

Grant Entity Data

Approved on: 11 November 2020, updated 30 March 2026
Approved by: Executive Grant Management Committee
Process Owner: Finance & Administration

Process Objectives

1. The grant entity data (GED) process¹ enables the efficient and effective delivery of all grant life cycle processes through use of accurate and updated information on Coordinating Mechanisms (CM)², Principal Recipients (PR)³, Local Fund Agents (LFA) and third-party organizations (Third Party). These are Global Fund partners that are actively engaged in the grant life cycle and collectively referred to as “Grant Entities” in this OPN.
2. The GED process is facilitated through the Global Fund Partner Portal, an online platform that serves as a central point of information entry and document sharing.
3. GED refers to the data sets presented in the diagram below. These data sets are critical to the execution of grant life cycle processes and may have legal and/or grant funding implications (i.e., used in the preparation of legal documents and/or release of Grant Funds). Refer to Annex 2 for definitions of terms used throughout this OPN.

GRANT ENTITY DATA				
	PR*	CM	LFA	Third Party
Organization Information	✓	✓	✓	✓
Banking Information	✓			✓
Contacts with Signatory Rights	✓	✓	✓	
Contacts with Notice Rights	✓		✓	
Contacts with GED Access Rights	✓	✓	✓	
Contacts with Grant Deliverables Access Rights (Editor / Submitter)	✓	✓	✓	
Key Country Actor	✓			

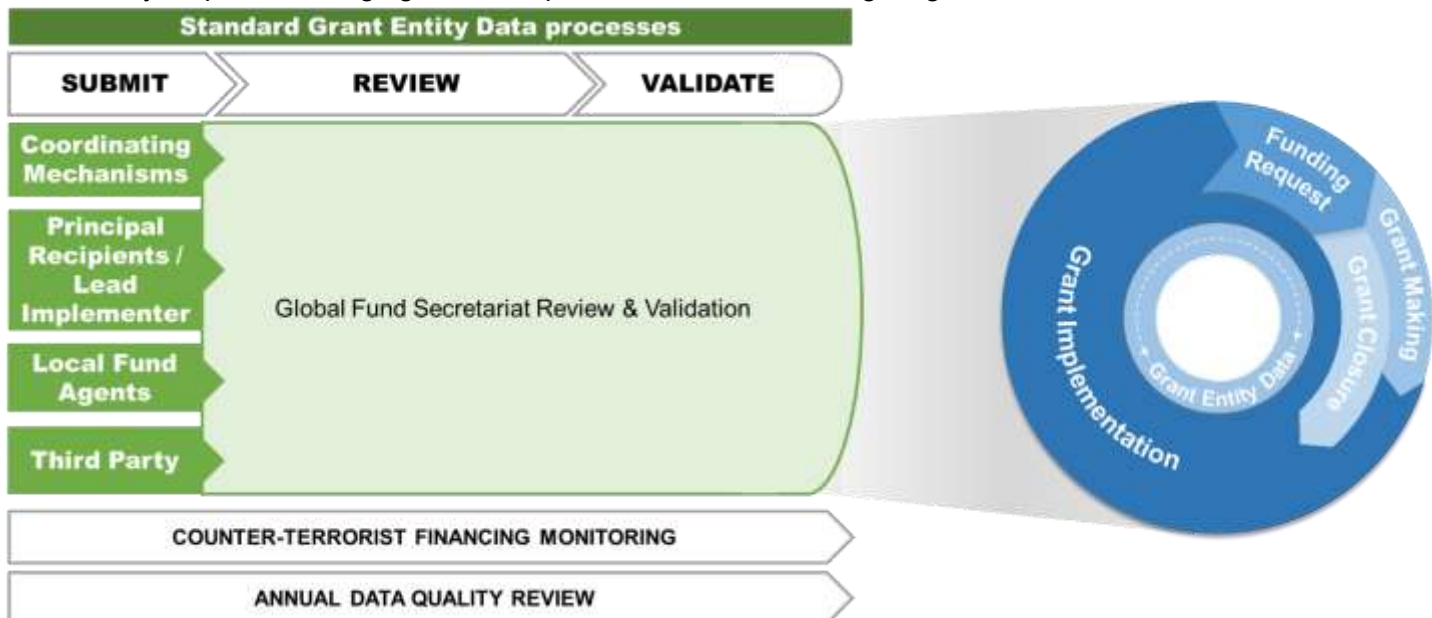
* And Lead Implementer if applicable (see footnote 3). The relevant GED for Lead Implementers are: Organization Information, Contacts with Notice Rights and Contacts with Access Rights. Lead Implementer GED are all non-Core GED.

¹ Formerly known as Master Data process.

² Throughout this OPN, references to CM include any Country Coordinating Mechanism (with or without CCM Funding Recipient), Regional Coordinating Mechanism (RCM), Regional Organization (RO) or other applicants, as applicable. In addition, unless defined in this OPN or the context otherwise requires, all capitalized terms used in this OPN shall have the same meaning set out in the Global Fund Grant Regulations (as amended from time to time). For terms not defined in the Global Fund Grant Regulations (as amended from time to time), please refer to Annex 2.

³ And Lead Implementer (LI), if applicable. LI arrangements are only applicable where a government implementer (such as the Ministry of Health) is not mandated to sign Grant Agreements per national laws or other reasons. In such cases, the mandated Government entity (such as the Ministry of Finance or Ministry of Foreign Affairs of the Host Country) signs the Grant Agreement as PR with the Government implementer (such as the Ministry of Health of the Host Country) acting as LI to lead grant implementation. LI arrangements do not change or waive the accountability and responsibilities of the PR for implementation of the grant under the terms of the relevant Grant Agreement. The LI role must be clarified in the Grant Agreement such as in the grant budget's Summary Budget. If an LI has been selected for expenditure tracking purposes. Please consult with the Country Team Legal Counsel for appropriate wording to be included as an attachment to the Summary Budget.

4. The key steps for managing GED are presented in the following diagram:



A. Operational Policy

5. This Operational Policy Note (OPN) defines the principles, rules and requirements for the submission, review and validation, and data quality review of GED. It applies to country and multicountry portfolios and grants.

6. Guiding Principles

- i. **GED Responsibility and Accountability.** Grant Entities are the source of their respective GED⁴. They are responsible and accountable for the integrity and quality of the data that they provide to the Global Fund, which includes ensuring its accuracy, completeness and overall compliance with the requirements of this operational policy. Grant Entities are responsible for defining and creating⁵, updating and managing their own information. Global PRs⁶ are also accountable for both their headquarters and country-level GED.
- ii. **GED Protection and Privacy.** GED containing personal data⁷ which is submitted to the Global Fund is processed and stored in accordance with the [Global Fund Privacy Statement](#) and the Global Fund Personal Data Protection Regulations. These policies ensure the Global Fund abides by internationally recognized standards for protecting personal data. In turn, Grant Entities are responsible for processing personal data in compliance with the requirements on privacy and data protection contained in their contracts with the Global Fund.
- iii. **GED Use.** Grant Entity Data is used, among other things, for the execution, monitoring and reporting of grant life cycle processes. The [Global Fund Privacy Statement for Global Fund Grant Funding and Management Activities](#) provides details on the various purposes for which GED may be used.

A. SUBMIT GED

7. The timely creation and updating of GED is crucial to support end-to-end grant life cycle processes, from funding request development to grant closure. This avoids unnecessary delays in preparing and signing grants, processing annual funding decisions and disbursements, among others. Annex 3 illustrates the

⁴ Under the Data Governance Committee Terms of Reference and the Information Data Regulations, these entities are the "Data Owners".

⁵ Except in cases defined in Submit GED section of this OPN.

⁶ As defined in Annex 2.

⁷ As defined in Annex 2.

use of GED across the whole grant life cycle. Grant Entities must take note of these milestones, and others listed in the respective grant life cycle Operational Policy Notes and Procedures and plan their GED creation or updates accordingly.

8. **Applicable Rules and Requirements.** All Grant Entities must ensure the quality of their GED (i.e. that all required information is complete and accurate with accompanying supporting documents) and that they comply with applicable rules and requirements for creating and updating GED defined in Annex 4.
9. **Creation and Update.** Each Grant Entity owns and is responsible for creating or updating their GED, including obtaining consent before entering personal data. However, the Global Fund Secretariat undertakes the creation of new organization information in all cases as new organizations do not yet have access to the Global Fund Partner Portal.
10. Depending on the type, GED is created and updated through the Grant Operating System (GOS) GED Module, the Global Fund Partner Portal (GED Module) and/or the Global Fund System (GFS). Grant Entity Contacts with Access Rights to the Global Fund Partner Portal are required to enter a verification code when logging into the Global Fund Partner Portal (Multi-Factor Authentication) and must agree to the Partner Portal Terms of Use.

B. REVIEW AND VALIDATE GED

11. **Review.** All GED submitted by Grant Entities undergoes a review process by the Global Fund Secretariat to ensure appropriate checks have been performed on information to be used in grant life cycle processes. The Country Team may also ask the LFA to perform in-country verification of GED of PRs and CCM.
12. The review process focuses on ensuring data quality, specifically:
 - i. completeness of GED and supporting documents;
 - ii. accuracy of information against submitted supporting documents; and
 - iii. and compliance with the GED requirements defined in this OPN.
13. **Validation.** Based on the review, GED will be validated by the following before being reflected in Global Fund systems:

Entity	Grant Entity Data	Validation
PR⁸	Organization Information	<i>Creation of new organization and update of official name:</i> Financial Transaction Management <i>Other organization updates:</i> <ul style="list-style-type: none"> ○ <i>Regular PR:</i> Country Team – Program Officer (PO) ○ <i>Global PR:</i> Senior Specialist, GFSC
	Banking Information	<i>Creation / Update / Deactivation:</i> Grant Finance Service Center
	Contacts with Signatory Rights; Contacts with Notice Rights	Financial Transaction Management
	Contacts with GED Access Rights Contacts with Grant Deliverables Access Rights (Editor / Submitter) Key Country Actor	<i>Regular PR:</i> Country Team – PO <i>Global PR:</i> Senior Specialist, GFSC
CM	Organization information	<i>Creation of a new CM organization and updates:</i> CCM Hub

⁸ And LI, if applicable. LI GED (Organization Information, Contacts with Notice Rights, Contacts with GED Access Rights and Contacts with Grant Deliverables Access Rights (Editors and Submitters) follows the validation process for Regular PRs.

Entity	Grant Entity Data	Validation
	Contacts with Signatory Rights	<i>New Chair / Vice Chair / acknowledgment signatories and update of critical fields⁹ for existing Chair / Vice Chair / acknowledgment signatories: CCM Hub</i> <i>Update of existing Chair / Vice Chair / acknowledgment signatories without critical fields¹⁰ edited: Country Team – PO</i>
	Contacts with GED Access Rights (Admin Focal Point)	CCM Hub
	Contacts with Grant Deliverables Access Rights (Editor / Submitter)	CCM Hub: <ul style="list-style-type: none"> <i>New Chair / Vice Chair / Admin Focal Point with Grant Deliverables Access Rights</i> <i>Update of critical fields¹¹ for existing Chair / Vice Chair / Admin Focal Point with Grant Deliverables Access Rights</i> Country Team – PO <ul style="list-style-type: none"> <i>New and updates to Member, Non-member, Alternate with Grant Deliverables Access Rights</i> <i>Update of existing Chair / Vice Chair / Admin Focal Point with Grant Deliverables Access Rights without critical fields edited</i>
LFA	Organization information	LFA Coordination Team
	Contacts with Signatory and Notice Rights	
	Contacts with GED Access Rights Contacts with Grant Deliverables Access Rights (Editor / Submitter)	
Third Party	Organization information	Financial Transaction Management
	Banking information	
	Relationship between PR and Third Parties	

C. INTEGRITY DUE DILIGENCE

14. In parallel with the review and validation process described above, the Global Fund Secretariat screens all Grant Entities against (a) international terrorism and (b) sanctions lists. The due diligence review is focused on screening of organization, banking information and contacts data against these lists. The Essential Due Diligence Procedure provides an overview of the process.

D. DATA QUALITY REVIEW

15. **Data Quality.** To ensure data quality, Grant Entities must undertake a regular (at least annual) comprehensive review and clean-up of their GED focusing on ensuring completeness, accuracy and compliance with GED requirements as well as removing duplicate records or outdated GED. In addition, the Global Fund will carry out a regular data check and cleansing exercise.

16. **Deactivate GED.** Where a GED record has expired or is no longer valid, it will be deactivated and archived by the Global Fund in accordance with the applicable Global Fund regulations on information

⁹ First Name, Last Name, Role, Recipient Status

¹⁰ Ibid.

¹¹ Ibid.

and data (as amended from time to time). Depending on the type of GED, the deactivation process is initiated by Grant Entities. Annex 6 defines scenarios and approaches for deactivation of GED records.

B. Specific Multicountry Considerations

17. The standard approach defined above also applies to multicountry portfolios and grants. The Global Fund’s Portfolio Services Team (PST) is responsible for internal review of GED relating to Global PRs.

Annex 1. GED Deliverables by Portfolio Category

GED Deliverables	Requirement by Portfolio Category			
	HI & Core	Focused		
		A	T	Li
Submit GED				
Change request to create, update or deactivate GED submitted in Global Fund systems with supporting documents, as needed		R		
Review GED				
Secretariat-reviewed change request		R		
LFA review		BP		
Validate GED				
Validated change request by defined authority		R		
Integrity Due Diligence				
GED screened against (a) international terrorism and (b) sanctions lists.		R		
Data Quality Review				
Comprehensive review and clean-up of GED		R		

A: Aligned; T: Targeted; Li: Light; Le: Legacy

Level of Requirements:

R Required

BP Best Practice

- Not required

Annex 2. Definition of Terms

- Third Party Organization (Third Party):** A Supplier of services or goods who may receive direct disbursements of Grant Funds from the Global Fund. The Direct disbursements may either be requested by the PR or mandated by the Global Fund Secretariat in accordance with the OPN on Annual Funding Decisions and Disbursements¹².
- Global PRs:** refer to (i) all “United Nations” organizations, and (ii) “other Multilateral Organizations”, “International Non-Government Organizations” and “International Faith-based Organizations” implementing in more than one country or multicountry. See Annex 5 of this OPN for the Global Fund categorization of implementers.
- Organization information:** refers to information about the organization to be captured in the legally-binding documents for the successful execution of grant lifecycle processes (such as official name, address and legal / disbursement signatories).
- Banking Information:** provides details of the bank account that will be used to receive disbursements from the Global Fund (such as Bank Account Number, Account Holder Name, Legal Owner of the Bank account, SWIFT/ABA (where applicable) and IBAN (where applicable)).

¹² See [Operational Policy Manual](#).

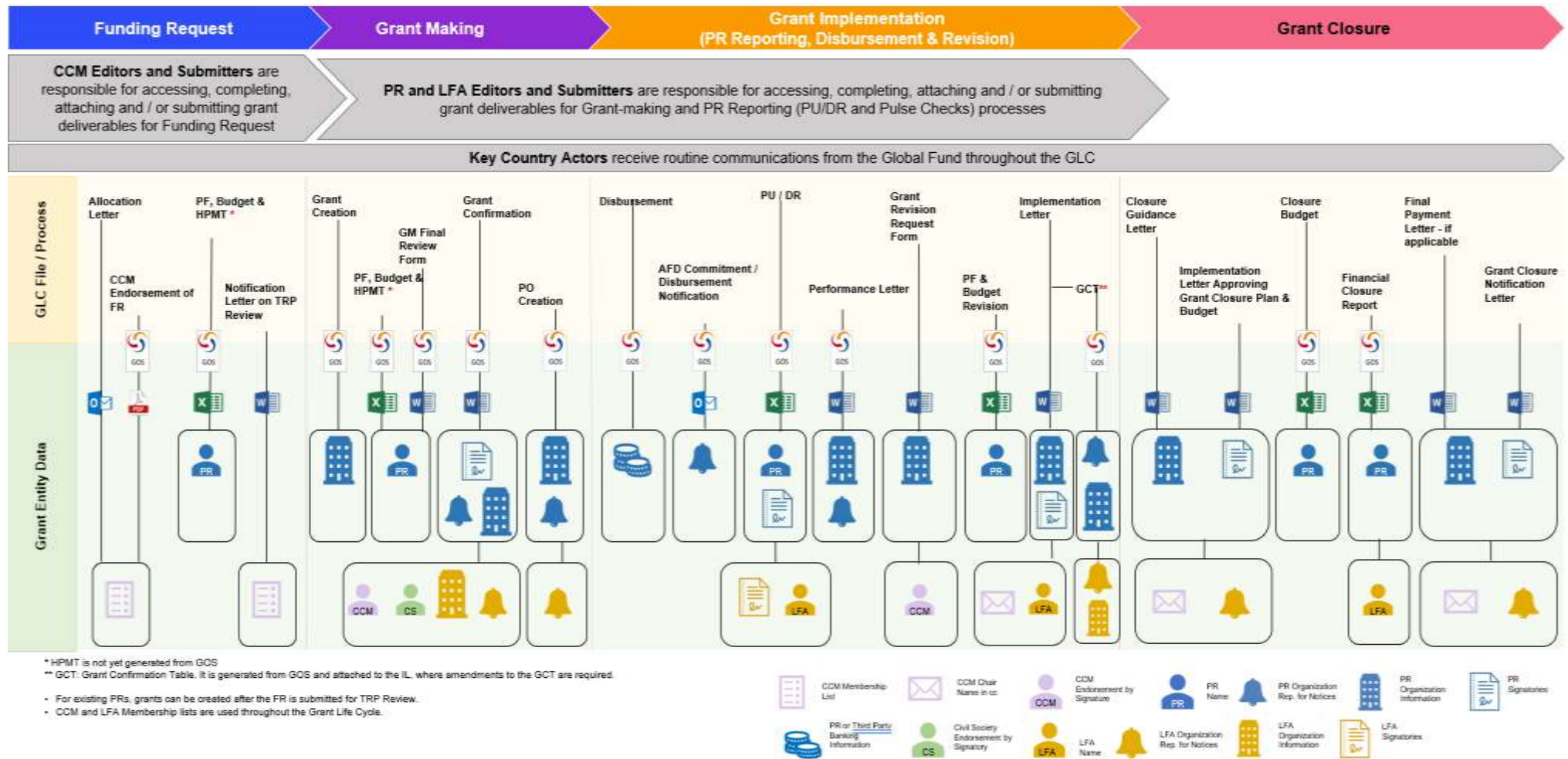
5. **Contacts with Signatory Rights:** refer to persons that are duly authorized by the organization to sign or acknowledge legally-binding documents and/or to sign disbursement requests.
6. **Contacts with Notice Rights:** refer to the persons that will serve as the contact point for Global Fund notices regarding contractual matters (as per the terms of the relevant Grant Agreement) and/or grant or portfolio-specific correspondences.
7. **Contact with GED Access Rights:** refers to the person that has access to the Global Fund Partner Portal to manage GED.
8. **Contact with Grant Deliverables Access Rights – Editor¹³:** Contacts responsible for accessing, completing, and attaching grant deliverables through the Partner Portal. This includes Funding Requests (completed only by CMs), Grant-making documents, Pulse Checks and PU/DRs (completed by PRs and/or LFAs) along with any required supporting documentation Editor rights are assigned per grant / portfolio¹⁴, and one contact can be Editor for either one or multiple grants / portfolios.
9. **Contact with Grant Deliverables Access Rights – Submitter¹⁵:** Contacts responsible for submitting grant deliverables (e.g., Funding Request, Grant-making, Pulse Checks, PU/DRs) to the Global Fund through the Partner Portal, in addition to having Editor rights (access, complete and attach).
10. **Key Country Actor:** Key government contacts who are not part of a PR or CM that receive routine operational communications from the Global Fund at the same time as other registered PR and CM contacts (including Organization Representative for Notices, Authorized Signatory, Editors and Submitters).
11. **Personal Data:** means any information relating to a natural person who can be identified by such data, from such data and other information, or by means reasonably likely to be used related to such data. This can include biographical data, such as name, sex, marital status, date and place of birth, country of origin, country of asylum, individual registration number, identification number, occupation, religion, ethnicity, sexual orientation, biometric data such as a photograph, fingerprint, facial or iris image, location data, an online identifier, or information that is linked specifically to the physical, physiological, genetic, mental, economic, cultural or social identity of the person.

¹³ Editors are expected to be PR staff, CM and LFA members who work on Global Fund grant deliverables, such as PR specialists in public health, finance or procurement & supply chain management or disease managers responsible for overseeing specific grants, and CM and LFA team members.

¹⁴ PR roles are assigned per grant, LFA roles per portfolio.

¹⁵ Submitters are expected to be those PR staff, CM and LFA members with authority to submit final grant deliverables to the Global Fund, such as the PR program or grant manager, LFA focal point or CM Admin Focal Points.

Annex 3. Visual illustrating the importance of GED across the Grant Life Cycle



Annex 4. Rules and Requirements on creating or updating GED

1. Organization Information						
Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR ¹⁶	CM	LFA	Third Party		
Official and/or Legal name of the organization	✓	✓	✓	✓	<ul style="list-style-type: none"> - Must be the organization name that appears in official or legal documents. - PR (and LI¹⁷ if applicable), LFA and Third-Party official name must be in English¹⁸ - For CM, the official name can be in one of the Global Fund official languages, however the CM organization short name must be in English. 	<p>All entities (except Third Party):</p> <ul style="list-style-type: none"> - Completed Organization Information Form¹⁹ EN ES FR - Documentary evidence such as certificate of incorporation, Articles of Association, registration certificate or trust deed ²⁰ - <u>LI, if applicable (in addition to the above):</u> Written document from the PR indicating the organization to be specified as the LI - <u>CM (in addition to the above):</u> Meeting minutes, email exchange or official letters may be attached. <p>Third Party - Supplier Information (To be continued on next page)</p>
Official Address of the Organization	✓	✓	✓	✓		
Type and sub-type of Organization	✓	✓			<ul style="list-style-type: none"> - Implementers (PR and LI if applicable) type and sub-type must be aligned with the Global Fund classification as defined in Annex 5. - CM types can be: Country Coordinating Mechanism (CCM), Regional Coordinating Mechanism (RCM), Regional Organization (RO) or Non-CCM. 	
Organization short name: organization name as per Global Fund standard terminology	✓	✓	✓		<p>Organization short name must be aligned with the following:</p> <ul style="list-style-type: none"> - PR (and LI if applicable) & LFA: Organization acronym and Country name (i.e., 'MOH Bangladesh' or 'UNDP Sudan', 'PwC Kenya') 	<p>(Continuation from previous page)</p> <p>Third Party - Supplier Information</p> <ul style="list-style-type: none"> - A Supplier Creation Form completed by the Third Party;

¹⁶ And LI, if applicable (see footnote 3).

¹⁷ See footnote 3.

¹⁸ The official name of an organization is the name that appears on all official or legal documents, such as registrations, constitutional documents and contracts. The organization should provide the document(s) which evidences its official name as part of submission of the signatory authority letter (e.g., Certificate of Incorporation, Articles of Association, registration certificate or trust deed) or a letter signed by an authorized person of the organization confirming the official name. The official name should be specified in English. If the Principal Recipient is proposing to use a non-English official name for Global Fund GED purposes (e.g., French or Spanish), the Country Team should consult with Legal Counsel.

¹⁹ Spanish and French versions are courtesy translations only. External stakeholders should complete and submit the English version of this template.

²⁰ This is only applicable if the CM is a legal entity. If the CM is not a legal entity, then these documents are provided by the Funding Recipient; and please consult with Legal Counsel in case of further queries.

					<ul style="list-style-type: none"> - CM: CM type and Country name (i.e., CCM Indonesia) - In creating the acronym of the organization's official name, the first letter of each word must be used up to a maximum of 7 letters. For example, for the Secrétariat Exécutif Permanent du Conseil National de Lutte contre le SIDA, the abbreviation is SEPCNLS. 	<ul style="list-style-type: none"> - A Third Party bank letter completed by the beneficiary's bank on letterhead using the Third party bank letter template; - LFA Verification or an affirmative confirmation with Third Party supplier - Formalized assurance of due diligence performed by the Country Team to be provided by Senior Finance Specialist/Grant Finance Manager - Communication from PR requesting Global Fund to process direct disbursements to third party; - Signed agreement between third party and PR or Global Fund; - Invoice from Third Party with full name and bank details (if possible) <i>(To be continued on next page)</i> <i>(Continuation from previous page)</i> <u>Third Party – Linking with PR</u> - Invoice from Third Party with full name and bank details (if possible) - A Third Party bank letter completed by the beneficiary's bank on letterhead using the Third party bank letter template;
Preferred communication language²¹	✓	✓			English, French or Spanish	
Organization Grant Abbreviation (PR only)	✓				Acronym of the official name of the organization which will be used in creating the grant name	
Focal point²² contact details: - Salutation, First name, Last name, Job title (PR and LI if applicable), Role (CM), Email address	✓	✓			<ul style="list-style-type: none"> - In case of new organization creation only - Contact Email Address: contacts have to use a unique official/business email address, but in cases where this is not possible, a unique alternate email address can be provided 	

2. Bank Information

Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR	CM	LFA	Third Party		
Bank Name (Full legal name)	✓			✓	<ul style="list-style-type: none"> - Registered name of the final bank where beneficiary's account is held - Bank must be cleared following anti-terrorism screening 	<p>PR:</p> <ul style="list-style-type: none"> - Official Letter from the Bank providing the bank account details including the name and

²¹ The selected preferred communication language will be considered by the Global Fund where applicable. However, not all communications with the Global Fund may be in the preferred communication language.

²² First contact point for the organization. This contact is also the first contact with access rights to the Global Fund Partner Portal (Grant Entity Data module) and duly authorized to represent and act on behalf of the organization with respect to the Global Fund Partner Portal.

Bank Full Address	✓		✓	The full postal address and location of bank (including country)	<p>contact information (telephone number and/or email address) of the bank manager for verification of the details.</p> <ul style="list-style-type: none"> ○ PR Bank Information Template (EN ES FR) <p>- PR notification to the bank manager authorizing the bank to provide the Global Fund or LFA information required as part of the verification process.</p> <p>- Additional information and security code required for the authentication process</p>
Bank Account Name	✓		✓	The exact name of the beneficiary of the bank account as held by the bank	
Bank Account Holder Name	✓		✓	<ul style="list-style-type: none"> - Legal Owner/Beneficiary Name of the bank account - Account holder must be the organization and not an individual - Account holder's address must be the same as the organization's registered address 	
Bank Account Number	✓		✓	<ul style="list-style-type: none"> - Account number held at beneficiary's bank which is to be credited - For PR: only one bank account per grant 	
Bank Account Currency	✓		✓	Currency in which account is held	
SWIFT/BIC code (mandatory)	✓		✓	<ul style="list-style-type: none"> - Code used to identify specific banks worldwide when financial transactions are made. It consists of 8 or 11 alpha-numeric characters (where the last 3 characters which are not mandatory represent the bank's branch) - Bank's SWIFT code must be duly verified 	
IBAN (International Bank Account Number)	✓		✓	<ul style="list-style-type: none"> - It has different structures according to the national rules of different countries. It always begins with two letters to represent the country and two additional numbers. This is followed by the bank code, account number (and national check digits where applicable) - Account's IBAN code must be duly verified 	
ABA: American Bankers Association routing transit number	✓		✓	<ul style="list-style-type: none"> - US Banks only - Nine-digit code 	<p>Third Party:</p> <ul style="list-style-type: none"> - Same as required documents for Third Party Organization Information - Completed Eco-Sign Letter
Special Instructions: Some banks in certain countries may require specific instructions in order to credit funds to the beneficiary's account.	✓		✓	This section must be completed ONLY if required.	
Routing Instructions: Some beneficiary banks can receive fund transfers only through a third bank, also called intermediary or pay through bank. The following details will then be required:	✓		✓	This section must be completed ONLY if required.	

<ul style="list-style-type: none"> • Intermediary Bank Name • Intermediary Bank Country • Intermediary Bank SWIFT (if applicable) • Intermediary Bank IBAN (if applicable) • Intermediary Bank Account Number (if applicable) This is the account number of the beneficiary's bank with the intermediary bank 						
--	--	--	--	--	--	--

3. Contacts with Signatory and/or Notice rights

3.a. Authorized Signatory for Legally-Binding Documents

Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR	CM	LFA	Third Party		
Full name of the Signatory	✓	✓			<p><u>PR:</u></p> <ul style="list-style-type: none"> - Must be a duly authorized official able to sign and enter into contracts and other legal documents on behalf of the PR. - At least 1 Primary and 1 Secondary signatory must be nominated <p><u>CM:</u> Must be Chair, Vice-Chair or any other CM member acting as Civil Society signatory.</p> <p>Contacts have to use a unique official/business email address, but in cases where this is not possible, a unique alternate email address can be provided</p>	<p><u>PR</u> Signatory Authority Letter²³</p> <p><u>CM:</u></p> <ul style="list-style-type: none"> - CM Signatory Authority Template for CM that is a legal entity - CM Signatory Authority Template for CM that is not a legal entity - CM Signatory Authority Template for CM that is not a legal entity (UNDP as CCM Funding Recipient) <p>For the purposes of the CM signing an acknowledgment, an agreement among CM members on the selection of the representatives of signature documented</p>
Official job title in the organization	✓	✓				
Email address	✓	✓				

²³ Spanish and French versions are courtesy translations only. External stakeholders should complete and submit the English version of this template.

through meeting minutes, non-objection approvals by all CM members

3.b. Authorized Signatory for Disbursement Requests

Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR	CM	LFA	Third Party		
Full name of the Signatory	✓		✓		<u>PR:</u> - At the least the Program/Project Manager or Finance Manager - At least 1 Primary and 1 Secondary signatory must be nominated <u>LFA:</u> - Partner or Team Leader - Must nominate one only	PR Signatory Authority Letter ²⁴ EN LFA Signatory Template English
Official job title in the organization	✓		✓			
Email address	✓		✓			

3.c Organization Representative for Notices

Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR ²⁵	CM	LFA	Third Party		
Full name of Organization Representative for Notices	✓		✓		<u>PR:</u> - Must be senior official - One Primary at PR level and one Secondary at LI level (if applicable) <u>LFA:</u> - Partner, Team Leader or similar role as nominated by the organization - Must nominate one only	<ul style="list-style-type: none"> - PR Signatory Authority Letter²⁶ EN - LI (if applicable): Completed Global Fund Template to appoint Secondary Organization Representative for Notices²⁷ EN ES FR
Official job title in the organization	✓		✓			

²⁴ Spanish and French versions are courtesy translations only. External stakeholders should complete and submit the English version of this template.

²⁵ And LI, if applicable (see footnote 3).

²⁶ Spanish and French versions are courtesy translations only. External stakeholders should complete and submit the English version of this template.

²⁷ Ibid.

Email address	✓		✓		Contacts have to use a unique official/business email address, but in cases where this is not possible, a unique alternate email address can be provided	- LFA: Email providing the required information
4. Contacts with Global Fund Partner Portal (GED Module) Access Rights						
Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR ²⁸	CM	LFA	Third Party		
Full name of the Contact	✓	✓	✓		<u>PR (and LI if applicable) and LFA</u> contacts responsible for GED management	<u>All Entities:</u> Completed Global Fund Portal Access Rights template ²⁹ EN ES FR
Official job title in the organization	✓	✓	✓		- 1 Primary and 1 Alternate in addition to the Focal Point contact created alongside a new organization <u>CM:</u> Admin focal points responsible for GED management for the CM A contact may have GED Portal access rights for multiple organizations only for the following cases: <ul style="list-style-type: none"> ○ A contact is the admin focal point for a PR and also for the CM ○ An LFA contact working for multiple LFA organizations 	
Email address	✓	✓	✓		Contacts have to use a unique official/business email address, but in cases where this is not possible, a unique alternate email address can be provided	
5. Contacts with Grant Deliverables Access Rights (Editor / Submitter)						
Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR ³⁰	CM	LFA	Third Party		
Full name of the Contact Grant(s) / portfolio(s) to which contacts are assigned	✓	✓	✓		<u>PR (and LI if applicable) and LFA</u> contacts responsible for submitting grant deliverables (e.g., Pulse Checks, PU/DRs)	PR Submitter Authorization Template An authorization letter is not required for PR Editor contacts and for CM Submitter and Editor contacts.

²⁸ And LI, if applicable (see footnote 3).

²⁹ Spanish and French versions are courtesy translations only. External stakeholders should complete and submit the English version of this template.

³⁰ And LI, if applicable (see footnote 3).

					<ul style="list-style-type: none"> - At a minimum, each grant / portfolio is required to have one Submitter. It is recommended to have two submitters per grant / portfolio, but no more. - Editor rights are assigned per grant / portfolio, and one contact can be Editor for either one or multiple grants / portfolios. <p><u>CM</u>: Submitter rights are assigned to CM admin focal points who are responsible for GED management for the CM (therefore can assign Editor and Submitter rights to other CM members or contracted consultants).</p>	
Full grant name	✓	✓				
Full portfolio name			✓			
6. Key Country Actor						
Required Information	Applicable To				Applicable Rules	Supporting Documents
	PR ³¹	CM	LFA	Third Party		
Full name of the Contact Email address Grant(s) / portfolio(s) to which contacts are assigned	✓				PRs are recommended to assign key government contacts in grants/portfolios with non-government PRs and/or CCM Chair/Vice-Chair.	N/A
Official Job Title	✓					

³¹ And LI, if applicable (see footnote 3).

Annex 5. Global Fund Categorization of Implementers³²

This annex presents the approach used by the Global Fund in categorizing implementers according to organizational types and sub-types (this approach may be amended or adapted depending on the circumstances, from time-to-time). Refer to this document for the categorization of organizations that are currently implementing Global Fund grants.

Organization Type	Organization Sub-type	Sub-type Distinction (if applicable)
Civil Society Organization (CSO) Organizations/groups generally distinct from government and commercial for-profit actors operating in support of shared health and development goals in the fight against HIV, TB and malaria.	Community-Based Organization (CBO): Community-based organizations deliver services in the community but are not necessarily community-led. They operate in community settings or locations, responding to community needs and challenges as they relate to HIV, TB and malaria to ensure services reach those who need it most. (CSS Technical Brief, 2022)	
	Community-Led organizations (CLO) Community-led organizations are organizations or networks (whether formally or informally organized) in which the majority of governance, leadership, and staff are from communities. These organizations are best suited to reach members of the community based on familiarity and trust, and ensure that HIV, TB and malaria services are accessible and available to them.	
	Non-Governmental Organization (NGO): An Organization which is independent of government involvement is known as a non-governmental organization or NGOs or non-government organizations. NGOs are a subgroup of organizations founded by citizens, which include clubs and associations providing services to its members and others. They are usually non-profit organizations. Many NGOs are active in humanitarianism or the social sciences, at local and international level.	International Non-Governmental Organizations (INTNGO): NGOs with global presence spanning across countries.
		Local Non-Governmental Organizations (LOCNGO): NGOs with mostly domestic presence (in-country).
Faith-Based Organization (FBO): An Organization that has values based on faith and/or beliefs. It has a mission based on social values of the particular faith; and most often draws	International Faith-Based Organization (INTFBO): FBOs with global presence spanning across countries.	

³² As a specific organization may fall within one or more categories, at any point in time and be categorized for various reporting and other purposes, please consult with the Operational Efficiency Team for any changes or proposed changes to the categorization for any specific organization under this Annex.

Organization Type	Organization Sub-type	Sub-type Distinction (if applicable)
	its activists (leaders, staff, volunteers) from a particular faith group. The faith relating to the FBO does not have to be academically classified as religion. Faith-based organizations are grass-root organizations active locally but also on an international scale.	Local Faith-Based Organization (LOCFBO): FBOs with mostly domestic presence (in-country).
Multilateral Organization (MO): Organizations formed by three or more nations to work on relevant cross-cutting issues. An MO can fund its projects by receiving funding from multiple governments.	United Nations (UN): All UN organizations / agencies, such as UNDP, UNICEF, UNOPS, and IOM.	N/A
	Others (OTH): MOs that are non-UN, such as International Bank for Reconstruction and Development (IBRD), Inter-American Development Bank (IDB), Caribbean Community Secretariat (CARICOM)	N/A
Governmental Organization (GOV): Public or nationally owned branch of government.	Ministry of Health (MOH) (including other governmental organizations which report to the Minister of Health)	N/A
	Ministry of Finance (MOF)	N/A
	Other – Governmental Organizations (OTH): Any other governmental organization, which is different from MOH and MOF.	N/A
Private Sector (PS): Businesses or entity owned, financed and/or controlled by private individuals, and not government. The main goal of most private sector organizations are to make a profit.		International Private Sector (IPS): Private Sector entity that is operational in more than one country.
		Local Private Sector (LPS): Private Sector entity that is legally registered and operational in one country only.

Annex 6. Rules for deactivation of GED in Global Fund Systems

	Impacted GED	When to Deactivate?	Who can Deactivate?	Supporting Documents (if applicable)
Deactivation of GED are due to replacement of bank account and/or contacts. Deactivation can be completed by relevant Grant Entity following Global Fund Secretariat approval of the change request.				
PR	Banking Information	Immediately when there is a change in PR banking details	PR Contact with GED Access Rights	Change Request to deactivate old record. In case of account closure, letter from the bank confirming closure of the bank account or for other situations, letter from authorized signatory

	Impacted GED	When to Deactivate?	Who can Deactivate?	Supporting Documents (if applicable)
Deactivation of GED are due to replacement of bank account and/or contacts. Deactivation can be completed by relevant Grant Entity following Global Fund Secretariat approval of the change request.				
	<ul style="list-style-type: none"> - Contacts with Signatory and Notice Rights³³ - Contacts with GED Access Rights³⁴ - Contacts with Grant Deliverables Access Rights - Key Country Actor 	Immediately when there is a PR decision to change the Signatory, Notice, Partner Portal Access contact(s), Grant Deliverables Access or Key Country Actors		Change Request to deactivate old record
CM	<ul style="list-style-type: none"> - Contacts with Signatory Rights - Contacts with GED Access Rights - Contacts with Grant Deliverables Access Rights 	Immediately when there is a CM decision to change the Signatory, Partner Portal Access contact(s), or Contacts with Grant Deliverables Access Rights	CM Contact with GED Access Rights	Change Request to deactivate old record
LFA	<ul style="list-style-type: none"> - Contacts with Signatory and Notice Rights - Contacts with GED Access Rights - Contacts with Grant Deliverables Access Rights 	Immediately when there is a LFA decision to change the Signatory, Notice or GED Access contact(s)	LFA Contact with GED Access Rights	Change Request to deactivate old record
Third Party	Banking Information	Immediately when there is a change in Third Party bank account	Country Team	<ul style="list-style-type: none"> - ServiceNow ticket to deactivate old record - In case of account closure, letter from the bank confirming closure of the bank account or for other situations, letter from Third Party

³³ And for LI, if applicable. The LI contact with GED Access Right is responsible for raising the contact deactivation change request via the GED Module in the Global Fund Partner Portal.

³⁴ And for LI, if applicable. The Alternate LI contact with GED Access Right is responsible for raising the contact deactivation change request via the GED Module in the Global Fund Partner Portal.