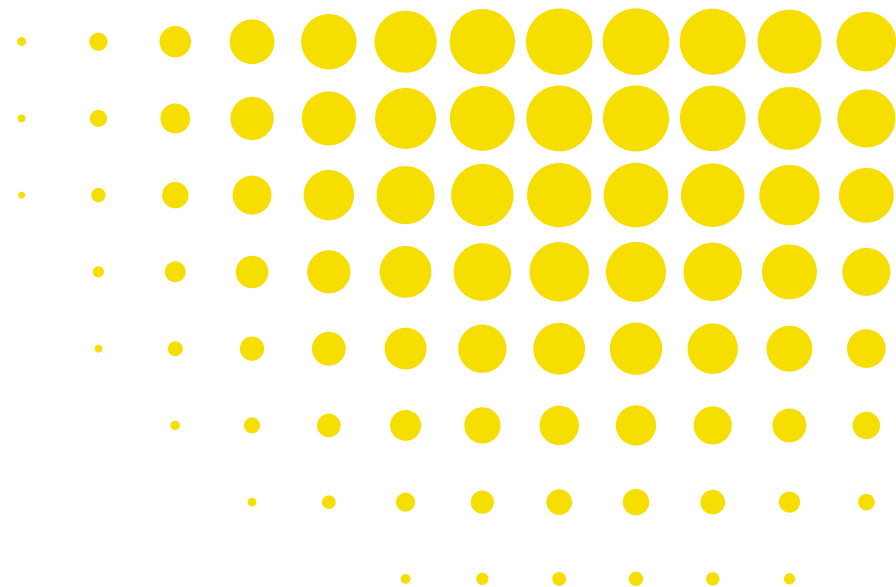
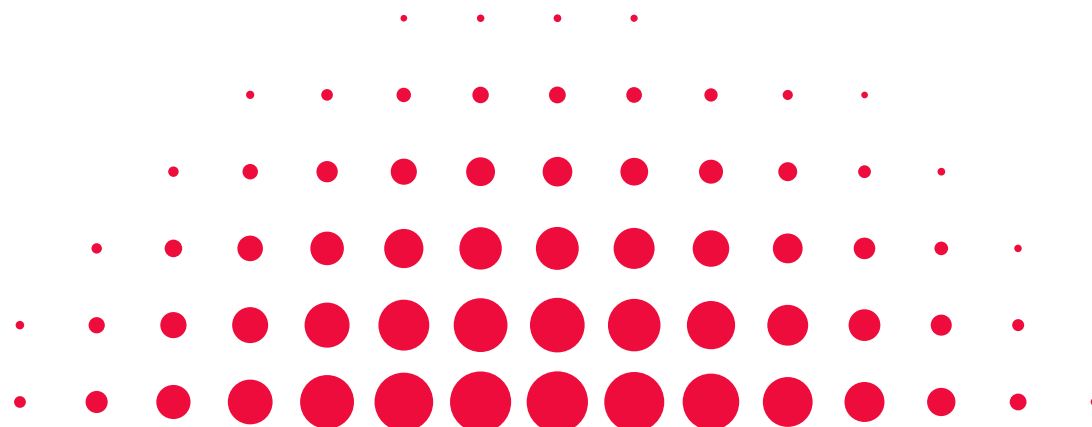
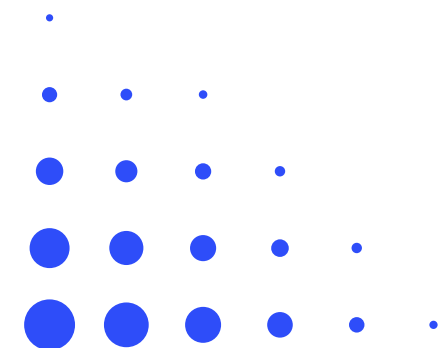




Partner Portal Manual



GC8 Investment Priorities Request





Click on the sections below for direct access

Introduction & Access

[How to Use This Manual](#)

[Legend](#)

[Goal, Objectives & Key Changes](#)

[Update GED](#)

[How to log in to the Partner Portal](#)

Process Overview & CCM Detailed Instructions

[CCM Overview](#)

[Step 2. Update GED & Complete CCM Form](#)

[Step 7. Define Investment Priorities](#)

[Step 10. Endorse Grant & Sign Statement of Compliance](#)

Process Overview & PR Detailed Instructions

[PR Overview](#)

[Step 4. Update GED](#)

[Step 9. Access, Develop & Share Grant Documents](#)

[Step 11. Submit Grant Documents to the Global Fund](#)

[Step 15. Sign & Share Grant Confirmation](#)

[Step 18. Access Signed Grant Confirmation](#)

[& Finalize Implementation Readiness](#)

Resources & Support

[Online Resources](#)

[List of Acronyms & Abbreviations](#)

[Contact Support for Technical Issues](#)

INTRODUCTION & ACCESS

How to Use This Manual

Legend

Goals, Objectives & Key Changes

Update GED

How to log in to the Partner Portal

CCM
Steps

PR
Steps

Resources
& Support

This manual provides comprehensive guidance for Country Coordinating Mechanisms (CCMs)* and Principal Recipients (PRs) performing steps in the Partner Portal for Grant Cycle 8 (GC8) **Investment Priorities Requests**.



- **The Investment Priorities Request application approach is by invitation only.**
- Streamlines the engagement for Focused portfolios that are expected to receive Global Fund financing beyond GC8. PRs submit an Investment Priorities Request using GC8 documents, building on Country Dialogue-driven investment priorities shared by the CCM, with Technical Review Panel (TRP) oversight rather than dedicated TRP review.

All GC8 Grant-making resources can be found on the dedicated [Global Fund website](#) page, including Partner Portal manuals for other submission pathways. General guidance for other submission pathways is covered in the document [Accessing your GC8 allocation](#). Demonstration videos on navigating the Partner Portal for Investment Priorities Request can be found on [here](#).

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 Page](#)

Direct access to the different sections and guide to navigation

[Introduction & Access](#)

How to use this manual, key changes for GC8 & how to access the Partner Portal

[CCM Overview & Detailed Instructions](#)

Process flow and detailed instructions for CCMs on what to do in the Partner Portal for each step

[PR Overview & Detailed Instructions](#)

Process flow and detailed instructions for PRs on what to do in the Partner Portal for each step

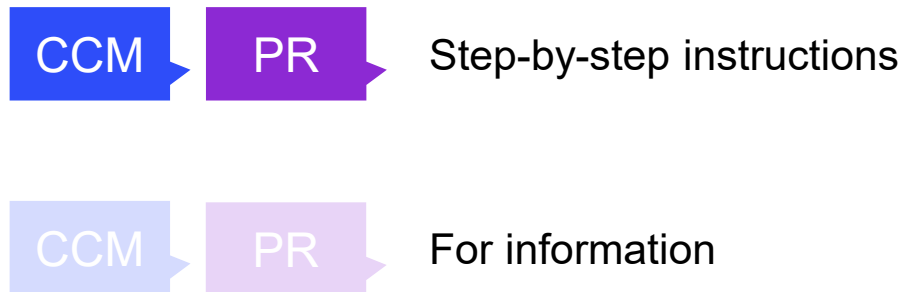
[Resources & Support](#)

Links to useful materials & technical support

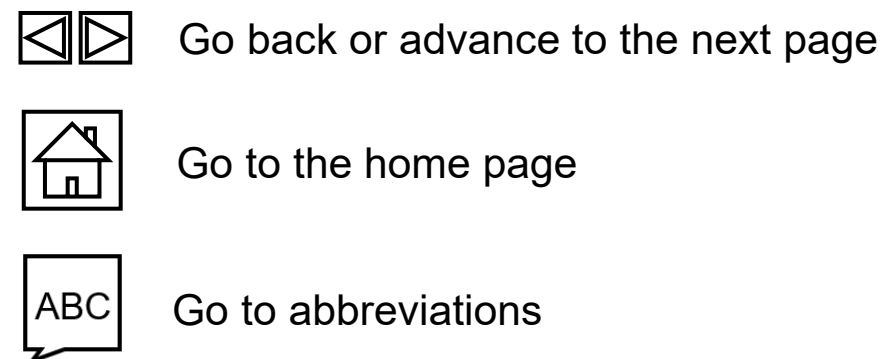
Legend



System Instructions

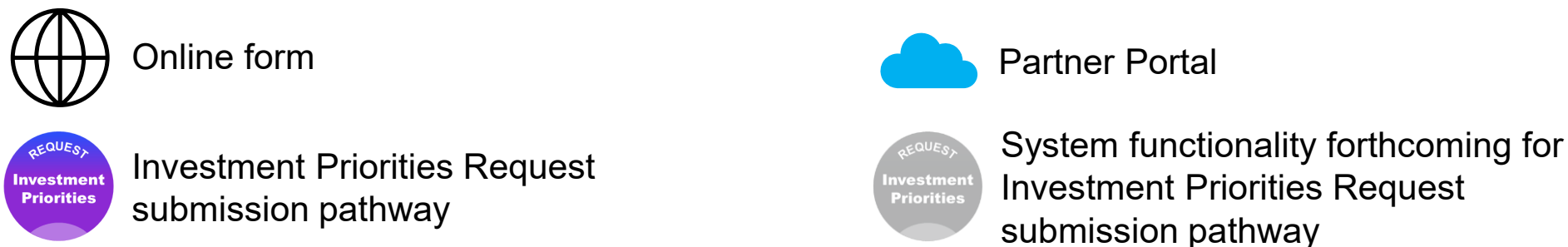


Navigation Buttons



Click on navigation buttons for direct access

Symbols



Goal, Objectives & Key Changes for GC8



GOAL

Design disbursement- and implementation-ready **quality grants** positioned to deliver strategic objectives and achieve the targeted impact

OBJECTIVES



Strategic shifts to increase sustainable program design & support effective transitions



Quality & timely grants signed within compressed 2026 timelines



Submissions & improved data quality through the Partner Portal

KEY CHANGES

- Support effective, predictable transitions from Global Fund financing
- Rigorous prioritization of investments
- Integrated systems for health & service delivery
- Community health systems & sustainable financing
- Optimize domestic resources & effective co-financing

- Fewer requirements & streamlined guidance
- Differentiated submission pathways tailored to country contexts
- An optimized Modular Framework, with rationalized modules, interventions & indicators

- Online completion of the PF & Co-financing Online Form
- On-screen Summary Budget visualization
- Strengthened data quality checks for all core documents
- Automated forms handling and features such as history tracking

Investment Priorities Request Submission Pathway



Introduction & Access

Intro

Access the Partner Portal

Application approach

Submission pathway

TRP engagement

High Impact / Core

Focused

Program Continuation (invitation only)

Full Review

Tailored for Transition

Tailored for Focused

CCM Investment Priorities (invitation only)

Program Continuation Submission

Grant-ready Funding Request

Classic Funding Request

Investment Priorities Request

No TRP review

Regular

Tailored

TRP Oversight

CCM Steps

PR Steps

Resources & Support

REQUEST Investment Priorities



Allocation Letter shared & Program Split communicated

1

TRP pre-shaping

2

CCM documents Country Dialogue & shares CCM Investment Priorities with PR & CT by email

3

PR develops grant documents & share with CCM by email

4

CCM reviews & endorses grant documents

5

PR submits grant documents & Investment Priorities to the Global Fund

6

Global Fund reviews grant documents & submits to GAC

7

GAC review + TRP as Partner

Board approval



IP start date

Grant-making

GC8 Required Documents – Investment Priorities Request



Introduction & Access

Intro

Access the Partner Portal

CCM Steps

PR Steps

Resources & Support

GC8 Documents Requirements – Investment Priorities Request		
Grant Confirmation	Required for GAC	✓
Grant PF		✓
Grant Budget, including Summary Budget		✓
Co-financing Commitment Letter		✓
Funding Landscape Table (FLT)		✓
<i>Updated Unfunded Quality Demand (UQD) Register</i>		-
CCM Investment Priorities CCM	Other supporting docs	✓
<i>Health Product Management Template (HPMT)</i>		-
<i>Implementation Arrangements Map</i>		-
<i>Updated Programmatic Gap Tables (PGT)</i>		-
<i>Monitoring and Evaluation (M&E) lan</i>		-
Evidence of realization of GC7 co-financing Commitment		✓
Co-financing online form		✓
CCM Statement of Compliance CCM		✓
CCM Endorsement CCM		✓
<i>Applicant response to TRP to be addressed during Grant-making</i>		-

Investment Priorities Request documents are accessed & submitted through the Partner Portal

The **Partner Portal** is the external-facing Global Fund platform for communication and sharing of deliverables between in-country actors (CCM, PR, LFA, as applicable) & the Global Fund Secretariat.

Document Name	Document Type	Attached	Language
BEN_M_CNLS_TP_BudgetGFShared_1 Budget - BEN-M-CNLS-TP	Budget GF Shared Excel	11-May-2026 10:48 The Global Fund	English
BEN_M_CNLS_TP_PerformanceFrameworkGFShared_2 Performance Framework - BEN-M-CNLS-TP	Performance Framework GF Shared Excel	11-May-2026 10:48 The Global Fund	English

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

Some forms are completed in the Partner Portal, while others are attached when ready

The Grant-making module:



Single entry point for PRs to download, complete & submit grant documents



Increases visibility of required documents, their status and next steps, with tailored notifications to PRs, CCMs & the Global Fund



Ensures quality data & complete submissions from the start, with completeness checks for PRs & CTs and automated ticketing for issues



Introduction & Access

Intro

Access the Partner Portal

CCM Steps

PR Steps

Resources & Support

Complete & accurate GED enables PRs to download, complete & submit grant documents

PRs access and submit grant documents through the Global Fund Partner Portal. Key documents are edited and/or checked for data quality directly in the Partner Portal. **Accurate Grant Entity Data (GED) is critical to ensure all required PR staff and consultants have appropriate access to the Grant-making module.**



Step-by-step [videos](#) for CCMs



Step-by-step [GED Guide for CCM Applicants](#)



Step-by-step instructions for PRs updating GED in the [GED Interactive Guide](#) [EN](#) | [FR](#) | [ES](#)



Actions to take

- PR contacts with access rights to the **GED App** in the [Global Fund Partner Portal](#) can submit Change Requests to create, update or deactivate an organization and/or contact.
- PRs** are asked to submit a Change Request in GED or reach out to their CT if updates are needed.
- PRs ensure contacts with access rights to Portal are updated for GC8.** The PF and Co-Financing Commitment Form are now completed online through the Grant-making module, while the Excel Budget includes final data quality checks in the Portal. Ensure appropriate focal points are set up in GED before Grant-making starts.

Log in to the Partner Portal

1. Sign into the [Global Fund Partner Portal](#) by entering your user ID (e.g. ***@ext.theglobalfund.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

The Global Fund
Sign in

Username@ext.theglobalfund.org or GF email

Can't access your account?

Back Next

The Global Fund

Enter password

Password

Forgot my password

Sign in

The Global Fund

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



Only for PRs

Principal Review

1. From the **Home** page,
Click on **All Applications**

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

Grant Making

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

Grant Revision

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

Access the Grant-making application

English | Français | Español

 **THE GLOBAL FUND**

Home All Applications Insights

 **Only for PRs**



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.



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

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

English | Français | Español

 THE GLOBAL FUND

Home All Applications Insights



Only for PRs

Principal Recipient Reporting

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

Grant Making

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

Grant Revision

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

My Applications

[View All](#)

	Principal Recipient Reporting	>	★
	Grant-making	>	★

Quick Links

-  The Global Fund Website
-  Digital Library
-  Data Explorer
-  Report fraud and corruption
-  Imbizo

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

Process Overview & Detailed CCM Instructions

Process Overview for CCM

Detailed CCM Instructions

Step 2. Update GED & Complete CCM Form

Step 7. Define Investment Priorities

Step 10. Endorse Grant & Sign Statement of Compliance

Introduction
& Access

CCM
Steps

PR
Steps

Resources
& Support

Investment Priorities Request

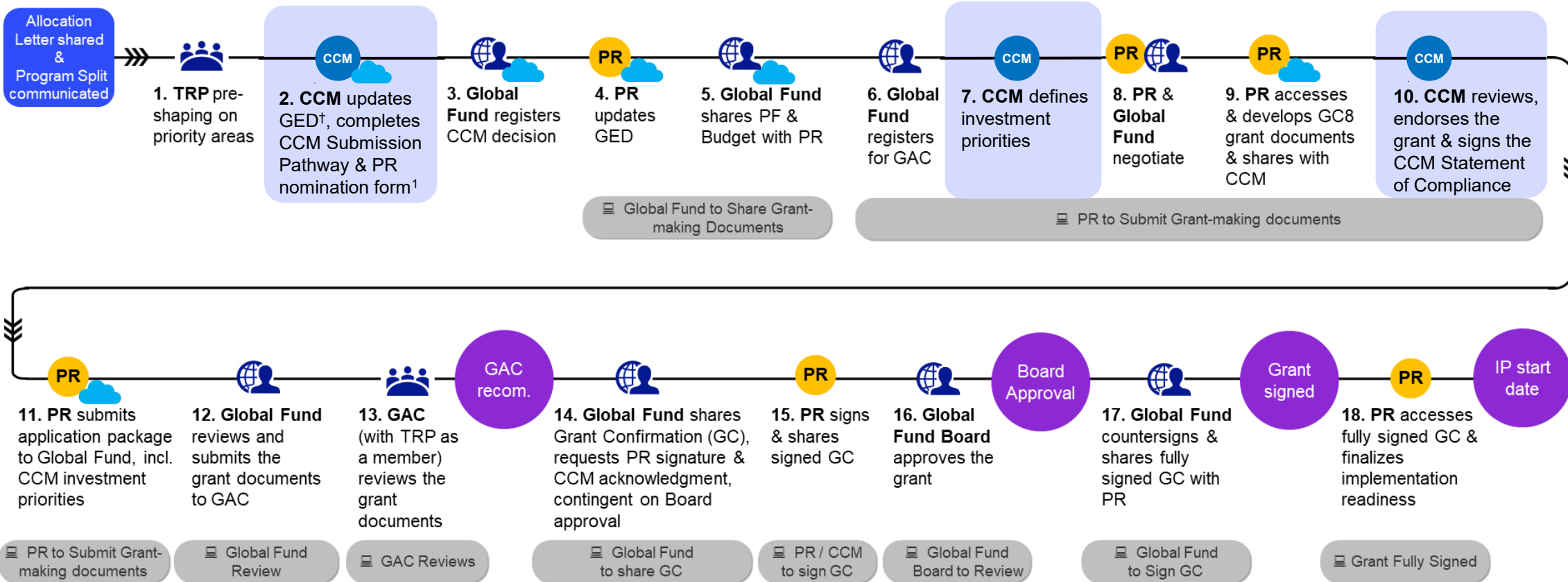
Process Overview

Focus of this section

CCM CCM
PR PR

TRP/GAC
The Global Fund

Partner Portal step
Partner Portal status



Introduction & Access

Process Overview

Step 2. Update GED & Complete CCM Form

Step 7. Define Investment Priorities

Step 10. Endorse Grant & Sign Statement

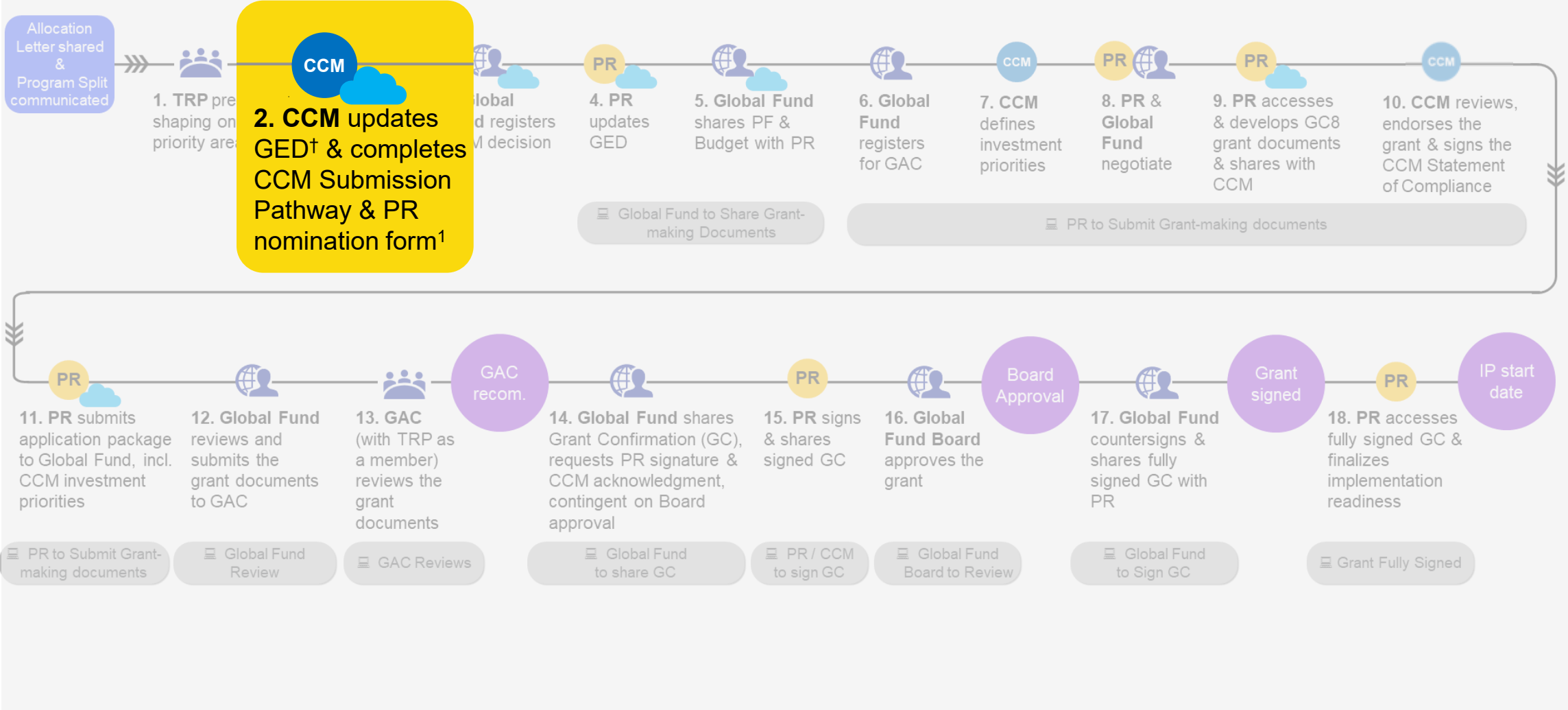
PR Steps

Resources & Support

Step 2. Update GED & Complete CCM Form



Introduction & Access
Process Overview
Step 2. Update GED & Complete CCM Form
Step 7. Define Investment Priorities
Step 10. Endorse Grant & Sign Statement
PR Steps
Resources & Support



† As applicable.
¹ See [GC8 PR Nomination Guidance](#)

Step 2. Update GED & Complete CCM Form

CCM updates Grant Entity Data (GED)



Introduction & Access
Process Overview
Step 2. Update GED & Complete CCM Form
Step 7. Define Investment Priorities
Step 10. Endorse Grant & Sign Statement
PR Steps
Resources & Support

English Français Español

Search...

SEARCH

CCM TEST ...

HOME ORGANIZATION INFORMATION

Organization Information

CCM Example

Update Organization

Create Contact

Update Contact

Organization Short Name	Organization Grant Abbreviation	Integration Status	#Open Change Requests for Organization	#Open Change Requests for Contacts	#Open Change Requests for Banking
CCM Example			0	2	0

DETAILS

ACCOUNT ROLES

CONTACTS

BANKING DETAILS

CHANGE REQUESTS

FILES

MORE

Organization Details

Organization Name

CCM Example

Organization Short Name ⓘ

CCM Example

Parent Account

Website

Communication Language ⓘ

English

Address Information

Organization

Role

Coordination

Representation

0

Representation

0

Representation by age group 26-40 ⓘ

0

Representation by age group 41-60 ⓘ

0

Representation by age group >60 ⓘ

0

Representation by gender Male

% Representation by age group 26 - 40

0%

% Representation by age group 41 - 60

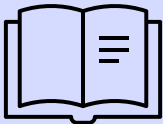
0%

% Representation by age group >60

0%

% Representation by gender Male

1. To either create a NEW member (external consultants, new CCM members) or update an EXISTING member, with access to the Partner Portal, click on **Create Contact** or **Update Contact** respectively



Note: For step-by-step instructions, consult the [GED Guide for CCM Applicants](#)



Step 2. Update GED & Complete CCM Form

CCM assigns new or existing contact permission as 'Submitter' or 'Editor'



Introduction
& Access

Process
Overview

Step 2.
Update
GED &
Complete
CCM Form

Step 7.
Define
Investment
Priorities

Step 10.
Endorse
Grant &
Sign
Statement

PR
Steps

Resources
& Support

The screenshot shows the 'Create Contact / Update Contact' form. On the left, under 'Organization Information', 'CCM Example' is selected. A blue callout box points to the 'Access to Grant Deliverables' checkbox, which is checked. Another blue callout box points to the 'Grant Deliverables Access Type' dropdown menu, which is open and shows 'Editor' and 'Submitter' as options. A third blue callout box points to the 'Next' button at the bottom right of the form. The form also includes checkboxes for 'Signatory for Legally-Binding Documents', 'Member of the Oversight Committee', and 'Member of the Executive Committee'. A note at the bottom of the form states: 'ensure transparency. If there are compelling reasons for not having your relevant personal data published on Global Fund digital platforms please tick this box. Please note that even if you tick this box, the Global Fund may disclose your email address to relevant partners and third parties. The Global Fund is committed to respecting the dignity and privacy of people, while balancing such rights with the Global Fund values of transparency, accountability and the ability to carry out its mission. For further information refer to the'.

English Français Español

Search...

Create Contact / Update Contact

☐ Signatory for Legally-Binding Documents

☐ Member of the Oversight Committee

☐ Member of the Executive Committee

Note: This will be automatically ticked if the contact is a...

☒ Access to Grant Deliverables

Grant Deliverables Access Type

Please select

Please select

Editor

Submitter

ensure transparency. If there are compelling reasons for not having your relevant personal data published on Global Fund digital platforms please tick this box. Please note that even if you tick this box, the Global Fund may disclose your email address to relevant partners and third parties. The Global Fund is committed to respecting the dignity and privacy of people, while balancing such rights with the Global Fund values of transparency, accountability and the ability to carry out its mission. For further information refer to the

Previous Next

Communication Language

English

Address Information

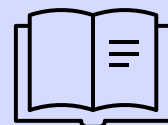
3. Select the **Grant Deliverables Access Type** for the existing contact: Submitter or Editor

ONLY **Submitters** have the right to submit the final FR

CCMs need to have **at least 2 submitters** with 1 being an Admin Focal Point

2. To provide access to the FR module in the Partner Portal for a new or existing contact, check/toggle the new **Access to Grant Deliverables** field as shown

4. Click **Next**



Step 2. Update GED & Complete CCM Form

CCM shares CCM Confirmation of Submission Pathway & PR Nomination Form



Introduction
& Access

CCM Confirmation of Submission Pathway & PR Nomination Form template ([EN](#), [FR](#), [ES](#)) available on the [website](#)
(Country Resources > Grant Life Cycle > Applying for Funding > Application Materials > CCM Documents)



CCM Confirmation of Submission Pathway & PR Nomination Form

Portfolio	Please enter text
Component(s)	Please enter text
Allocation Cycle	Grant Cycle 8 (GC8)

The Country Coordinating Mechanism¹ (CCM) submits **one form per Funding Request** to confirm its intention for the GC8 (i) submission pathway, (ii) TRP window, and (iii) PR nomination.

Application Approach	Available Submission Pathway(s)
Full Review	Grant-ready Funding Request
Tailored for Focused	or
Tailored for Transition (HI/Core/Focused)	Classic Funding Request
Program Continuation	Program Continuation Submission
CCM Investment Priorities	Investment Priorities Request

The application approach is communicated in the Allocation Letter and defines the available submission pathways.

i. Application Approach:

---Select an option---

ii. TRP Window:

---Select an option---

iii. Submission Pathway:

---Select an option---

iv. PR Nomination:

---Select an option---

5. Download the form ([EN](#), [FR](#), [ES](#)) - from the [website](#)

6. Complete the form - outside the Portal

7. Share the form - by email with CT

Note: CCMs planning to register to **any 2026 TRP Window** confirm their Submission Pathway & TRP Window to CT through the designated form **no later than 30 days upon receipt of the Allocation Letter**

Process
Overview

Step 2.
Update
GED &
Complete
CCM Form

Step 7.
Define
Investment
Priorities

Step 10.
Endorse
Grant &
Sign
Statement

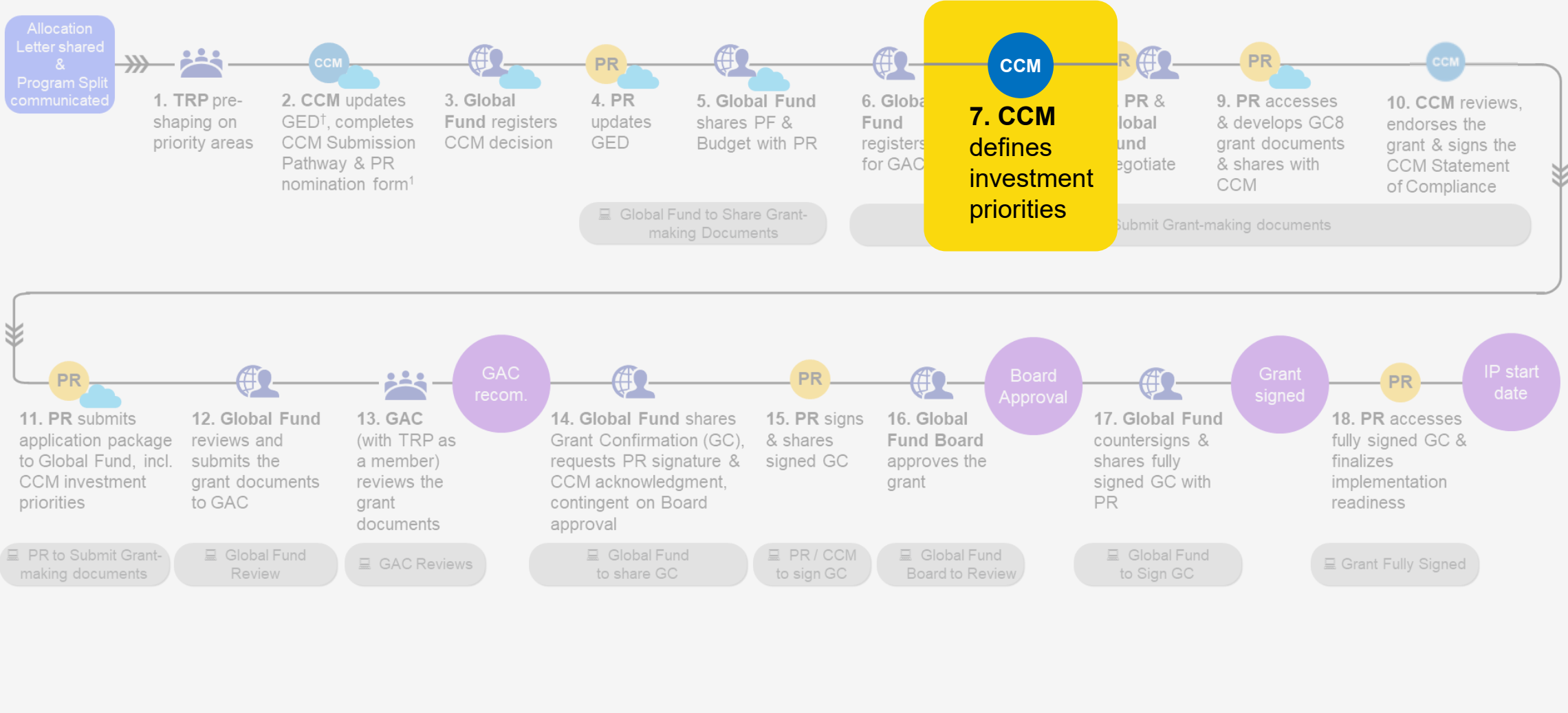
PR
Steps

Resources
& Support

Step 7. Define Investment Priorities



Introduction & Access
Process Overview
Step 2. Update GED & Complete CCM Form
CCM Steps
Step 7. Define Investment Priorities
Step 10. Endorse Grant & Sign Statement
PR Steps
Resources & Support



Step 7. Define Investment Priorities



Introduction
& Access

Process
Overview

Step 2.
Update
GED &
Complete
CCM Form

CCM Steps

Step 7.
Define
Investment
Priorities

Step 10.
Endorse
Grant &
Sign
Statement

PR
Steps

Resources
& Support



1. Document Country Dialogue & **share CCM Investment Priorities** with PR & CT by email

Step 10. Endorse Grant & Sign Statement



Introduction
& Access

Process
Overview

Step 2.
Update
GED &
Complete
CCM Form

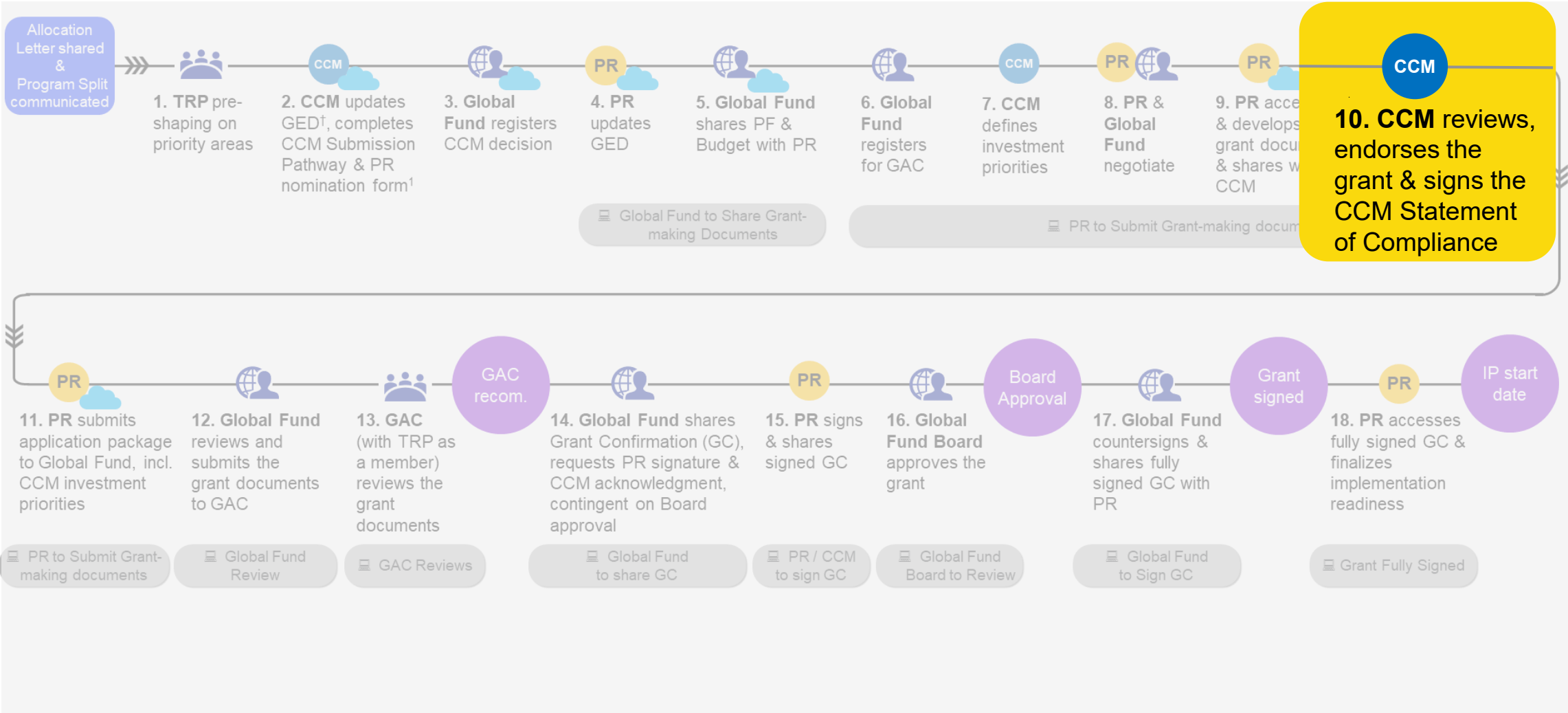
CCM Steps

Step 7.
Define
Investment
Priorities

Step 10.
Endorse
Grant &
Sign
Statement

PR
Steps

Resources
& Support



Step 10. Endorse Grant & Sign Statement

CCM reviews grant documents



Introduction
& Access

Process
Overview

Step 2.
Update
GED &
Complete
CCM Form

CCM Steps

Step 7.
Define
Investment
Priorities

Step 10.
Endorse
Grant &
Sign
Statement

PR
Steps

Resources
& Support

Note: PR shares GC8 grant documents with CCM via email



1. Download & review all GC8 grant documents shared by the PR via email

Step 10. Endorse Grant & Sign Statement

CCM endorses grant documents



Introduction
& Access

Process
Overview

Step 2.
Update
GED &
Complete
CCM Form

Step 7.
Define
Investment
Priorities

Step 10.
Endorse
Grant &
Sign
Statement

PR
Steps

Resources
& Support



SATISFACTORY REVIEW: CCM ENDORSES GRANT DOCUMENTS

If the CCM deems the GC8 grant documents shared by the PR satisfactory, the CCM endorses by completing & sharing via email the **CCM endorsement form & CCM Statement of Compliance** with the PR & CT. See [next slide](#).



UNSATISFACTORY REVIEW: CCM ASKS PR TO UPDATE GRANT DOCUMENTS & RESUBMIT

If the CCM deems the GC8 grant documents shared by the PR unsatisfactory, the CCM informs the PR to update and resubmit grant documents

Once the PR resubmits, restart the review ([details here](#))

Step 10. Endorse Grant & Sign Statement

CCM endorses grant documents & signs CCM Statement of Compliance



Introduction
& Access

Process
Overview

Step 2.
Update
GED &
Complete
CCM Form

Step 7.
Define
Investment
Priorities

Step 10.
Endorse
Grant &
Sign
Statement

PR
Steps

Resources
& Support

The **CCM Statement of Compliance** ([EN](#), [FR](#), [ES](#)) & the **CCM members endorsement of funding application** ([EN](#), [FR](#), [ES](#)) are available on the [Global Fund website](#) (Country Resources > Grant Life Cycle > Applying for Funding > Application Materials > CCM Documents)



CCM¹ Statement of Compliance

Date published: March 2026

Applicant Information

Country(s)	
Component(s)	
Submission Date	

In connection with the sub-
Documentation) for the c
Mechanism (**CCM**) unders

- Compliance with CCM
 - 1 to 6 are a condit
 - 1 and 2 are asse
 - Funding Documen
 - 3 to 6 are asse
 - yearly basis throu
- The Global Fund Secr
- the processes followed
- If the Global Fund Se
- Secretariat reserves th
- signing until such req
- request [a resubmissior](#)

CCM Members Endorsement of Funding Application

Country	e.g. Fictitia
Component(s)	e.g., TB/ HIV
Funding Application	e.g. FR1445-FICT-C or FICT-C-MOH

No.	First Name	Family Name	CCM Role	Sector Represented	Non State Actors Category (see key on abbreviations)	Signing Date	Signature
1							
2							
3							
4							
5							
6							
7							
8							
9							

2. Download the forms - from the [website](#)

3. Complete the forms - outside the Portal

4. Share the forms - by email with the PR & CT

Page 1

Process Overview & Detailed PR Instructions

Process Overview for PR

Detailed PR Instructions

Step 4. Update GED

Step 9. Access, Develop & Share Grant Documents

Step 11. Submit Grant Documents to the Global Fund

Step 15. Sign & Share Grant Confirmation

Step 18. Access Signed Grant Confirmation
& Finalize Implementation Readiness

Introduction
& Access

CCM
Steps

PR
Steps

Resources
& Support

Investment Priorities Request

Process Overview

Focus of this section

CCM

CCM

TRP/GAC

TRP/GAC

Partner Portal step

Partner Portal step

PR

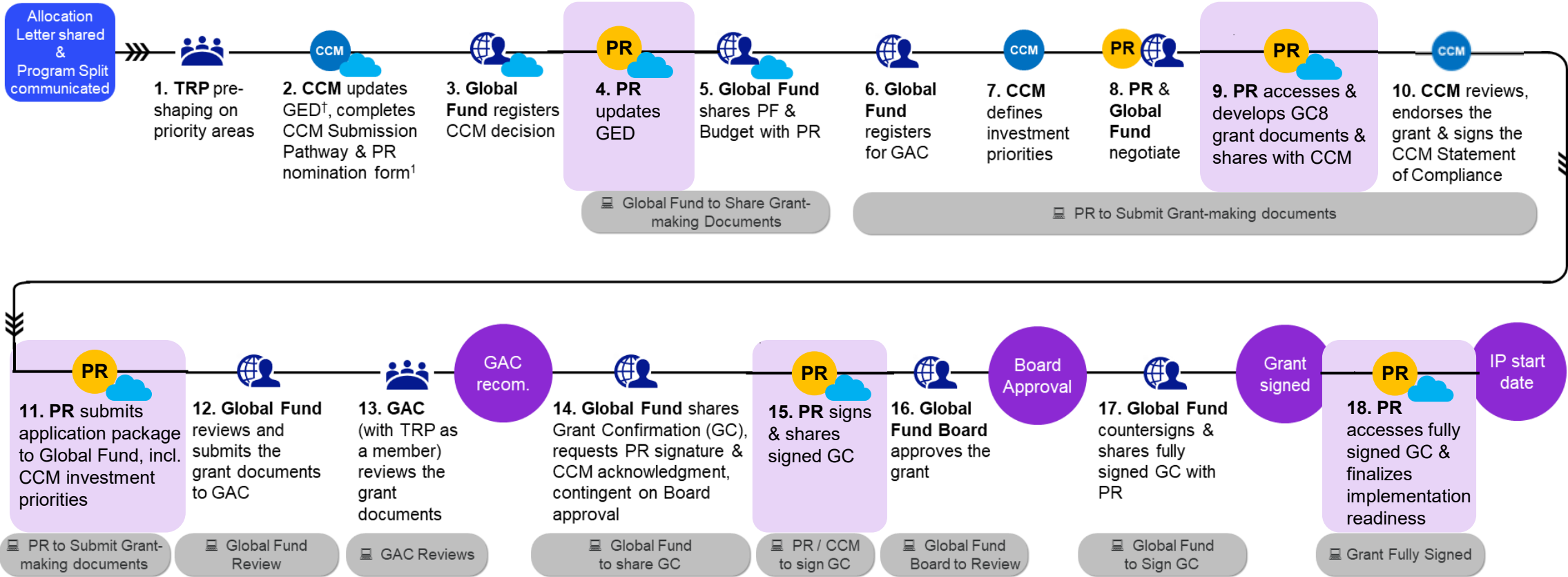
PR

The Global Fund

The Global Fund

Partner Portal status

Partner Portal status



Introduction & Access
CCM Steps
Process Overview
Step 4. Update GED
Step 9. Access & Develop Grant Docs
Step 11. Submit Grant Docs
Step 15. Sign & Share GC
Step 18. Access Signed GC & Finalize
Resources & Support

[†] As applicable.
¹ See [GC8 PR Nomination Guidance](#)

Step 4. Update GED



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

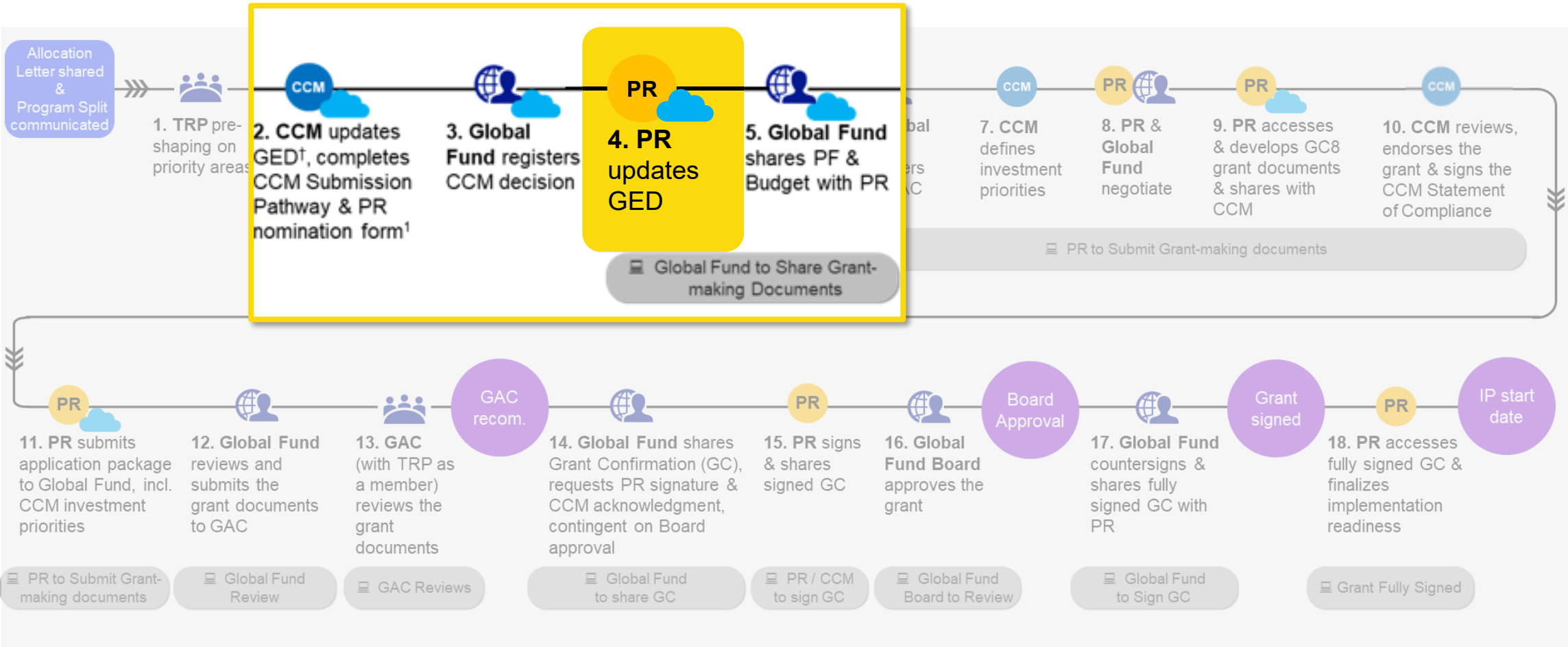
PR Steps

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support



Complete & accurate GED enables PRs to download, complete & submit grant documents

PRs access and submit grant documents through the Global Fund Partner Portal. Key documents are edited and/or checked for data quality directly in the Partner Portal. **Accurate Grant Entity Data (GED) is critical to ensure all required PR staff and consultants have appropriate access to the Grant-making module.**



Step-by-step instructions for PRs updating GED in the **GED Interactive Guide** [EN](#) | [FR](#) | [ES](#)



Actions to take

- PR contacts with access rights to the **GED App** in the [Global Fund Partner Portal](#) can submit Change Requests to create, update or deactivate an organization and/or contact.
- **PRs** are asked to submit a Change Request in GED or reach out to their CT if updates are needed.
- **PRs ensure contacts with access rights to Portal are updated for GC8.** The PF and Co-Financing Commitment Form are now completed online through the Grant-making module, while the Excel Budget includes final data quality checks in the Portal. Ensure appropriate focal points are set up in GED before Grant-making starts.

Step 9. Access, Develop & Share Grant Documents



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

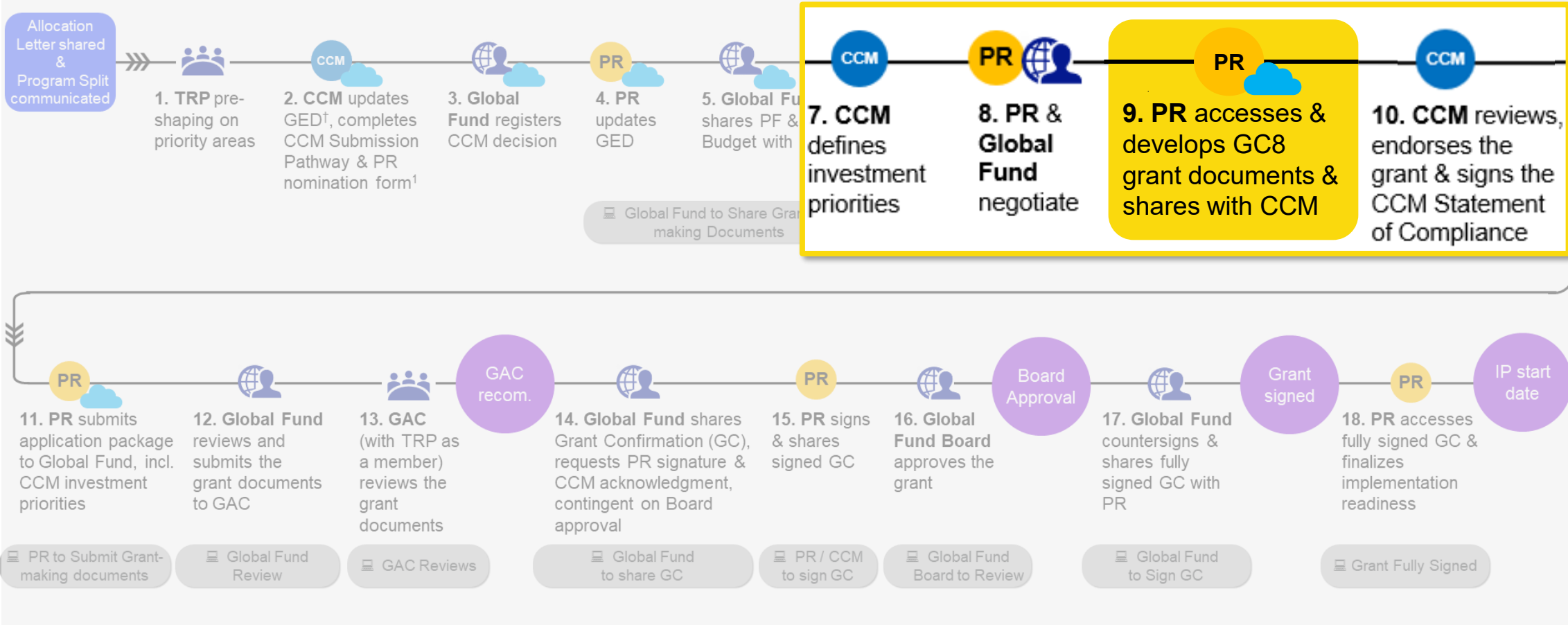
Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support



Step 9. Access, Develop & Share Grant Documents

PR accesses the Partner Portal



Introduction & Access
CCM Steps
Process Overview
Step 4. Update GED
Step 9. Access & Develop Grant Docs
Step 11. Submit Grant Docs
Step 15. Sign & Share GC
Step 18. Access Signed GC & Finalize
Resources & Support



An email notification is sent when the Global Fund shares the Grant-making documents
1. Click the link provided in the email to access the Grant-making module in the Partner Portal

English Français Español

Report an Issue Tracey Burton

THE GLOBAL FUND

Home Grant-making

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

Grant-making

Grant-making

Guidance

XXX-X-XXXX

Implementation Period Start Date
1-Jan-2027

Implementation Period End Date
31-Dec-2029

Grant-making Status
[Funding Request] PR to share grant forms with Applicant

GAC Meeting Date

XXX-X-XXXX

Implementation Period Start Date
1-Jan-2028

Implementation Period End Date
31-Dec-2030

Grant-making Status
[Funding Request] PR to share grant forms with Applicant

GAC Meeting Date

3. Click on the **tile**

THE GLOBAL FUND

Note: Refer to [How to Login to Partner Portal](#) if needed



Step 9. Access, Develop & Share Grant Documents

PR accesses the Partner Portal



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

English Français Español

? Report an Issue Tracey Burton

THE GLOBAL FUND

Home Grant-making

Grant-making > XXX_X_XXXX

XXX_X_XXXX

TRP Review Window
FR Window R1

TRP Review Outcome
Grant-making

Implementation Period Name
XXX_X_XXXX_P0X

Implementation Period Currency
Currency Code

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

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

GAC Meeting Date
D-Mmm-YYYY

Organization representative for notice

Signatory for legal agreements

Submitter

Guidance

Note: The status is at **PR to submit grant documents**

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

Download

Performance Framework

Budget

Attach & Submit

4 tabs available:

Download ([more details here](#))

➤ Excel Budget shared by the Global Fund

Performance Framework ([more details here](#))

➤ Access to the online PF

Budget ([more details here](#))

➤ Summary Budget visualization & DQCs after file attachment

Attach & Submit ([more details here](#))

➤ Form or additional guidance shared by the Global Fund (if any)

➤ Excel Budget & other documents to be attached and submitted to the Global Fund

THE GLOBAL FUND



Step 9. Access, Develop & Share Grant Documents

PR downloads the Budget



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Performance Framework

Budget

Attach & Submit

Grant-making Forms

Filters

Document Name

Filter...

Document Type

All

Language

All

Reset

Documents

1/1

Download selected

Download all

Document Name ↑↓	Document Type ↑↓	Attached ↑↓	Language ↑↓	Version ↑↓	File Size ↑↓	
XLS XXX_X_XXXX_BudgetGFShared_2 Budget – XXX-X-XXXX	Budget GF Shared Excel	20-Mar-2026 17:16 The Global Fund	English	2	3.60 MB	Download ✓

4. Scroll down and click on **Download** tab

5. Click on **Download** icon for the **Budget**

Step 9. Access, Develop & Share Grant Documents

PR downloads the Budget



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

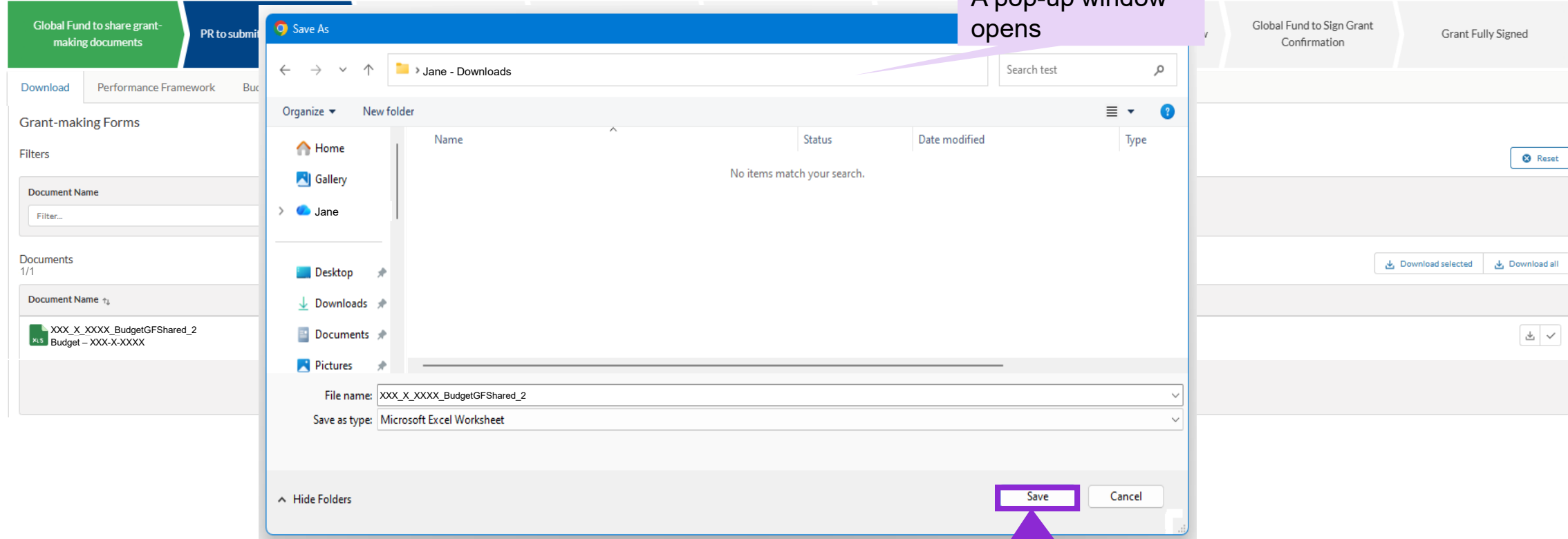
Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support



6. Click **Save**

7. Open the **Excel Budget file** on your desktop and complete



[Financial guidance](#)

Step 9. Access, Develop & Share Grant Documents

Optional - PR downloads guidance documents (if any)



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Performance Framework

Budget

Attach & Submit

8. Click on **Attach & Submit** tab

Attach & submit

Submit to the Global Fund

Document Requirements

Required

Performance Framework

Budget

Grant-making Documents

9. Scroll down to **Grant-making Documents** section

Filters

Document Name

Filter...

Document Type

All

Language

All

Documents

3 / 3

Download selected

Download all

Document Name	Document Type	Attached	Language	Version	File Size	Final PR Submission	
GC8 PR Guidance test	Other Word	6-Jul-2026 12:05 The Global Fund	English	1	57.52 KB	☐	
Form Form	Form PDF	6-Jul-2026 12:05 The Global Fund	English	1	19.98 KB	☐	
Document test	Other Excel	6-Jul-2026 13:32 The Global Fund	English	1	11.22 KB	☐	

< 1 >

1 - 3 / 3

10. Click on **Download** icon

Step 9. Access, Develop & Share Grant Documents

PR accesses the online PF



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

THE GLOBAL FUND

11. Scroll down and click on the **Performance Framework** tab

Home Grant-making

Global Fund to share grant-making documents PR to submit grant documents 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

Download Performance Framework Budget Attach & Submit

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

Overview

Here are the different **sub-tabs** of the PF (similar structure to the previous Excel)

Grant XXX-X-XXXX	Geography Country
IP start date 1-Jan-2027	IP end date 31-Dec-2029

> Reporting Periods

> Principal Recipients

> Modules

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

Refresh Generate Excel Expand All Collapse All Edit

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

Note: There is **no import option** for the Excel PF, this can only be used for preparatory work and requires manual inputs in the online PF in Partner Portal

12. Click **Edit / Add** button to fill in each section & sub-section

Edit + Add + Add

THE GLOBAL FUND

Note:
Modular Framework Handbook available here: [English](#) | [Spanish](#) | [French](#)
Separate PF Partner Portal Manual here: [English](#) | Spanish & French forthcoming



Step 9. Access, Develop & Share Grant Documents

PR attaches & imports the Budget to review & address the Budget DQCs



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Performance Framework

Budget

Attach & Submit

Attach & submit

Document Requirements

Required

Performance Framework

Budget

Grant-making Documents

Attach

Share with Applicant

13. Scroll down and click on **Attach & Submit** tab

Note: documents required - as applicable

14. Click on the **Attach** button

Step 9. Access, Develop & Share Grant Documents

PR attaches & imports the Budget to review & address the Budget DQCs



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Attach

Document

Required

Performance Budget

Grant-making Documents

Attach

Attach Documents

Select Documents

Upload Files

Or drop files

Cancel

Save & Close

15. Click Upload Files

Step 9. Access, Develop & Share Grant Documents

PR attaches & imports the Budget to review & address the Budget DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

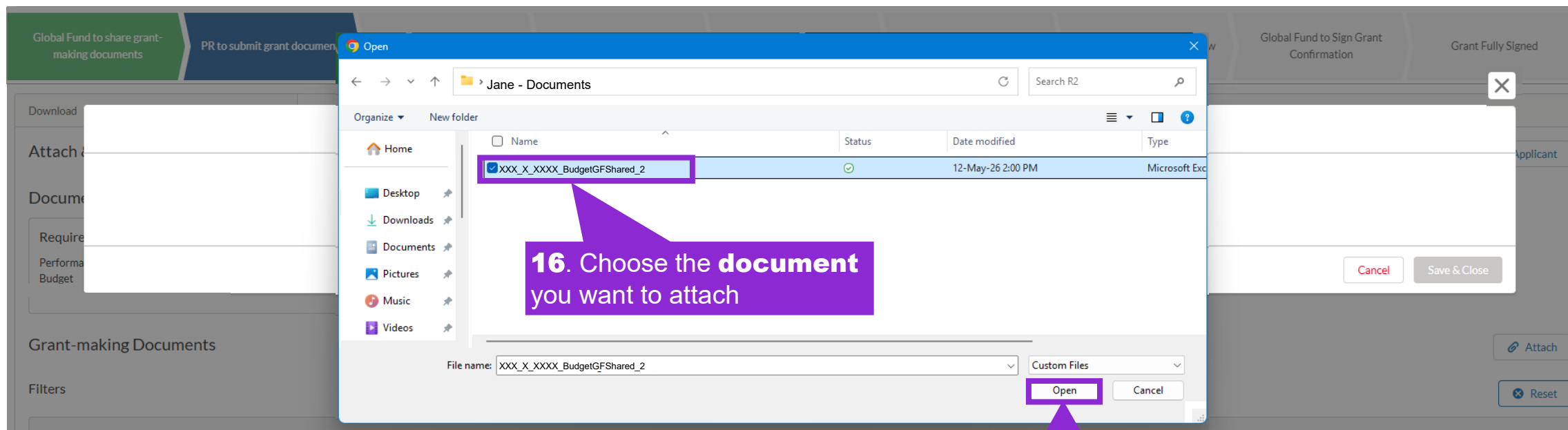
Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support



Step 9. Access, Develop & Share Grant Documents

PR attaches & imports the Budget to review & address the Budget DQCs



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Attach

Document

Required

Performance Budget

Grant-making Documents

Filters

1 of 1 file uploaded

XXX_X_XXXX_BudgetGFShared_2.xlsx

4.1 MB

Done

Cancel

Save & Close

18. Wait for the file to upload and then click **Done**

Step 9. Access, Develop & Share Grant Documents

PR attaches & imports the Budget to review & address the Budget DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

Attach Documents

19. Select **document type and **language** in the drop-down lists**

Name	Type	Language
XXX_X_XXXX_BudgetGFSHared_2.xlsx Excel	Budget	English

Only an Excel file can be selected as Budget

20. Click **Save & Close. The document now appears in the document list**

Save & Close

Note: Please wait for the data to load at each step as indicated on screen

Step 9. Access, Develop & Share Grant Documents

PR attaches & imports the Budget to review & address the Budget DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

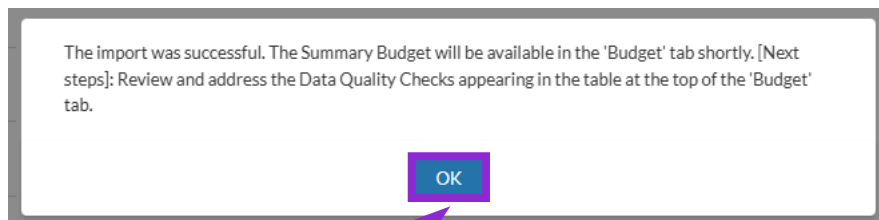
Step 18.
Access
Signed
GC &
Finalize

Resources
& Support



SUCCESSFUL IMPORT

Upon import, a confirmation message is displayed



Click **OK** and continue

The Budget tab does not auto-refresh after import. Click on  **Refresh** (*Budget tab – Navigation section*) for the latest Budget information to appear



UNSUCCESSFUL IMPORT

An error message is displayed if:

- the selected file is not for the same IP
- the file was tampered with
- an issue occurred during import

Click **Close/Cancel** and **review your file as per guidance shared in the error message.**
Re-attach if any changes applied

If an issue occurred during import, a request is raised automatically by the system to Country Support for investigation.

Contact the CT for guidance if submission is urgent and the issue is not resolved

Note: It is strongly recommended to resolve the issue prior to submission to the Global Fund to avoid any delays in finalization of the documents

Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses the Budget DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

PR Steps

Resources
& Support

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.

Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses the Budget DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

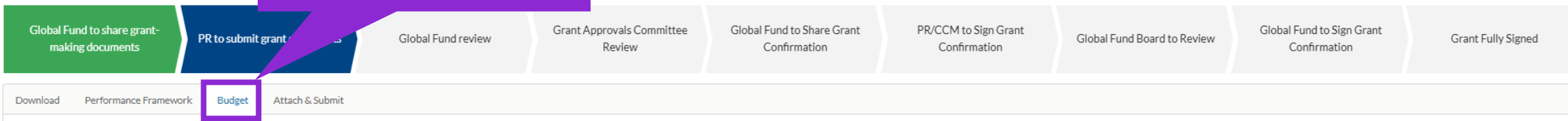
Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

Note: it can take up to **5 minutes** before the Summary Budget is visible – **Refresh the page** if not displayed after 5 minutes

21. Click on Budget tab



Different sections available:

Data Quality Checks (DQCs)

- Summary of DQCs detected during Budget import that need to be reviewed and resolved or justified

Summary Budget visualization

- Filters (Versions & Source of Funds)
- Navigation to sub-sections
 - By Module
 - By Cost Grouping
 - By Implementer
 - By Cost Input
 - By Intervention

Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses the Budget DQCs



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Performance Framework

Budget

Attach & Submit

22. Review and resolve the DQCs by revising the Excel Budget file

▼ Data Quality Checks (4)

ⓘ If Data Quality Checks (DQCs) are detected in the imported Budget, they will appear in a table below. [Next steps]: Review and resolve the DQCs by revising, reattaching and importing the updated Budget. Warnings that cannot be resolved require a justification.

	Data Quality Check	Justification
⚠ Warning	Budget The Budget contains lines with cost inputs and cost groupings. If budgeting at cost grouping level, only cost groupings can be used. If budgeti	Add a comment...
⚠ Warning	Budget Line Non-HP / BL-0001 This Budget Line has a cost input that does not match the selected intervention. Review the Budget in line with the Budgeting Guidelines and	Add a comment...
⚠ Warning	Budget Line Non-HP / BL-0002 This Budget Line has a cost input that does not match the selected intervention. Review the Budget in line with the Budgeting Guidelines and update the intervention and cost inputs or provide a justification.	Add a comment...
⚠ Warning	Budget Line Non-HP / BL-0003 This Budget Line has a cost input that does not match the selected intervention. Review the Budget in line with the Budgeting Guidelines and update the intervention and cost inputs or provide a justification.	Add a comment...

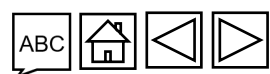
4 warning(s)

Download Data Quality Checks

Warnings that cannot be resolved require a justification

23. Optional – click on **Download Data Quality Checks** to get the DQC summary in an Excel file. File can be formatted as needed and share within the team to help update the Excel Budget file directly

Note: when attaching and importing a new version of the Budget, all previous data is **overwritten**, including previously provided justifications for DQCs. By clicking on **Download Data Quality Checks**, all justifications can be extracted and copied into the system after re-import if needed.



Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses the Budget DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

24. Once ready, re-attach and re-import the updated Budget (follow again [step 9 from the start](#))

Note: when attaching and importing a new version of the Budget, all previous data is **overwritten**, including previously provided justifications for DQCs.

Attention! An updated Budget is being attached and will be imported. This step deletes and overwrites all previous Budget data in the system, including previously provided justifications for Data Quality Checks (DQCs). [Next steps]: To access and save the existing DQCs and justifications prior to attaching an updated Budget, click 'Cancel' and then click on the button 'Download DQCs'. To proceed with attachment of the updated Budget, click the 'OK' button below. Are you sure you want to attach an updated Budget and overwrite the existing data and DQCs in the system?

Cancel

OK

25. Click **Cancel to perform the recommended actions before attaching again.**

26. Click **OK once ready to proceed**

27. Click the refresh Button and check and address DQCs as needed ([details here](#)) before submitting to the Global Fund

The Budget is ready to be [shared with CCM for endorsement](#) and then [submitted to the Global Fund](#) once all DQCs are addressed (resolved or justified)

Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses the PF DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

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.

Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses the PF DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

28. Go to **Performance Framework** tab

The screenshot shows the 'Performance Framework' tab selected. Under 'Coverage Indicators (1)', there is a section for 'Data Quality Checks (1)'. A table lists a 'Data Quality Check' with an 'Error' status. The error message is: 'Coverage Indicator VC-1.1 No targets set. Enter targets, select 'TBD' or remove the indicator if not to be reported.' To the right of the table, there are buttons for 'Check Data Quality' and 'Download Data Quality Checks'. A red triangle icon indicates '1 error(s)'.

29. Click on **Check Data Quality**

31. *Optional* – click **Download Data Quality Checks** to get the DQC summary in an Excel file **per sub-tab**.
File can be formatted as needed

30. Review and resolve the DQCs in each sub-tab of the PF

Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses the PF DQCs



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

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 - test / Missing one or more WPTM "Category". Select from dropdown list.	Add a comment...

32. Enter justification if DQC warnings cannot be resolved for any reason

Step 9. Access, Develop & Share Grant Documents

PR reviews & addresses PF DQCs



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

The screenshot shows the 'PR to submit grant documents' step in the process flow. The 'Coverage Indicators' tab is active, displaying a table of Data Quality Checks (DQCs). One error is listed: 'Coverage Indicator VC-1.1: No targets set. Enter targets, select 'TBD' or remove the indicator if not to be reported.' A purple callout box with the number 33 states: 'Once DQCs addressed, click again on **Check Data Quality** and confirm **all resolved for each sub-tab**'. The 'Check Data Quality' button is highlighted.



The screenshot shows the same PR review interface, but now the 'Data Quality Checks' section shows '(0)' with a checkmark icon, indicating that all DQCs have been resolved. A purple callout box with the word 'Note:' states: 'Justified DQCs will remain on screen and submission to the Global Fund is allowed'. The 'Check Data Quality' button is still visible.

The online PF is ready to be shared with CCM for endorsement and then submitted to the Global Fund once all DQCs are addressed (resolved or justified)

Step 9. Access, Develop & Share Grant Documents

PR shares grant documents with CCM for review & endorsement



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support



34. Download & save all GC8 grant documents, and **share** with the CCM via email for review & endorsement

Note:

- **Download all GC8 documents previously attached ([details here](#)) to share latest final version with CCM**
- **Generate PF Excel ([details here](#)) from the online PF to share final version with CCM**

Step 11. Submit to the Global Fund



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

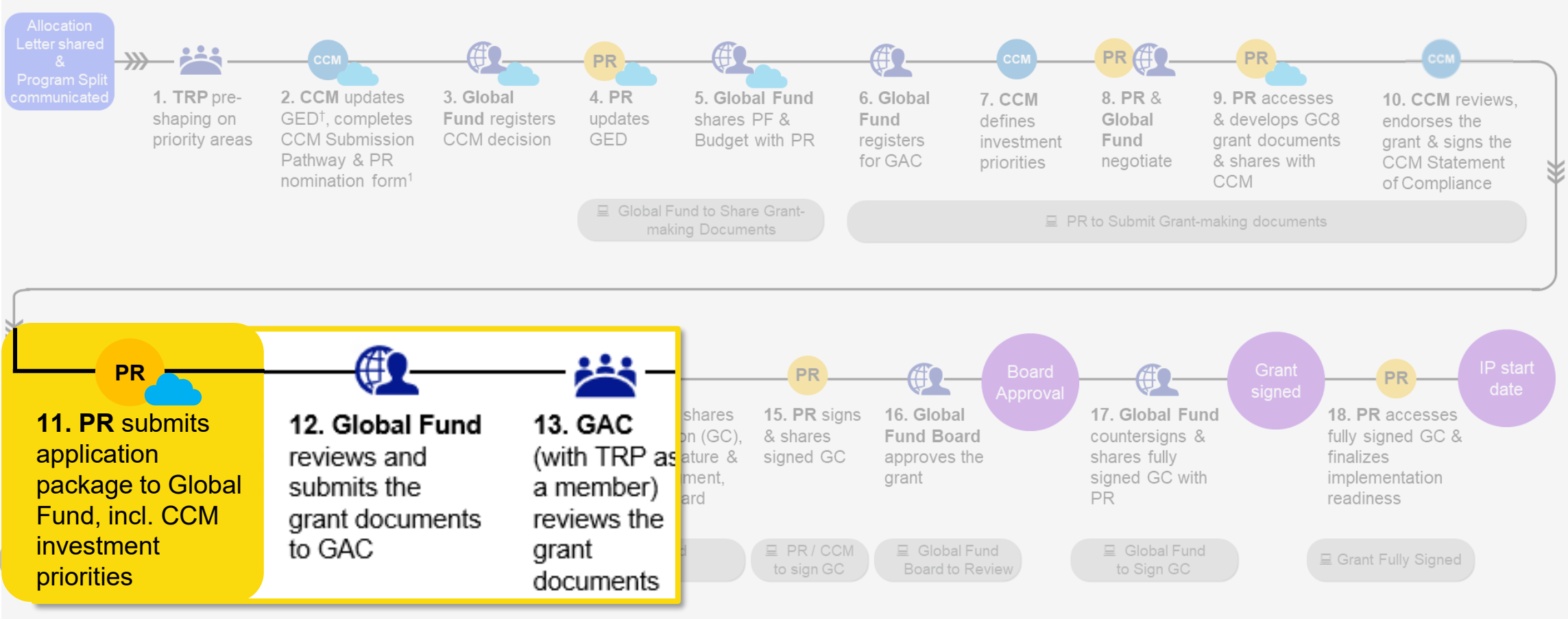
Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support



Step 11. Submit to the Global Fund

PR attaches other supporting documents



Introduction & Access
CCM Steps
Process Overview
Step 4. Update GED
Step 9. Access & Develop Grant Docs
Step 11. Submit Grant Docs
Step 15. Sign & Share GC
Step 18. Access Signed GC & Finalize
Resources & Support

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

Download

Performance Framework

Budget

Attach & Submit

1. Scroll down and click on **Attach & Submit** tab

Attach & submit

Submit to the Global Fund

Document Requirements

Required

Performance Framework

Budget

Grant-making Documents

Attach

2. Click on the **Attach** button

Note: Steps to attach and import the Budget, and review & address Budget & PF DQCs are covered in the [previous section](#)

Step 11. Submit to the Global Fund

PR attaches other supporting documents



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Attach

Document

Required

Performance

Grant-making Documents

Attach

Attach Documents

Select Documents

Upload Files

Or drop files

Cancel

Save & Close

3. Click Upload Files

Step 11. Submit to the Global Fund

PR attaches other supporting documents



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

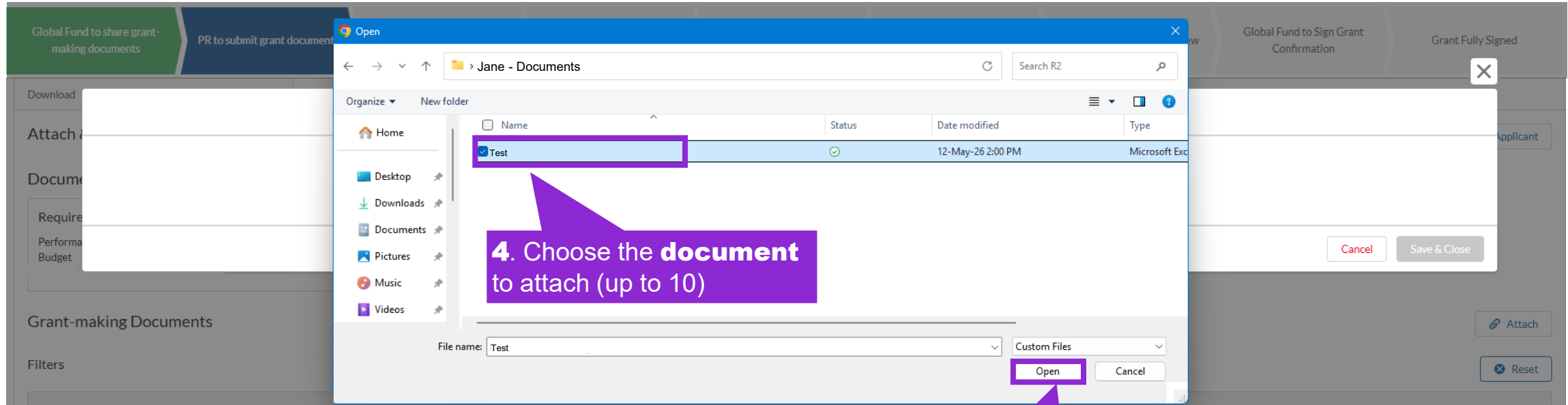
PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support



Step 11. Submit to the Global Fund

PR attaches other supporting documents



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

Download

Attach

Document

Required

Performance Budget

Grant-making Documents

Filters

1 of 1 file uploaded

Done

Cancel

Save & Close

6. Wait for the file to upload and then click **Done**

Step 11. Submit to the Global Fund

PR attaches other supporting documents



Introduction & Access

CCM Steps

Process Overview

Step 4. Update GED

Step 9. Access & Develop Grant Docs

Step 11. Submit Grant Docs

Step 15. Sign & Share GC

Step 18. Access Signed GC & Finalize

Resources & Support

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

Download

Performance Frameworks

Budget

Attach & submit documents

Attach & submit documents with Applicant

Document

Required

Performance Framework

Budget

An HPMT need

Grant-making

Filters

Document Name

Filter...

All

Documents

3 / 3

test.pdf

PDF

Other

Agreed Audit Arrangements

Agreed Implementation Workplan for Y1

Approved ToRs and contracting of PR, HR, SRs, and Suppliers

Co-financing Commitment Letter

Implementation Arrangements Map

List of Program Assets and Receivables

Monitoring & Evaluation Plan

Other

Rapid SEAH Risk Assessment

Select the Language

English

French

Spanish

Other

Cancel

Save & Close

Attach

Reset

7. Select **document type** and **language** in the drop-down lists

8. Click **Save & Close**

Note: Please wait for the data to load at each step as indicated on screen

Step 11. Submit to the Global Fund

PR marks grant documents as Final PR Submission



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

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

Download

Performance Framework

Budget

Attach & Submit

Attach & submit

Document Requirements

Required

Performance Framework

Budget

Grant-making Documents

Filters

Document Name

Filter...

Document Type

All

Language

Documents

3 / 3

Document Name

Document Type

Attached

Language

Version

File Size

Final PR Submission

DOC

XXX-X-XXX_Other Document 1

Other Word

6-Jul-2026 12:05
PR contact

English

1

57.52 KB

☒

Download

Delete

Check

PDF

XXX-X-XXX_Other Document 2

Other PDF

6-Jul-2026 12:05
PR contact

English

1

19.98 KB

☐

Download

Delete

Check

XLS

XXX-X-XXX_Budget Document 3

Budget Excel

6-Jul-2026 13:32
PR contact

English

1

11.22 KB

☒

Download

Delete

Check

Download selected

Download all

List of key required documents as applicable is displayed

Please refer to the [OPN on Design Funding Requests and Sign Quality Grants](#) for more information

Note: The PF is not displayed in the document list. The online version will be shared directly with the Global Fund

9. Tick **Final PR Submission** checkbox for remaining grant documents

Note: The latest imported Budget is automatically ticked as **Final PR Submission**

Submit to the Global Fund

Attach

Reset

Step 11. Submit to the Global Fund

PR submits grant documents to the Global Fund



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

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

Download

Performance Framework

Budget

Attach & Submit

Attach & submit

Document Requirements

Required

Performance Framework

Budget

Grant-making Documents

Filters

Document Name

Document Type

Language

Filter...

All

All

Documents

3 / 3

Download selected

Download all

Document Name ↑↓	Document Type ↑↓	Attached ↑↓	Language ↑↓	Version ↑↓	File Size ↑↓	Final PR Submission ↑↓
XXX-X-XXX_Other Document 1	Other Word	6-Jul-2026 12:05 PR contact	English	1	57.52 KB	☐
XXX-X-XXX_Other Document 2	Other PDF	6-Jul-2026 12:05 PR contact	English	1	19.98 KB	☐
XXX-X-XXX_Budget Document 3	Budget Excel	6-Jul-2026 13:32 PR contact	English	1	11.22 KB	☒

Submit to the Global Fund

List of key required documents as applicable is displayed

Please refer to the [OPN on Design Funding Requests and Sign Quality Grants](#) for more information

10. Click on **Submit to the Global Fund**

Note: Only the PR Submitter(s) can see and click the **Submit to the Global Fund** button

Step 11. Submit to the Global Fund

PR submits grant documents to the Global Fund



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

In case there are any unaddressed DQCs in the PF or Budget, an error message will be displayed

The screenshot shows the 'Attach & Submit' step of the Global Fund submission process. A progress bar at the top indicates the current step. Below it, a tabbed menu shows 'Performance Framework' and 'Budget' as active tabs. A white error message box is displayed, stating: 'There are unresolved Data Quality Checks (DQC) for the PF and/or Budget. [Next steps]: Resolve any Data Quality Check (DQC) errors and/or warnings. Provide justifications for any remaining DQCs.' An 'OK' button is visible on the error message. To the right of the error message is a 'Submit to the Global Fund' button. Below the error message, the 'Document Requirements' section is visible, showing 'Required' items: 'Performance Framework' and 'Budget'.

11. Click **OK** and go back to the **Performance Framework** and/or **Budget** tab to address the remaining DQCs

Step 11. Submit to the Global Fund

PR submits grant documents to the Global Fund



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

The screenshot displays the 'Submit Grant-making to the Global Fund' modal. The modal has a title bar and a main content area. The main content area is divided into two sections: 'Document Requirements' and 'Submit to the Global Fund'. The 'Document Requirements' section contains a list of required documents: 'Performance Framework' and 'Budget'. The 'Submit to the Global Fund' section contains a 'Cancel' button and a 'Submit to the Global Fund' button. The 'Submit to the Global Fund' button is highlighted with a red border. A callout box points to the 'Submit to the Global Fund' button with the text: 'List of key required documents as applicable is displayed. Please refer to the [OPN on Design Funding Requests and Sign Quality Grants](#) for more information.'

12. Click on **Submit to the Global Fund** button

Note: Please wait for the data to be shared as mentioned on screen

Step 11. Submit to the Global Fund

PR submits grant documents to the Global Fund



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

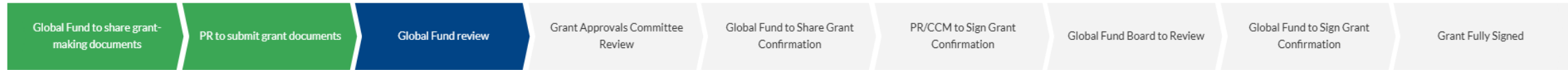
PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support



The status moves to **Global Fund review**

Note after submission to the Global Fund:

- A confirmation message is displayed to confirm successful submission to the Global Fund and an email confirmation is sent to the PRs & CCMs
- An email notification is also sent to the Global Fund to inform them about the grant documents submission
- The online PF becomes read-only. The PR can view and download other documents, including the Budget but can no longer attach or submit new versions.
- Nothing further is required from the PR at this stage

Step 11. Submit to the Global Fund

Optional – PR resubmits PF and/or Budget as requested by the Global Fund



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

If changes to the grant documents are needed, the **Global Fund** can request the **PR to resubmit the PF and/or Budget** – the rationale is included in the email notification. The status moves back to **PR to submit grant documents**

BUDGET RESUBMISSION

13. Update the Budget file on desktop

14. Attach & import the Budget file in the Partner Portal (repeat step 9 from [here](#))

Note: when attaching and importing a new version of the Budget, all previous data is **overwritten**, including previously provided justifications for DQCs.

Attention! An updated Budget is being attached and will be imported. This step deletes and overwrites all previous Budget data in the system, including previously provided justifications for Data Quality Checks (DQCs). [Next steps]: To access and save the existing DQCs and justifications prior to attaching an updated Budget, click 'Cancel' and then click on the button 'Download DQCs'. To proceed with attachment of the updated Budget, click the 'OK' button below. Are you sure you want to attach an updated Budget and overwrite the existing data and DQCs in the system?

Cancel

OK

15. Click **Cancel** to perform the recommended actions before attaching again ([details here](#))

16. Click **OK** once ready to proceed

17. Check and address DQCs as needed ([details here](#)) before resharing with CCM for endorsement ([details here](#)) and resubmitting to Global Fund ([details here](#))

Step 11. Submit to the Global Fund

Optional – PR resubmits PF and/or Budget as requested by the Global Fund



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

If changes to the grant documents are needed, the **Global Fund** can request the **PR to resubmit the PF and/or Budget** – the rationale is included in the email notification. The status moves back to **PR to submit grant documents**

PERFORMANCE FRAMEWORK (PF) RESUBMISSION

18. Go back to the online Performance Framework tab & Update the sub-tabs as needed ([details here](#))

19. Check and address DQCs as needed ([details here](#)) before resharing with CCM for endorsement ([details here](#)) and resubmitting to the Global Fund ([details here](#))

Step 15. Sign & Share Grant Confirmation



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

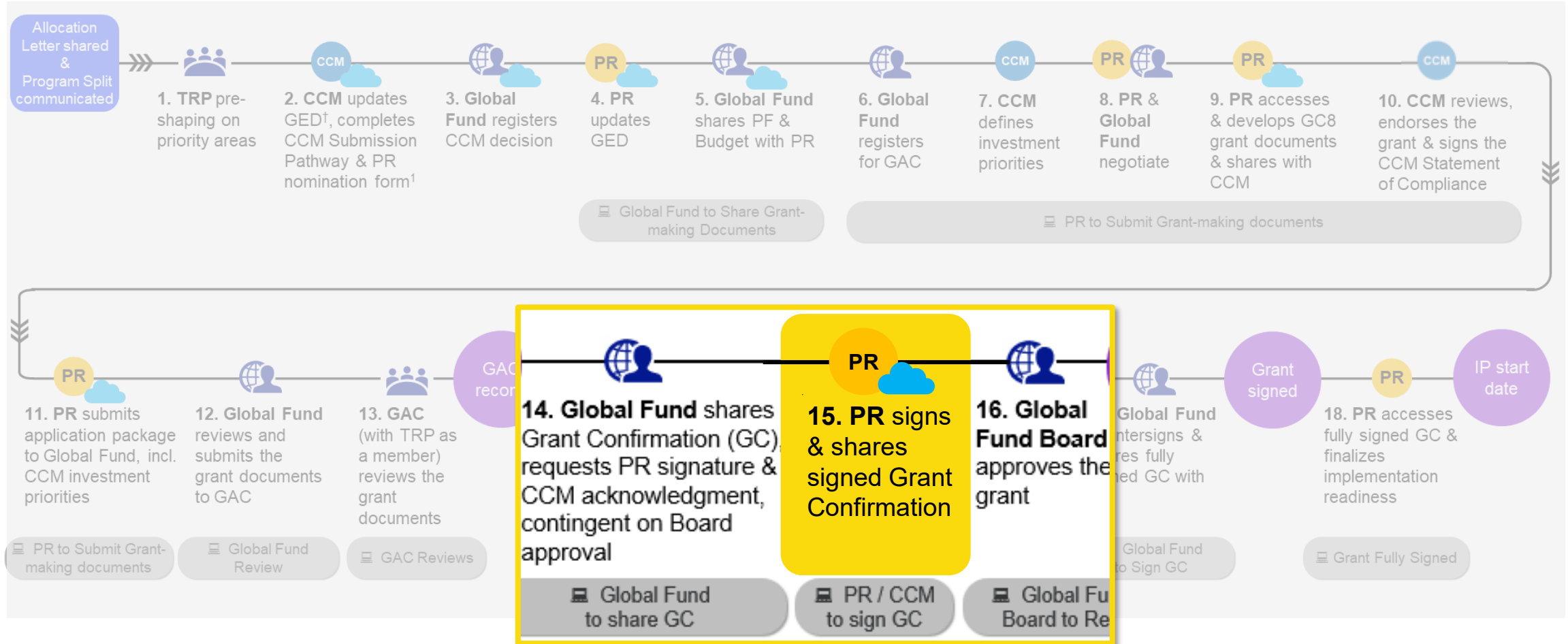
PR Steps

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support



Step 15. Sign & Share Grant Confirmation



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

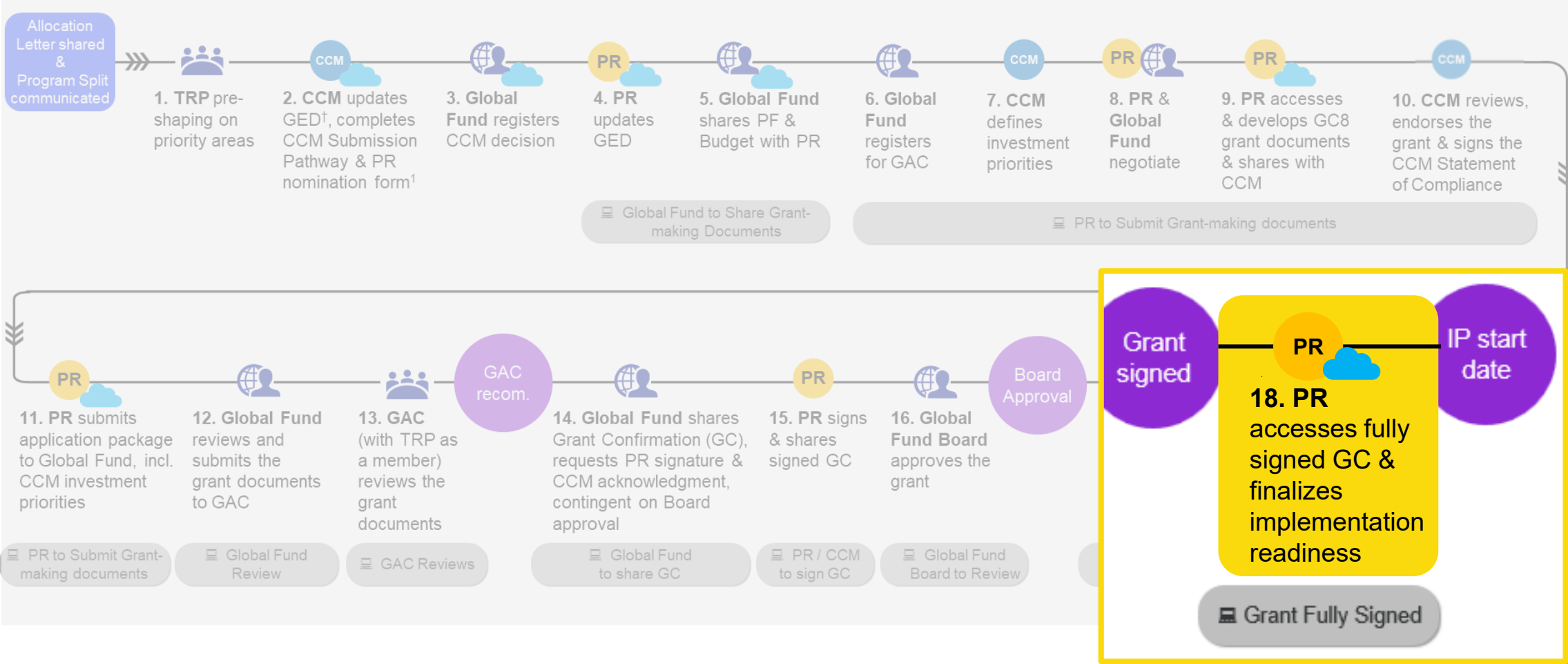
Resources
& Support

Coming soon

These instructions will be updated once enhancements to the Partner Portal are introduced.

Dedicated communications will be sent to CCMs and PRs

Step 18. Access signed GC & Finalize Implementation Readiness



Step 18. Access signed GC & Finalize Implementation Readiness



Introduction
& Access

CCM
Steps

Process
Overview

Step 4.
Update
GED

Step 9.
Access &
Develop
Grant Docs

Step 11.
Submit
Grant Docs

Step 15.
Sign &
Share GC

Step 18.
Access
Signed
GC &
Finalize

Resources
& Support

Coming soon

These instructions will be updated once enhancements to the Partner Portal are introduced.

Dedicated communications will be sent to CCMs and PRs

RESOURCES & SUPPORT

Online Resources

List of Acronyms & Abbreviations

Contact Support for Technical Issues

Introduction
& Access

CCM
Steps

PR
Steps

Resources
& Support

Online Resources

Operational Policy & Procedures

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

Grant-making Guidance

- PF Partner Portal Manual [English](#) | *Français* | *Español (forthcoming)*
- GC8 Essentials [English](#) | [Français](#) | [Español](#)
- Country Resources [Grant-making section](#)
- Information Sessions [Grant-making section](#)
- Video demos [Partner Portal Demos](#)

Additional Resources

- Accessing your GC8 allocation [English](#) | [Français](#) | [Español](#)
- GED Interactive Guide (PR) [English](#) | [Français](#) | [Español](#)
- Guidelines for Grant Budgeting [English](#) | [Français](#) | [Español](#)
- GC8 Modular Framework [English](#) | [Français](#) | [Español](#)
- Funding Request Partner Portal Manual [English](#) | [Français](#) | [Español](#)



List of Acronyms & Abbreviations



Introduction
& Access

CCM
Steps

PR
Steps

Online
Resources
&
Acronyms

Technical
Support

CCM	Country Coordinating Mechanism
CT	Country Team
DQC	Data Quality Checks
GAC	Grant Approvals Committee
GC	Grant Confirmation
GC8	Grant Cycle 8
GED	Grant Entity Data
HPMT	Health Product Management Template

IP	Implementation Period
LFA	Local Fund Agent
OPN	Operational Policy Note
PF	Performance Framework
PR	Principal Recipient
TRP	Technical Review Panel
UQD	Unfunded Quality Demand

HOW TO

Contact Support for Technical Issues



Introduction
& Access

If you have any questions or encounter technical issues, please contact the Global Fund Country Support team

Partner Portal Home Page

English Français Español

THE GLOBAL FUND

Home Grant-making

A new tab opens:

English | Français | Español

THE GLOBAL FUND

Home All Applications Insights

Report an Issue Tracey Burton

View Tickets

* Category
Grant Making

Urgency
3 - Low

* Title
Enter Title

Description (Please enter the Grant details in the description for support team to investigate)
Enter Description

Available date
Enter Date

Available Time(CET)
Enter Time

2. Fill in the different fields

3. Click on **Submit**

Submit Cancel

THE GLOBAL FUND

Support available in English, French & Spanish



CCM
Steps

PR
Steps

Resources & Support
Online
Resources
&
Acronyms

Technical
Support



The Global Fund to Fight
AIDS, Tuberculosis and Malaria

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