



Information Session: Editors and Submitters for PU/DRs

13 December 2021

Information Session: Editors and Submitters for PU/DRs

1

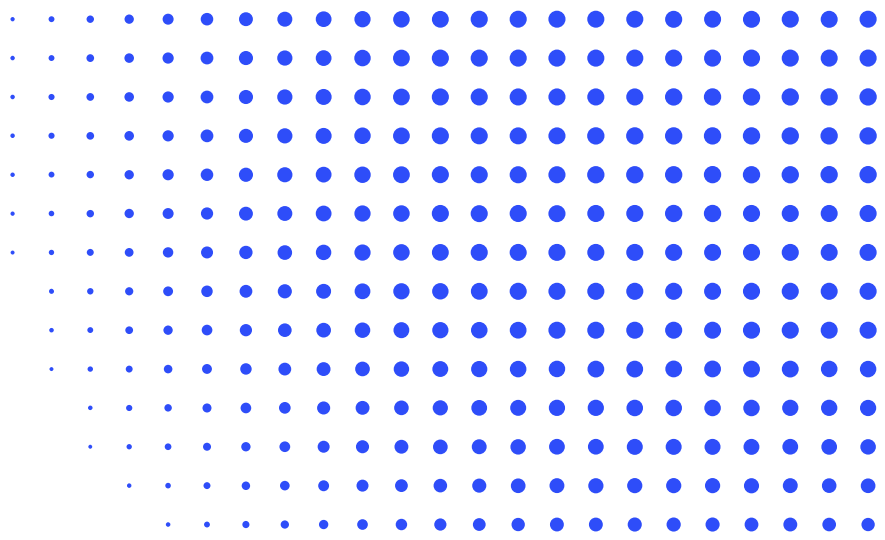
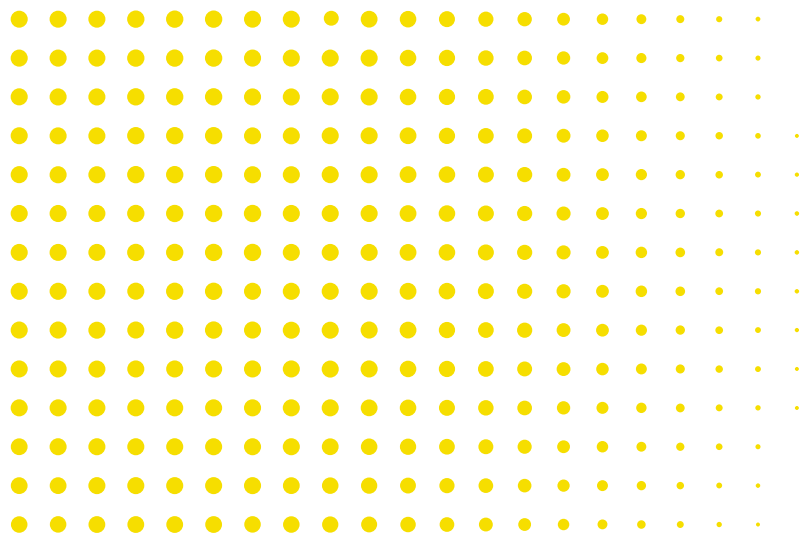
Management of grant deliverables through the Global Fund Partner Portal

2

Grant Entity Data - Editor and Submitter roles for PU/DR management

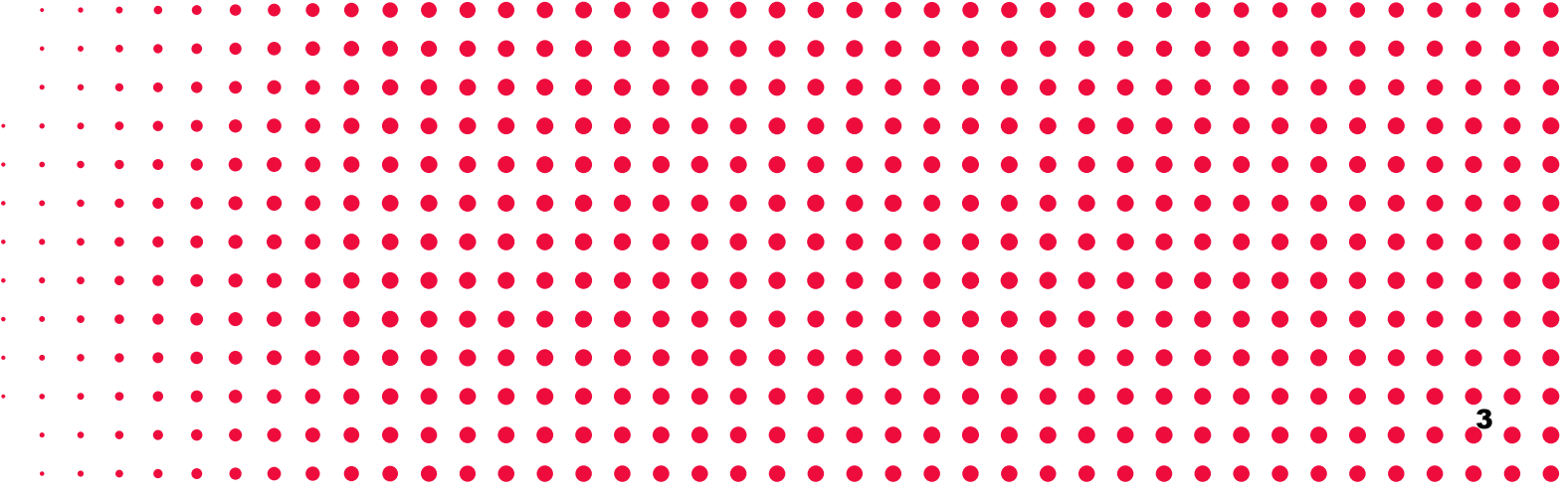
3

Raising Editor and Submitter change requests in the Partner Portal
(system demonstration)



1

Management of Grant Deliverables through the Global Fund Partner Portal

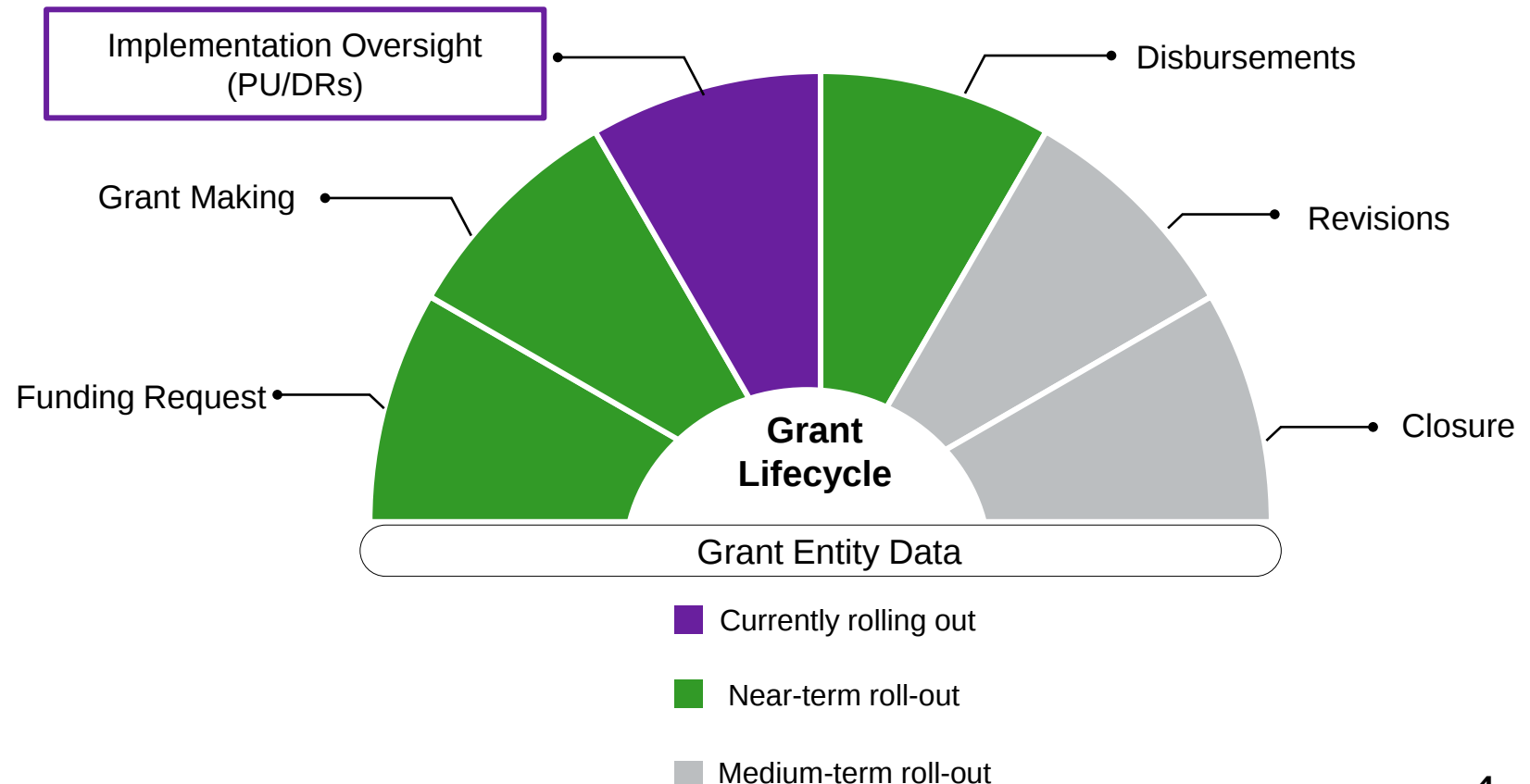


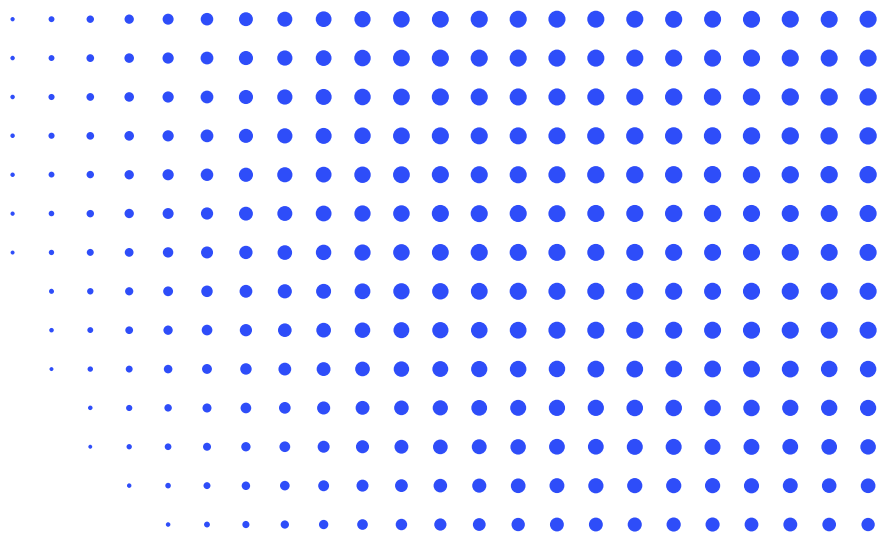
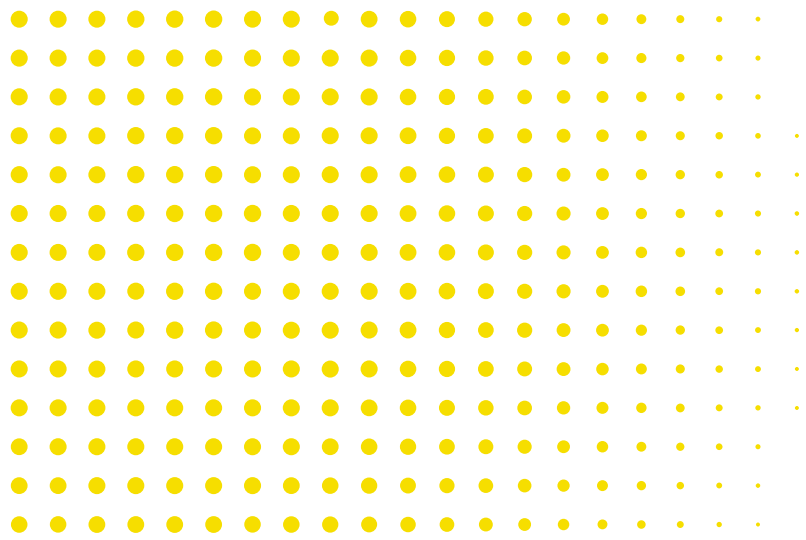
Starting with PU/DRs, Principal Recipients will gradually handle more grant deliverables through the Partner Portal.

Benefits to direct engagement through the Partner Portal:

- Immediate access to correct forms / templates to save time and eliminate human error (e.g., PU/DR, latest signed budget at the start of a revision).
- For certain deliverables, information can be entered directly into online forms, which lowers the administrative burden, the risk of resubmission from template errors & allows for automated data quality checks.
- Targeted communications to individuals with portfolio, grant and process level rights.

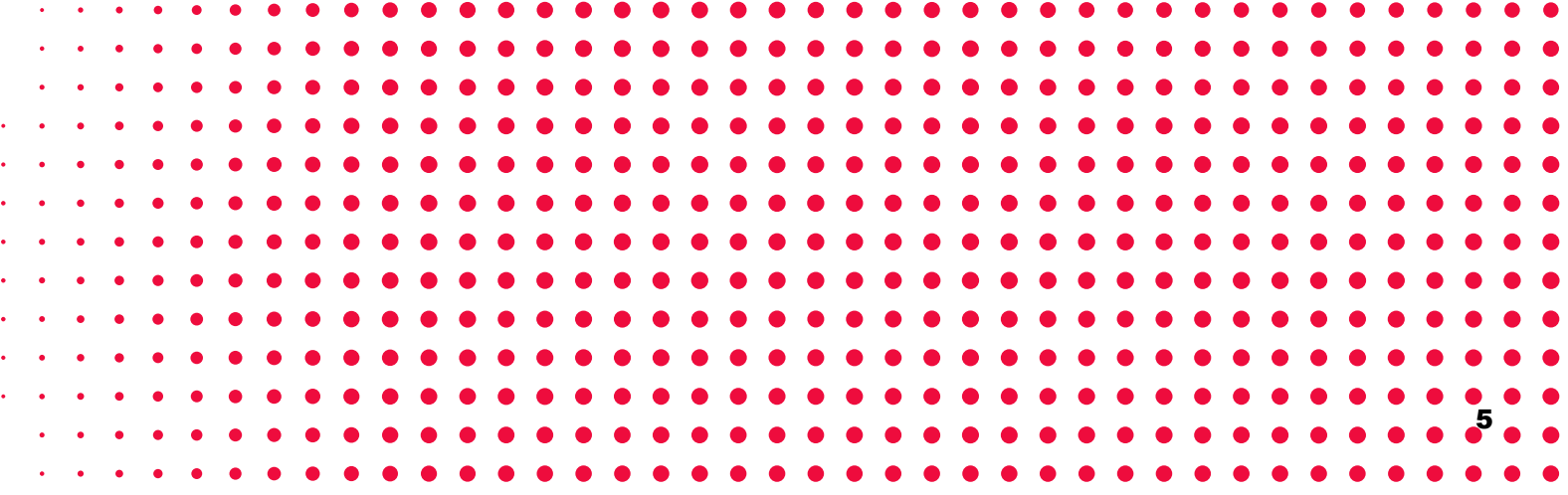
Grant lifecycle processes & deliverables considered for handling through the Partner Portal:





2

Grant Entity Data Editor and Submitter Roles for PU/DR Management



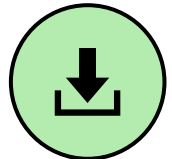
Future process for receiving and submitting PU/DRs through the Partner Portal (beginning in January 2022)

Steps for Principal Recipients



01 Access the Global Fund Partner Portal

ROLE
Editor
Submitter

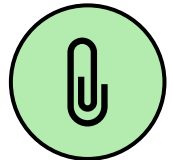


02 Download Excel form

Editor
Submitter



03 Complete Excel form



04 Attach Excel form

Editor
Submitter



05 Submit PU/DR to Global Fund

Submitter

- Editor and Submitter rights are assigned per grant.
- At a minimum, **each grant is required to have one Submitter. We recommend having two submitters** per grant, but not more.

KEY

-  Steps completed through the Global Fund Partner Portal
-  Steps completed offline

Mandatory requirements for Principal Recipients

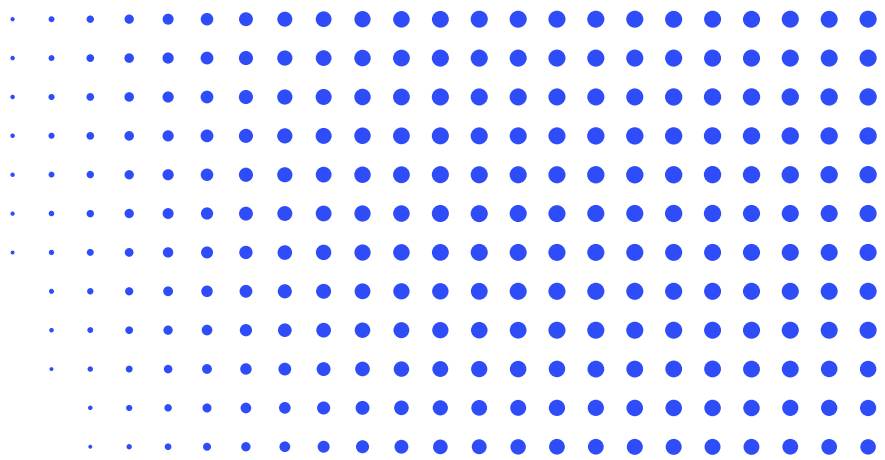
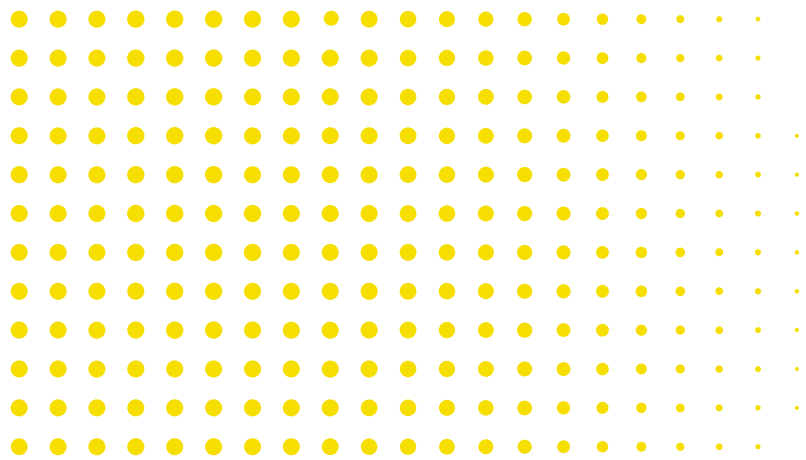
At a minimum, each grant is required to have one Submitter.

We recommend having two submitters per grant, but no more.

To request Submitter rights, a signed Authorization Letter is mandatory when submitting the change request.

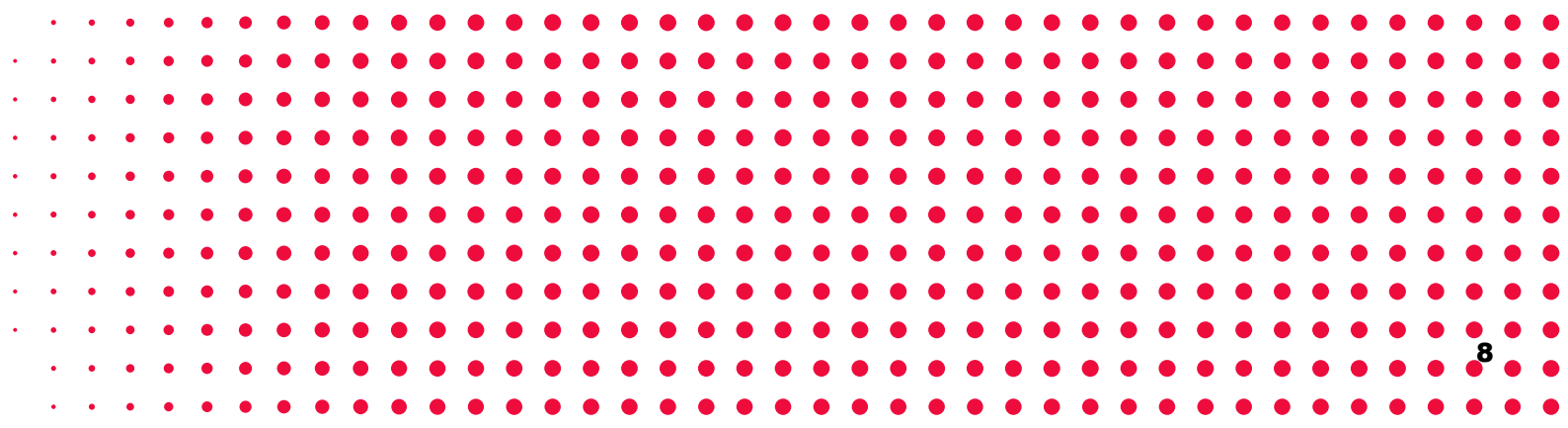
[Access the template here.](#)

Principal Recipients are required to raise all change requests for Editor and Submitter rights by **Wednesday, 12 January 2022, or as early as possible.**



3

Raising Editor and Submitter change requests in the Partner Portal (system demonstration)



Resources

[Letterhead of the applicable Principal Recipient, Coordinating Mechanism or Local Fund Agent, where available, including the official address information]

GRANT ENTITY DATA
Template Letter: Authorizing PR contact(s)
as "Submitter(s)" for Global Fund grant deliverables¹

Template dated: [November 2021]

Instructions:

This letter is used for the **designation of new or updates to existing** authorized persons with "Submitter" rights for Global Fund grant deliverables.

The relevant Coordinating Mechanism (CM), the Principal Recipient (PR) and Lead Implementer (LI), if applicable², or Local Fund Agent (LFA), each an "Entity", completes this letter (using the official Entity letterhead) ensuring that section 1 is filled and signed by a duly authorized person. The signed letter must be submitted with an applicable change request in the Global Fund Partner Portal as a mandatory supporting document.

In preparing this letter, please take note of the following **important considerations**:

- "Submitter" authority is delegated with respect to specified grants (PRs and Lis) or specified portfolios (LFAs and CMs) and allows a person to (a) download, attach, and complete information through the Global Fund Partner Portal and (b) submit grant deliverables to the Global Fund. The Global Fund recommends that Entities authorize no more than two Submitters per grant (PRs and Lis) or portfolio (LFAs and CMs).
- Issuing this letter will confirm that Submitter authorization for the Entity is currently accurately reflected in the GED Module in the Global Fund Partner Portal, including any necessary revocation of authority approved under previous letters.
- The **Operational Policy Note on Grant Entity Data (GED)** defines specific rules and requirements for Grant Entity Data submitted through this template. Before completing the template, please ensure that you have read these requirements carefully and that the Grant Entity Data submitted is compliant with these requirements.
- Additional specific instructions are provided in the footnotes in the template letter. Please read them carefully.
- Courtesy translations in French and Spanish are available, if needed by the Principal Recipient. However, the original English version must be completed, signed and submitted to the Global Fund.

¹ Grant "deliverables" are any documents required as part Grant Lifecycle processes including, but not limited to: Funding Request, Grant Making, PR Reporting, Revisions, and Closure.
² 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) signs the Grant Agreement as PR with the Government implementer (such as the Ministry of Health) acting as LI.

Authorization Letter template
for Submitter rights

Grant Entity Data

Grant Entity Data, formerly known as Master Data, is information that the Global Fund uses to actively manage grant life cycle activities. This includes organization names, banking information, grant signatory names and other essential information.

Global Fund Grant Entities, including Principal Recipients, Country Coordinating Mechanisms, Local Fund Agents and other organizations, own this information and are responsible for keeping it up-to-date and accurate.

To create, update and deactivate Grant Entity Data (GED), users can access the **Global Fund Partner Portal (GED Module)** and use the documents below.

Letter Templates for all grant entities

0

Letter Templates for Principal Recipients

0

Letter Templates for Coordinating Mechanisms

0

Letter Templates for Local Fund Agents

0

Process Infographics & Manuals

0

Principal Recipients

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

Country Coordinating Mechanisms

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

Local Fund Agents

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

Third Parties

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

GED Interactive Guide

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

GED Interactive Guide (printable version)

download in [English](#)

Instructions for Submitting GED for Data Checks

Process Infographics & Manuals
on Grant Entity Data (GED)

 THE GLOBAL FUND

9

Thank you!



The Global Fund to Fight
AIDS, Tuberculosis and Malaria

+41 58 791 1700
theglobalfund.org