat oversight**
- Global Fund role remains hands-on grant management and compliance

**Discontinued from GC8**