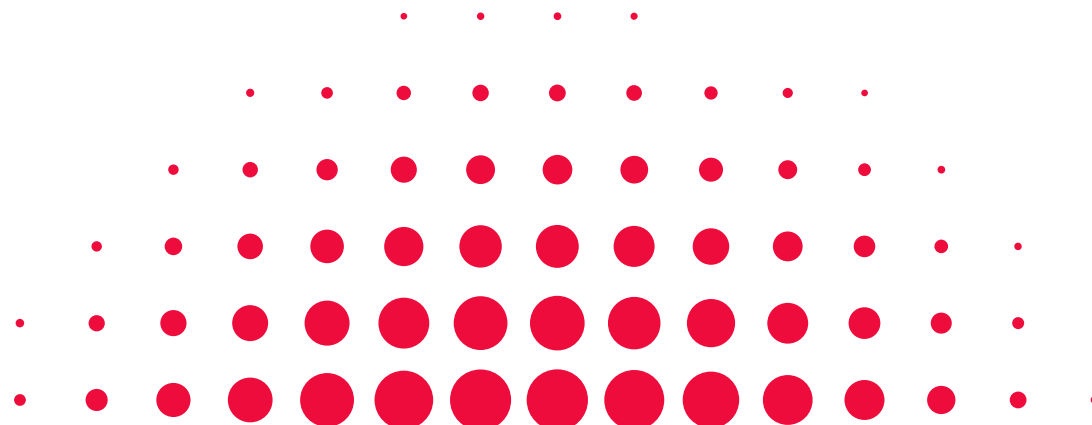
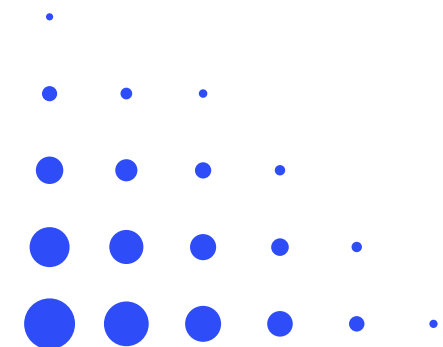
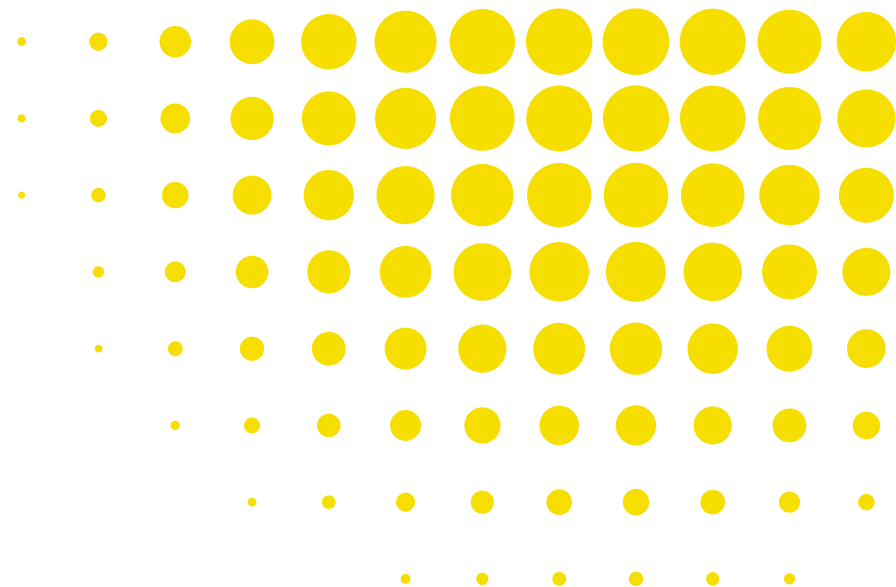


Partner Portal Manual

GC8 Online PF





Click on the sections below for direct access 

Introduction & Access

[How to Use this Manual](#)
[Grant Entity Data Reminder](#)
[Introduction to the PF for GC8](#)
[Log in & Access](#)

PF Process Flow & Detailed Instructions

[PF Process Flow](#)
[Detailed instructions](#)
[Overview](#)
[Goals](#)
[Objectives](#)
[Impact Indicators](#)
[Outcome Indicators](#)
[Coverage Indicators](#)
[WPTMs](#)
[Review & Submit](#)

Resources & Support

[Online Resources](#)
[List of Acronyms & Abbreviations](#)
[Contact Support for Technical Issues](#)

Introduction
& Access

PF Process
Flow &
Detailed
Instructions

Resources
& Support

INTRODUCTION & ACCESS

How to Use This Manual

Grant Entity Data Reminder

Introduction to the PF for GC8

Log in & Access

PF Process
Flow &
Detailed
Instructions

Resources
& Support

This manual provides comprehensive guidance for Principal Recipients (PRs) on how to

- i. access the online Performance Framework (PF) in the Partner Portal, and
- ii. capture information in the online PF, section by section, for submission to the Global Fund.

You can navigate the pages by clicking on the 'Previous' and 'Next' buttons at the bottom of the screen, or by simply scrolling through.

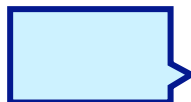
The manual is structured into the following sections:

- **Home** Direct access to the different sections and guide to navigation
- **Introduction & Access** General information & instructions to access the PF in the Partner Portal
- **PF Process Flow** Visual process flow from start to finish
- **Detailed Instructions** Section by section, step by step instructions on how to complete the online PF in the Partner Portal
- **Resources & Support** Links to useful materials & technical support

System Instructions



Step-by-step instructions



For information

Navigation Buttons



Go back or advance to the next page



Go to the home page



Go to abbreviations

Symbols



Partner Portal step



Partner Portal status



Principal Recipient (PR)



Global Fund



Local Fund Agent (LFA)

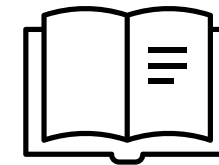
Ensure your Grant Entity Data is up-to-date

Grant Entity Data (GED) consists of the organization and contact information required from Grant Entities (example: PRs, LFAs, CCMs, and third-party organizations).

- Up-to-date Grant Entity Data allows Grant Entities to successfully complete deliverables through the Global Fund Partner Portal.
- Remember to update your GED immediately through a **Change Request** when organization or contact information changes (to allow time for review & validation by the Global Fund).

Raising a Change Request

The Grant Entity contact with access rights submits a Change Request to create, update or deactivate an organization/contact through the **GED Module** in the [Global Fund Partner Portal](#).



For step-by-step guidance:
[GED Interactive Guide](#)



Introduction to the Online PF for GC8

The PF defines the agreed programmatic results, indicators, and targets, forming a basis for monitoring progress and disbursement.

It is based on the [Modular Framework](#) and [Indicator Guidance Sheets](#) (IGSs) which are updated for Grant Cycle 8 (GC8).

The template for this document is system-generated by the Global Fund and is made available to CCMs and/or PRs after the funding request is registered.

The PF is a required grant document for all applicants, regardless of application approach / submission pathway and portfolio category.

The online PF is used for Grant-ready Funding Request submission and for Grant making. Classic Funding Request uses an Excel version of the PF. For a visual overview of Grant-ready and Classic Funding Requests and Grant-making, click [here](#).

The online PF includes the following sections: Overview, Goals, Objectives, Impact Indicators, Outcome Indicators, Coverage Indicators, and Work plan Tracking measures. There is no separate section for disaggregations.

A sample PF for GC8 is available [here](#).

Log into the Partner Portal

Open the notification email you received from the Global Fund and click on the link provided.

Dear recipient,

The Global Fund has shared the Performance Framework for **XXX-M-PR1P02**.

Use this [link](#) to access the Performance Framework in the Partner Portal.

Next steps: Access the Performance Framework in the Partner Portal, complete, and submit it to the Global Fund. The Principal Recipient must actively engage the CCM to provide updates and receive feedback on progress.

This is an automatic message from the Global Fund Partner Portal. Do not reply.

Support and resources:

If you have forgotten your password, go to:

<https://passwordreset.microsoftonline.com>.

You can contact country.support@theglobalfund.org if you face any system issues.

Chrome is the recommended browser to access the Partner Portal.

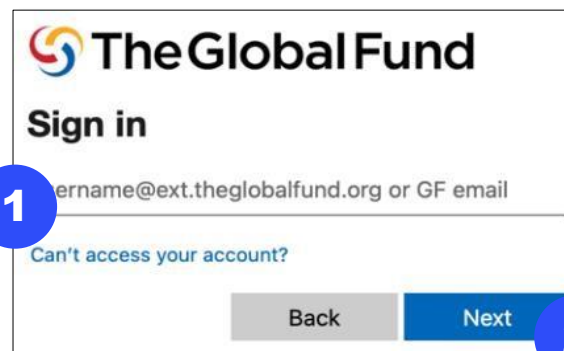
You can also access the online form by directly accessing the Partner Portal at <https://portal.theglobalfund.org>.

Click  below for further login instructions



Log into the Partner Portal

1. Sign into the Global Fund Partner Portal by entering your user ID ([e.g.***@moh.org](mailto:***@moh.org)).
 2. Click **Next**
 3. Enter your password and click **Sign in**
 4. Click **Yes** to stay signed into the site
 5. If applicable, click **Allow** in the Allow Access screen
- >> The **Home** page opens



TheGlobalFund

Sign in

Username@ext.theglobalfund.org or GF email

Can't access your account?

Back Next



TheGlobalFund

Enter password

Password

Forgot my password

Sign in



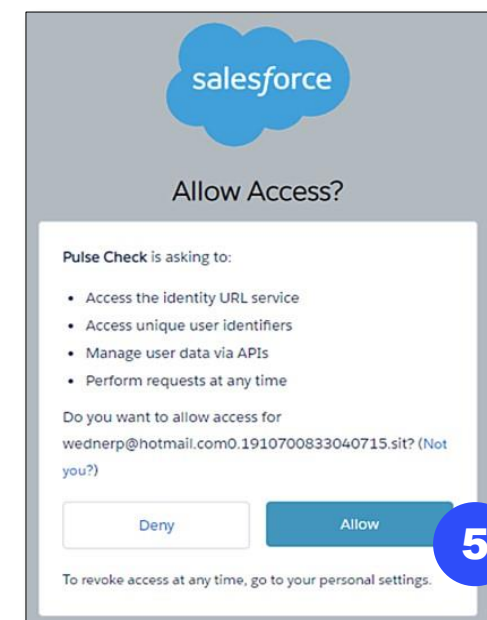
TheGlobalFund

Stay signed in?

Do this to reduce the number of times you are asked to sign in.

☐ Don't show this again

No Yes



salesforce

Allow Access?

Pulse Check is asking to:

- Access the identity URL service
- Access unique user identifiers
- Manage user data via APIs
- Perform requests at any time

Do you want to allow access for wednerp@hotmail.com0.1910700833040715.sit? (Not you?)

Deny Allow

To revoke access at any time, go to your personal settings.

English | Français | Español

THE GLOBAL FUND

Home **All Applications** Insights

Principal Re

1. From the Home page, Click on All Applications

PU	Status	Due Date	Due in
XXX-M-PR1P02	Pending PR completion	14-Aug-2024	56 Days
XXX-M-PR1P02	Submitted	05-May-2024	Overdue by 45 Days
XXX-M-PR1P02	Pending PR completion	14-Aug-2024	56 Days
XXX-M-PR1P02	Pending PR completion	14-Aug-2024	56 Days
XXX-M-PR1P02	Pending PR completion	14-Aug-2024	56 Days

Grant Making

XXX-M-PR1P02	Status	IP End Date
Global Fund Review	Global Fund Review	2024-07-18
Global Fund Review	Global Fund Review	2024-09-12

Grant Revision

XXX-M-PR1P02	Status	IP End Date
Global Fund Review	Global Fund Review	2024-06-30
Global Fund to finalize revision	Global Fund to finalize revision	2026-12-31
Global Fund to sign Implementation Letter	Global Fund to sign Implementation Letter	2025-03-31
PR to sign Implementation Letter	PR to sign Implementation Letter	2026-12-31
Glo	Glo	

Access the online PF in the Partner Portal

English | Français | Español

THE GLOBAL FUND

Home All Applications Insights

2. Click on the **Grant-making application**

Grant-making

Grant-making is the process of translating the funding request into quality grants, with the Global Fund strategy embedded in the grant design. The Grant-making application summarizes available information on grants being negotiated. PRs can download, attach and submit their grant documents.

Grant Revisions

Revisions allow the PR to adjust investments to ensure they remain aligned to national strategic plans and the Global Fund strategy. The Revisions application provides access to active and completed revisions, where PRs can download, attach and submit revisions and associated forms/documents.

Health Product Management

Health Product Management allows PRs to capture information pertaining to the procurement and supply management of health products, in line with the programmatic targets, and as input into the grant budget. The HPM application allows PRs to complete, submit and view the latest approved HPMT.

NOTE. Click on '*' to add it to the favorites list for quick access from the **Home** page

HOW TO

Access the online PF in the Partner Portal

[English](#) | [Français](#) | [Español](#)



[Home](#) [All Applications](#) [Insights](#)

Principal Recipient Reporting

XXX-M-PR1P02 Final PU Status Pending PR completion Due Date 01-Mar-2027 Due in 354 Days	XXX-M-PR1P02 PU Status Pending PR completion Due Date 14-Aug-2026 Due in 155 Days	XXX-M-PR1P02 PUDR Status Pending PR completion Due Date 01-Mar-2026 Overdue !	XXX-M-PR1P02 PUDR Status Pending PR completion Due Date 01-Mar-2026 Overdue	FCR Status Due Date Overdue !
---	---	---	---	--

Grant Making

XXX-M-PR1P02 Status [Funding Request] PR to share grant forms with Applicant IP End Date	XXX-M-PR1P02 Status [Funding Request] PR to share grant forms with Applicant IP End Date	XXX-M-PR1P02 Status [Funding Request] PR to share grant forms with Applicant IP End Date	XXX-M-PR1P02 Status [Funding Request] PR to share grant forms with Applicant IP End Date	Status [Funding share IP End Date
--	--	--	--	--------------------------------------

Grant Revision

XXX-M-PR1P02 Status PR to sign Implementation Letter IP End Date 2023-12-31	XXX-M-PR1P02 Status PR to submit documents IP End Date 2027-03-31	XXX-M-PR1P02 Status Global Fund to share Implementation Letter IP End Date 2026-12-31	XXX-M-PR1P02 Status Global Fund Review IP End Date 2026-12-31	Status Glo IP End Date
---	---	---	---	---------------------------

[Report an Issue](#)

My Applications

[View All](#)

Principal Recipient Reporting	>	★
Grant-making	>	★

Quick Links

- [The Global Fund Website](#)
- [Digital Library](#)
- [Data Explorer](#)
- [Report fraud and abuse](#)

NOTE. Applications marked with '*' can be accessed directly from the **Home** page

Introduction & Access

How to use this Manual

GED Reminder

Intro to GC8 PF

Log in & Access

PF Process Flow & Detailed Instructions

Resources & Support

NOTE. The online PF is used for Grant-ready Funding Request and Grant-making

THE GLOBAL FUND

Home Grant-making

Grant-making > XXX-M-PR1

▼ XXX-M-PR1

1 Guidance

TRP Review Window
FR Window R1

Allocation Utilization Period Dates
1-Jan-2027 - 31-Dec-2029

Organization representative for notice
Peter

TRP Review Outcome

Prospective Implementation Period Dates
1-Jan-2027 - 31-Dec-2029

Signatory for legal agreements
Paul

Implementation Period Name
XXX-M-PR1P02

Implementation Period Currency
USD

Submitter
Jack

3. Click on the **Performance Framework** tab to access and edit the online PF

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download Performance Framework Attach & Submit

Grant-making Forms

No documents found.

PF OVERVIEW & DETAILED INSTRUCTIONS

PF Process Flow

Detailed Instructions

[Overview](#)

[Goals](#)

[Objectives](#)

[Impact Indicators](#)

[Outcome Indicators](#)

[Coverage Indicators](#)

[WPTMs](#)

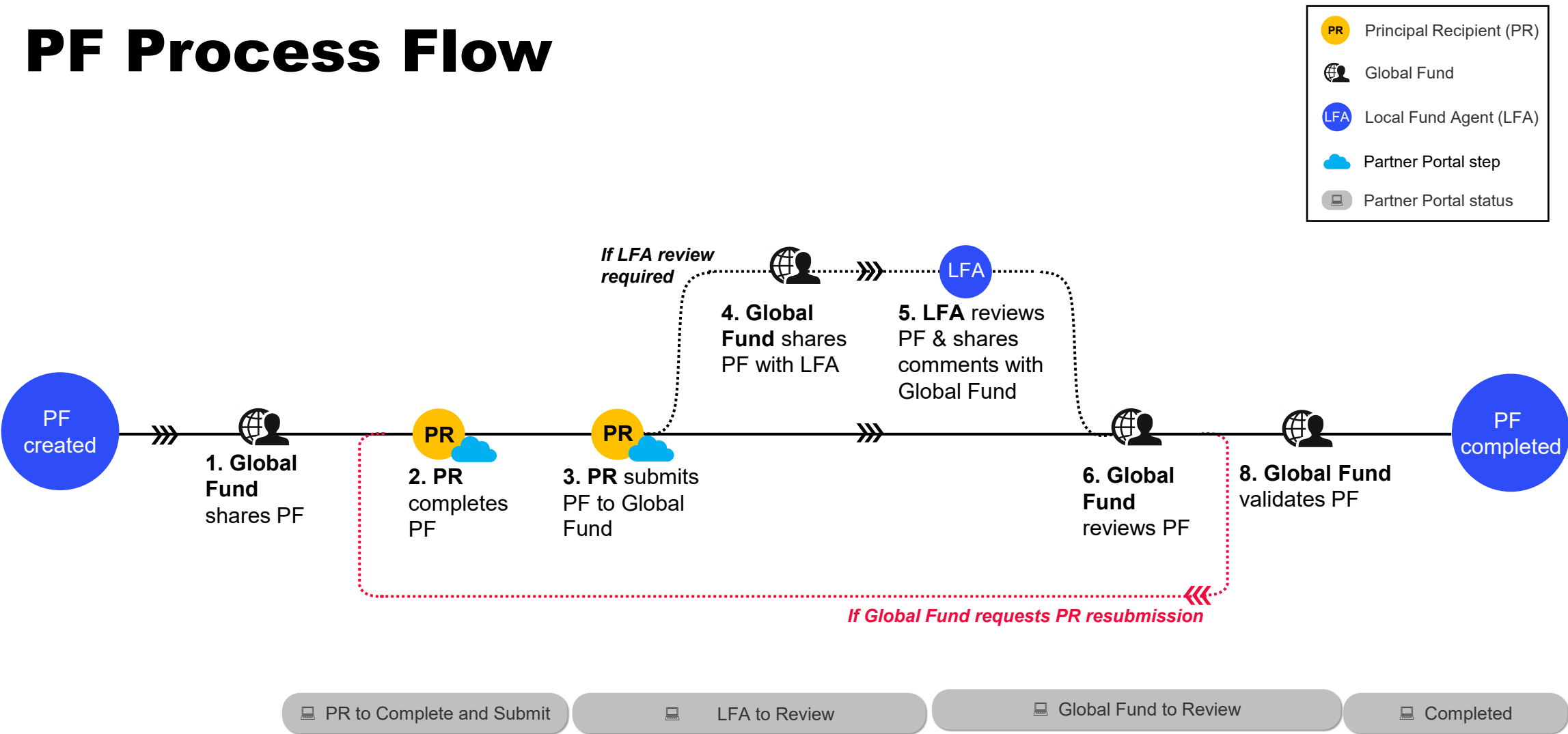
[Review & Submit](#)

Introduction
& Access

PF Process
Flow &
Detailed
Instructions

Resources
& Support

PF Process Flow



For a visual process flow of Grant-ready and Classic Funding Requests and Grant-making, click [here](#)

General Information

NOTE. Read this section carefully before filling the online PF. Even though the content of the PF has not changed, there are new functionalities, features and key considerations to aid in PF completion.

1 Data Entry & Values

- For indicators that require N and D, % is auto-calculated. For % only indicators, % field is editable
- For reporting periods where no targets need to be set, leave the fields blank. **Do not enter zero (0)**
- Apply data validation after completing data entry for each indicator or a couple of indicators

3 Indicators & Structure

- Disaggregation sub-sections are included under each indicator. **Focused portfolios do not need to fill the disaggregation sub-sections**
- For impact and outcome indicators, results are reported after the target year (i.e., the reporting due date must be later than the target year).
- In multi-component PFs, indicators/WPTMs are grouped by component (by fixed sort order). Serial numbers can change

2 Baseline Data

- When a baseline value is reported, **the baseline year and source must also be provided.**
- Any difference between the baseline data source and the results reporting data source should be explained in the comment field.
- Where baseline data are not yet available, leave all fields blank, **do not enter zero (0)**, and provide in the comment field the expected date of availability.

4 Language & Review Comments

- For French and Spanish texts, use the separate free text fields provided under or next to the English text fields
- The fields 'Global Fund Review Comment' included in the indicators and WPTM pages are only visible and non editable. These fields are for the Global Fund to edit

Overview Section (1/10)

Section overview

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

Download Performance Framework Attach & Submit

Instructions Overview Goals Objectives Impact Indicators Outcome Indicators Coverage Indicators Work Plan Tracking Measures

Overview

> Implementation Period

> Reporting Periods

> Principal Recipients

> Modules

> Interventions (Only required if you have Work Plan Tracking Measures)

Refresh Generate Excel Expand All Collapse All

Edit Edit + Add

1. Click on **Overview to open the section**

2. Click on **Refresh to refresh the displayed information. Click on **Expand All** / **Collapse All** to easily navigate through the different sub-sections**

NOTE.

- The online PF has 7 sections: Overview, Goals, Objectives, Impact/Outcome/Coverage Indicators, and WPTMs
- The **Overview** section includes 5 sub-sections: Implementation Periods, Reporting Periods, Principal Recipients, Modules and Interventions

Overview Section (2/10)

1. Implementation Period

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download

Performance Framework

Attach & Submit

Instructions

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

Work Plan Tracking Measures

Overview

Refresh

Generate Excel

Expand All

Collapse All

Implementation Period

Edit

Grant	Geography	Includes Payment for Results	Reporting frequency
XXX-M-PR1	Lalaland	Partial	6
IP start date	IP end date	AUP start date	
1-Jan-2027	31-Dec-2029	1-Jan-2027	

> Reporting Periods

> Principal Recipients

> Modules

> Interventions (Only required if you t

1. Click on **Edit** to edit the Implementation Period

2. Select **Yes**, **No**, or **Partial** from the **Payment for Results** (PfR) dropdown list to specify whether the grant includes PfR modality

NOTE. IP dates, AUP dates and reporting frequency are selected by the Global Fund at the time of form generation and are pre-populated in the PF. These fields cannot be edited on the PF page. If needed, PRs request the Global Fund to update them. **IP dates** should be consistent across all required documents (e.g. Budget and health product management template).

Introduction & Access

PF Process Flow

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

WPTMs

Review & Submit PF

Resources & Support

Detailed Instructions – Section by Section

Overview Section (3/10)

2. Reporting Periods

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

DownloadPerformance FrameworkAttach & Submit

InstructionsOverviewGoalsObjectivesImpact IndicatorsOutcome IndicatorsCoverage IndicatorsWork Plan Tracking Measures

Overview

RefreshGenerate ExcelExpand AllCollapse All

Implementation Period

Edit

Grant	Geography	Includes Payment for Results	Reporting frequency
XXX-M-PR1	Lalaland	Partial	6
IP start date	IP end date	AUP start date	AUP end date
1-Jan-2027	31-Dec-2029	1-Jan-2027	31-Dec-2029

Reporting Periods

Edit

Start date	End date	Is PUDR due?	Due date
1-Jan-2027	30-Jun-2027	No	14-Aug-2027
1-Jul-2027	31-Dec-2027	Yes	29-Feb-2028
1-Jan-2028	30-Jun-2028	No	
1-Jul-2028	31-Dec-2028	Yes	
1-Jan-2029		No	14-Aug-2029

1. Click on **Edit** to edit the reporting periods

NOTE.

- The **Reporting Periods** are pre-populated based on IP start/end dates and reporting frequency.
- The **End dates** of the reporting periods can be revised to align with national programmatic reporting cycle.
- The start date of first reporting period and the end date of the last reporting period cannot be beyond the IP start and end dates.
- The reporting periods in the PF must be consistent with the reporting periods in the budget.

ABC

Introduction & Access

PF Process Flow

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

WPTMs

Review & Submit PF

Resources & Support

Detailed Instructions – Section by Section

19

Overview Section (4/10)

2. Reporting Periods

Start date	End date	Is PUDR due?	Due date
01-Jan-2027	30-Jun-2027	No	14-Aug-2027
01-Jul-2027	31-Dec-2027	Yes	29-Feb-2028
01-Jan-2028	30-Jun-2028	No	14-Aug-2028
01-Jul-2028	31-Dec-2028	Yes	01-Mar-2029
01-Jan-2029	30-Jun-2029	No	14-Aug-2029
01-Jul-2029	31-Dec-2029	No	01-Mar-2030

NOTE.

- **End date** fields are editable to align reporting periods to national reporting cycle in case of off-cycle grants in which case the first and last reporting periods of a grant can be shorter or longer than 12 months
- **Is PUDR due?** Specify whether a PUDR is due by selecting Yes/No from the list
- The **Due date** fields show the submission dates for the PU and PUDR and are pre-populated by the Global Fund

Overview Section (5/10)

3. Principal Recipient

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download

Performance Framework

Attach & Submit

Instructions

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

Work Plan Tracking Measures

Overview

Refresh

Generate Excel

Expand All

Collapse All

Edit

1. Click on > / v to expand / collapse the sub-section

> Reporting

Principal Recipients

#	Principal Recipient	
1	Principal Recipient 1	
2	Principal Recipient 2	

2. Hover over to visualize more information

NOTE. The PR names are pre-filled in the form

> Modules

> Interventions (Only required if you have Work Plan Tracking Measures)

Add

Detailed Instructions – Section by Section	Introduction & Access
	PF Process Flow
	Overview
	Goals
	Objectives
	Impact Indicators
	Outcome Indicators
	Coverage Indicators
	WPTMs
Review & Submit PF	
Resources & Support	

Overview Section (6/10)

4. Modules

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

DownloadPerformance FrameworkAttach & Submit

InstructionsOverviewGoalsObjectivesImpact IndicatorsOutcome IndicatorsCoverage IndicatorsWork Plan Tracking Measures

Overview

RefreshGenerate ExcelExpand AllCollapse All

Implementation PeriodEdit

Reporting PeriodsEdit

Principal Recipients

Modules

#	Module	Interventions #	Coverage Indicators #
1	Vector control	0	1

Add

Interventions (Only required if you have Work Plan Tracking Measures)

Add

1. Click on **Add** to select modules

NOTE. Add **Modules** which are relevant for programmatic reporting (for indicators & WPTMs). For more information, refer to the [GC8 Modular Framework](#)

Introduction & Access

PF Process Flow

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

WPTMs

Review & Submit PF

Resources & Support

Detailed Instructions – Section by Section

Overview Section (7/10)

4. Modules

The screenshot shows the 'Add Module' popup window. The window has a title bar with a close button (X). Below the title bar is a search bar labeled 'Module'. A dropdown list is open, showing the following options: 'Vector control', 'Case management', 'Specific prevention interventions (SPI)', 'Program management', and 'Payment for results'. At the bottom right of the popup are two buttons: 'Cancel' and 'Save & Close'. A blue callout box points to the 'Save & Close' button with the text: '2. The **Add Module** popup window opens. Select one module at a time from the dropdown list. Click on **Save & Close**'. A light blue callout box points to the dropdown list with the text: '**NOTE.** The list of modules in the **Add Module** popup window is organized by disease component'.

NOTE. The list of modules in the **Add Module** popup window is organized by disease component

Overview Section (8/10)

4. Modules

Download

Performance Framework

Attach & Submit

Instructions

Overview

Goals

Overview

> Implementation Period

> Reporting Periods

> Principal Recipients

▼ Modules

#	Module	Interventions #	Coverage Indicators #	
1	Payment for results	1	1	 
2	Specific prevention interventions (SPI)	1	1	 
3	Case management	0	2	 
4	Vector control	0	2	 
5	Program management	0	0	 

> Interventions (Only required if you have Work Plan Tracking Measures)

+ Add

Expand All

Collapse All

Edit

Edit

NOTE. A module added to the PF can be edited or deleted only if there are no associated interventions and indicators. To edit/delete a module, users must complete the following actions

1. In the relevant indicators/WPTMs sections of the PF, delete all indicators/WPTMs associated with the module to be edited/deleted
2. In the Overview section of the PF, delete all interventions associated with the module to be edited/deleted.
3. In the module sub-section of the overview, edit/delete the relevant module by clicking on the enabled   buttons

5. Interventions

1. Click on **Add**
to select a new
intervention

Overview Section (10/10)

5. Interventions

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download Performance Framework Attach & Submit

Instructions Overview Goals Objectives Impact Indicators Outcome Indicators Coverage Indicators Work Plan Tracking Measures

5

1

2

3

4

5

Program management

0

2. The **Add Interventions** popup window opens. Select **Module** and **Intervention** from the dropdown lists

Module

Case management

Intervention

Integrated community case management (ICCM)

Private sector case management

Epidemic preparedness

Intensified activities for elimination

Surveillance of biological threats to malaria intervention efficacy

Social and behavior change (SBC) (Case management)

NOTE. Only interventions related to the selected module appear in this list. The list is organized by disease component and modules

Goals (1/2)

Add a goal

NOTE. Program **Goals** are broad statements of desired medium to long term impact of the program, consistent with NSP or regional strategies

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global F

Download Performance Framework Attach & Submit

Instructions Overview **Goals** Objectives Impact Indicators Outcome Indicators Coverage Indicators Work Plan Tracking Measures

Goals (0)

No Goals found.

1. Click on **Goals to open the section**

2. Click on **Add to enter program goal**

+ Add

Add Goal

Goal 1

Description

Description (French / Spanish)

3. The **Add Goal popup window opens. Enter a **Description****

4. Click on **Save & Close**

Cancel Save & Close

NOTE. A separate field is provided for the PR to enter the description in French or Spanish, if needed. The Global Fund is responsible for ensuring that English translations are completed

Goals (2/2)

Edit a goal

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

DownloadPerformance FrameworkAttach & Submit

InstructionsOverviewGoalsObjectivesImpact IndicatorsOutcome IndicatorsCoverage IndicatorsWork Plan Tracking Measures

Goals (2)

NOTE. The number in brackets specifies the total number of goals included in the PF

+ Add

Goal 1

Description

Description (French / Spanish)

EditDelete

Goal 2

Description

Description (French / Spanish)

5. Click on **Edit** to make changes to a goal
Click on **Delete** to delete it

6. The **Edit Goal** popup window opens.
Once edits are made, click on **Save & Close** to save your changes

[Funding Request] Global Fund to share FR documents with Applicant[Funding Request] Global Fund to share grant forms with PR[Funding Request] PR to share grant forms with Applicant[Funding Request] In progress

Download

InstructionsGoals

Goal 1

Description

test

Description (French / Spanish)

xghsjs

CancelSave & Close

Objectives (1/2)

Add an objective

NOTE. Program **Objectives** need to be consistent with the objectives of the national strategic plans or regional strategies

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share

Download Performance Framework Attach & Submit

Instructions Overview Goals **Objectives** Impact Indicators Outcome Indicators Coverage Indicators Work Plan Tracking Measures

Objectives (0)

No Objectives found.

1. Click on **Objectives to open the section**

2. Click on **Add to enter a program objective**

+ Add

Add Objective

Objective 1

Description

Description (French / Spanish)

3. The **Add Goal popup window opens. Enter a **Description****

4. Click on **Save & Close**

NOTE. A separate field is provided for the PR to enter the description in French or Spanish, if needed. The Global Fund is responsible for ensuring that English translations are completed

Cancel Save & Close

Objectives (2/2)

Edit an objective

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download

Performance Framework

Attach & Submit

Instructions

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

Work Plan Tracking Measures

Objectives (2)

Objective 1

Description

Description (French / Spanish)

Objective 2

Description

Description (French / Spanish)

Testo 2

+

Add

Edit

Delete

5. Click on **Edit** to make changes to an objective

Click on **Delete** to delete it

6. The **Edit Objective** popup window opens. Once edits are made, click on **Save & Close** to save your changes

Objective 1

Description

Description (French / Spanish)

Cancel

Save & Close

Introduction & Access

PF Process Flow

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

WPTMs

Review & Submit PF

Resources & Support

Impact Indicators Section (1/7)

Section overview

[Funding Request] Global Fund to share FR documents with Applicant

1. Click on **Impact Indicators** to open the section

2. Click on **Expand All** and **Collapse All** to quickly navigate through the different indicators

3. Indicators can be added, edited or deleted using the **Add**, **Edit** and **Delete** buttons

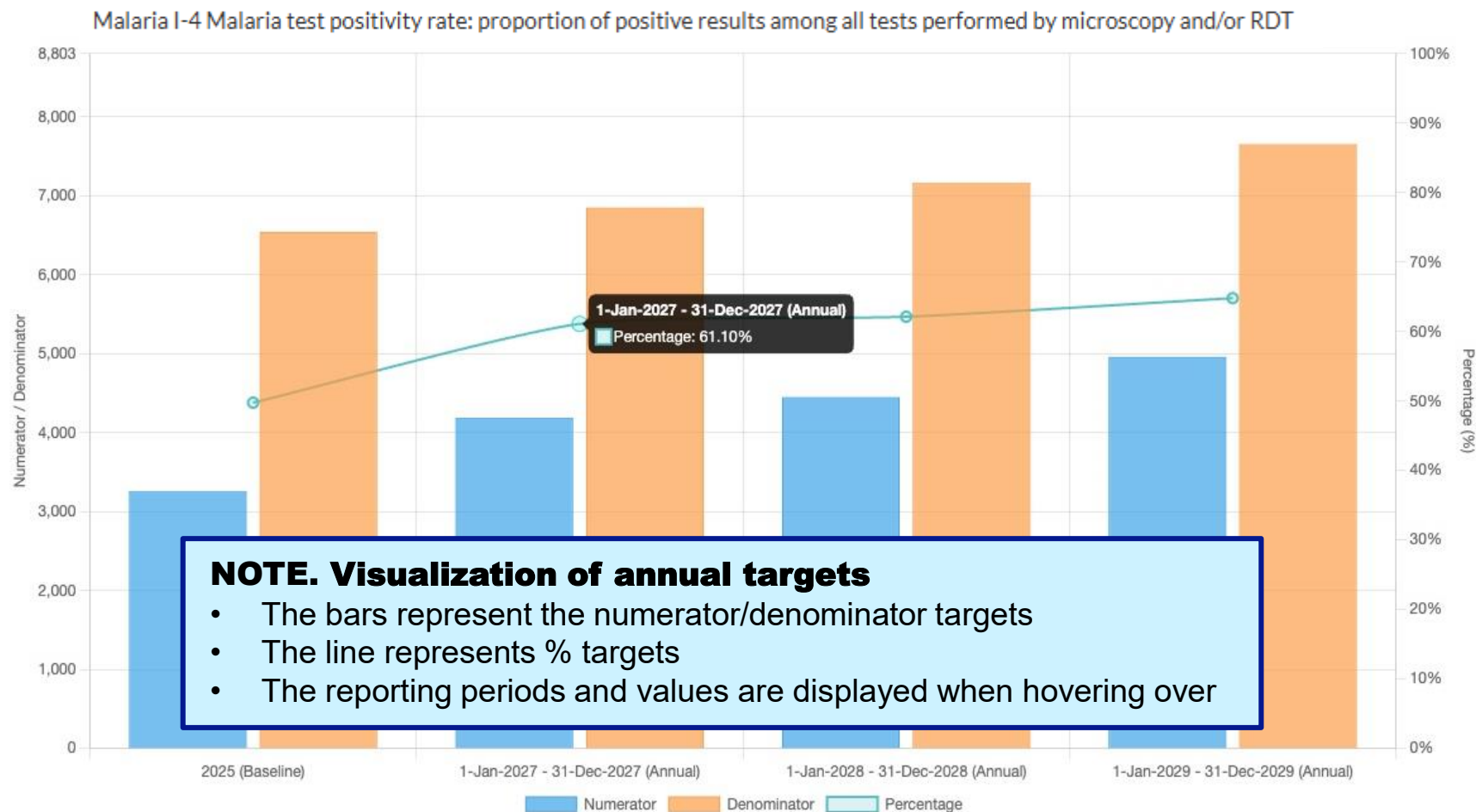
Click on **Chart** to access a visual representation of the annual targets

NOTE. The number in brackets specifies the total number of impact indicators included in the PF

NOTE. For regional applications/grants, select the name of the country pertaining to each indicator. If an **indicator covers two or more countries**, specify the related countries/geographic area in the comment box.

Impact Indicators Section (2/7)

Visualize annual targets



Impact Indicators Section (3/7)

Add an impact indicator

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download Performance Framework Attach & Submit

Instructions Overview Goals Objectives **Impact Indicators** Outcome Indicators Coverage Indicators Work Plan Tracking Measures

Impact Indicators (0)

1. Click on **Add to enter an impact indicator**

Add Impact Indicator

Impact Indicator 1

Impact Indicator

Custom Impact Indicator

Custom Impact Indicator (French / Spanish)

2. The **Add Impact Indicator popup window opens. Select a standard **Impact Indicator** from the dropdown menu or enter a **Custom Impact Indicator** if there is no suitable standard impact indicator available in the list**

NOTE. A separate field is provided for the PR to enter the Custom Impact Indicator in French or Spanish, if needed

Cancel Save & Continue

3. Click on **Save & Continue**
This action opens the popup window **Edit Impact Indicator**

NOTE. Custom Impact Indicator, once created, are added to the list with the identifier **Impact-Other-X**

Impact Indicators Section (4/7)

Edit an impact indicator – Baseline

NOTE. The bubble specifies the required target data type for standard indicators (e.g., 'Percentage only'). The relevant data fields are enabled for data entry

Edit Impact Indicator

1. Select **Country** for regional grants (pre-populated for single country grants)

Impact Indicator 1 **Percentage only**

Impact Indicator
Malaria I-13 Malaria case fatality rate

Country
Lalaland

▼ Baseline and Targets

Baseline	Year	TBD	Numerator	Denominator	Percentage	Report due date
	2023				20.00%	
					40.00%	
					70.00%	
					90.00%	

2. Enter the baseline data in the fields provided

NOTE. If a **baseline value** is provided, the **Baseline Year** and **Source** must be filled. If the baseline data is not available, leave all fields blank

Impact Indicators Section (5/7)

Edit an impact indicator – Targets

Edit Impact Indicator

Impact Indicator 1 Percentage only
Impact Indicator
Malaria I-13 Malaria case fatality rate

Note. The **Percentage** fields are only editable for percentage-only indicators. When targets requires N & D, Percentage fields are auto-calculated

3. Set targets values in the year of measurement and not when report/results are available

Baseline and Targets

Baseline	Year	TBD	Numerator	Denominator
	2023			
Targets	2027	☐		
	2028	☐		
	2029	☐		

Percentage	Report due date
20.00%	
40.00%	
70.00%	
90.00%	

4. Check the **TBD** box if the targets need to be determined later, and provide in the **Comment** field the date by when the targets will become available and the PF revised

5. **Report due date** to specify when results are available in the country, not when reported to the Global Fund

NOTE. Targets are included according to the frequency of their measurement and in the year of their measurement

Introduction
& Access

PF Process
Flow

Overview

Goals

Objectives

**Impact
Indicators**

Outcome
Indicators

Coverage
Indicators

WPTMs

Review &
Submit PF

Detailed Instructions – Section by Section

Impact Indicators Section (6/7)

Edit an impact indicator – Baseline source & Comments

GLOBAL FUND

Edit Impact Indicator

Baseline Source

Baseline Source (French / Spanish)

PR enters the Baseline Source

6. Enter a **baseline source** or leave blank if the baseline value is not available

Comment

1. Baseline :
2. Indicator definition:
3. Targets and Assumptions:
4. Measurement and recording :
5. Grant Contribution :
6. Other :

7. Use the **Comment** field to provide additional information, e.g., if the data source of the baseline value is different from the data source for reporting results

Comment (French / Spanish)

NOTE.

- **Comment** fields are available for the PF editor to enter additional information on different aspects of the indicator (e.g. Baseline, Targets & Assumptions, etc.)
- Separate fields are provided for the PR to enter the **Baseline Source** and **Comment** in French or Spanish, if needed

Impact Indicators Section (7/7)

Edit an impact indicator – Disaggregation

NOTE.

- Focused portfolios do not need to fill the disaggregation section
- It is not possible to add disaggregation for custom indicators
- For standard indicators, the required disaggregations can be found below the corresponding standard indicators

▼ Disaggregation

Category: Disaggregation
Age: <25

Year	Numerator	Denominator	Percentage

Baseline Source

Baseline Source (French / Spanish)

Comment

Comment (French / Spanish)

Category: Disaggregation
Age: 25+

Year	Numerator	Denominator	Percentage

Baseline Source

Baseline Source (French / Spanish)

Cancel Save & Close

8. Complete the **Baseline Year, Value, Source and **Comment** fields for all applicable disaggregation. If the baseline data is not available, leave all fields blank and provide in the **Comment** field the date by when the baseline data will become available**

9. Click on **Save & Close**

Outcome Indicators Section (1/4)

Section overview

NOTE. This page provides a view of all outcome indicators, baselines and targets, and disaggregation

The screenshot shows the 'Outcome Indicators' section of the Global Fund system. At the top, there are tabs for 'Instructions', 'Overview', 'Goals', 'Objectives', 'Impact Indicators', 'Outcome Indicators' (selected), 'Coverage Indicators', and 'Work Plan Tracking Measures'. Below the tabs, there is a header 'Outcome Indicators (1)' with a note: 'NOTE. The number in brackets specifies the total number of outcome indicators included in the PF'. Below this, there is a table with columns for 'Outcome Indicator', 'Country', and 'Lobland'. The first row shows 'Malaria O-1a Proportion of population that slept under an insecticide-treated net the previous night in areas targeted for ITNs'. To the right of the table, there are buttons for 'Add', 'Expand All', 'Collapse All', 'Edit', 'Delete', and 'Chart'. Below the table, there are two expandable sections: 'Baseline and Targets' and 'Disaggregation'. On the right side of the page, there is a vertical navigation menu with the following items: 'Introduction & Access', 'PF Process Flow', 'Overview', 'Goals', 'Objectives', 'Impact Indicators', 'Outcome Indicators' (highlighted), 'Coverage Indicators', 'WPTMs', 'Review & Submit PF', and 'Resources & Support'. The page number '38' is at the bottom right.

1. Click on **Outcome Indicators** to open the section

2. Click on **Expand All** and **Collapse All** to quickly navigate through the different indicators

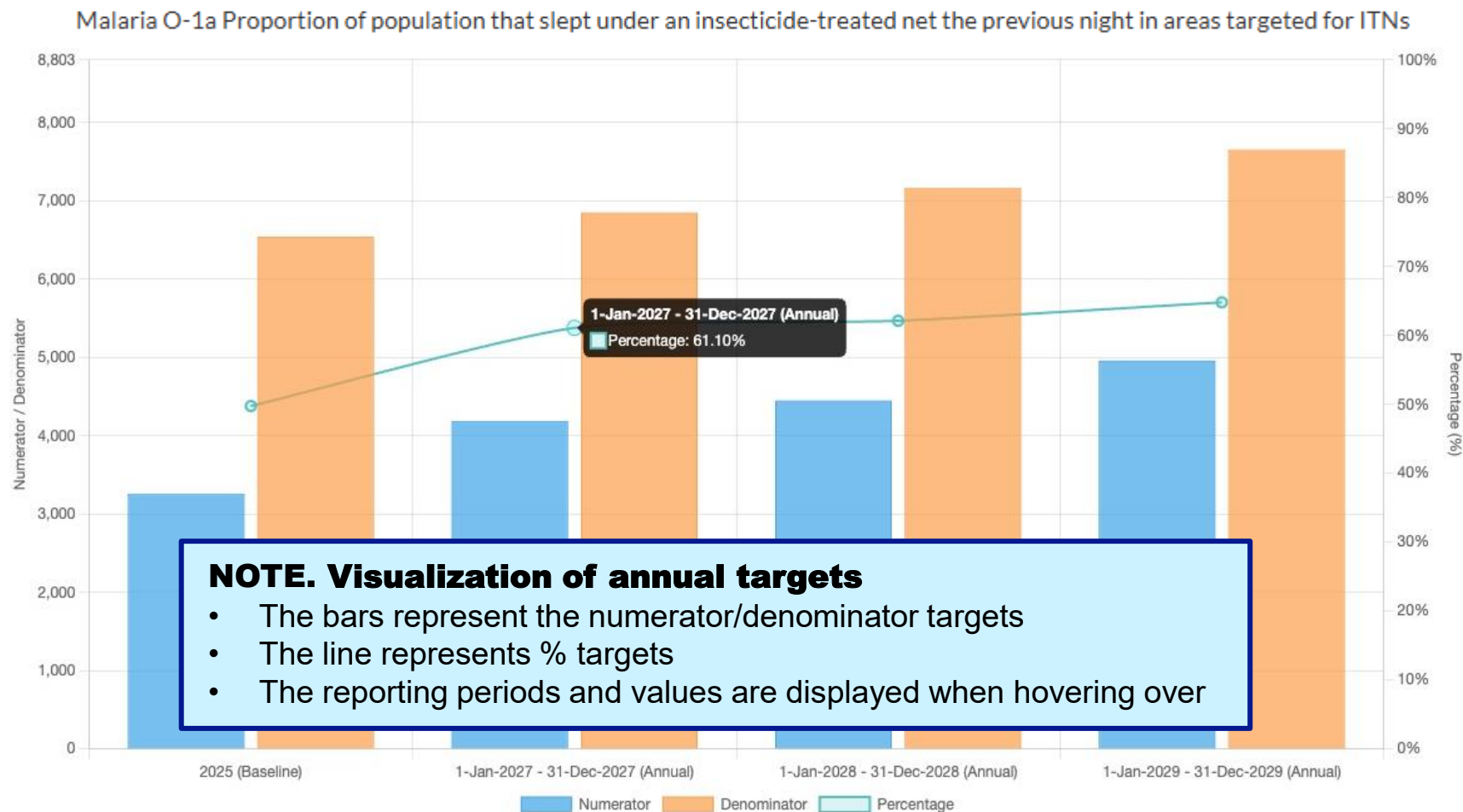
3. Indicators can be added, edited or deleted using the **Add**, **Edit** and **Delete** buttons

Click on **Chart** to access a visual representation of the annual targets

NOTE. The number in brackets specifies the total number of outcome indicators included in the PF

Outcome Indicators Section (2/4)

Visualize annual targets



Outcome Indicators Section (3/4)

Add an outcome indicator

[Funding Request] Global Fund to share FR documents with Applicant [Funding Request] Global Fund to share grant forms with PR [Funding Request] PR to share grant forms with Applicant [Funding Request] In progress

Download Performance Framework Attach & Submit

Instructions Overview Goals Objectives Impact Indicators Outcome Indicators Coverage Indicators Work Plan Tracking Measures

Outcome Indicators (0)

No Outcome Indicators found.

+ Add Expand All Collapse All

1. Click on **Add** to enter an Outcome indicator

Add Outcome Indicator

Outcome Indicator 1

Outcome Indicator

Custom Outcome Indicator

Custom Outcome Indicator (French / Spanish)

2. The **Add Outcome Indicator** popup window opens. Select a standard **Outcome Indicator** from the dropdown menu or enter a **Custom Outcome Indicator** if there is no suitable standard outcome indicator available in the list

NOTE. A separate field is provided for the PR to enter the Custom Outcome Indicator in French or Spanish, if needed

Cancel Save & Continue

3. Click on **Save & Continue**
This action opens the popup window **Edit Outcome Indicator**

NOTE. The indicator code is generated automatically for custom indicators.

Outcome Indicators Section (4/4)

Edit an outcome indicator – Baseline, targets, comments & disaggregations

Edit Outcome Indicator

Outcome Indicator 1 **Percentage only**

Outcome Indicator

Malaria O-1a Proportion of population that slept under an insecticide-treated net the previous night in areas targeted for ITNs

Country

Lalaland

▼ Baseline and Targets

Baseline	Year	TBD	Numerator	Denominator	Percentage	Report due date
	2027	☐				
Targets	2027	☐				
	2028	☐				
	2029	☐				

Note. The instructions to edit indicators are the same for impact and outcome indicators. Click [here](#) for step-by-step instructions

Baseline Source

The PR enters the Baseline Source

Baseline Source (French / Spanish)

Comment

1. Baseline:
2. Indicator Definition:
3. Objectives and [Assumptions](#):
4. Measurement and Recording:
5. Grant [Contribution](#):

Comment (French / Spanish)

> Disaggregation

Cancel

Save & Close

NOTE. Focused portfolios do not need to fill disaggregation section

Coverage Indicators Section (1/10)

Section overview

The screenshot displays the 'Coverage Indicators' section of the Global Fund system. At the top, a green banner reads '[Funding Request] Global Fund to share FR documents with Applicant'. Below this is a navigation bar with tabs: 'Download', 'Performance Framework', and 'Attach & Submit'. The 'Performance Framework' tab is active, showing a sub-menu with 'Instructions', 'Overview', 'Goals', 'Objectives', 'Impact Indicators', 'Outcome Indicators', 'Coverage Indicators' (highlighted), and 'Work Plan Tracking Measures'. The main content area shows 'Coverage Indicators (2)'. The first indicator, 'Coverage Indicator 1', is for 'Case management' in 'Lalaland' and is described as 'CM-8 Percentage of districts achieving national targets for the proportion of patients with confirmed malaria who received first-line antimalarial treatment'. It has a 'Percentage only' filter. The second indicator, 'Coverage Indicator 2', is also for 'Case management' in 'Lalaland' and is described as 'CM-5 Proportion of confirmed cases classified (elimination settings)'. It also has a 'Percentage only' filter. Both indicators have expandable sections for 'Baseline and Targets' and 'Disaggregation'. Callouts provide instructions: 1. Click on 'Coverage Indicators' to open the section. 2. Click on 'Expand All' and 'Collapse All' to quickly navigate through the different indicators. 3. Indicators can be added, edited or deleted using the 'Add', 'Edit' and 'Delete' buttons. A note states: 'NOTE. The number in brackets specifies the total number of coverage indicators included in the PF'. A 'Chart' button is also visible for each indicator.

1. Click on **Coverage Indicators** to open the section

2. Click on **Expand All** and **Collapse All** to quickly navigate through the different indicators

NOTE. The number in brackets specifies the total number of coverage indicators included in the PF

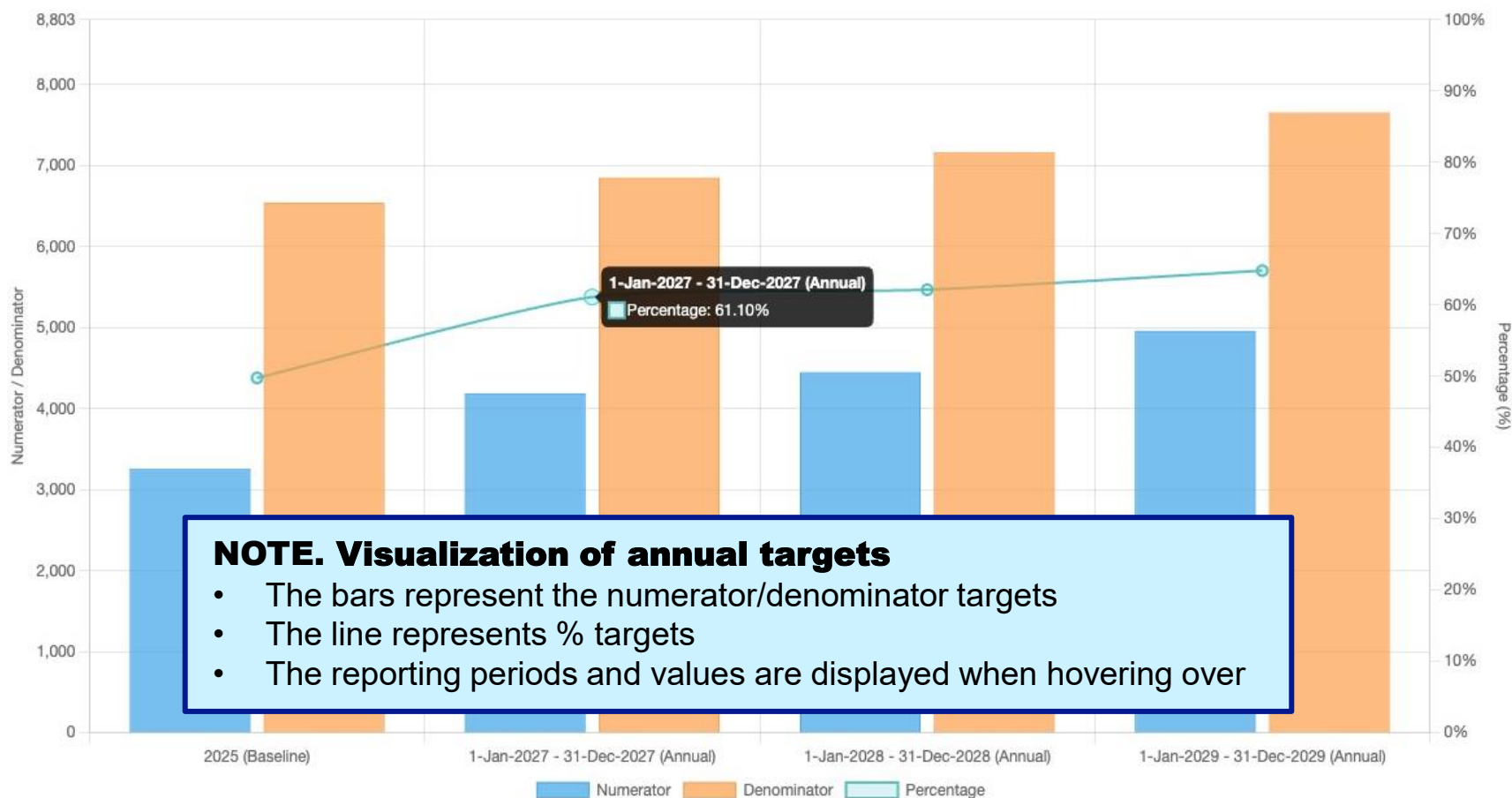
3. Indicators can be added, edited or deleted using the **Add**, **Edit** and **Delete** buttons

Click on **Chart** to access a visual representation of the annual targets

Coverage Indicators Section (2/10)

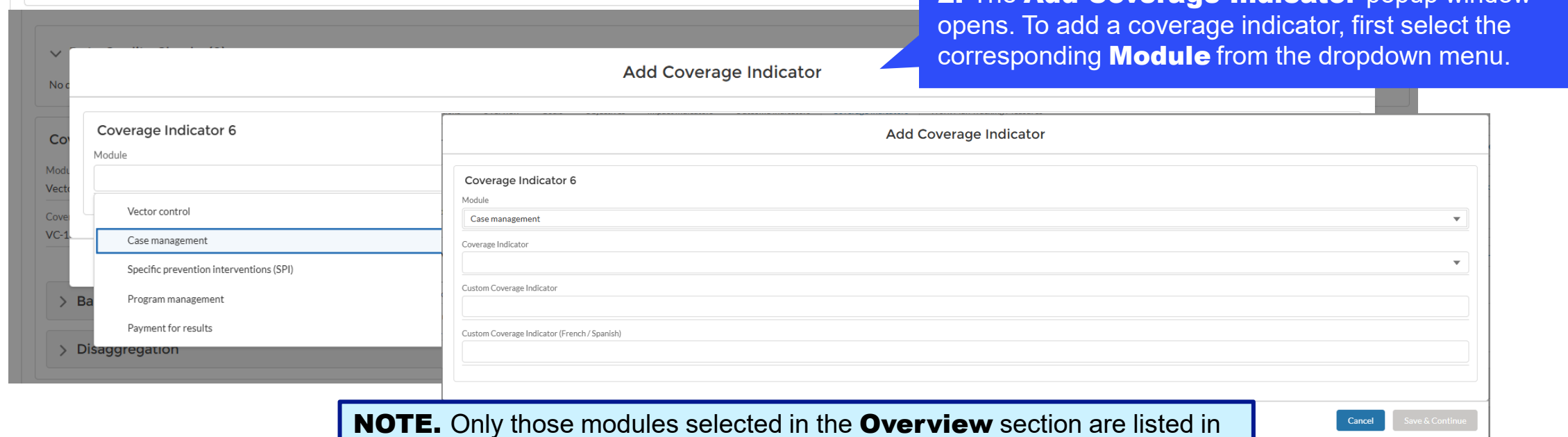
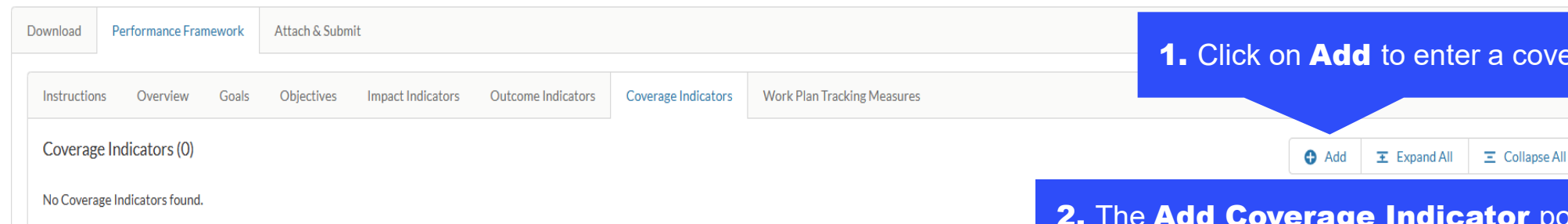
Visualize annual targets

CM-8 Percentage of districts achieving national targets for the proportion of patients with confirmed malaria who received first-line antimalarial treatment



Coverage Indicators Section (3/10)

Add a coverage indicator



NOTE. Only those modules selected in the **Overview** section are listed in the dropdown menu. If additional modules need to be listed to select related indicators, return to the overview page and add the required modules there

Coverage Indicators Section (4/10)

Add a coverage indicator

[Funding Request] Global Fund to share FR documents with Applicant [Funding Request] Global Fund to share grant forms with PR [Funding Request] PR to share grant forms with Applicant [Funding Request] In progress

Download Performance Framework Attach & Submit

Instructions Overview Goals Objectives Impact Indicators Outcome Indicators Coverage Indicators Work Plan Tracking Measures

Coverage Indicators (0) + Add Expand All Collapse All

No Coverage Indicators found.

Add Coverage Indicator

Coverage Indicator 6

Module
Case management

Coverage Indicator

Custom Coverage Indicator

Custom Coverage Indicator (French / Spanish)

Cancel Save & Continue

3. Use the dropdown menu to select a standard **Coverage Indicator** related to the selected module. Alternatively, enter a **Custom Coverage Indicator** if there is no suitable standard coverage indicator available in the list

4. Click on **Save & Continue**. It opens a dialogue box **Edit Coverage Indicator**

NOTE. A separate field is provided for the PR to enter the Custom Coverage Indicator in French or Spanish, if needed

Coverage Indicators Section (5/10)

Edit a coverage indicator

Edit Coverage Indicator

Coverage Indicator 3 **Percentage only**

Module
Case management

Coverage Indicator
CM-6 Proportion of foci classified as active, residual non-active and cleared (elimination setti

Country
Lalaland

1. Select **Country** for regional grants (pre-populated for single country grants)

2. Specify if **Scope of Targets** is national or sub-national

Scope of Targets
[Dropdown menu]

Include in Global Fund Results
☐

Cumulation Type
Non cumulative

Reverse Indicator
☐

3. Select the appropriate **Cumulation Type** and check **Reverse Indicator**, if needed. For standard indicators, these fields are pre-populated and cannot be changed.

NOTE. At Grant-making, the Global Fund checks this box if the results need to be included in the Global Fund annual results reporting. This is to avoid duplication of same indicators results from different PRs. For details on scope of targets and cumulation type refer to [this slide](#)

Baseline and Targets

Baseline	Year	Reporting Period
Targets	[Dropdown menu]	
		1-Jan-2027 - 30-Jun-2027
		1-Jul-2027 - 31-Dec-2027
		1-Jan-2028 - 30-Jun-2028
		1-Jul-2028 - 31-Dec-2028
		1-Jan-2029 - 30-Jun-2029

Cancel Save & Close

Coverage Indicators Section (6/10)

Edit a coverage indicator – Baseline

Edit Coverage Indicator

Coverage Indicator 2 Numerator and Denominator

Module
Vector control

Country
Lalaland

NOTE. The bubble specifies the required target data type for standard indicators (e.g., 'Numerator and Denominator'). The relevant data fields are enabled for data entry

▼ Baseline and Targets

Baseline	Year	Reporting Period	TBD	Numerator	Denominator	Percentage
			☐			
			☐			
			☐			
		1-Jul-2028 - 31-Dec-2028	☐			
		1-Jan-2028 - 31-Dec-2028 (Annual)	☐			
		1-Jan-2029 - 30-Jun-2029	☐			
		1-Jul-2029 - 31-Dec-2029	☐			

4. If baseline value is provided, the **Baseline Year** and **Source** must be filled. If baseline data is not available, leave all fields blank

NOTE. Where baseline is not available, leave all fields blank and provide in the comment box the date by when baseline data will become available

Coverage Indicators Section (7/10)

Edit a coverage indicator – Targets

SIC01 Kenny Dakadisy, Daniella RANDRIAMANANA, Herman Randrianantoanina, Siddig Alasyouti, Graciela Ortega

Edit Coverage Indicator

Coverage Indicator 2 Numerator and Denominator

Module Case management Country Lalaland

Coverage Indicator CM-8 Percentage of districts achieving n

Cumulation Type Non cumulative - other

Reverse Indicator ☐

5. Check the **TBD** box if the targets need to be determined later. Provide in the **Comment** field the date by when targets will become available and the PF revised

Baseline and Targets

Baseline	Year	Reporting Period	TBD	Numerator	Denominator	Percentage
Targets		1-Jan-2027 - 30-Jun-2027	☐			
		1-Jul-2027 - 31-Dec-2027	☐			
		1-Jan-2027 - 31-Dec-2027 (Annual)				
		1-Jan-2028 - 30-Jun-2028	☐			
		1-Jul-2028 - 31-Dec-2028	☐			
		1-Jan-2028 - 31-Dec-2028 (Annual)				
		1-Jan-2029 - 30-Jun-2029	☐			
		1-Jul-2029 - 31-Dec-2029	☐			

NOTE. Annual targets are auto-calculated for grants with semi-annual targets

Coverage Indicators Section (8/10)

Important information on target setting

NOTE.

1. Scope of targets

Geographically national, 100% of the national program target	Target refers to the whole country and represent 100% of the national program target
Geographically subnational, 100% of the national program target	Target refers to some geographical areas only but still reflects 100% of the national program target. For example, if the epidemic is concentrated in only some geographical areas
Geographical subnational, less than 100% national program target	Target refers to some geographical areas only and reflects a subset of the national program target. For example, where targets are from some specific areas supported by the Global Fund grant/PR and do not cover other affected geographic areas

2. Method to aggregate annual targets

	Cumulation Type	Semesterly
Non-cumulative	Non-cumulative [N/D]	Sum of S1+S2
Non-cumulative – special	Non-cumulative – special [N]	Sum of S1+S2
	Non-cumulative – special [D]	Last semesterly value of the reporting period (S2)
Non-cumulative – other	Non-cumulative – other [N]	Last semesterly value of the reporting period (S2)
	Non-cumulative – other [D]	Last semesterly value of the reporting period (S2)

Coverage Indicators Section (9/10)

Edit a coverage indicator – Baseline source & Comments

Edit Coverage Indicator

The screenshot shows a web form titled "Edit Coverage Indicator". It contains four text input fields arranged vertically. The first field is labeled "Baseline Source" and has a callout box pointing to it with the text: "6. Enter **baseline source**. Leave blank if the baseline value is not available". The second field is labeled "Comment" and has a callout box pointing to it with the text: "7. Use the **Comment** field to provide additional information, e.g., if the data source of the baseline value is different from the data source for reporting results". The third field is labeled "Comment (French / Spanish)" and the fourth field is labeled "GF Review Comment".

NOTE.

- The **Comment** field is available for the PR to enter any additional information on different aspects of the indicator (e.g. Baseline, Targets & Assumptions, etc.)
- Separate fields are provided for the PR to enter the **Baseline Source** and **Comment** in French or Spanish, if needed

Coverage Indicators Section (10/10)

Edit a coverage indicator – Disaggregation

NOTE.

- Focused portfolios do not need to fill the disaggregation section
- For standard indicators, the required disaggregations can be found below the corresponding standard indicators
- Pre-selected, as per the Indicator Guidance Sheets

The screenshot shows a web form for editing a coverage indicator. At the top, it says 'Category: Disaggregation' and 'Age: 15-19'. Below this is a table with columns for 'Year', 'Numerator', 'Denominator', and 'Percentage'. Each column has a corresponding input field. Below the table are three text input fields: 'Baseline Source', 'Comment', and 'Comment (French / Spanish)'. A blue callout box with the number '8' points to the 'Year', 'Baseline Source', and 'Comment' fields, containing the text: '8. Complete the **Baseline Year**, **values**, **Source** and **Comment** fields for all applicable disaggregation.' Another blue callout box with the number '9' points to the 'Save & Close' button at the bottom right, containing the text: '9. Click on **Save & Close**'. At the bottom left of the form are 'Cancel' and 'Save & Close' buttons.

NOTE.

- If the baseline data is not available, provide in the **Comment** field the date by when the baseline data will become available
- Separate fields are provided for the PR to enter the **Baseline Source** and **Comment** in French or Spanish, if needed

WPTMs Section (1/4)

Section overview

1. Click on **Work Plan Tracking Measures** to open the section

2. Click on **Expand All / Collapse All** to quickly navigate through the page

NOTE. The number in brackets specifies the total number of Work Plan Tracking Measures (WPTMs) included in the PF

3. WPTMs can be added, edited or deleted using the **Add**, **Edit** and **Delete** buttons

Download Performance Framework Attach & Submit

Instructions Overview Goals Objectives Impact Indicators Outcome Indicators Coverage Indicators Work Plan Tracking Measures

Work Plan Tracking Measures (3)

Work Plan Tracking Measure 1

Module: Vector control
Intervention: Insecticide treated nets (ITNs) distribution
Key Activity: Set up a tracking system for LLIN in abc region
Key Activity (French / Spanish):

> Milestones / Targets

Work Plan Tracking Measure 2

Module: Case management
Intervention: Integrated community case management (iCCM)
Country: xxx

Buttons: Add, Expand All, Collapse All, Edit, Delete

WPTMs Section (2/4)

Add a WPTM

The screenshot shows the 'Performance Framework' section with tabs for 'Download', 'Performance Framework', and 'Attach & Submit'. Below these are tabs for 'Instructions', 'Overview', 'Goals', 'Objectives', 'Impact Indicators', 'Outcome Indicators', and 'Coverage Indicators'. The 'Work Plan Tracking Measures (3)' section has an '+ Add' button, 'Expand All', and 'Collapse All' options. A popup window titled 'Work Plan Tracking Measure 1' is open, showing a 'Module' dropdown with 'Vector control' selected and an 'Intervention' dropdown with 'Insecticide treated nets (ITNs) distribution' selected. At the bottom of the popup are 'Cancel' and 'Save & Continue' buttons.

1. Click on **Add**

2. A popup window opens. Use the drop-down list to select a **module**. Interventions related to the selected module appear in the next drop-down list

3. Use the drop-down list to select an **intervention**

4. Click on **Save & Continue** to add related key activities

NOTE. Only those modules & interventions added in the **Overview** section are listed in the dropdown menus. If additional modules and/or interventions need to be selected, return to the overview page to add the required modules and/or interventions there

WPTMs Section (3/4)

Edit a WPTM

Work Plan Tracking Measure 1

Module Vector control	Intervention Insecticide treated nets (ITNs) distribution	Country lalaland
--------------------------	--	---------------------

Key Activity
Describe here the key activity

Key Activity (French / Spanish)

6. Provide a description of the **Key Activity**

NOTE. A separate field is provided for the PR to enter the description of Key Activity in French or Spanish, if needed

▼ **Milestones / Targets**

Reporting Period 1-Jan-2027 - 31-Dec-2027	
Milestone / Target	Milestone / Target (French / Spanish)
Progress Criteria - Started	Progress Criteria - Started (French / Spanish)

WPTM Category

- Capacity Building
- Data collection and analysis
- Digitalization
- Guidelines and SOPs
- Recruitment and hiring
- Renovation, installation, and maintenance
- Service Delivery and Program Implementation
- Strategy, policy, advocacy and planning

5. Select a **Country for regional grants (pre-populated for single country grants)**

7. Select the appropriate **WPTM Category from the dropdown list**

WPTMs Section (4/4)

Edit a WPTM

Reporting Period
1-Jan-2029 - 31-Dec-2029

Milestone / Target

Progress Criteria - Started

Progress Criteria - Advanced

Progress Criteria - Completed

Comment

Comment (French / Spanish)

GF Review Comment

Cancel Save & Close

8. Include the relevant Milestones / Targets to be achieved during the reporting period

NOTE. This field cannot exceed 4000 characters

9. Specify the **Progress Criteria** when the milestone/target is considered as **Started**, **Advanced** or **Completed**

NOTE.

- Provide additional relevant information related to the activity and/or the targeted milestones in the **Comment** field
- Separate fields are provided for the PR to enter the Milestones / Targets, Progress Criteria and Comments in French or Spanish, if needed

10. Click on **Save & Close**

Review & Submit (1/8)

Generate Excel

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download

Performance Framework

Budget

Attach & Submit

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

Work Plan Tracking Measures

Overview

Refresh

Generate Excel

Expand All

Collapse All

Edit

Implementation Period

Grant

XXX-X-XXXX

IP start date

1-Jan-2027

Geography

Lalaland

IP end date

31-Dec-2029

Reporting Periods

Principal Recipients

Modules

Interventions (Only required if you have Work Plan Tracking Measures)

Edit

Add

Add

1. To work on the PF outside of the Partner Portal, click on **Generate Excel** to extract the online PF data into an Excel file

NOTE. There is no import option for the Excel PF, this is only for preparatory work and requires manual inputs in the online PF in Partner Portal

Review & Submit (2/8)

Run DQCs

Data Quality Checks (DQCs) are a set of automated actions 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 contains a potential error.
- PR is strongly encouraged to address data issues before submitting.
- Requires a justification comment if the warning is overruled which allows the PR to proceed and submit.

Review & Submit (3/8)

Run DQCs

NOTE. Review and resolve the DQCs in each section of the PF

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

DownloadPerformance FrameworkBudgetAttach & Submit

InstructionsOverviewGoalsObjectivesImpact IndicatorsOutcome IndicatorsCoverage IndicatorsWork Plan Tracking Measures

Coverage Indicators (1)

▼ Data Quality Checks (1)

▲ 1 error(s)

Check Data QualityDownload Data Quality Checks

Data Quality Check	Justification
▲ Error Coverage Indicator VC-1.1 No targets set. Enter targets, select 'TBD' or remove the indicator if not to be reported.	

1. Click on **Check Data Quality**

Optional – 2. Click on **Download Data Quality Checks** to get the DQC summary in an Excel file per section. File can be formatted as needed

Introduction & Access

PF Process Flow

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

WPTMs

Review & Submit PF

Resources & Support

Review & Submit (4/8)

Run DQCs

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download

Performance Framework

Budget

Attach & Submit

Instructions

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

Work Plan Tracking Measures

Work Plan Tracking Measures (2)

+ Add

⌵ Expand All

⌵ Collapse All

▼ Data Quality Checks (1)

⚠ 1 warning(s)

Check Data Quality

Download Data Quality Checks

Data Quality Check	Justification
⚠ Warning Work Plan Tracking Measure - Case management - Facility-based treatment Missing one or more WPTM "Category". Select from dropdown list.	Add a comment...

3. Review errors & warning and resolve the issue where possible. Enter a **Justification** if DQC warnings cannot be resolved for any reason

Review & Submit (5/8)

Run DQCs

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

Download

Performance Framework

Budget

Attach & Submit

Instructions

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

Work Plan Tracking Measures

Coverage Indicators (1)

▼ Data Quality Checks (1)

1 error(s)

Check Data Quality

Download Data Quality Checks

Data Quality Check	Justification
▲ Error Coverage Indicator VC-1.1 No targets set. Enter targets, select 'TBD' or remove the indicator if not to be reported.	

4. Once DQCs are addressed, click again on **Check Data Quality** to confirm all issues are solved for each section



[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

Download

Performance Framework

Budget

Attach & Submit

Instructions

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

Work Plan Tracking Measures

Coverage Indicators (1)

▼ Data Quality Checks (0)

No data quality issues found.

Check Data Quality

Download Data Quality Checks



NOTE. The online PF is ready to be shared once all DQCs are addressed (resolved or justified)

Review & Submit (6/8)

Submit the PF

[Funding Request] Global Fund to share FR documents with Applicant

[Funding Request] Global Fund to share grant forms with PR

[Funding Request] PR to share grant forms with Applicant

[Funding Request] In progress

DownloadPerformance FrameworkBudgetAttach & Submit

Attach & submit

Document Requirements

Required

Performance FrameworkBudgetHealth Product Management Template

➤ Share with Applicant

1. Click on **Share with Applicant**

ⓘ An HPMT needs to be submitted to the Global Fund before submitting a ready Funding Request before Global Fund submits to TRP. There is no requirement to share the HPMT Excel extract with the CCM; however, it can be attached as a supporting document type 'Other' at PR discretion in the 'Attach & Submit' tab.

Grant-making Documents

Ⓜ Attach

NOTE. The **Share with Applicant** button is only enabled when all the applicable required documents are ready to be shared

Introduction & Access

PF Process Flow

Overview

Goals

Objectives

Impact Indicators

Outcome Indicators

Coverage Indicators

WPTMs

Review & Submit PF

Resources & Support

Detailed Instructions – Section by Section

Review & Submit (7/8)

Submit the PF

NOTE. In case there are any unaddressed DQCs in the PF, an error message is displayed

The screenshot shows the Global Fund submission interface. At the top, there are four tabs: "[Funding Request] Global Fund to share FR documents with Applicant", "[Funding Request] Global Fund to share grant forms with PR", "[Funding Request] PR to share grant forms with Applicant", and "[Funding Request] In progress". Below the tabs, there are sections for "Download", "Performance Framework", and "Budget". A modal dialog box is displayed in the center, containing the text: "There are unaddressed PF and/or Budget-related Data Quality Checks (DQCs). [Next steps]: Review and address the DQCs before sharing with the CCM by making changes to the online PF or updating and attaching a Budget. Warnings that cannot be resolved require a justification." Below the text is an "OK" button. A blue callout box points to the "OK" button with the text: "2. Click **OK** and then click on the **Performance Framework** tab to address the remaining DQCs".

There are unaddressed PF and/or Budget-related Data Quality Checks (DQCs). [Next steps]: Review and address the DQCs before sharing with the CCM by making changes to the online PF or updating and attaching a Budget. Warnings that cannot be resolved require a justification.

OK

2. Click **OK** and then click on the **Performance Framework** tab to address the remaining DQCs

Review & Submit (8/8)

Submit the PF

Submit Grant-making to CCM

Document Requirements

- Performance Framework
- Budget
- Health Product Management Template

Cancel **▶ Share with Applicant**

NOTE. The applicable required documents are listed in the popup window

3. Click on **Share with Applicant**

NOTE. Wait for the data to be shared as mentioned on screen

RESOURCES & SUPPORT

Online Resources

List of Acronyms & Abbreviations

Contact Support for Technical Issues

Introduction
& Access

PF Process
Flow &
Detailed
Instructions

Resources
& Support

Online Resources

Operational Policy & Procedures

- [OPN](#) & [Operational Procedures](#) on Apply for Funding & Sign Quality Grants
- [Operational Policy Manual](#)

PF Guidance

- Country Resources
- Information Sessions
- GC8 Modular Framework
- [Sample PF for GC8](#)

[Apply for Funding](#) | [Grant-making](#)
[Apply for Funding](#) | [Grant-making](#)
[English](#) | [Français](#) | [Español](#)

Additional Resources

- GED Interactive Guide
- GED Change Request Instructions
- Guidelines for Grant Budgeting
- Funding Request Partner Portal Manual
- Grant-making Partner Portal Manual

[English](#) | [Français](#) | [Español](#)
[English](#) | [Français](#) | [Español](#)
[English](#) | [Français](#) | [Español](#)
[English](#) | [Français](#) | [Español](#)
English | *Français* | *Español*

List of Acronyms & Abbreviations

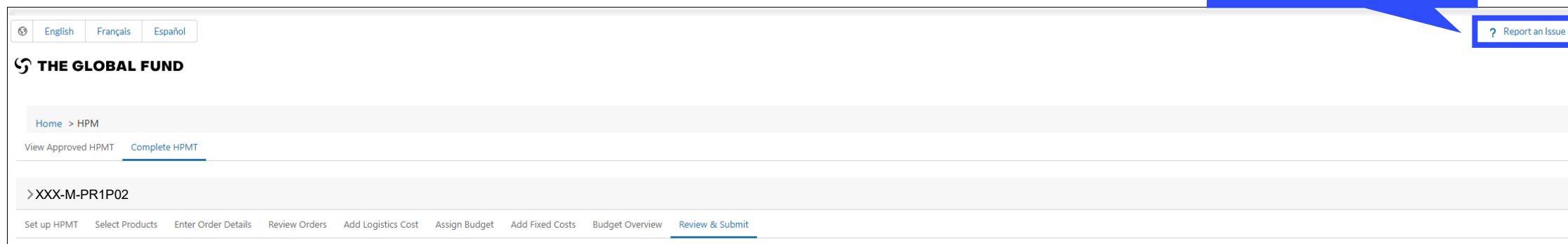
AUP	Allocation Utilization Period
CT	Country Team
CCM	Country Coordinating Mechanism
DQC	Data Quality Checks
GED	Grant Entity Data
GOS	Grant Operating System
FR	Funding Request
GAC	Grant Approval Committee
GC8	Grant Cycle 8
HIV	Human Immunodeficiency Virus
HPMT	Health Product Management Template
IGS	Indicator Guidance Sheet

IP	Implementation Period
LFA	Local Fund Agent
NGO	Non-Governmental Organization
NSP	National Strategic Plan
OPN	Operational Policy Note
PF	Performance Framework
PfR	Payment for Results
PR	Principal Recipient
SR	Sub-recipient
TB	Tuberculosis
TRP	Technical Review Panel
WPTM	Work Plan Tracking Measure

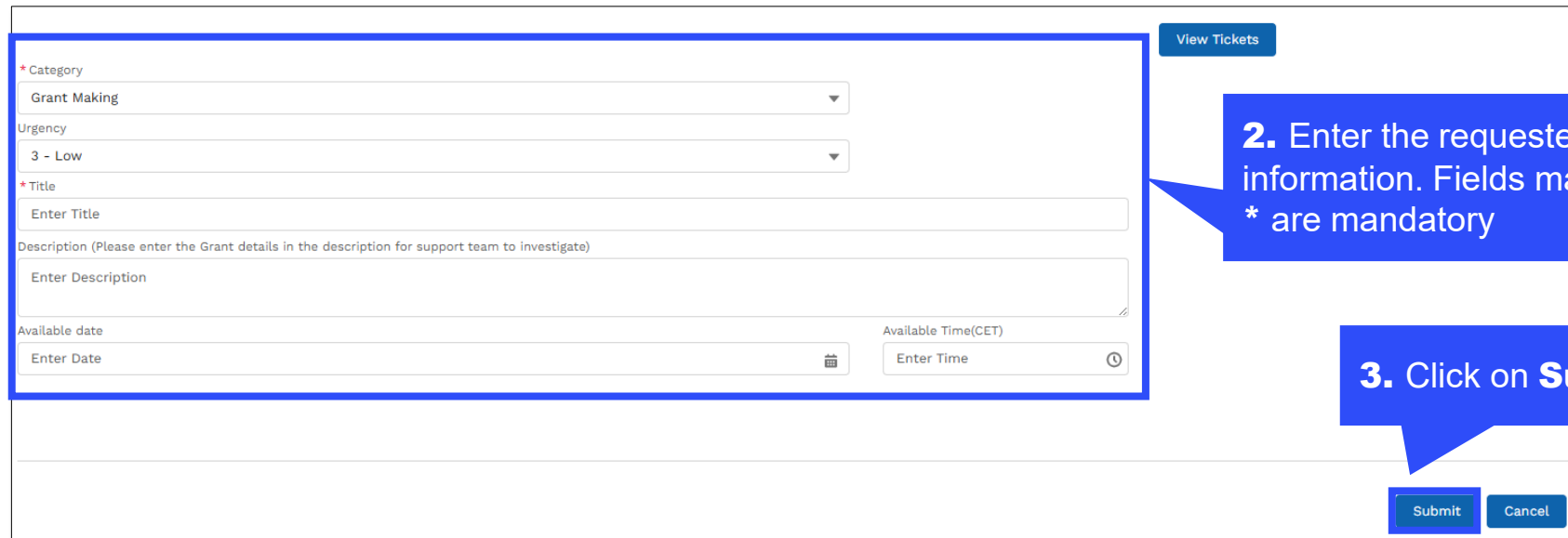
Contact Support for Technical Issues

If you have any questions or encounter technical issues, please contact the Global Fund:

1. Click on **Report an Issue**



The screenshot shows the top navigation bar of the Global Fund website. It includes language selection buttons for English, Français, and Español. The Global Fund logo is on the left. A breadcrumb trail shows 'Home > HPM'. Below this, there are tabs for 'View Approved HPMT' and 'Complete HPMT'. A specific grant identifier '> XXX-M-PR1P02' is displayed. At the bottom of this section, a series of tabs represent the process flow: 'Set up HPMT', 'Select Products', 'Enter Order Details', 'Review Orders', 'Add Logistics Cost', 'Assign Budget', 'Add Fixed Costs', 'Budget Overview', and 'Review & Submit'.



The screenshot shows the 'Report an Issue' form. A blue rectangular box highlights the following fields: 'Category' (with a dropdown menu showing 'Grant Making'), 'Urgency' (with a dropdown menu showing '3 - Low'), 'Title' (with a text input field labeled 'Enter Title'), 'Description' (with a text area labeled 'Enter Description'), 'Available date' (with a date picker labeled 'Enter Date'), and 'Available Time(CET)' (with a time picker labeled 'Enter Time'). To the right of the form is a 'View Tickets' button. At the bottom right of the form are 'Submit' and 'Cancel' buttons.

2. Enter the requested information. Fields marked * are mandatory

3. Click on **Submit**

