THE GLOBAL FUND

Updates to Revisions

10 December 2025

Agenda

1 Overview of the Grant Revisions process

2 Revisions enhancements

    a New budgeting approach

    b Performance Framework visualization

    c Reduce administrative burden

**3** Recap

4 Resources

5 Q&A

Overview of the Revisions process

1

Revisions is a critical grant life cycle process

<u>What</u> a grant revision is and revision types

A grant revision allows for planned Global Fund investments of an existing **grant to be adjusted to changing contexts and requirements** during grant implementation.

There are five revision types which follow a hierarchy: the higher-level revisions can include the lower-level ones, but not the contrary.
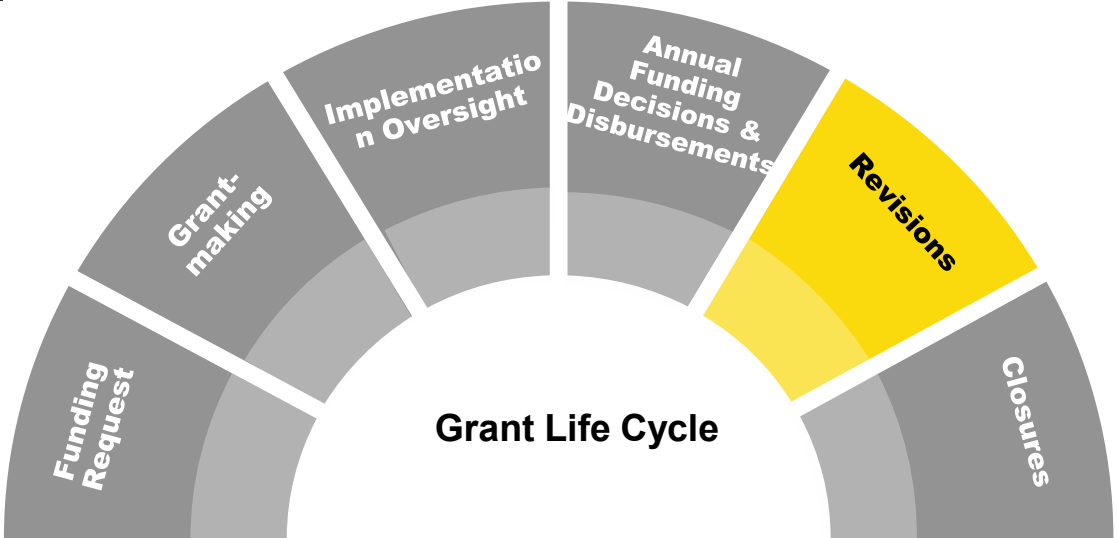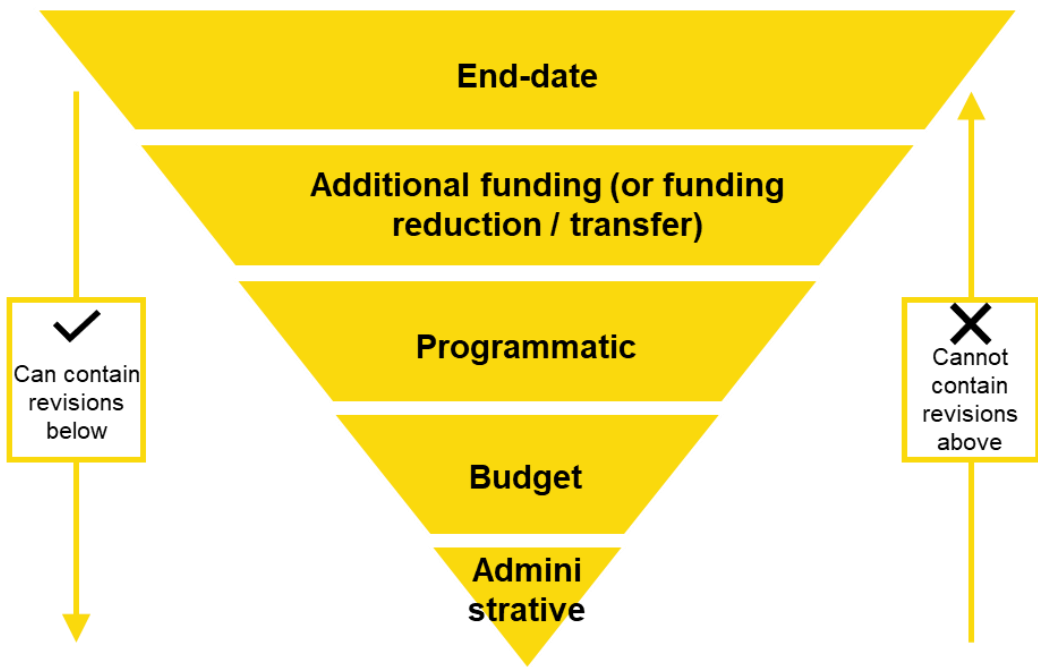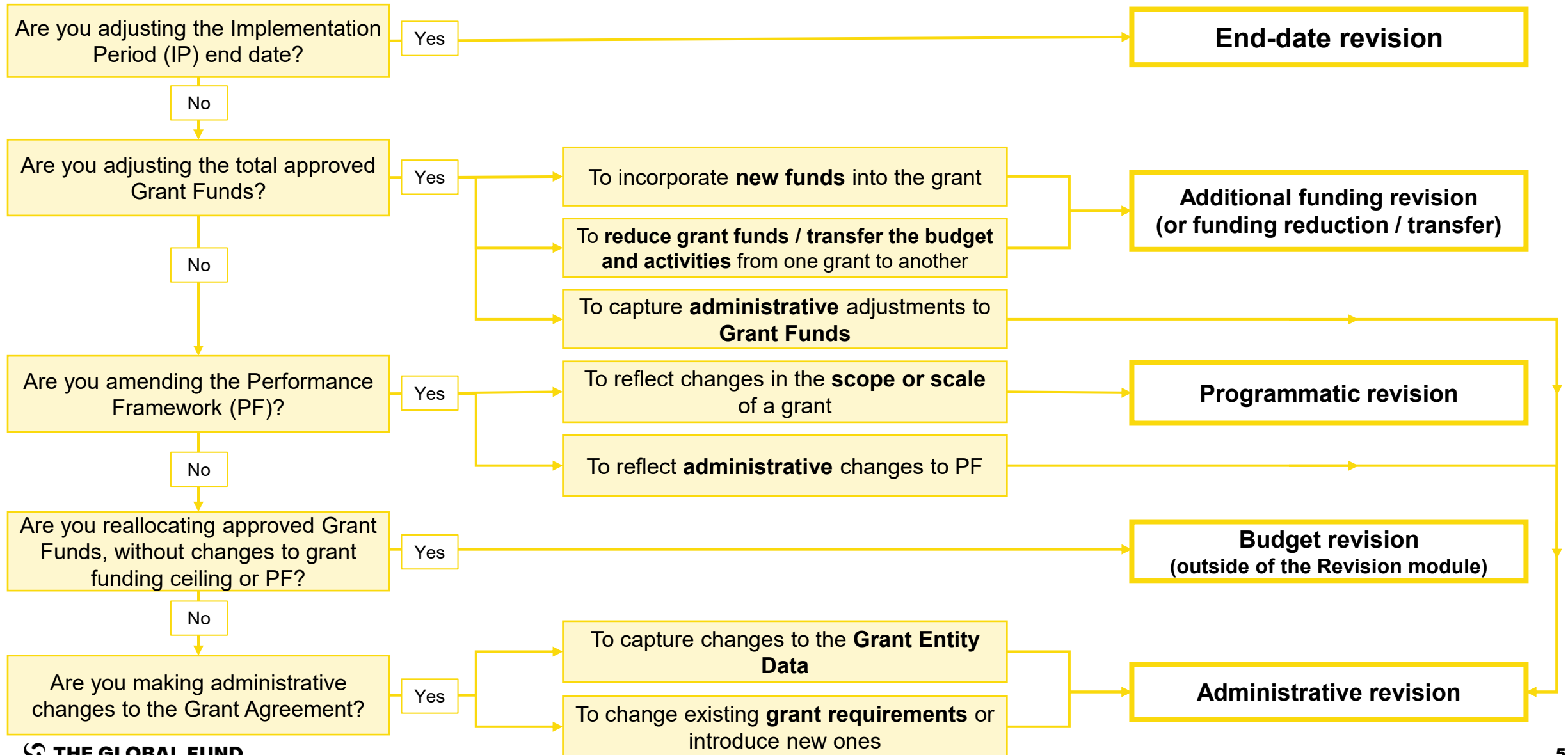

<u>Why</u> a revision is important

Timely and quality revisions ensure continued effective and efficient use of Global Fund resources to achieve maximum impact in line with national strategic plans, the [Global Fund Strategy](), and emerging priorities such as new diseases (e.g. mpox) and initiatives (e.g. climate & health).

<u>When</u> a revision is initiated and by <u>whom</u>

A revision must be initiated by the Country Team (CT) as soon as the need has been agreed between the Principal Recipient (PR) and the Country Team (CT), considering the required timelines for completion. End-date, Additional Funding and Programmatic revisions must be endorsed by the CCM.   Budget revisions must be announced to CCMs for information.
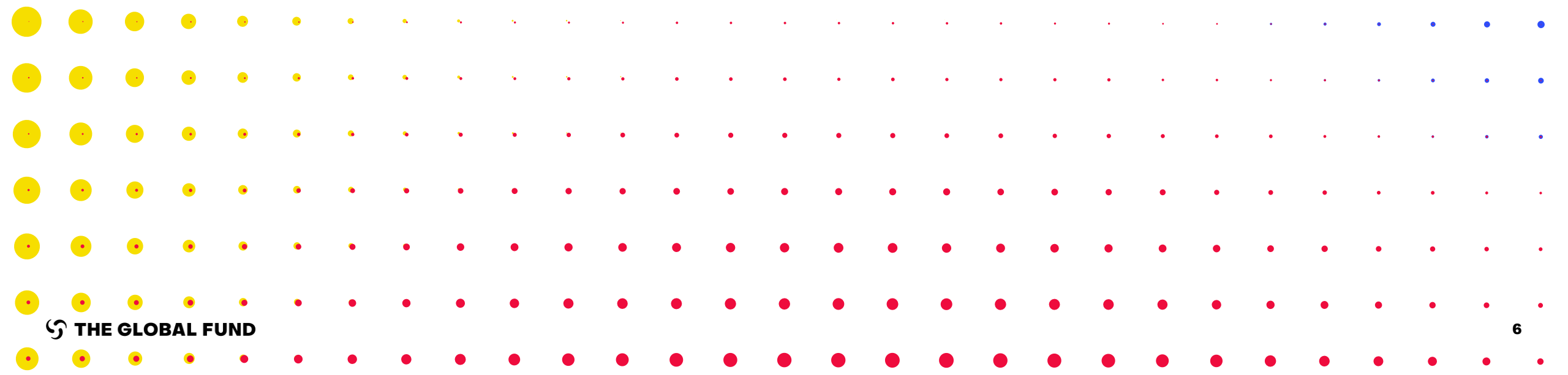
Reminder – Choosing the correct revision type

Are you adjusting the Implementation Period (IP) end date? — **Yes** → **End-date revision**

No ↓

Are you adjusting the total approved Grant Funds? — **Yes** →

- To incorporate **new funds** into the grant → **Additional funding revision (or funding reduction / transfer)**
- To **reduce grant funds / transfer the budget and activities** from one grant to another → **Additional funding revision (or funding reduction / transfer)**
- To capture **administrative** adjustments to Grant Funds → **Administrative revision**

No ↓

Are you amending the Performance Framework (PF)? — **Yes** →

- To reflect changes in the **scope or scale** of a grant → **Programmatic revision**
- To reflect **administrative** changes to PF → **Administrative revision**

No ↓

Are you reallocating approved Grant Funds, without changes to grant funding ceiling or PF? — **Yes** → **Budget revision (outside of the Revision module)**

No ↓

Are you making administrative changes to the Grant Agreement? — **Yes** →

- To capture changes to the **Grant Entity Data** → **Administrative revision**
- To change existing **grant requirements** or introduce new ones → **Administrative revision**

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For more information, please refer to the **Resources** slide.

2 **Revisions enhancements**

Info sessions are planned to align with Revisions system release

2025		
	English	**French**
Externas *TODAY*	**10 December** **14.00-15.00** Info Session and Q&A *** With live subtitles in Spanish ***	**11 December** **15.00-16.00** Info Session and Q&A
Audience	Principal Recipients	

Objectives for change

Increase flexibility
To respond to evolving business needs mid-cycle (e.g. climate & health).

Reduce administrative burden
To reduce administrative burden for CTs and PRs and enable revision of essential content promptly throughout grant implementation, to ensure maximum impact.

Improve data quality & monitoring
To enable robust oversight and streamlined management throughout every phase of the Grant Life Cycle.

New revisions functionalities

		Increase flexibility	Reduce administrative burden	Improve data quality & monitoring
a	Budgeting approach	Introduce the incremental detailed budget & Budget Adjustment Form	🔵	🟠	
b	First step toward full online PF	Visualize the PF for regular grants in the Partner Portal		🟠	🟣
c	Simplification & Automation	Enable PF and DB generation and import for administrative revisions	🔵		
		Remove Request Form A, simplify Request Form B		🟠	🟣
		Add new revision types and sub-types	🔵		🟣
		Add new file types	🔵	🟠	🟣

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2a   **New budgeting approach**

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New budgeting approach
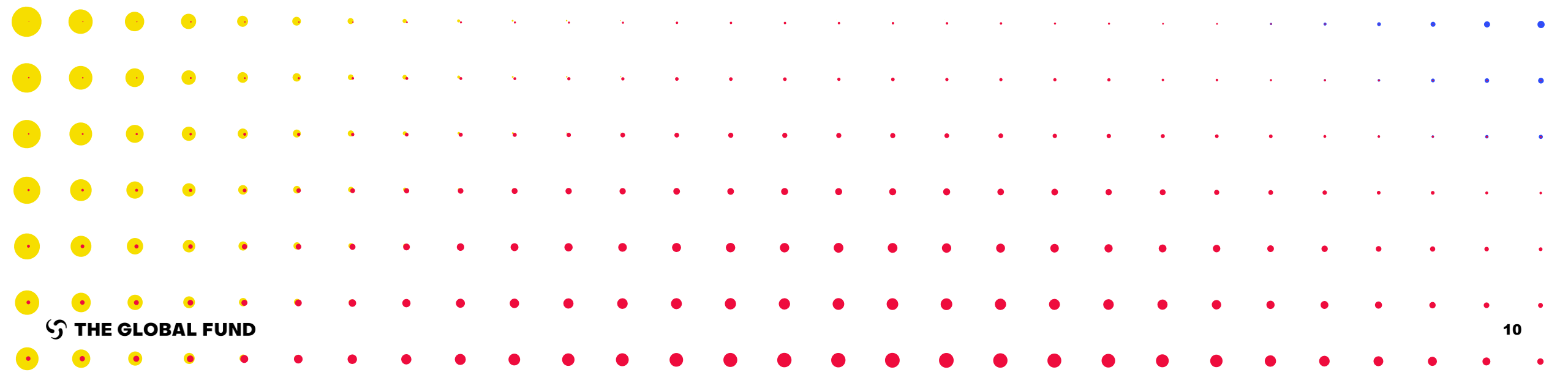
The Global Fund policies, processes & systems have been optimized to streamline and simplify budget changes through a new budget management approach*
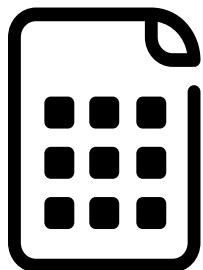
An **incremental detailed budget** form covers the change requested in Additional Funding and End-date revisions
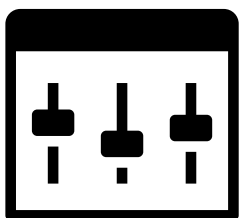
The new **Budget Adjustment Form** (BAF) in the Financial Management Module (in the Partner Portal) captures changes resulting from Budget and Programmatic revisions.

In both cases, a fully updated detailed budget is no longer needed

- ✓ Streamlines & simplifies updates to the budget
- ✓ Maintains the integrity of the original detailed budget
- ✓ Reduces administrative burden
- ✓ Ensures accurate financial tracking & reporting

Incremental detailed budget

The **incremental detailed budget form is required** to process changes for Additional Funding or End Date revisions. The original approved Baseline Budget can only be updated for administrative revisions.

Example: Budget Versions in Revisions

Baseline Budget

The original approved detailed budget for the IP, processed through grant-making. Only updated for Admin revisions that require it, otherwise it is not revised.

+

Incremental 1*

Contains the increases or reductions requested in the revision. Once approved, does not change.

+

Incremental 2*

Contains the increases or reductions requested in a *subsequent* revision. Once approved, does not change.

Applies to both regular and C19RM revisions

Summary Budget

Aggregate of Baseline Budget + any approved Incremental Detailed Budgets. Updated with each revision.

Total IP Budget

The sum of the Baseline Budget and any approved Incremental Detailed Budgets.

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12

*The template is the same as the existing detailed budget, but only the additional/reduced funds are captured.
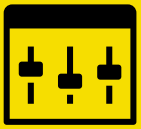
Budget Adjustment Form (BAF)

Budget adjustments resulting from Programmatic and Budget revisions are processed using the BAF

- Adjustments are made at the summary level in the BAF – no updates to the baseline budget.
- Controls applied to ensure the baseline budget is not exceeded.
  - If there is an on-going End-date or Additional Funding revision for the same IP, the controls will be adjusted for the incremental amounts/time once the Summary Budget of that Revision is generated.

Applies to both regular and C19RM revisions

The PR Editor/Submitter makes and submits changes directly to the CT Finance Specialist for review and validation.

Budget Revisions[1]

(PR)

Material

(PR)

PR

1. PR follows their internal budget review & approval process[1]

2. PR requests agreement from CT to process budget revision

3. The Global Fund provides written agreement to the PR

4. PR prepares & submits the BAF[2]

5. The Global Fund reviews the BAF and completes the budget revision

Non-material (optional)

Completed

(PR) / **PR** PR / in Partner Portal

The Global Fund

Budget Adjustment Form – PR accesses the form

Budget Adjustment Form – PR finds the form

Use the **Country / Group of Countries** and **Implementation Period name** filters to refine the search

Click 🔗 to open the **Budget Adjustment** section for the grant

Budget Adjustment Form – PR initiates a form

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Home   Financial Management

Financial Management > Budget Adjustment > ETH-T-FMOHP06

⌄ Implementation Period

Country / Group of Countries	Implementation Period name	Currency	Implementation Period status
Ethiopia	ETH-T-FMOHP06	USD	Active
Principal Recipient		Amount Signed	Total Budget
Federal Ministry of Health of the Federal Democratic Republic of Ethiopia		58.362.193 $	58.362.193 $
Implementation Period dates	C19RM Utilization Date	Amount Disbursed	Regular Budget
1/7/2024 to 30/6/2027	0 $	17.258.973 $	0 $
Region	Category	Amount Committed	C19RM Budget
RT High Impact Africa 2	High-Impact	23.740.487 $	0 $

No Budget Adjustment forms found. Generate one: Generate   ← **Click on Generate**

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Budget Adjustment Form – Status with PR

Budget Adjustment Form – Main navigation options

Interventions   **Cost Inputs**   **Implementing Entities**   **Documents**

Implementing Entities
Legend: ● ⚠

Filters   ⊗ Reset

Implementing Entity

All

Results
2 / 2

> Scroll down the page to access the budget, broken down by **Interventions**, **Cost Inputs** and **Implementing Entities**. Click on the tab to open it. Relevant files can be attached in the **Documents** tab.

Implementing Entity ↑↓	Period	Budget ↑↓		Latest Reported Cumulative Expenditure ↑↓	Unexecuted Budget ↑↓	Positive Budget Adjustment	Negative Budget Adjustment	Additional Funding	Revised Budget ↑↓	
	Total	58.362.193 $	100%						58.362.193 $	100%
	Year 1	23.690.257 $							23.690.257 $	
	Year 2	21.332.449 $							21.332.449 $	
	Year 3	13.339.487 $							13.339.487 $	
● Federal Ministry of Health of the Federal Democratic Republic of Ethiopia	Total	57.680.494 $	99%						57.680.494 $	99%
	Year 1	23.433.627 $							23.433.627 $	
	Year 2	21.124.666 $							21.124.666 $	
	Year 3	13.122.201 $							13.122.201 $	
● CSO	Total	681.699 $	1%						681.699 $	1%
	Year 1	256.630 $							256.630 $	
	Year 2	207.782 $							207.782 $	
	Year 3	217.287 $							217.287 $	

2 / 2

> Click **Add** to make a new adjustment to the budget

Budget Adjustments
Legend: ●

+ Add

No results found.

Budget Adjustment Form – Adding an adjustment

Budget Adjustment Form – Edit existing adjustments

		Total	58.362.193 $	100%				58.362.193 $	100%
		Year 1	23.690.257 $			10.000 $		23.700.257 $	
		Year 2	21.332.449 $					21.332.449 $	
		Year 3	13.339.487 $				(10.000 $)	13.329.487 $	
●	Federal Ministry of Health of the Federal Democratic Republic of Ethiopia	Total	57.680.494 $	99%				57.680.494 $	99%
		Year 1	23.433.627 $			10.000 $		23.443.627 $	
		Year 2	21.124.666 $					21.124.666 $	
		Year 3	13.122.201 $				(10.000 $)	13.112.201 $	
●	CSO	Total	681.699 $	1%				681.699 $	1%
		Year 1	256.630 $					256.630 $	
		Year 2	207.782 $					207.782 $	
		Year 3	217.287 $					217.287 $	

2 / 2

Budget Adjustments

Legend: ●

Filters

Note!

The saved changes are reflected on the main page, and listed in the Budget Adjustments section.

+ Add

⊗ Reset

Implementing Entity				Funding Opportunity	
All	▼	All	▼	All	▼

Results
2 / 2

Implementing Entity ↑↓	Period ↑↓	Source of Funds ↑↓	Funding Opportunity ↑↓	Positive Budget Adjustment ↑↓	Negative E Adjustmen
Federal Ministry of Health of the Federal Democratic Republic of Ethiopia	Year 1	Approved Funding	Approved Funding	10.000 $	🗑
Federal Ministry of Health of the Federal Democratic Republic of Ethiopia	Year 3	Approved Funding	Approved Funding		

Click ✏ to edit an existing budget adjustment. Click to delete it.

2 / 2

Budget Adjustment Form – Data Quality checks (1/2)

Click **Check data quality** to review and fix any errors before submitting the Budget Adjustment Form to the Global Fund. The data quality errors are listed on the main page.

Click **Sync** at any time to pull the latest budget information and expenditures.

Budget Adjustment Form – Data Quality Checks (2/2)

Financial Management > Budget Adjustment > ETH-T-FMOHP06

> Implementation Period

Working Version

Form status: **PR to complete and submit**   Escalated approval required: **No**

Sync   Submit   Download Excel

Budget overview   Check data quality

Total	58.362.193 $
Approved Funding	58.362.193 $
C19RM	0 $
MPOX	0 $

Errors   Check data quality

⚠ The budget information of the 'Costing Dimension', 'Module / Intervention' and 'Implementing Entity' tables must be equal. Update the budget value(s) accordingly.

⚠ Your submission to the Global Fund was unsuccessful. Please address the data quality issue(s) flagged and attach all mandatory documents before re-submission. If you continue to face issues, you can contact Country Support through the 'Help' tab.

Source of Funds

Total ▼

> The budget breakdown by year and budget dimensions also highlights any error.

	Year 1 1-Jul-2024 30-Jun-2025	Year 2 1-Jul-2025 30-Jun-2026	Year 3 1-Jul-2026 30-Jun-2027	Total
Interventions	23.690.257 $	21.332.449 $	13.339.487 $	58.362.193 $
Cost Inputs	23.690.257 $	21.332.449 $	13.339.487 $	58.362.193 $
Implementing Entities	23.700.257 $	21.332.449 $	13.329.487 $	58.362.193 $
Checks	⚠	✔	⚠	✔

Budget Adjustment Form – Submit to Global Fund (1/2)

When all adjustments are made and there are no errors, you are ready to click **Submit**.

Budget Adjustment Form – Submit to Global Fund (2/2)

Upon submission, the form status changes to **Global Fund to Review**

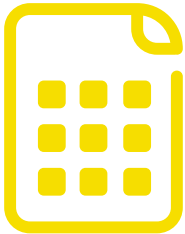# Budget Adjustment Form – Global Fund Validation

Note!

- The Global Fund reviews and validates information submitted by the PR
- Once completed by the Global Fund, the Budget Adjustment Form can be accessed in the **Latest Completed** section
- The Form status changes to **Completed (date of completion)**

# Budget Adjustment Form – Archives
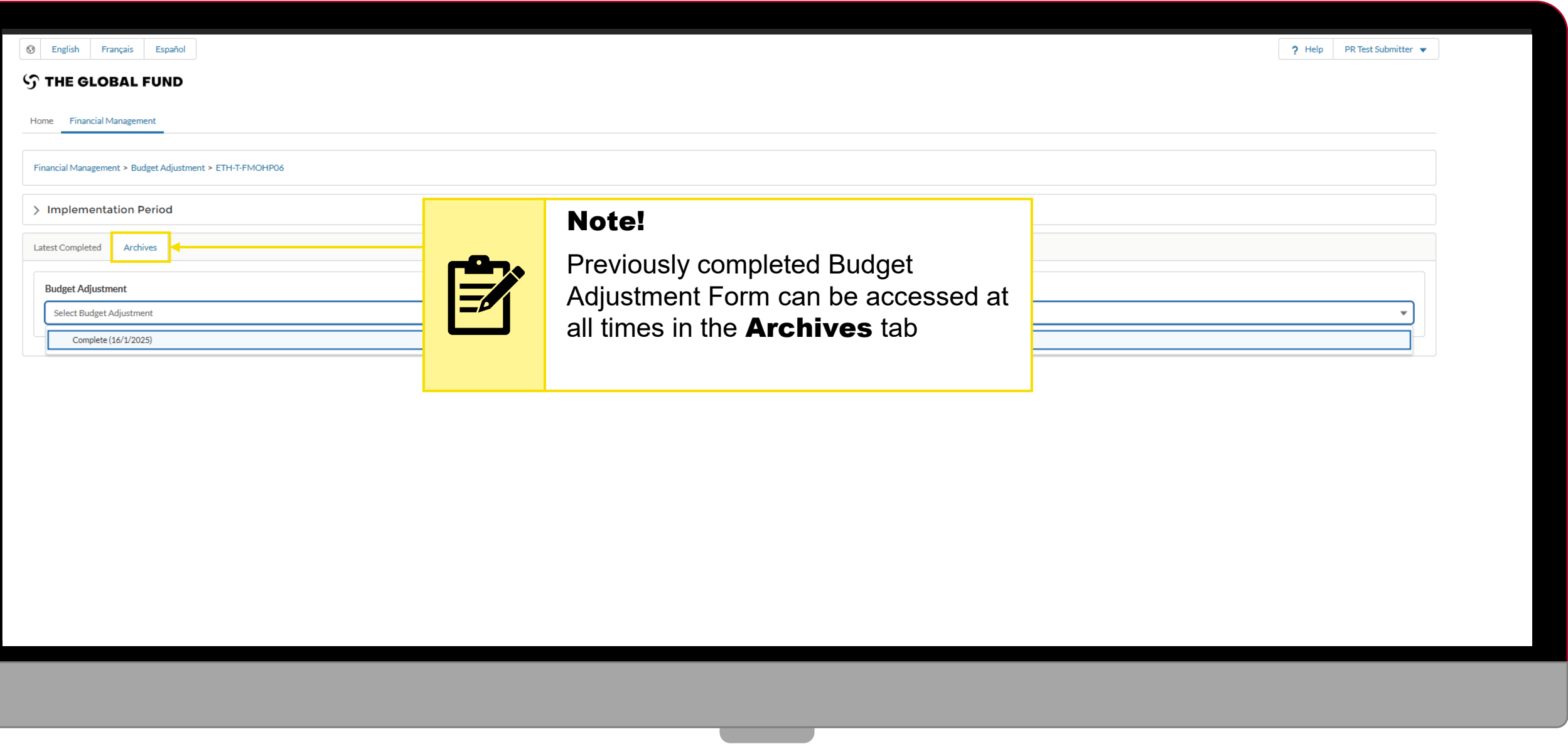
Incremental Detailed Budget

11 December onwards

- New revisions[1] (where no work has been done on the DB) use the incremental detailed budget

- Ongoing revisions may use the "old process" of submitting a revised baseline budget if it has already been attached in GOS. *If the revised baseline budget has not been attached in GOS but work has already been undertaken to revise the baseline budget, seek approval from Finance on how to continue.*

[1] in Additional Funding and End-date revisions

BAF
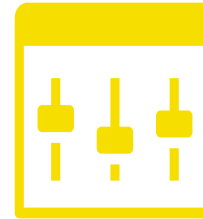
11 December onwards

The BAF is used to record budget changes resulting from Budget or Programmatic revisions.

No budget revisions can be processed in the GOS Revisions module without approval from GFM.

2b **First step towards online Performance Framework – Visualization**

What's new?

When the PR attaches a revised Excel PF in the Partner Portal, the PRs sees an online screen with the data entered in the Excel.

This lays the foundation for future enhancements to further digitize the PF, to support a streamlined and automated form, including data validations.

Only for PF for regular grants; C19RM PF process remains unchanged

Performance Framework

in the Partner Portal

Accessing the PF online in the Partner Portal

If the **Performance Framework** is part of the revision …

… the PR can directly visualize the PF online by clicking on the **Performance Framework** tab (read only).

To make changes to the PF, the PR downloads the Excel form along with all other documents shared by the Global Fund in the **Download Revisions Forms** tab.

Only for PF for regular grants; C19RM PF process remains unchanged

Attaching revised PF and visualizing changes online

Visualizing the PF online – Overview page

Download Revision Forms | Performance Framework | Attach & Submit Revision Forms

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

Overview

⊤ Expand All   ☰ Collapse All

∨ Imple...

Grant
ETH-T-FM...

IP start date
1-Jul-2024

AUP end date
30-Jun-2027

When clicking on the **Performance Framework** tab, a menu with the various sections of the PF appears. The PR lands on the **Overview** section.

> Reporting Periods

∨ Modules

#	Module	
1	Key and vulnerable populations (KVP) – TB/DR-TB	⊕
2	Program management	⊕
3	Collaboration with other providers and sectors	⊕
4	TB diagnosis, treatment and care	⊕
5	Drug-resistant (DR)-TB diagnosis, treatment and care	⊕
6	TB/DR-TB Prevention	⊕

∨ Interventions (Only required if you have Work plan Tracking Measures)

#	Module		Intervention	
1	RSSH: Monitoring and evaluation systems	⊕	Surveys	⊕
2	Removing human rights and gender related barriers to TB services	⊕	Ensuring people-centered and rights-based TB services at health facilities	⊕

Visualizing the PF online – Indicators page

The PR navigates through the different sections of the PF by clicking on the corresponding section header. In this example, the PR opened the **Coverage Indicators** section.

If changes are needed, the PR updates the PF Excel form and attaches it in the **Attach & Submit Revision Forms**.

The latest version of the PF can be visualized in the **Performance Framework** tab upon attachment.

2c **Reduce administrative burden**
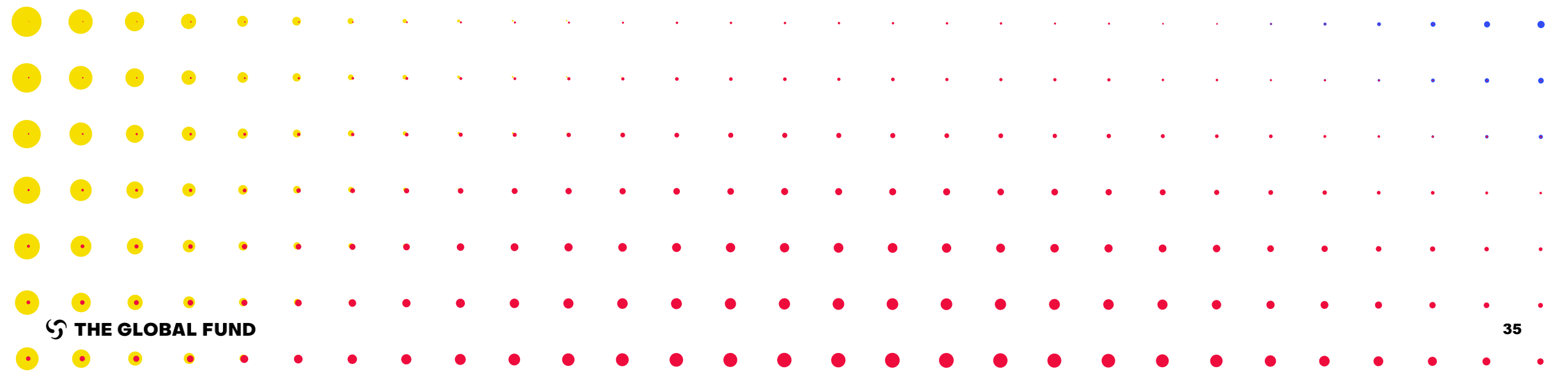
Ability to make admin changes to the PF & budget

Users can now make administrative edits to the existing PF and budget as part of an Administrative revision.

- Users can select the Administrative revision sub-type "Changes to the PF and/or budget" to generate, edit and attach the Excel PF and/or budget for import.

- The CT user shares the forms with the PR. The PR edits and submits to the Global Fund as per the same process for other revision types.

Admin changes to the Performance Framework

Are allowed when: they do <u>not</u> change the targets

Can include the following:
- Revising the reporting schedule
- Updating or adding a missing source of data
- Correcting/clarifying custom indicator names, comments fields, cumulation type without any changes to targets
- Realigning the targets according to the cumulation type, geographic coverage or scope of targets
- Aligning indicators and targets with measurement guidance and standard indicator definitions, and to ensure internal consistency across indicators

Admin changes to the Baseline Budget

Are allowed when: i) they do <u>not</u> change the Baseline Budget amounts at module, intervention, cost input and/or implementer level; ii) they do <u>not</u> change the Baseline budget by replacing budget amounts with actual expenditures from past periods; and iii) they affect more than 10% of the Total IP budget*

Can include the following:
- Changing the Sub-recipients (SRs) names in the Baseline budget in cases where SRs were not identified during Grant-making or when there is a change in the official name of SRs during implementation.
- Correcting any error or omission in the descriptive information of the Baseline budget.

*If less than 10% of the total IP budget is impacted (for example, errors relate to less than 10% of the budget, SR is implementing less than 10% of the budget), CTs and PRs wait until the >10% threshold is reached to initiate administrative changes to the Baseline Budget.

Revamp Request Forms A & B

Request Form A is retired. Request Form B is simplified.
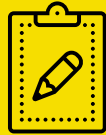
Request Form A is retired

- CCM endorsement is provided separately (via email or other forms, per OPN flexibility).
- CT attaches the endorsement to the revision.

Request Form B is replaced with a simplified Grant Revision Review Form

- Streamlined to reduce content and improve efficiency.
- **Internal-only form**. CT attaches the form to the revision.

The revision types and sub-types are updated to align with the current OPN and more accurately identify revisions.

Type	Sub-type
End-date	Extension Shortening
Additional Funding	Additional Funding Funding reduction/Transfer
Programmatic	
Administrative	Changes to the PF and/or Budget Other

There is no major functionality change for the subtypes, except in the case of the Administrative revision where the PF and budget are now able to be generated and attached when needed to process minor changes.

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New file types

New document types are introduced to (i) align with the new budgeting approach, and (ii) to improve tracking and visibility of all required documents for a revision.

Old Document Names	New Document Names	Rationale for change
Detailed Budget C19RM Detailed Budget	Detailed Budget - Baseline Budget revised Detailed Budget - Incremental Budget C19RM Detailed Budget - Baseline Budget revised C19RM Detailed Budget - Incremental Budget	**To align with new budgeting approach and used for End-date and Additional Funding revisions** • Baseline Budget – only used for Admin revisions • Incremental – used to request the change
None Revision Request Form A and B (not previously available in GOS)	CCM Endorsement Grant Revision Review Form	**Streamlining Revision Request Forms A+B** • Form A is retired and CCM endorsement can be provided via email or other format (as per previous flexibility in the OPN.)
Grant Signing Calculator All others did not exist in GOS	Grant Signing Calculator (GSC) - Board Approved Grant Signing Calculator (GSC) - GFM Approved Notification Letter / Email GFM Approval TRP Recommendation GAC Recommendation	**Allows CTs to attach all required documents** to their revisions, improve tracking and visibility.

3 Recap
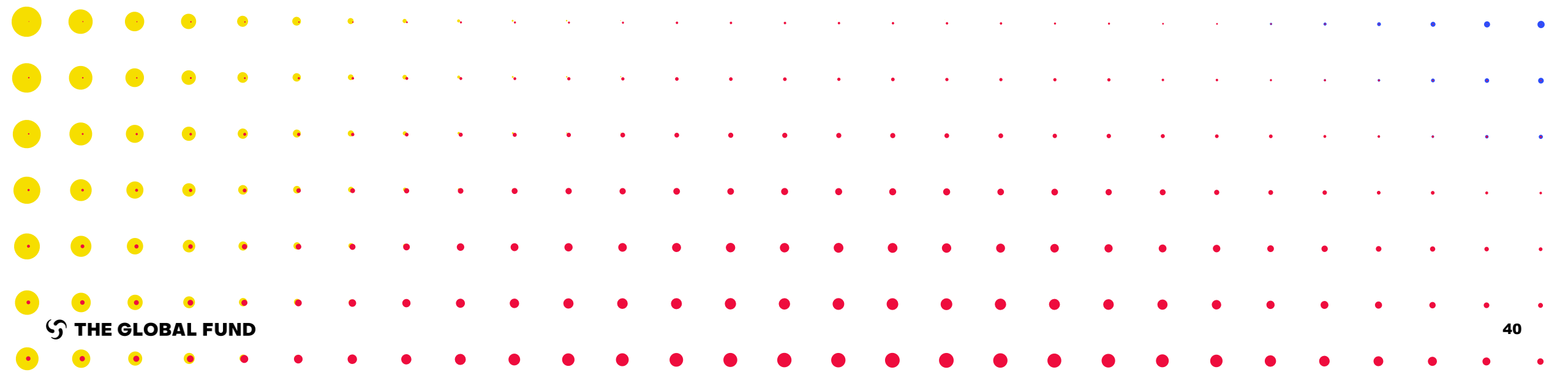
Enhancements introduced, by revision type

End-date	Additional funding	Programmatic	Budget	Admin
No need to change the baseline budget. **Provide incremental detailed budget only for additional amount of time / funds**.			**Budget Adjustment Form (BAF)** for PRs and CTs to make adjustments at summary budget level, with automated controls and usage dashboards.	Allowing PF and DB generation and import
Visualize PF in the Partner Portal laying the foundation for future enhancements to further digitize the PF, including adding data validations.				
Retire Grant Revision Request Form A. Simplify Request Form B				
New file types to allow better visibility and tracking of required documents			Exception: not needed for budget revisions	
New revision types and sub-types			Exception: not needed for budget revisions	

Grant Revisions

Process Overview

PR — PR in Partner Portal

The Global Fund

REVISION TYPES

End date
Additional Funding
Programmatic
Administrative

The Global Fund initiates the revision & shares documents with the PR

PR

Step 1. PR accesses & edits grant revision documents

PR

Step 2. PR attaches & submits grant revision documents

The Global Fund analyzes & validates documents submitted by the PR[1]

The Global Fund generates IL/NL & shares it with the PR

PR

Step 3. PR signs & sends IL

The Global Fund finalizes the process & registers the revision

Completed

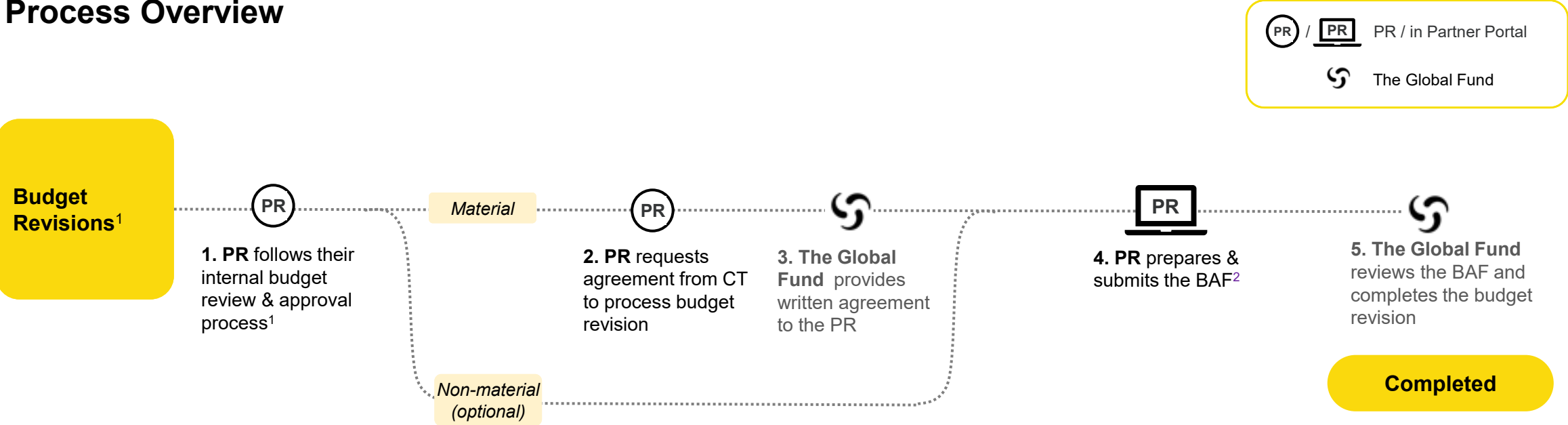[1] The Global Fund may request PR to resubmit documents

Budget Revisions through the Budget Adjustment Form (BAF)

Process Overview

PR / PR̄ PR / in Partner Portal

The Global Fund

Budget Revisions[1]

(PR) 1. **PR** follows their internal budget review & approval process[1]

Material

(PR) 2. **PR** requests agreement from CT to process budget revision

Non-material (optional)

3. **The Global Fund** provides written agreement to the PR

PR̄ 4. **PR** prepares & submits the BAF[2]

5. **The Global Fund** reviews the BAF and completes the budget revision

Completed

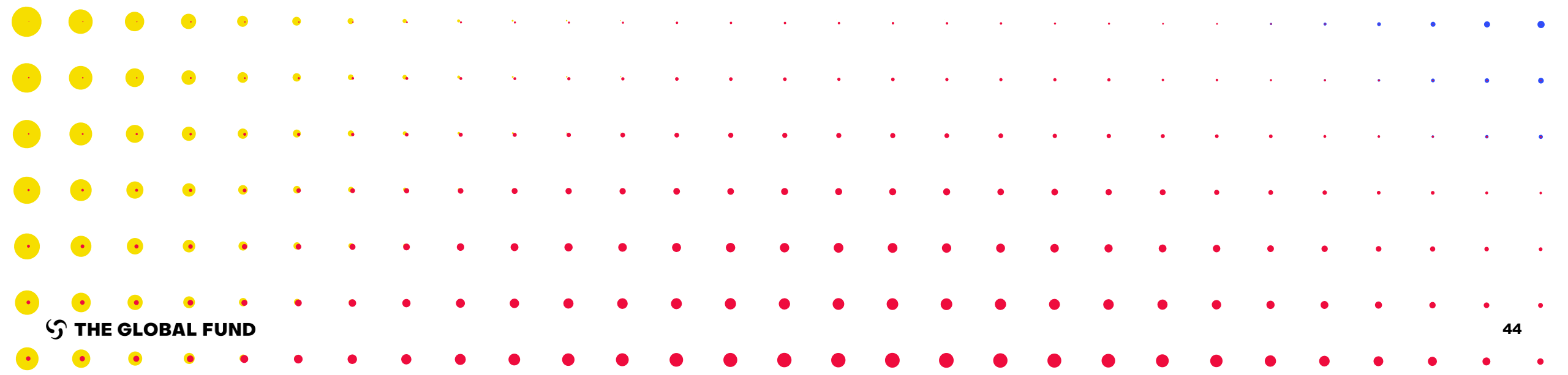[1] Refer to the Guidelines for Grant Budgeting and the OPN and Operational Procedures on Revise Grants for more information.
[2] During implementation, a Budget Adjustment Form can be initiated at any time, irrespective of any existing revision

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4 Resources

Resources

Resources	Links
General	[Summary of changes](#)
Operational Policy	[Operational Policy Manual](#)
	[Operational Policy Note](#) (OPN) on Revise Grants
	[Operational Procedures](#) on Revise Grants
Information sessions	[Presentation slides and recording](#) (to be published shortly)
System guidance	[Partner Portal Revisions Manual](#)
The Global Fund website	[Grant Revision](#) webpage
	[Operational Policy](#) webpage
Raise a request	Contact country.support@theglobalfund.org

5 Any questions?