THE GLOBAL FUND

Partner Portal Manual

Integrated Financial Assessments (IFA)

ISSUE: October 2026

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INTRODUCTION & ACCESS

- How to Use This Manual
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- Log-in & Access
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HOW TO Use This Manual

This manual provides comprehensive guidance for Principal Recipients (PRs) accessing and reporting clarifications on Budget Analysis Triggers.

It includes “how to” sections which walk through how to report on each tab found in the online forms. You can navigate the pages by clicking on the ‘Previous’ and ‘Next’ buttons at the bottom of the screen, or simply scrolling through.

The manual is structured into the following sections:

- **Home:** Direct access to the different sections and guide to navigation
- **Introduction & Access:** Instruction and how to access the Integrated Financial Assessments module in the Partner Portal
- **Integrated Financial Assessments:** Process flow & step-by-step guide for the module
- **Resources & Support:** Links to useful materials & technical support

Legend

System Instructions

Step-by-step instructions

For information

Symbols

Online form

Navigation Buttons



Go back or advance to the next page



Go to the home page

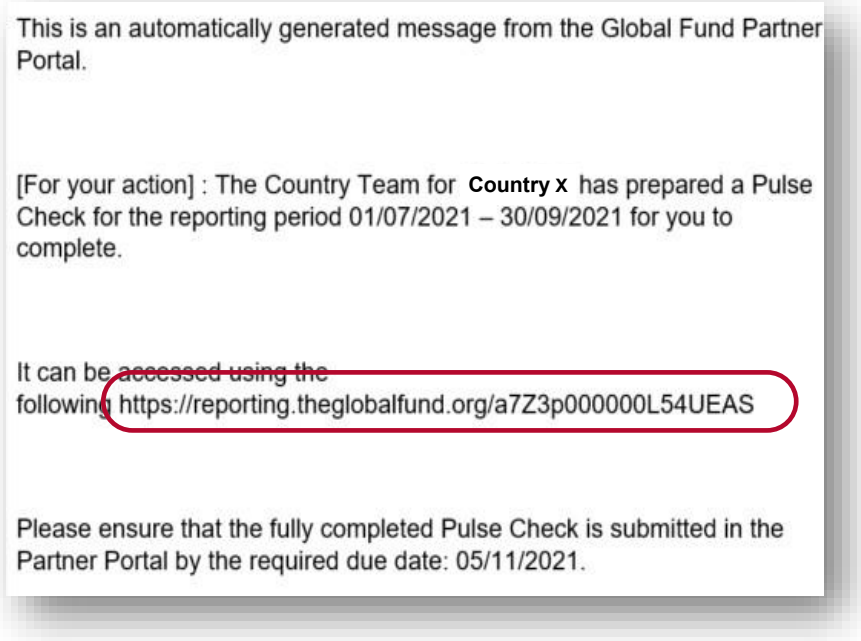


Go to abbreviations

HOW TO

Log in to the Partner Portal

Open the notification email you received from the Global Fund*. Click the link to the online form. The address begins with https://reporting.theglobalfund.org/.



This is an automatically generated message from the Global Fund Partner Portal.

[For your action] : The Country Team for **Country X** has prepared a Pulse Check for the reporting period 01/07/2021 – 30/09/2021 for you to complete.

It can be accessed using the following https://reporting.theglobalfund.org/a7Z3p000000L54UEAS

Please ensure that the fully completed Pulse Check is submitted in the Partner Portal by the required due date: 05/11/2021.

* Note: Instead of clicking the link from the email, you can also access the online form by going to the Partner Portal at https://portal.theglobalfund.org.

HOW TO

Log in to the Partner Portal

- Sign into the Global Fund Partner Portal by entering your user ID (e.g.***@ext.theglobalfund.org).
- Then, click **Next**.
- Enter your password and click **Sign in**.

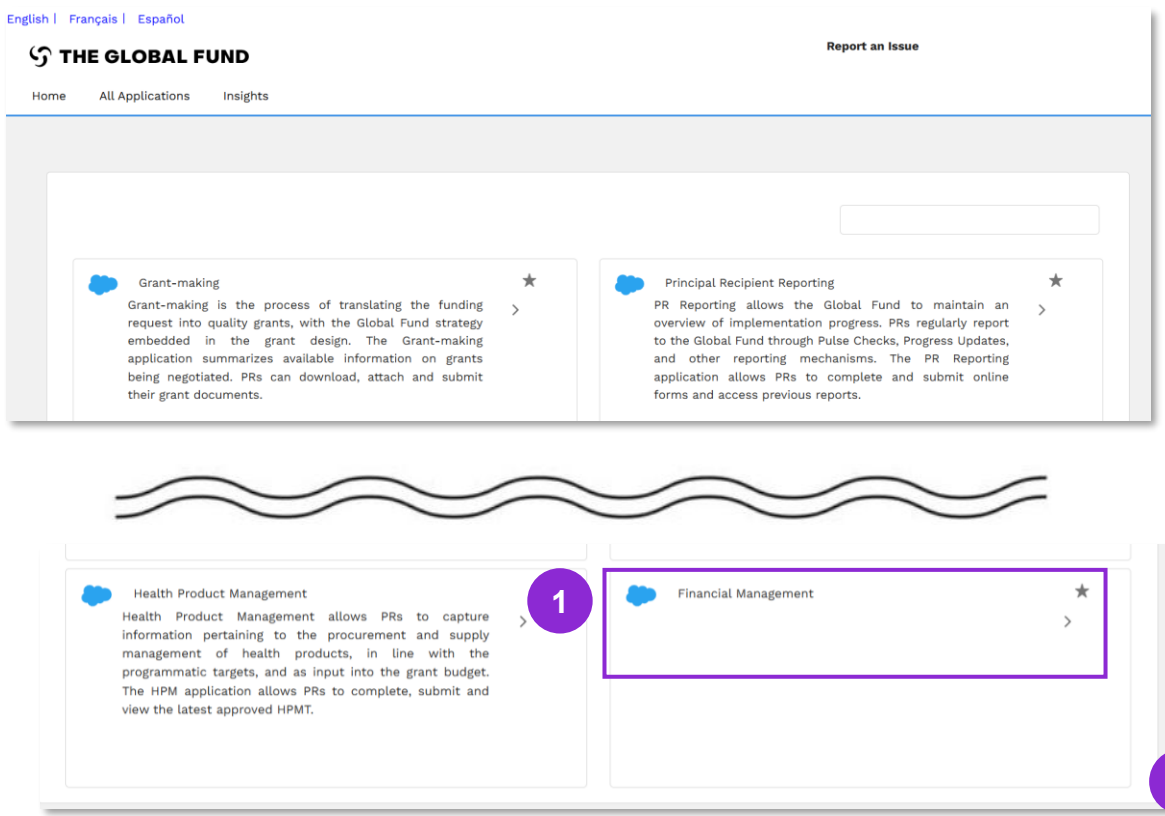


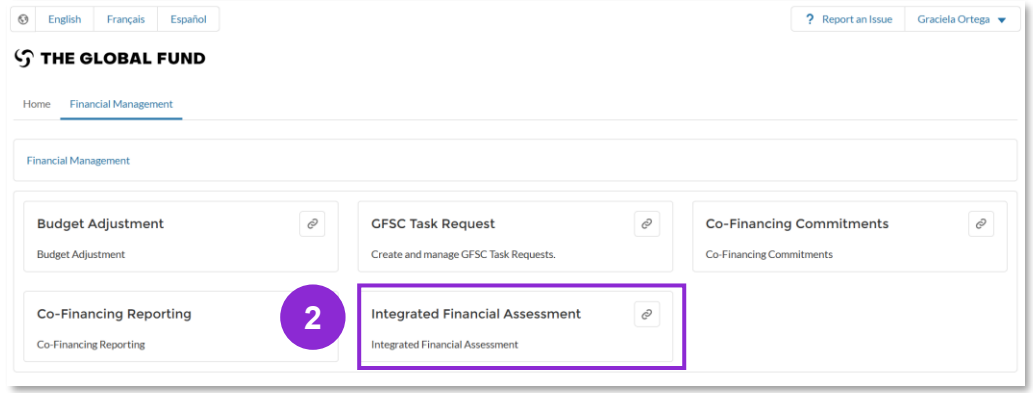


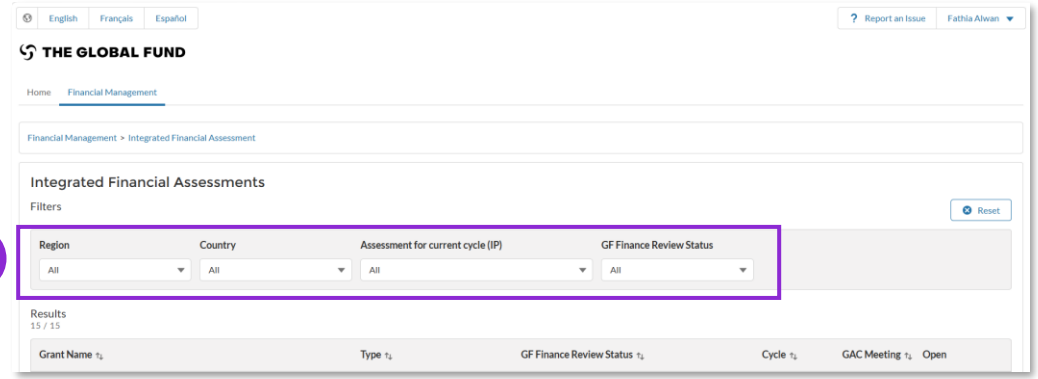
- Click **Yes** to stay signed into the site.



HOW TO Access IFA in the Partner Portal







3

1 Select Financial Management

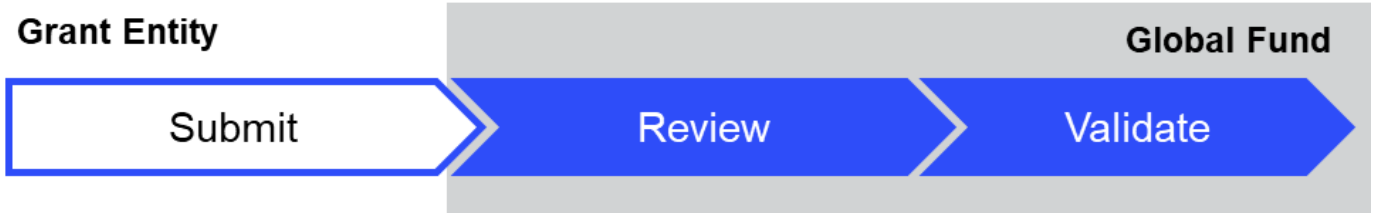
2 Select Integrated Financial Assessment

3 Select the applicable grant

Ensure Your Grant Entity Data is Up-to-date

Grant Entity Data (GED) consists of the organization and contact information required from Grant Entities (PRs, LFAs, CCMs, and third-party organizations) to enable them to process key grant life cycle activities and achieve business milestones in a timely and quality manner.

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



Raising a Change Request

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

For step-by-step guidance:
GED Interactive Guide

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INTEGRATED FINANCIAL ASSESSMENTS

- Process
- Assessment Structure
- Pre-brief Tab
- GFM Budget & Context Review Tab
- Submission

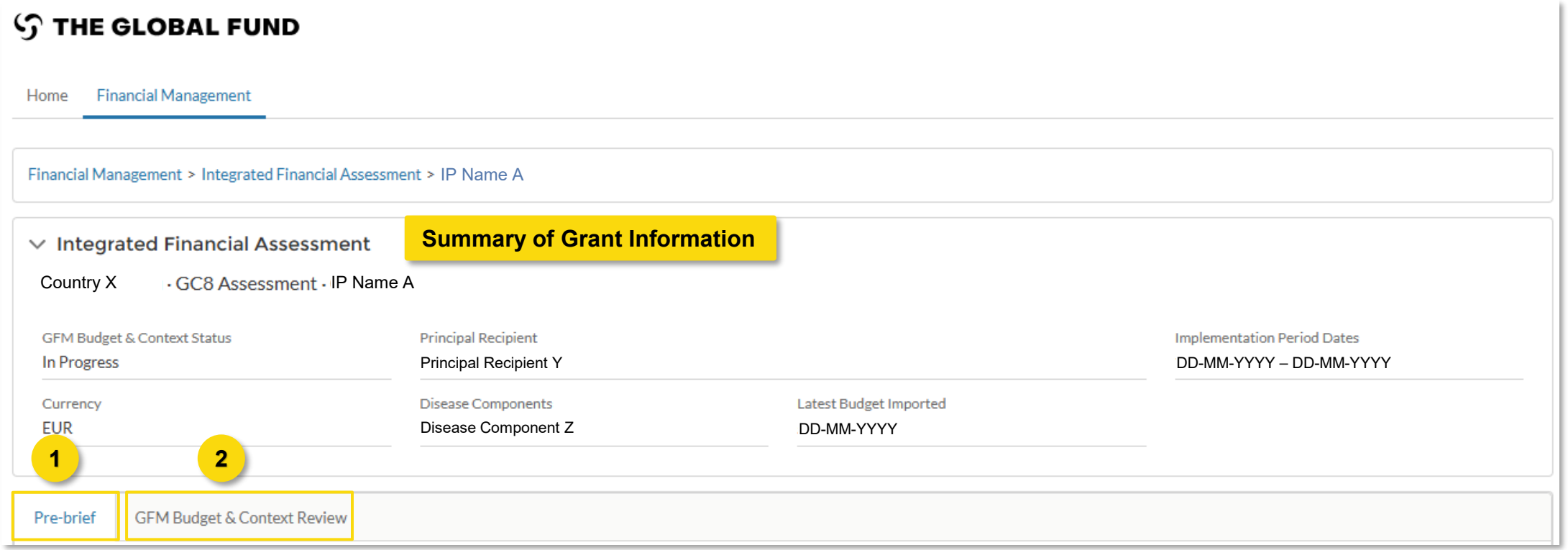
Process

How a Budget & Context Review moves from budget import to a completed assessment.

PROCESS STEP	KEY CONSIDERATIONS
1 **An assessment record is created** for the grant and the current cycle when the grant is created in grant making.	The assessment opens at Draft status and appears in the landing page list.
2 **Grant budget is imported** automatically into Grant Making for the implementation period when PR attaches in partner portal	The header shows Latest Budget Imported. Attaching a new budget re-imports the data and refreshes calculated sections.
3 **PR responds to clarifications** raised against the budget analysis triggers.	The Principal Recipient replies in the PR Clarifications column.
4 **Global Fund** conducts a review and submits the assessment	GFM Budget & Context status changes to Completed and the assessment feeds GAC and CFO review.

High Level Structure of the Assessment

The assessment opens on the Pre-brief tab. This manual covers the GFM Budget & Context Review.



1

Pre-brief
Read-only scores carried from portfolio analytics. Nothing is completed here.

2

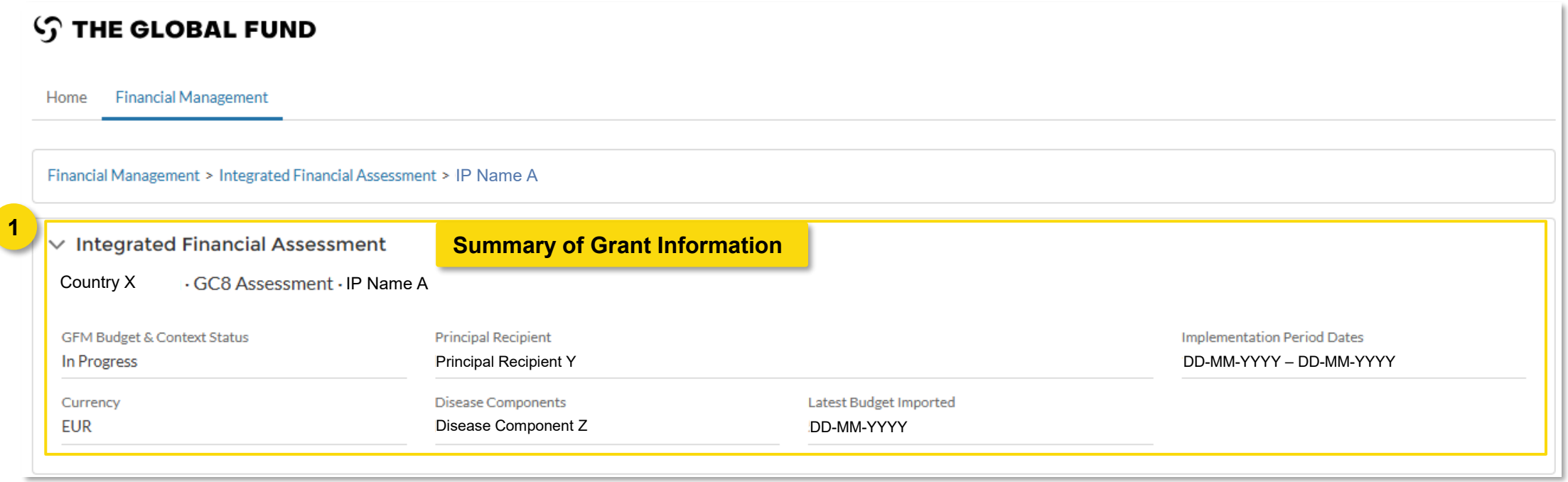
GFM Budget & Context Review
The body of this manual:

- Section 1 Strategic Context,
- Section 2A Trigger Calculation

Common header
Grant identity, both statuses and the Submit button stay visible above the tabs on every page.

Common header

Visible above the tabs on every page of the assessment.



1

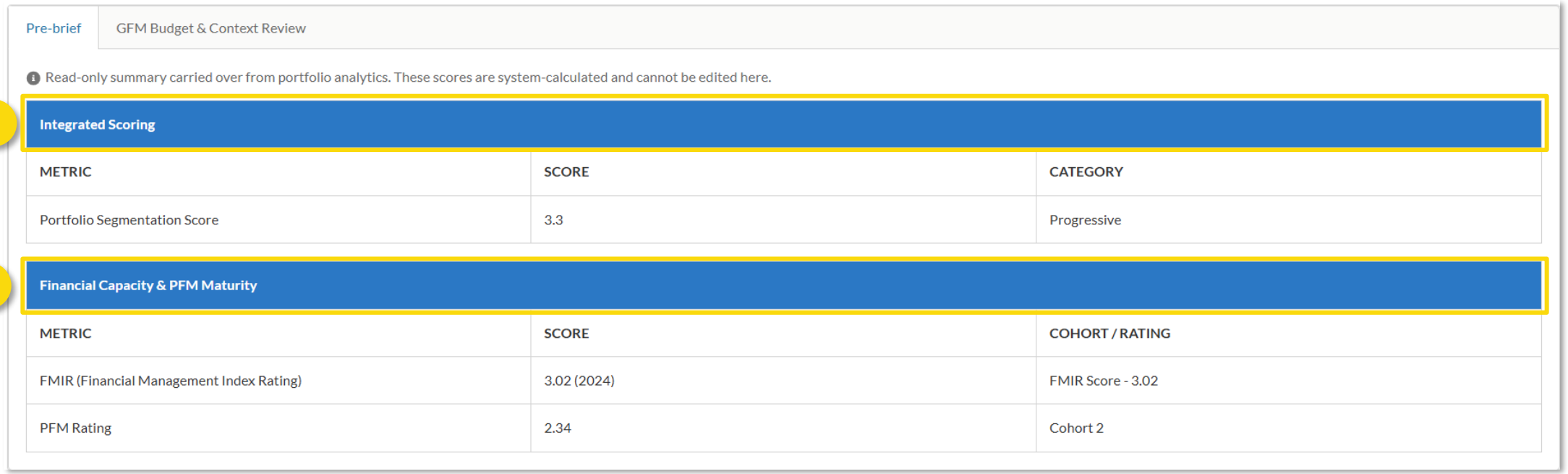
Assessment details
Geography, cycle and implementation period name

Two statuses
GFM Budget & Context Status and Co-Financing & Financial Sustainability Status are tracked separately, and progress independently.

Grant details
Principal Recipient, Implementation Period Dates, Currency, Disease Components and Latest Budget Imported are read-only, carried from the grant record.

Pre-brief Tab

Read-only summary carried over from portfolio analytics.



Pre-brief | GFM Budget & Context Review

Read-only summary carried over from portfolio analytics. These scores are system-calculated and cannot be edited here.

Integrated Scoring

METRIC	SCORE	CATEGORY
Portfolio Segmentation Score	3.3	Progressive

Financial Capacity & PFM Maturity

METRIC	SCORE	COHORT / RATING
FMIR (Financial Management Index Rating)	3.02 (2024)	FMIR Score - 3.02
PFM Rating	2.34	Cohort 2

1

Integrated Scoring
Portfolio Segmentation Score with its category, for example 3.3 / Progressive.

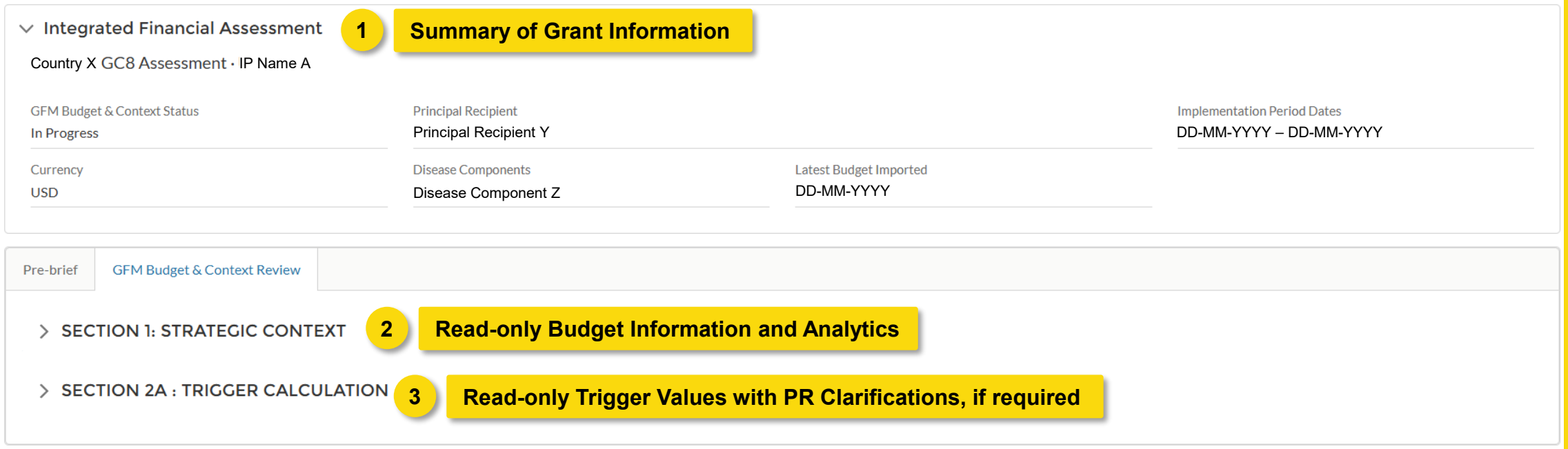
2

Financial Capacity & PFM Maturity
FMIR score with the year it was set and its cohort or rating, and the PFM Rating with its cohort.

Read-only
These scores are system-calculated in portfolio analytics and cannot be edited in IFA.

GFM Budget & Context Review

Overview of the sections under the GFM Budget and Context Review



Section 1: Strategic Context

Budget Reference and Source of Funds

SECTION 1: STRATEGIC CONTEXT

1 Budget Reference

IP Name	Disease Components	Principal Recipient	IP Start Date	IP End Date	Budget (USD)
IP Name A	Disease Component Z	Principal Recipient Y	DD-MM-YYYY	DD-MM-YYYY	40,881,926
TOTAL					40,881,926

2 Source of Funds - Current Grant

SOURCE	AMOUNT (USD)	% OF TOTAL
Approved Funding	15,195,971	25%
Climate and Health Fund	13,551,271	22%
Special Purpose 2	16,521,719	27%
Special Purpose 3	15,511,220	26%
TOTAL	60,780,181	100%

1

Budget Reference – Previous Grant
IP Name, Disease Components, Principal Recipient, IP start and end dates, and the budget in grant currency.

2

Source of Funds - Current Grant
Breakdown of each funding source with its amount and share of the total, closing with a 100% total row.

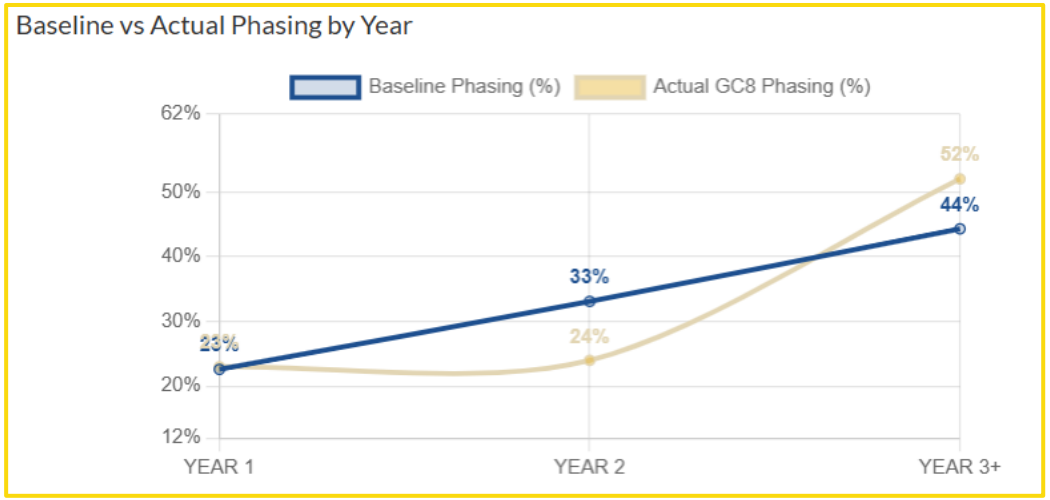
Section 1: I. Budget Phasing

How the GC8 budget is spread across the implementation period, against baseline.

I. Budget Phasing — Phased

METRIC	YEAR 1	YEAR 2	YEAR 3+	TOTAL
1 Baseline Phasing (%)	23%	33%	44%	100%
2 Actual GC8 Phasing (%)	23%	24%	52%	100%
3 *Variance (%)*	↑ 0%	↓ 9%	↑ 8%	---

4 Flat <11% | Mildly Phased 11–22% | Phased >23%



1 **Baseline Phasing (%)**
Based on Actuals / Global Fund's reference data

2 **Actual GC8 Phasing (%)**
Based on current grant data

3 **Variance (%)**
Fluctuations of the Actual GC8 Phasing (%)

4 **Results Badge - Flat / Mildly Phased / Phased**
Based on the absolute value of the Actual GC8 Phasing (Max – Min)

$$|Actual\ GC8\ Phasing_{Max} - Actual\ GC8\ Phasing_{Min}|$$

Section 1: II. Investment Landscape Shift

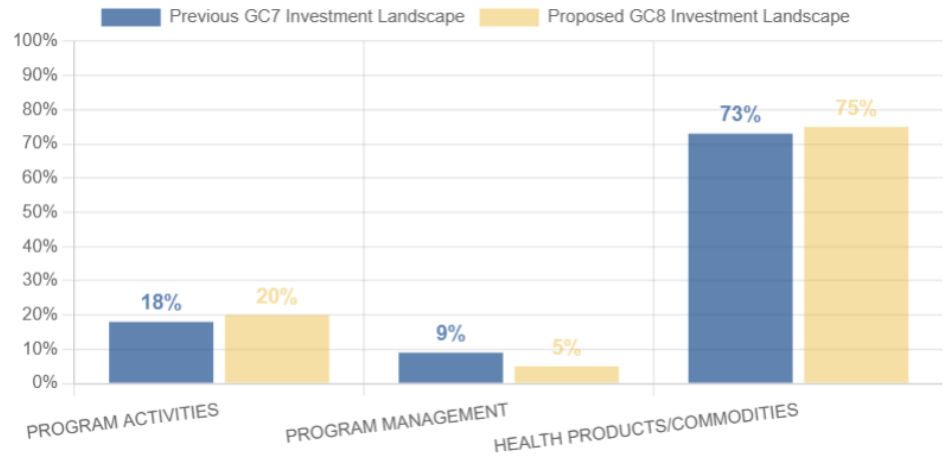
How the shape of the investment changes between GC7 and GC8.

II. Investment Landscape — Stable

CYCLE	PROGRAM ACTIVITIES	PROGRAM MANAGEMENT	HEALTH PRODUCTS/COMMODITIES	TOTAL
1 Previous GC7 Investment Landscape	18%	9%	73%	100%
2 Proposed GC8 Investment Landscape	20%	5%	75%	100%
3 *Variance (%)*	↑ 2%	↓ 4%	↑ 2%	---
4 *Sum (Absolute Variance)*	2	4	2	8

5 Stable <10% | Moderate Shift 10–20% | Material Shift >21%

GC7 vs GC8 by Category



1 **Previous GC7 Investment Landscape**
Based on GC7 Data

2 **Proposed GC8 Investment Landscape**
Based on GC8 Data

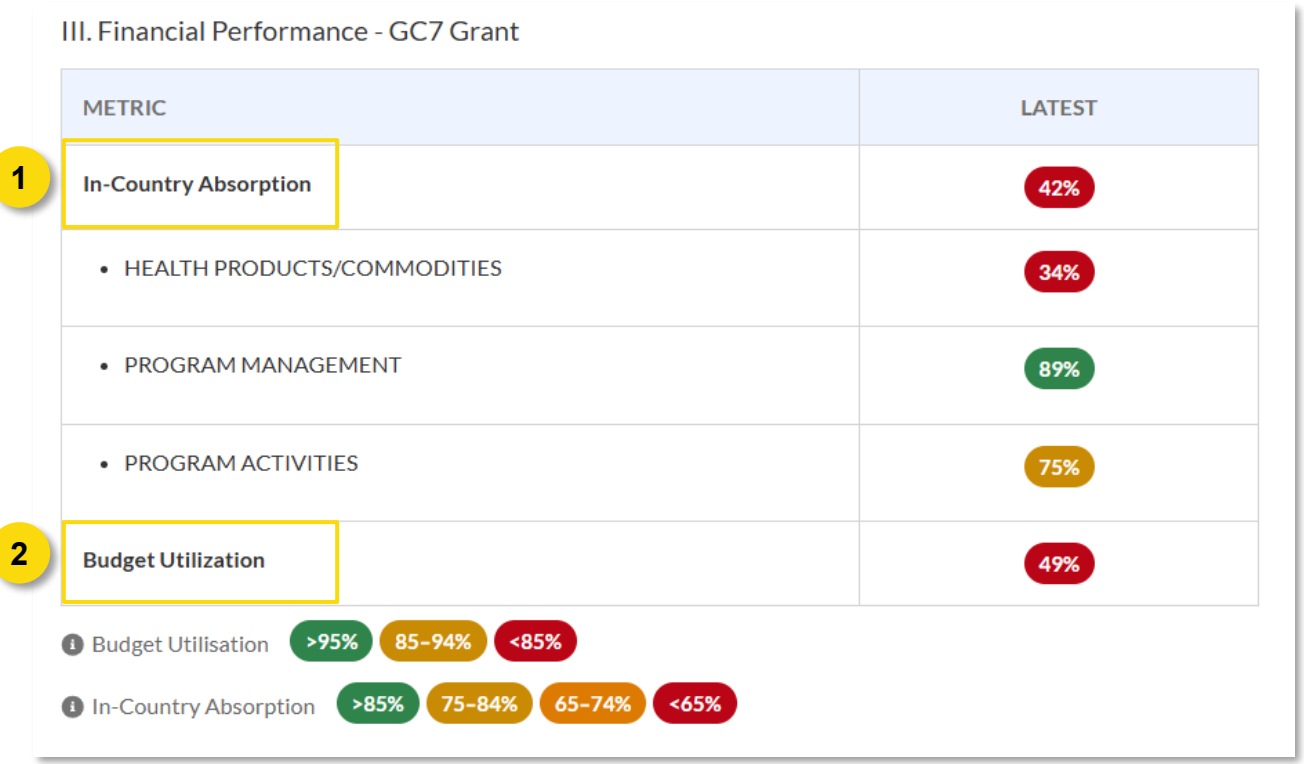
3 **Variance (%)**
Difference between GC7 and GC8 (GC7 – GC8)

4 **Sum (Absolute Variance)**
Based on the absolute value of **Variance (%)**

5 **Results Badge - Stable/Moderate Shift/Material Shift**
Based on the total sum of **Absolute Variance**

Section 1: III. Financial Performance

How the previous cycle performed.



III. Financial Performance - GC7 Grant

METRIC	LATEST
1 **In-Country Absorption**	42%
• HEALTH PRODUCTS/COMMODITIES	34%
• PROGRAM MANAGEMENT	89%
• PROGRAM ACTIVITIES	75%
2 **Budget Utilization**	49%

Budget Utilisation: >95% | 85–94% | <85%

In-Country Absorption: >85% | 75–84% | 65–74% | <65%

1

In-Country Absorption
Absorption for the GC7 grant, split by:
1. Health Products/Commodities
2. Program Management, and
3. Program Activities.

2

Budget Utilization
Utilization against the GC7 budget.

Section 1: IV. Others

Cost lines carried from the budget that need separate visibility.

1

IV. Others

DESCRIPTION	% OF BUDGET	AMOUNT (USD) (USD)
Fiscal Agent (Cost Input 3.2)	2%	122,616
RBF/P4R- (CG 13)	0%	0

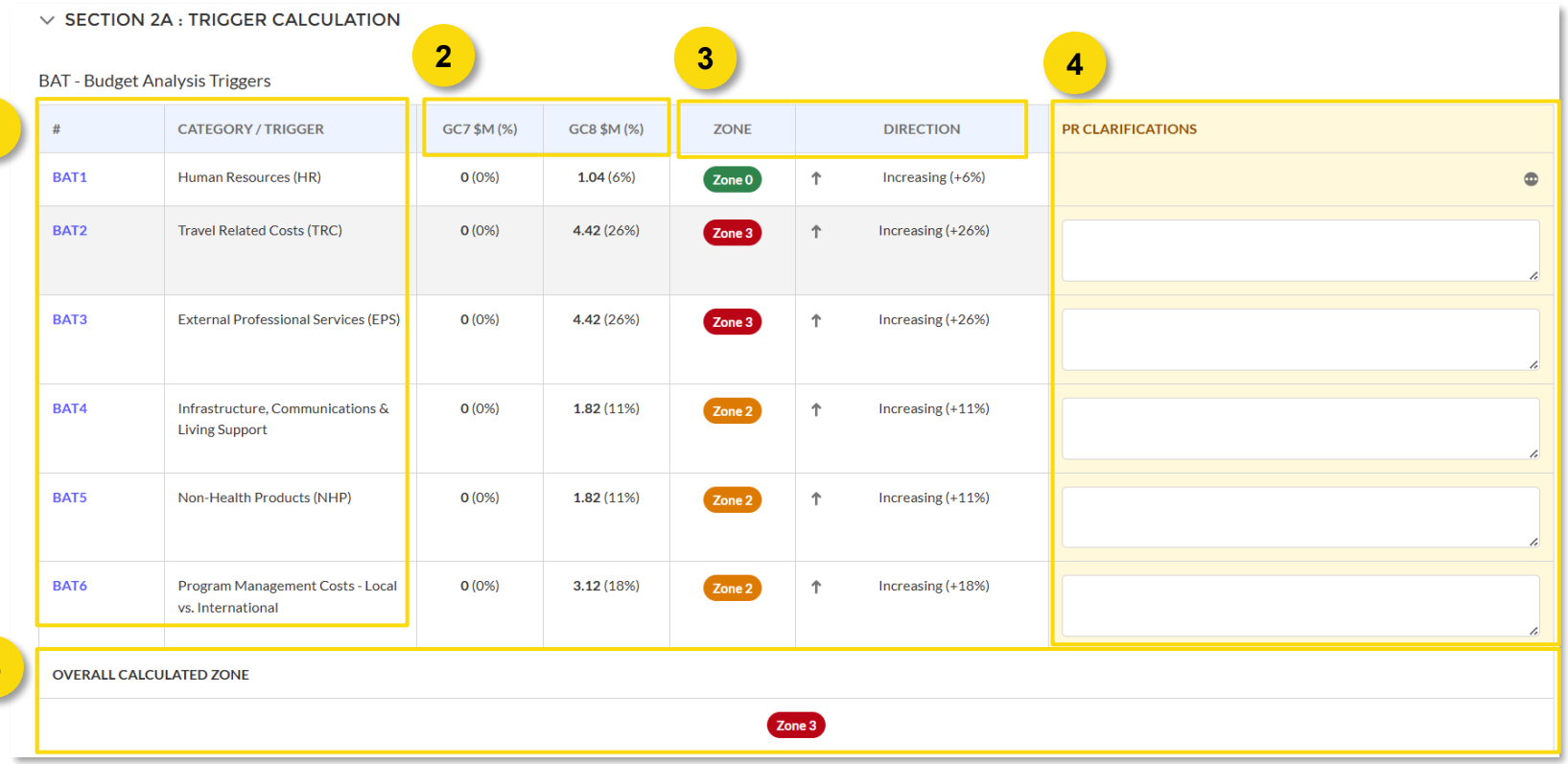
1

Others table
Each line with its share of the budget and its amount in grant currency.

Typical entries
Fiscal Agent (Cost Input 3.2) and RBF/P4R (CG 13.0).
The list follows what is present in the imported budget.

Section 2A: Trigger Calculation - BAT

Budget Analysis Triggers (BAT) based on Cost Groupings



SECTION 2A : TRIGGER CALCULATION

BAT - Budget Analysis Triggers

#	CATEGORY / TRIGGER	GC7 $M (%)	GC8 $M (%)	ZONE	DIRECTION	PR CLARIFICATIONS
BAT1	Human Resources (HR)	0 (0%)	1.04 (6%)	Zone 0	Increasing (+6%)	
BAT2	Travel Related Costs (TRC)	0 (0%)	4.42 (26%)	Zone 3	Increasing (+26%)	
BAT3	External Professional Services (EPS)	0 (0%)	4.42 (26%)	Zone 3	Increasing (+26%)	
BAT4	Infrastructure, Communications & Living Support	0 (0%)	1.82 (11%)	Zone 2	Increasing (+11%)	
BAT5	Non-Health Products (NHP)	0 (0%)	1.82 (11%)	Zone 2	Increasing (+11%)	
BAT6	Program Management Costs - Local vs. International	0 (0%)	3.12 (18%)	Zone 2	Increasing (+18%)	

OVERALL CALCULATED ZONE

Zone 3

1

Cost Groupings
Budget comparison on BAT 1 – 6

2

GC7 / GC8 $M (%)
Calculated from the imported budget for each cycle

3

Zone and Direction
Zone badge, and whether the category is increasing or decreasing, with percentage change

4

PR Clarifications
PR comments required for (i) Zone 2 and 3, and (ii) increasing direction

5

Overall Calculated Zone
The combined BAT zone for GC8

Section 2A: Trigger Calculation - FATO

Financial and Audit Triggers (FATO) appears if applicable

1

FATO - Financial and Audit Triggers

2

#	CATEGORY / TRIGGER	INDICATOR
FATO 1	Two consecutive years of qualified audit opinions and/or missing audit reports	N/A
FATO 2	Two consecutive years of unsatisfactory External auditor performance	N/A
FATO 3	Recovery score (value-based and time-based) 1 to 3	2
FATO 4	Exchange rate varying from TGF	N/A

1

FATO 1–4
Qualified audit opinions or missing reports, external auditor performance, recovery score, and exchange rate varying from The Global Fund.

2

Indicator
System-set: Yes, No, N/A, or a numeric recovery score from 1 to 3.

Submission

What happens when you submit the assessment

Automatic Saving Function
No submit button. Please ensure the pop-up 'Saved. Your input has been saved.' appears.



Next Steps ⏭

Upon submission, the Global Fund will review the PR clarifications (if any).

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RESOURCES & SUPPORT

List of Acronyms & Abbreviations

List of Acronyms & Abbreviations

BAT	Budget Analysis Tool
CFO	Chief Financial Officer
CG	Cost Grouping
EPS	External Professional Services
FATO	Financial Accounting and Treasury Operations
FMIR	Financial Management Impact Review
GAC	Grant Approval Committee
GC7 / GC8	Grant Cycle 7 / Grant Cycle 8
GED	Grant Entity Data
GFM	Grant Financial Management
HR	Human Resources
IFA	Integrated Financial Assessment
IP	Implementation Period
NHP	Non-Health Products
OPN	Operational Policy Note
PFM	Public Financial Management
PR	Principal Recipient
TRC	Travel Related Costs

* The term 'PU/DR' is used to refer to PUDRs, PUs, and Final PUs, unless otherwise specified.