Progress Update and Disbursement Request (PU/DR)

How to Download and Submit PU/DRs through the Partner Portal

Before you begin

Click here for information on “The Purpose of this Guide”

Click here for instructions on “How to Use this Guide”

THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES

The Purpose of this Guide

An effective grant relies on strong implementers to ensure targets are met for HIV, TB, malaria and COVID-19. Those who oversee grants support the efficient delivery of grant activities. The Global Fund has introduced more efficient ways to perform data collection and analysis to support countries in anticipating problems, unblocking bottlenecks and optimizing progress.

The **Progress Update and Disbursement Request (PU/DR)** form has been updated to encourage early identification of issues and to support decision-making and prioritization to meet grant targets. PRs and LFAs now access this form through the **Global Fund Partner Portal,** which serves as a central entry point for information and document-sharing linked to the management of grants.

This document is an interactive guide for **PRs and LFAs** to understand the process and system steps involved in **downloading and submitting the PU/DR through the Partner Portal**.

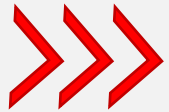
Click here for instructions on "How to Use this Guide"

THE GLOBAL FUND

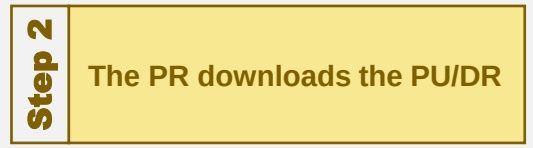
PARTNER PORTAL LEARNING SERIES

How to Use this Guide

1. **To select the different actors (e.g. PR, LFA) or access the home page click on the tabs to the right.**



2. **After selecting an actor, the guide moves to the end-to-end process page where key steps for this actor are highlighted.**



3. **For in-system instructions, click on the thumbnail at the bottom of the steps (as applicable).**

4. **To advance to the next stage of this process, click on the buttons marked with a red square.**

5. **To go back to the main process page, click on the top right button on the systems steps page.**

June 2022

THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs through the Partner Portal

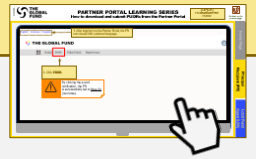
PU/DR End-to-End Process

The highlighted steps are assigned to the PR.

Step 1 The PU/DR is shared with the PR through the Partner Portal. PR Editors and Submitters receive an e-mail notification.

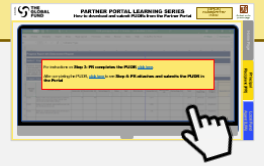
Click here to access TheGlobalFund Partner Portal

Step 2 The PR downloads the PU/DR.



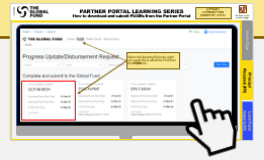
Click on the thumbnail for in-system instructions

Step 3 The PR completes the PU/DR in Excel.



Click on the thumbnail for further instructions

Step 4 The PR attaches and submits the PU/DR and supporting documents through the Partner Portal.



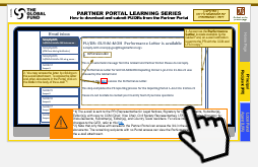
Click on the thumbnail for in-system instructions

Steps 5-8 On Global Fund request, the LFA reviews the PU/DR.

Step 9 The Global Fund reviews the PU/DR.

Step 10 The Global Fund confirms the Performance Rating and issues the Performance Letter.

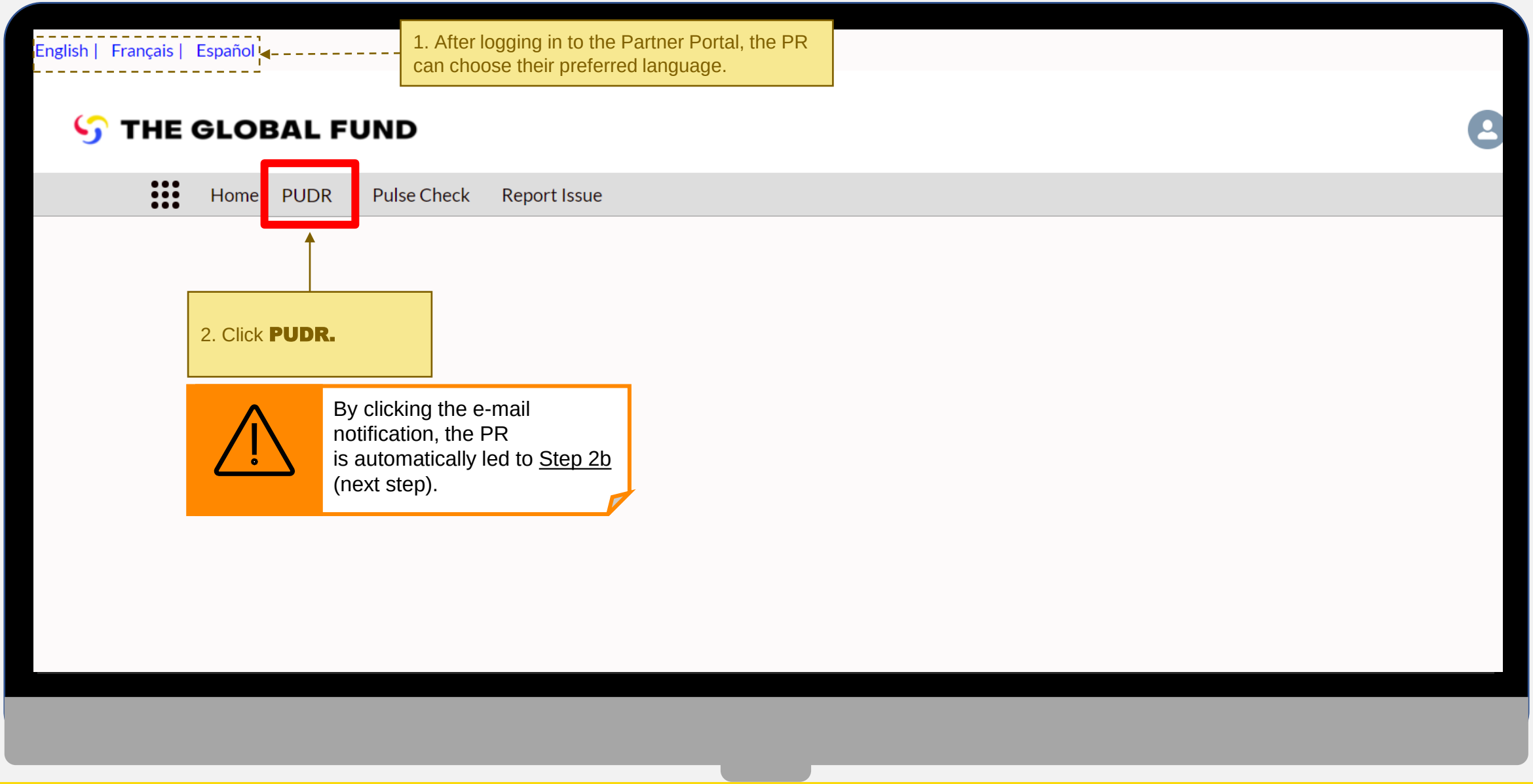
Step 11 The PR receives an e-mail notification and accesses the Performance Letter through the Partner Portal.



Click on the thumbnail for further instructions

In Portal

In Excel file


English | Français | Español
1. After logging in to the Partner Portal, the PR can choose their preferred language.
THE GLOBAL FUND
Home
PUDR
Pulse Check
Report Issue
2. Click PUDR.
By clicking the e-mail notification, the PR is automatically led to Step 2b (next step).

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

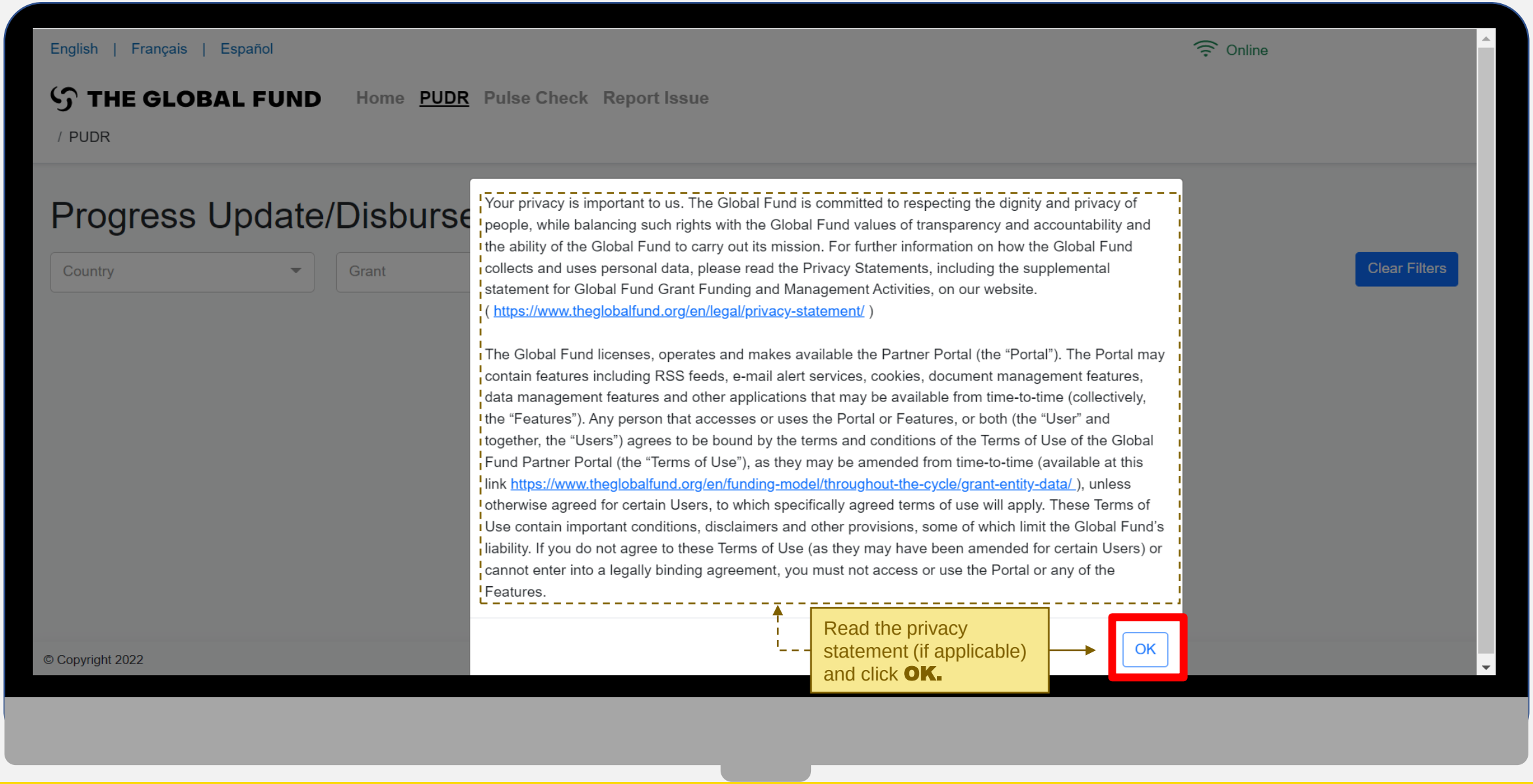
| Step 2b | PR downloads the PU/DR.

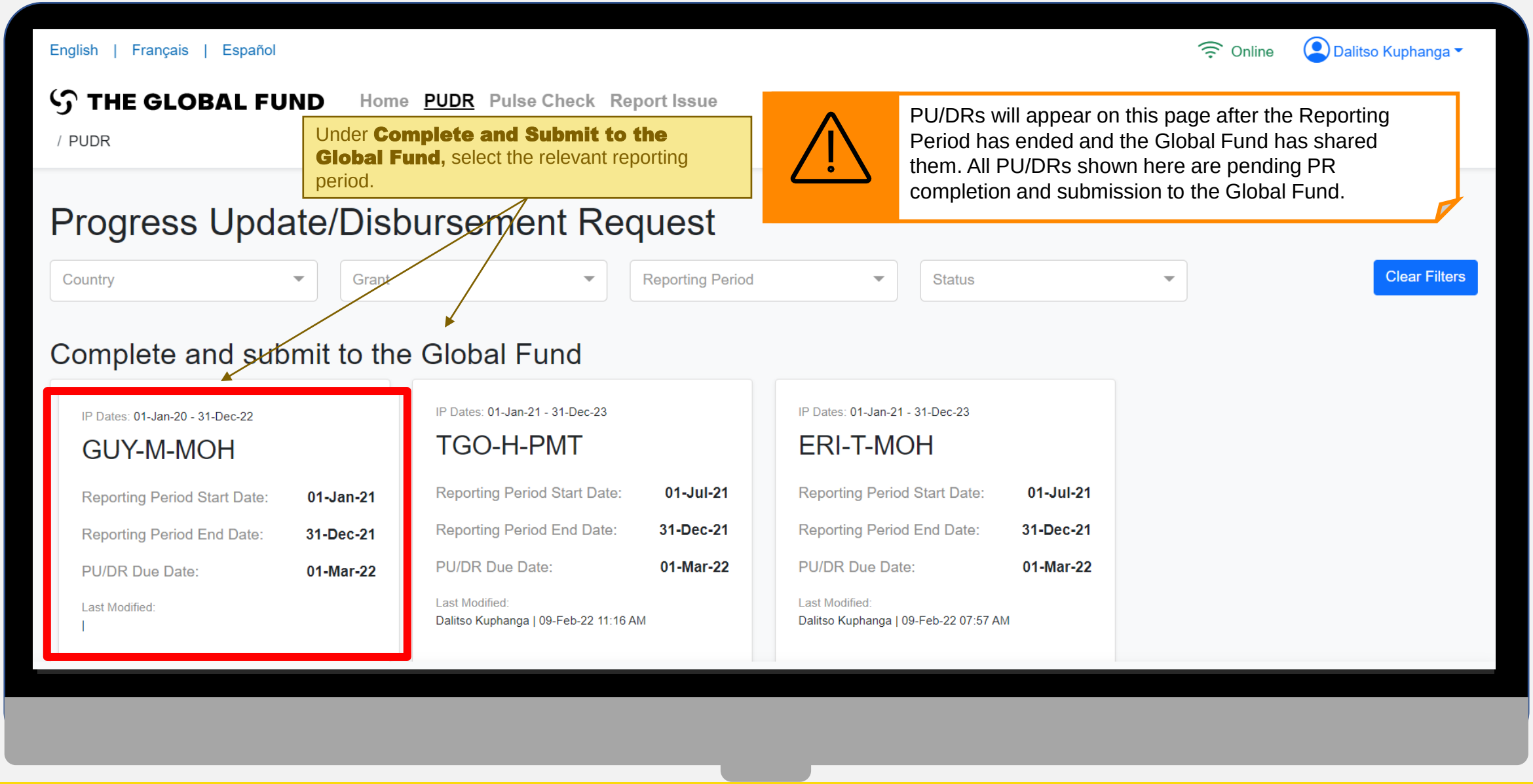
Go back to the process page

Home Page

Principal Recipient (PR)

Local Fund Agent (LFA)

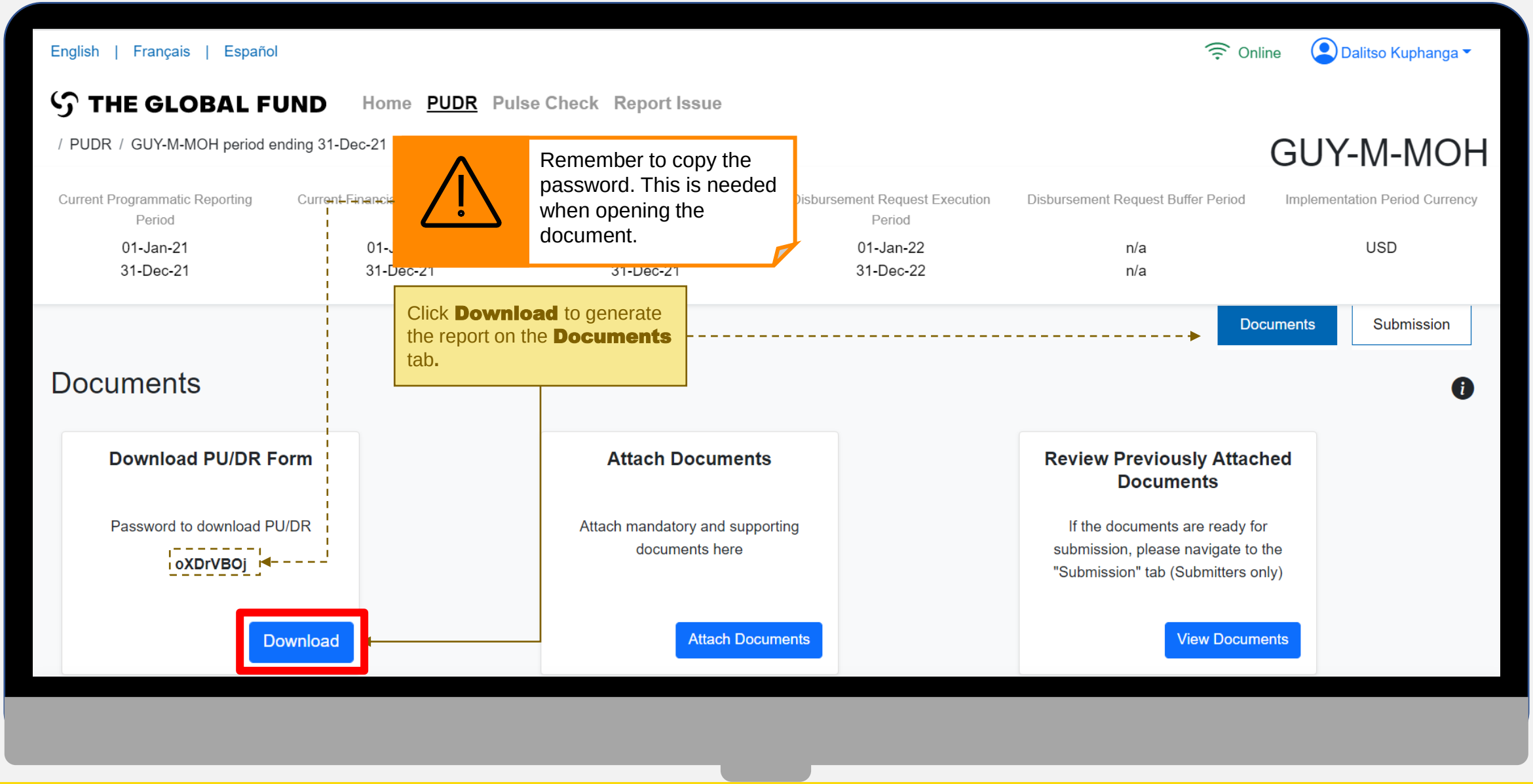




Home Page

Principal Recipient (PR)

Local Fund Agent (LFA)

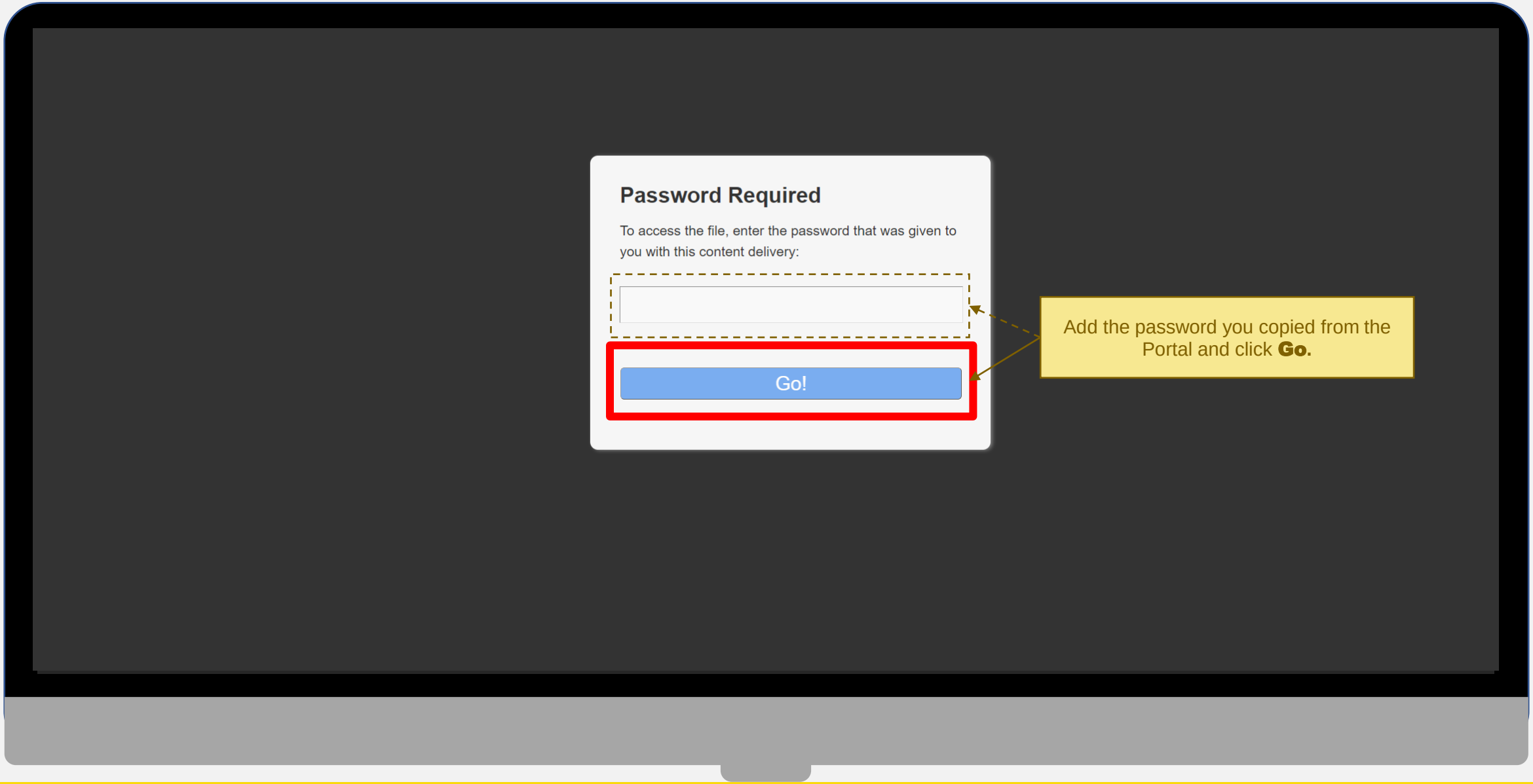

English | Français | Español
Online
Dalitso Kuphanga
THE GLOBAL FUND
Home
PUDR
Pulse Check
Report Issue
/ PUDR / GUY-M-MOH period ending 31-Dec-21
GUY-M-MOH
Current Programmatic Reporting Period
Disbursement Request Execution Period
Disbursement Request Buffer Period
Implementation Period Currency
01-Jan-21
31-Dec-21
01-Jan-22
31-Dec-22
n/a
n/a
USD
Remember to copy the password. This is needed when opening the document.
Click Download to generate the report on the Documents tab.
Documents
Submission
Documents
Download PU/DR Form
Password to download PU/DR
oXDrVBOj
Download
Attach Documents
Attach mandatory and supporting documents here
Attach Documents
Review Previously Attached Documents
If the documents are ready for submission, please navigate to the "Submission" tab (Submitters only)
View Documents

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 2e | PR downloads the PU/DR.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

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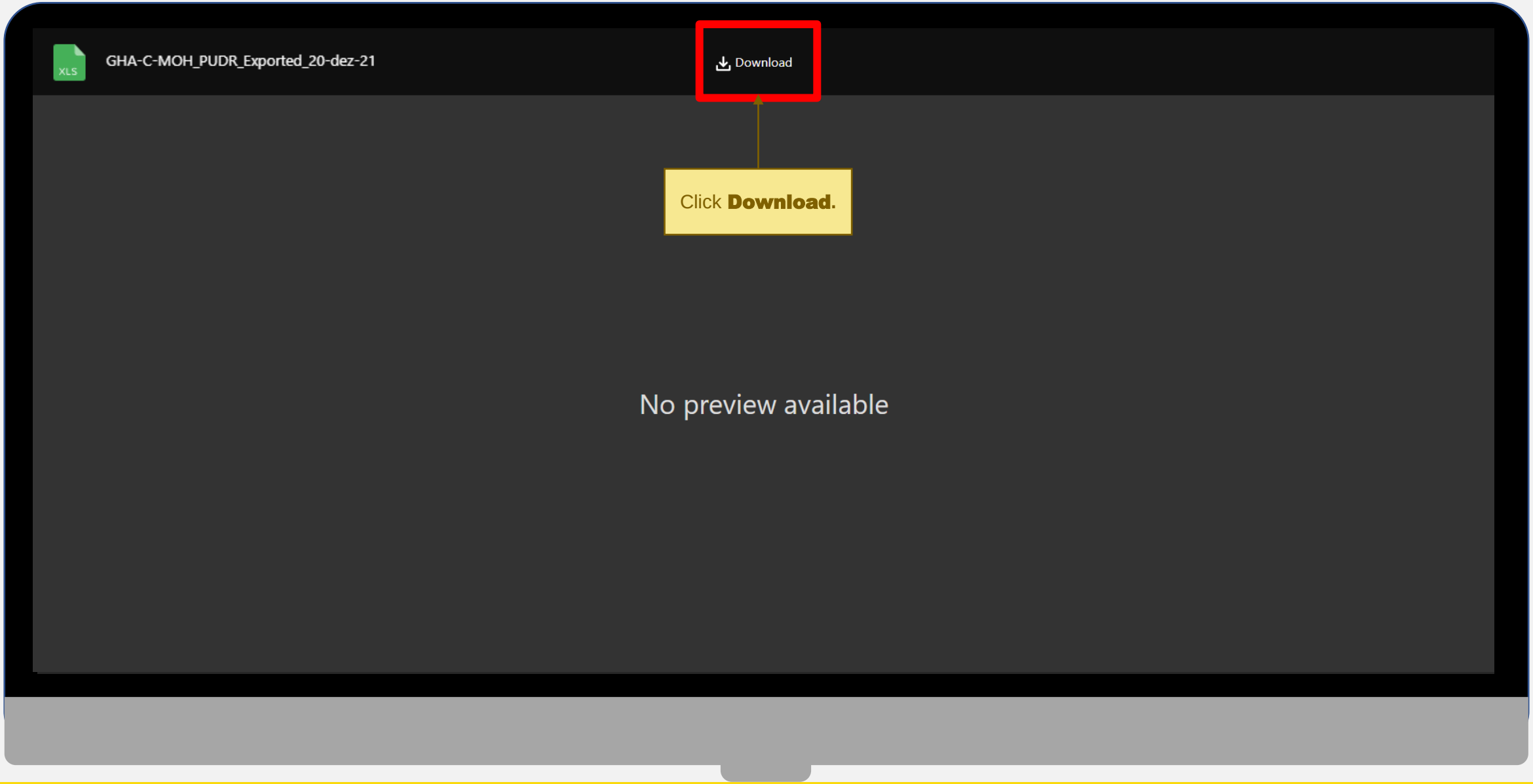
PARTNER PORTAL LEARNING SERIES

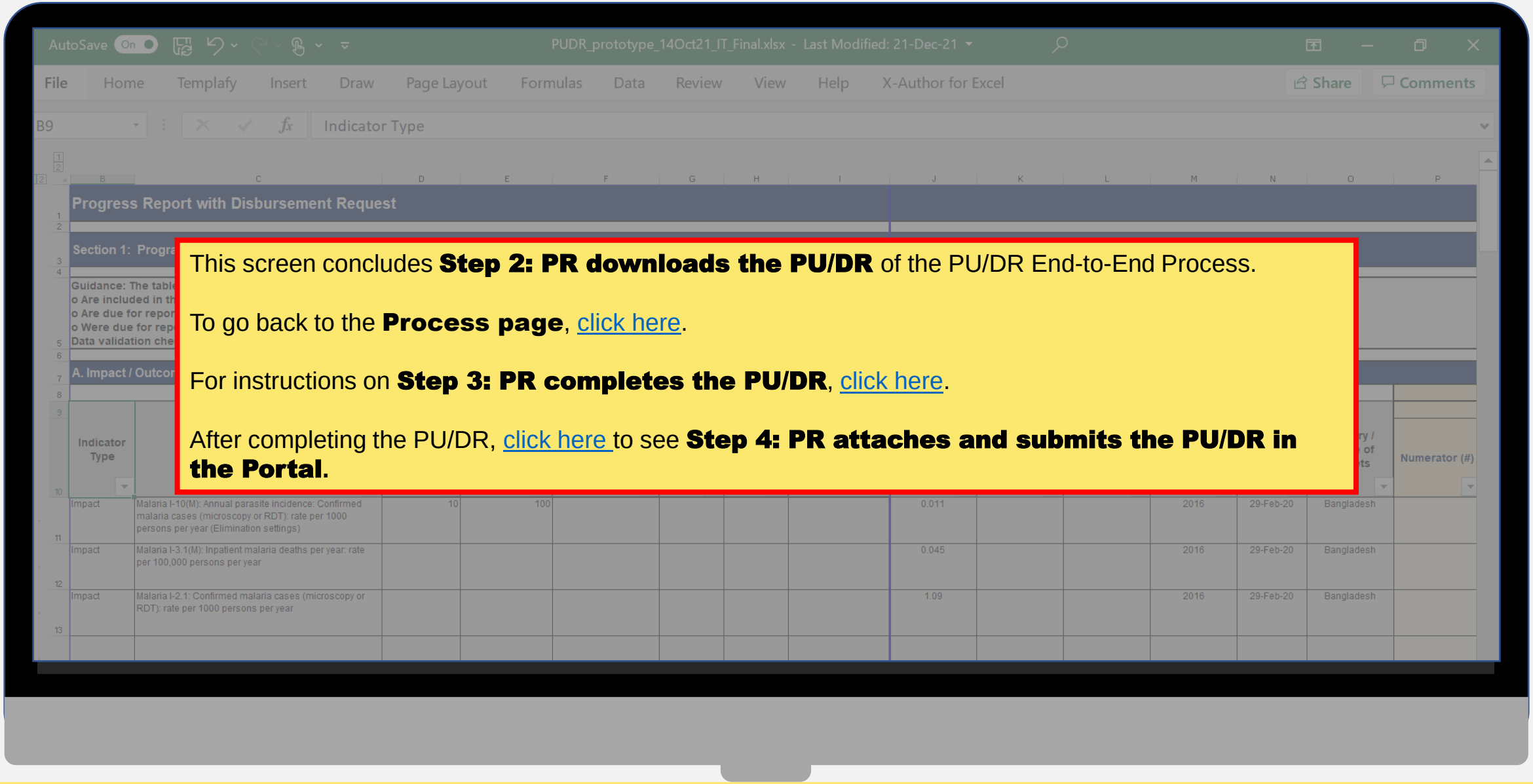
How to download and submit PU/DRs from the Partner Portal

| Step 2f |
PR downloads the PU/DR.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

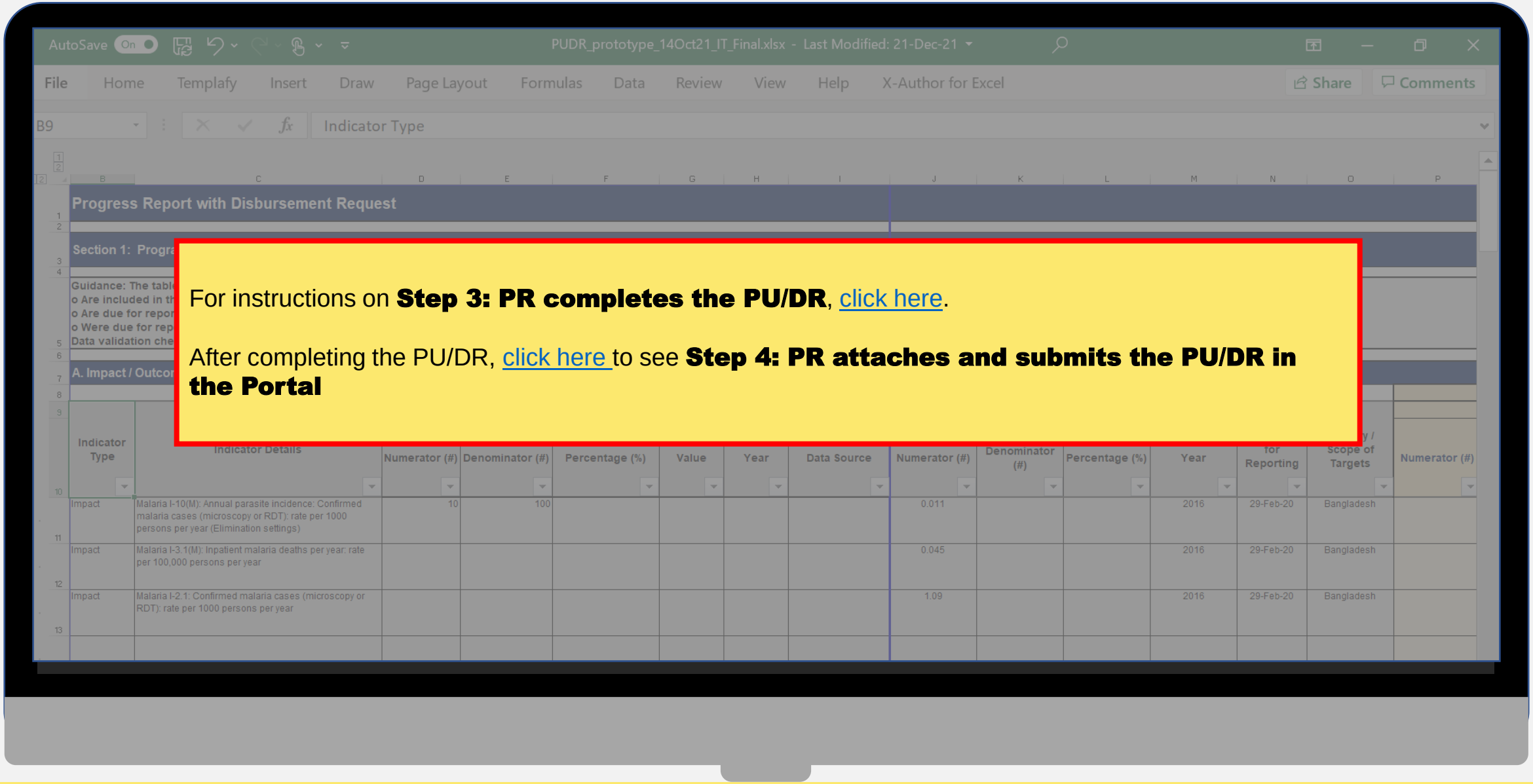


This screen concludes **Step 2: PR downloads the PU/DR** of the PU/DR End-to-End Process.

To go back to the **Process page**, click here.

For instructions on **Step 3: PR completes the PU/DR**, click here.

After completing the PU/DR, click here to see **Step 4: PR attaches and submits the PU/DR in the Portal.**



For instructions on **Step 3: PR completes the PU/DR**, click here.

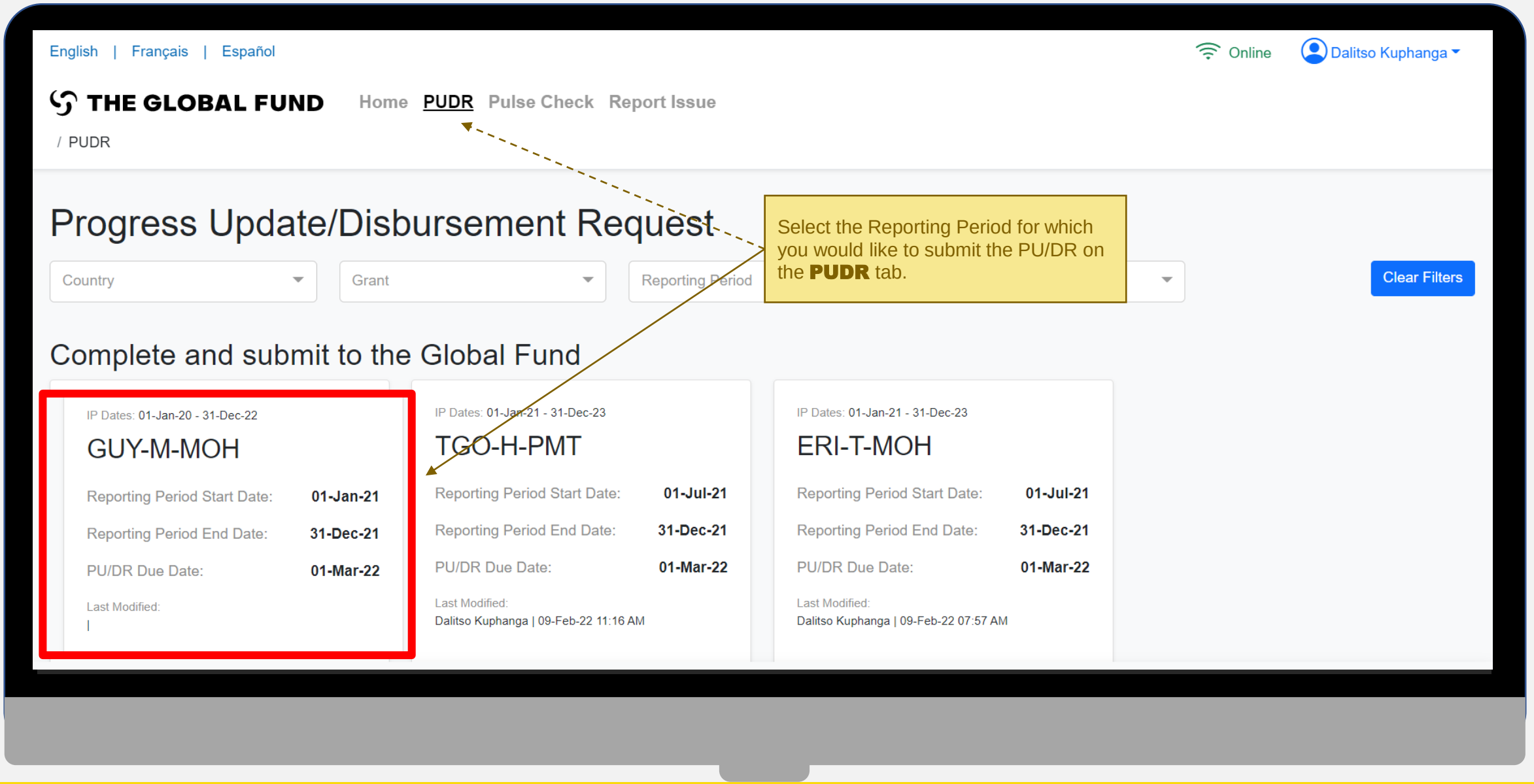
After completing the PU/DR, click here to see **Step 4: PR attaches and submits the PU/DR in the Portal**

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 4a |
PR attaches and submits the PU/DR.

Go back to the process page



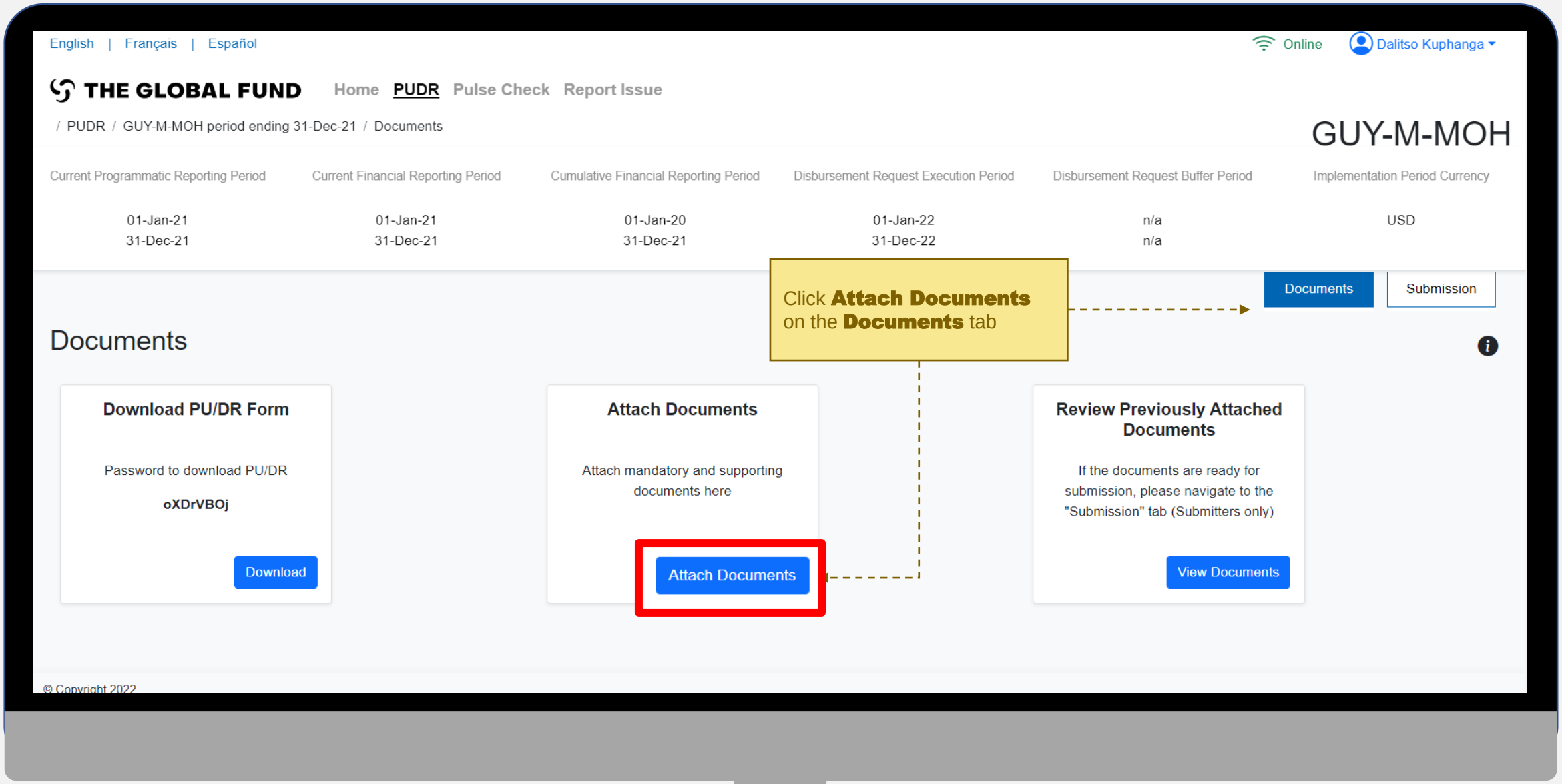
Select the Reporting Period for which you would like to submit the PU/DR on the **PUDR** tab.

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 4b |
PR attaches and submits the PU/DR.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

THE GLOBAL FUND

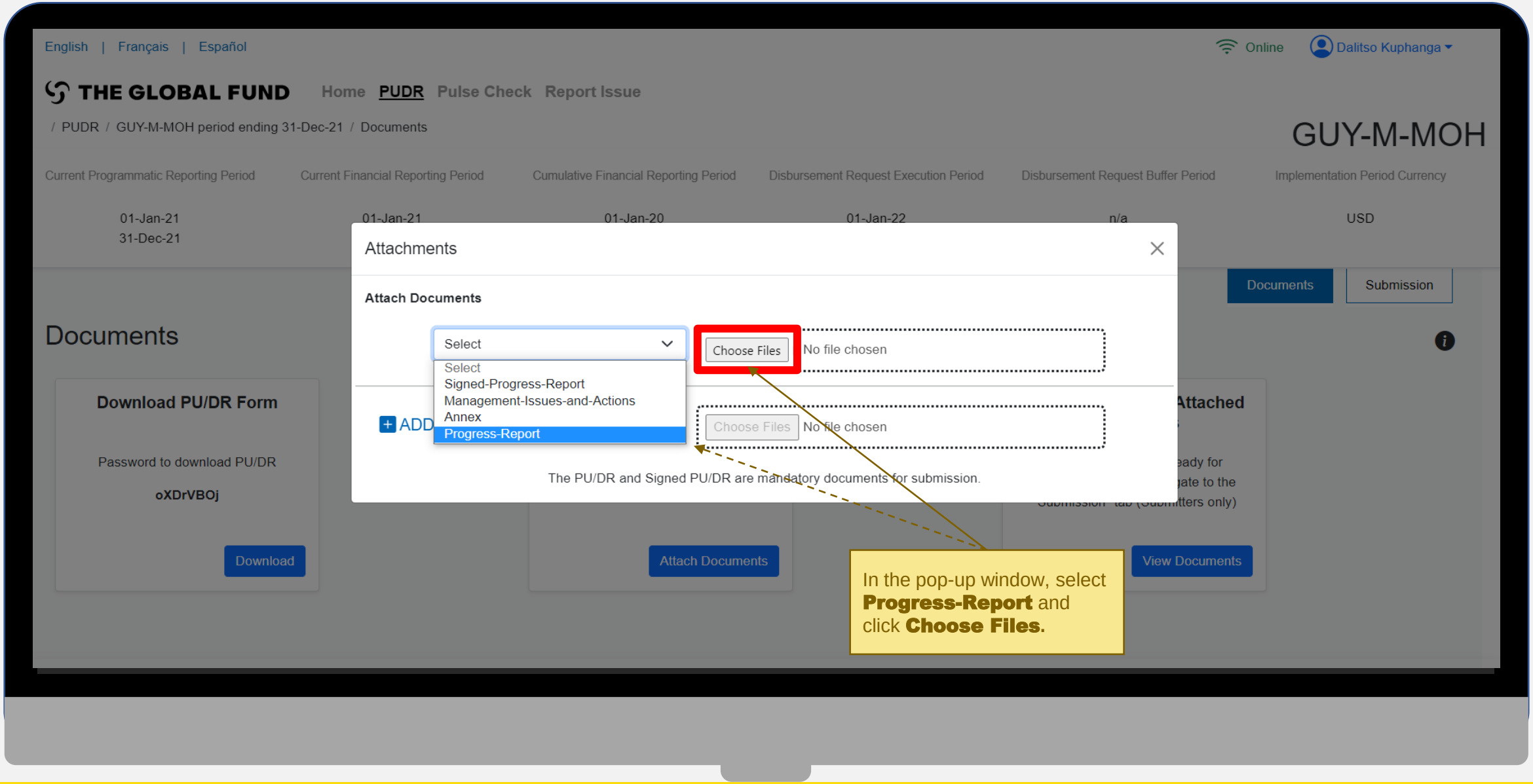
PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 4c |
PR attaches and submits the PU/DR.

Go back to the process page

Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)



PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

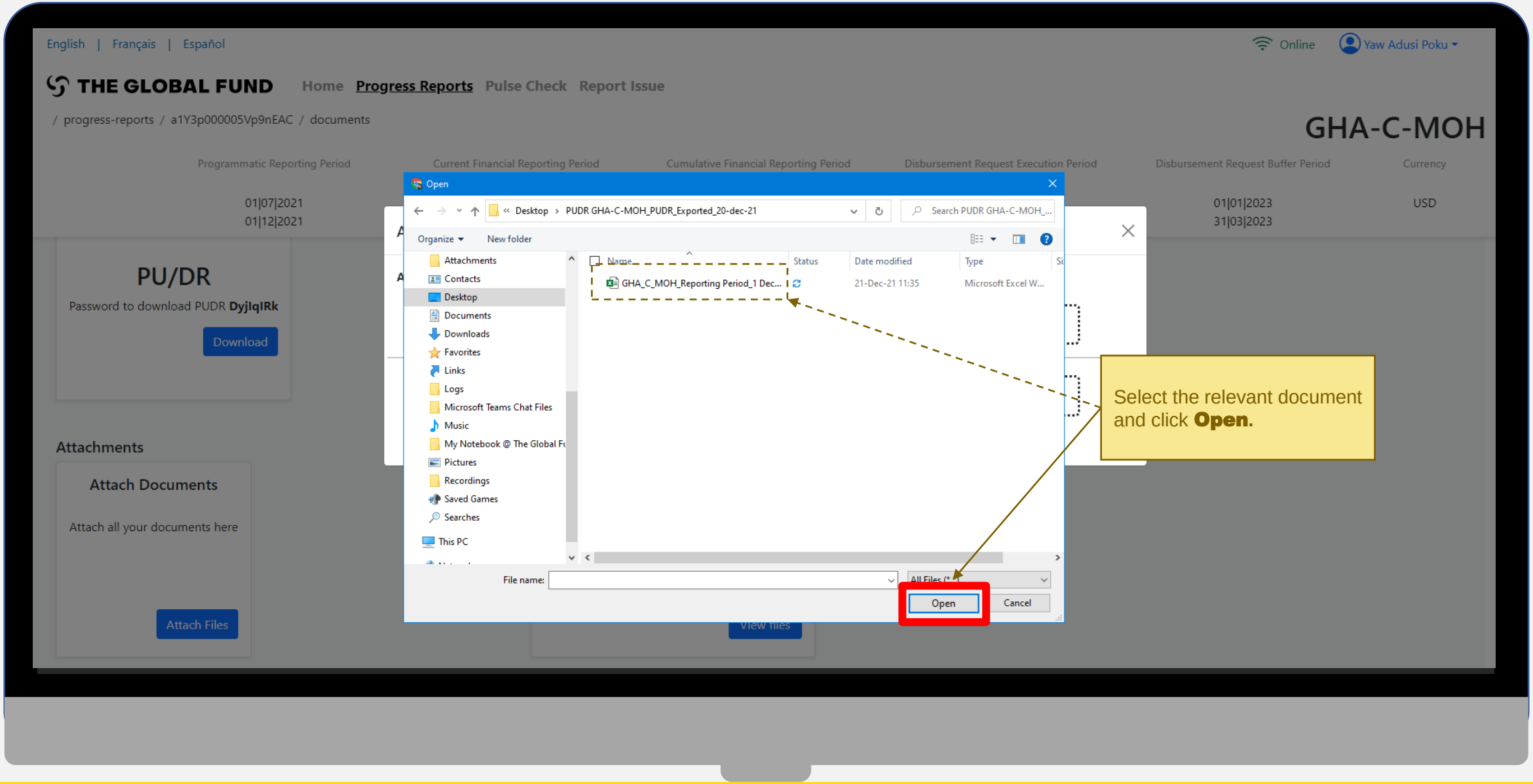
| Step 4d |
PR attaches and submits the PU/DR.

Go back to the process page

Home Page

Principal Recipient (PR)

Local Fund Agent (LFA)

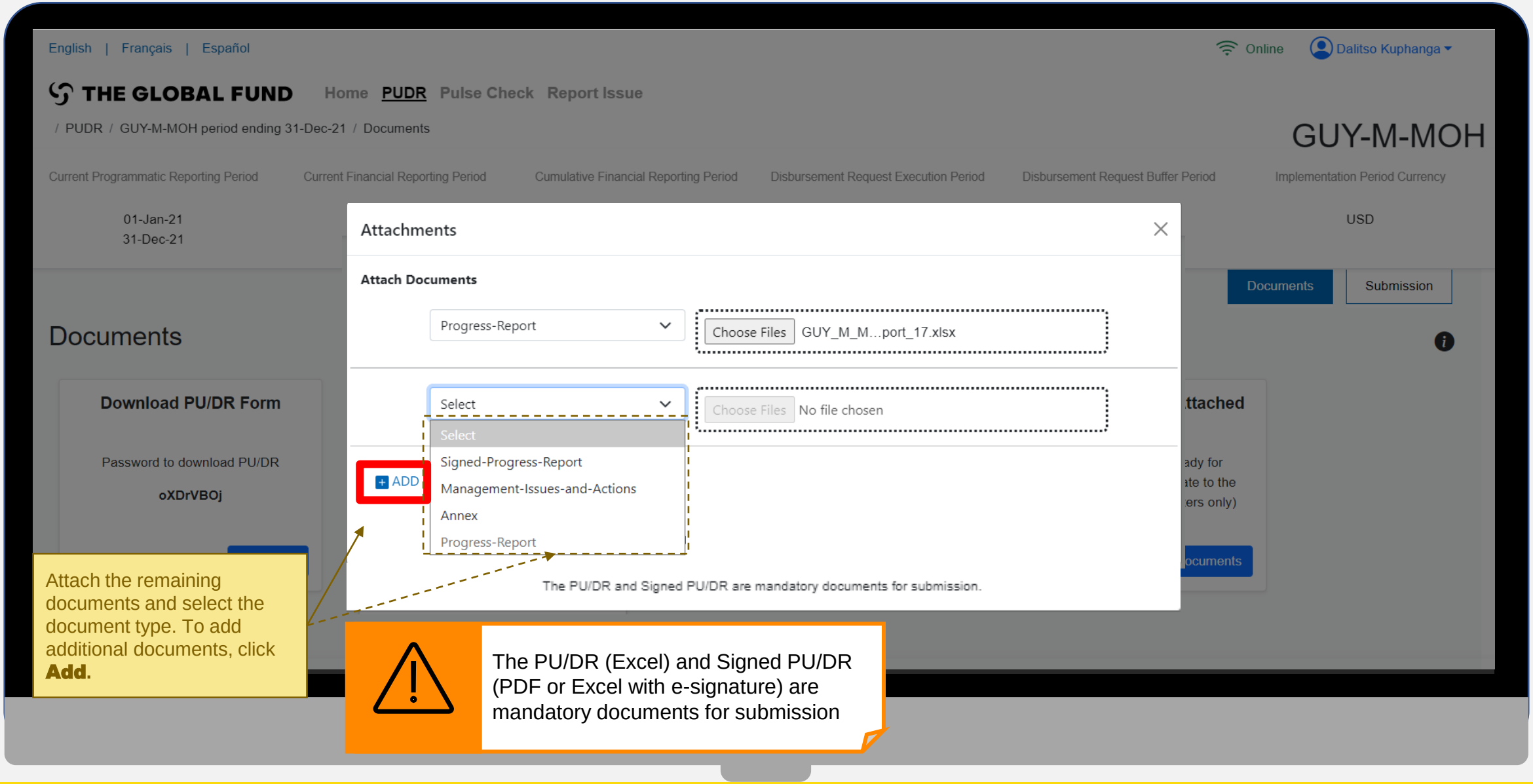


PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 4e |
PR attaches and submits the PU/DR.

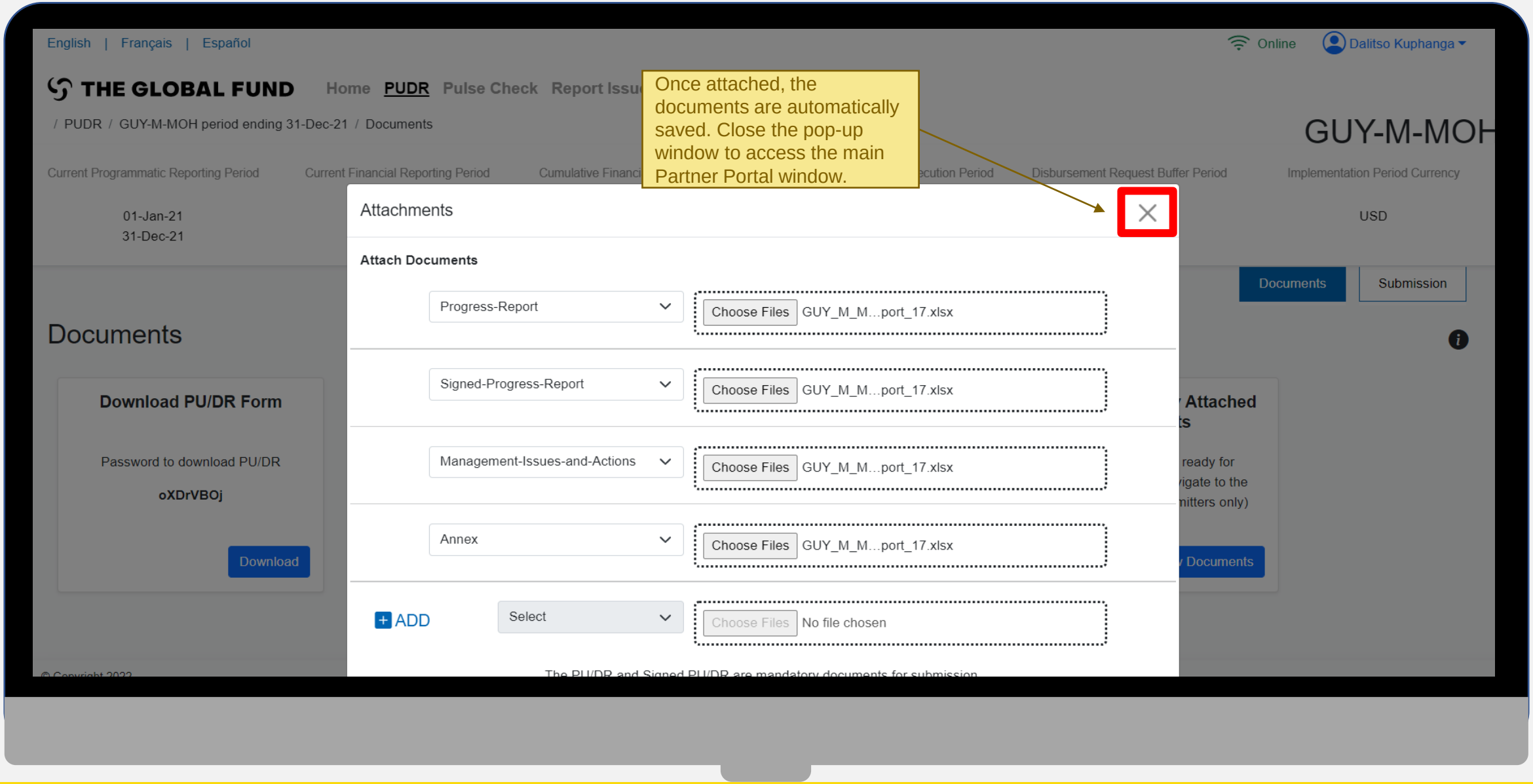
Go back to the process page



Attach the remaining documents and select the document type. To add additional documents, click **Add**.

The PU/DR (Excel) and Signed PU/DR (PDF or Excel with e-signature) are mandatory documents for submission

Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)


English | Français | Español
Online
Dalitso Kuphanga
THE GLOBAL FUND
Home
PUDR
Pulse Check
Report Issue
/ PUDR / GUY-M-MOH period ending 31-Dec-21 / Documents
GUY-M-MOH
Current Programmatic Reporting Period
Current Financial Reporting Period
Disbursement Request Buffer Period
Implementation Period Currency
01-Jan-21
31-Dec-21
USD
Documents
Submission
Documents
Download PU/DR Form
Password to download PU/DR
oXDrVBOj
Download
Once attached, the documents are automatically saved. Close the pop-up window to access the main Partner Portal window.
Attachments
Attach Documents
Progress-Report
Choose Files
GUY_M_M...port_17.xlsx
Signed-Progress-Report
Choose Files
GUY_M_M...port_17.xlsx
Management-Issues-and-Actions
Choose Files
GUY_M_M...port_17.xlsx
Annex
Choose Files
GUY_M_M...port_17.xlsx
ADD
Select
Choose Files
No file chosen
The PU/DR and Signed PU/DR are mandatory documents for submission

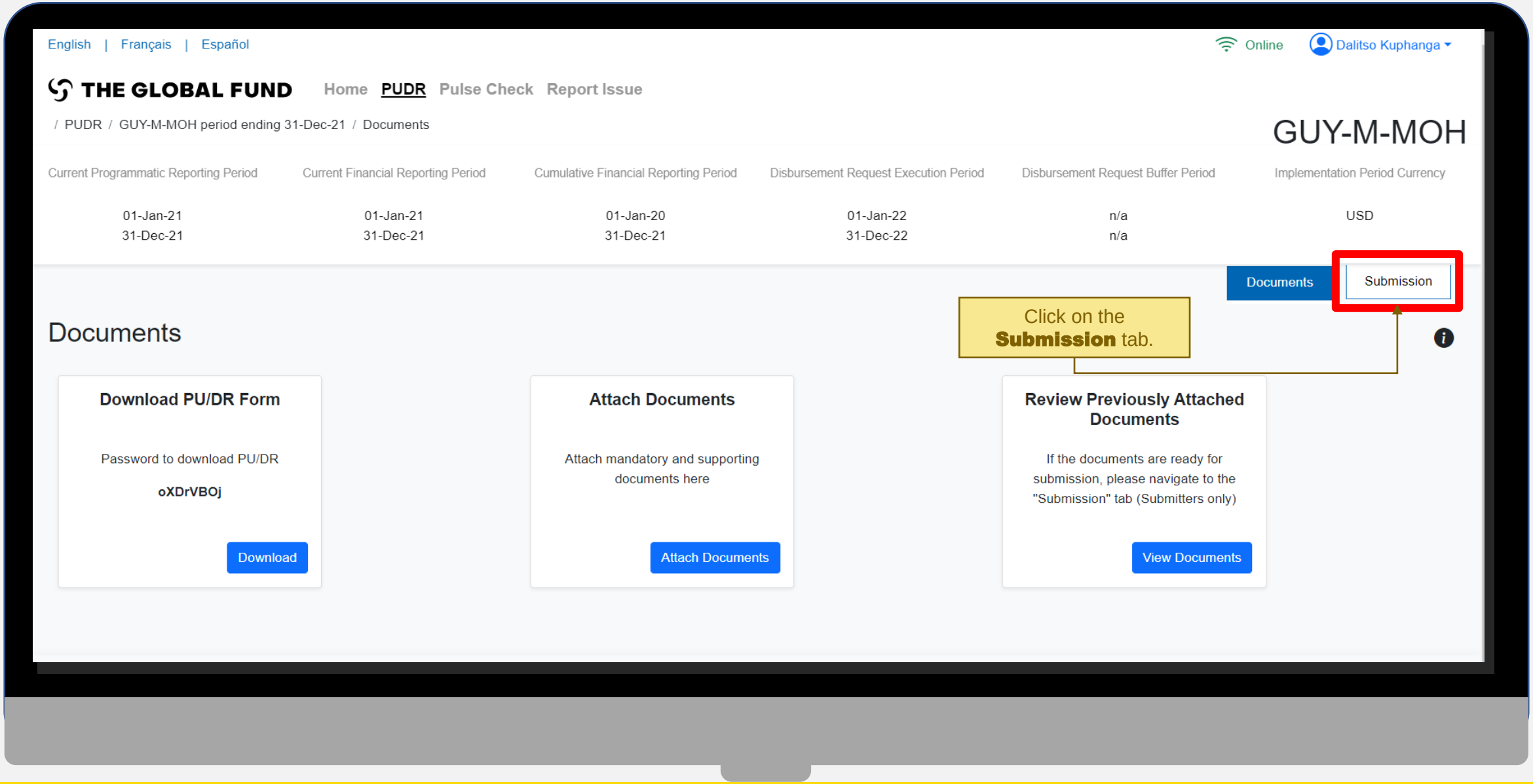
THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES

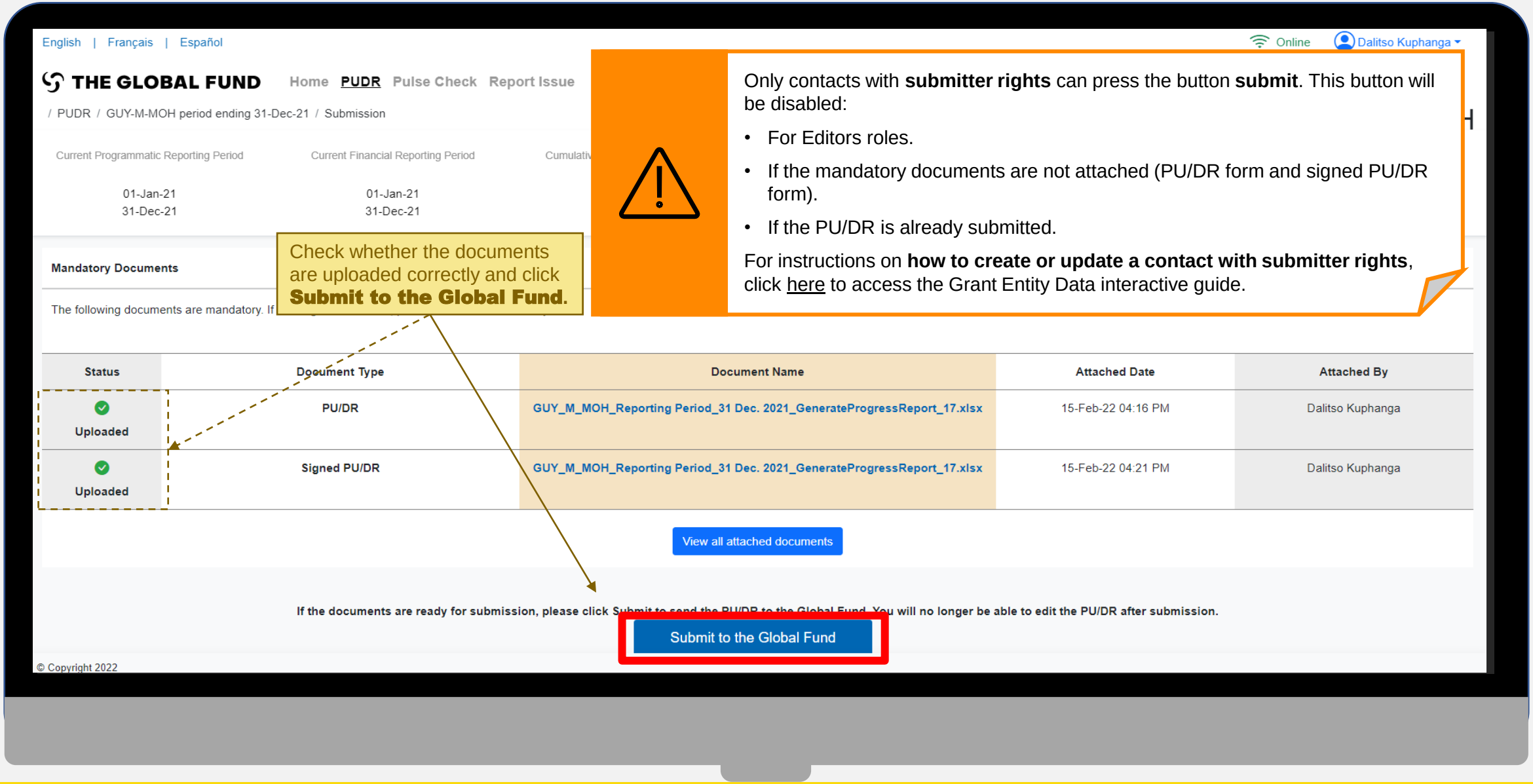
How to download and submit PU/DRs from the Partner Portal

| Step 4g |
PR attaches and submits the PU/DR.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)



Check whether the documents are uploaded correctly and click **Submit to the Global Fund.**

Only contacts with **submitter rights** can press the button **submit**. This button will be disabled:

- For Editors roles.
- If the mandatory documents are not attached (PU/DR form and signed PU/DR form).
- If the PU/DR is already submitted.

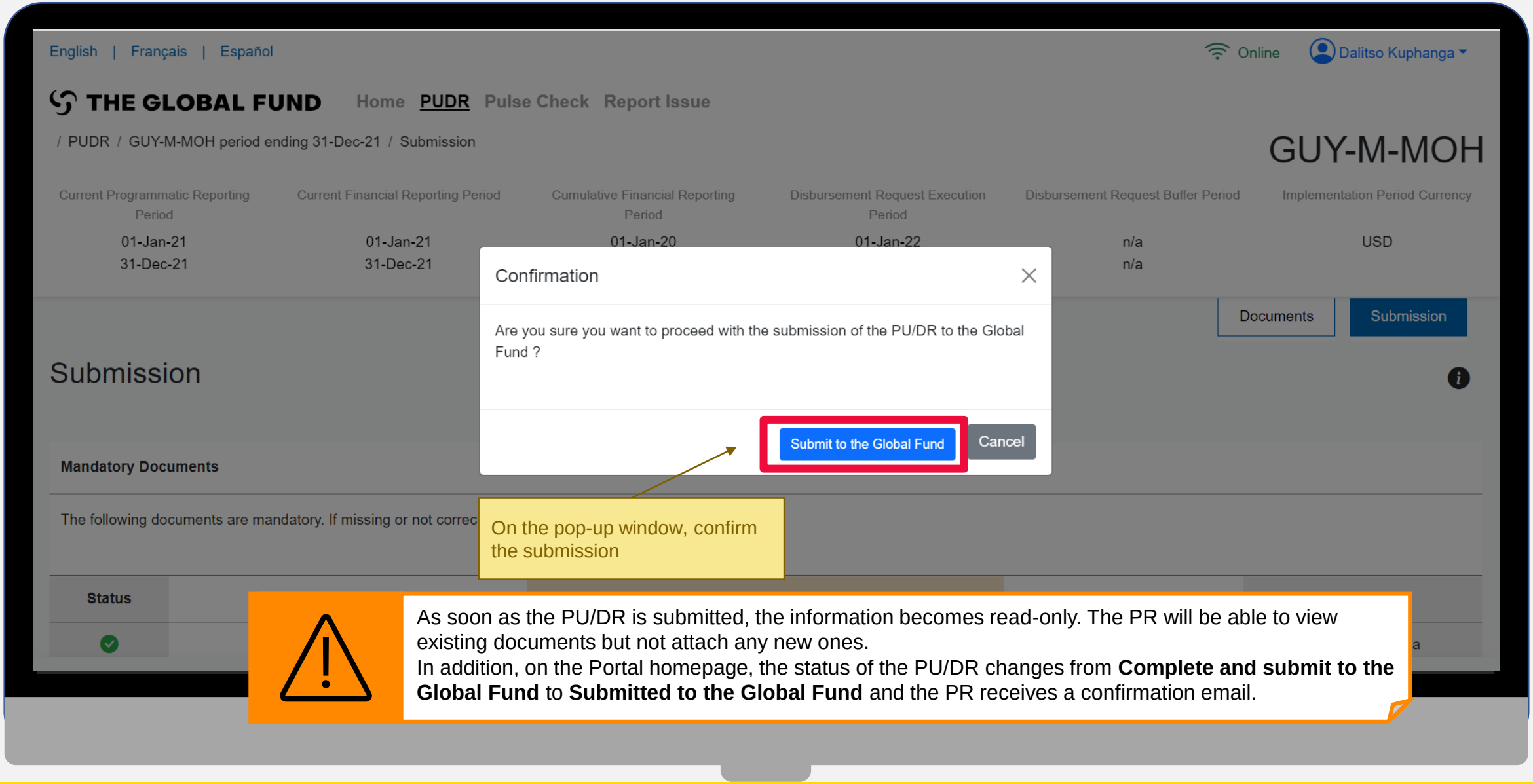
For instructions on **how to create or update a contact with submitter rights**, click here to access the Grant Entity Data interactive guide.

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 4j |
PR attaches and submits the PU/DR.

Go back to the process page



On the pop-up window, confirm the submission

As soon as the PU/DR is submitted, the information becomes read-only. The PR will be able to view existing documents but not attach any new ones.
In addition, on the Portal homepage, the status of the PU/DR changes from **Complete and submit to the Global Fund** to **Submitted to the Global Fund** and the PR receives a confirmation email.

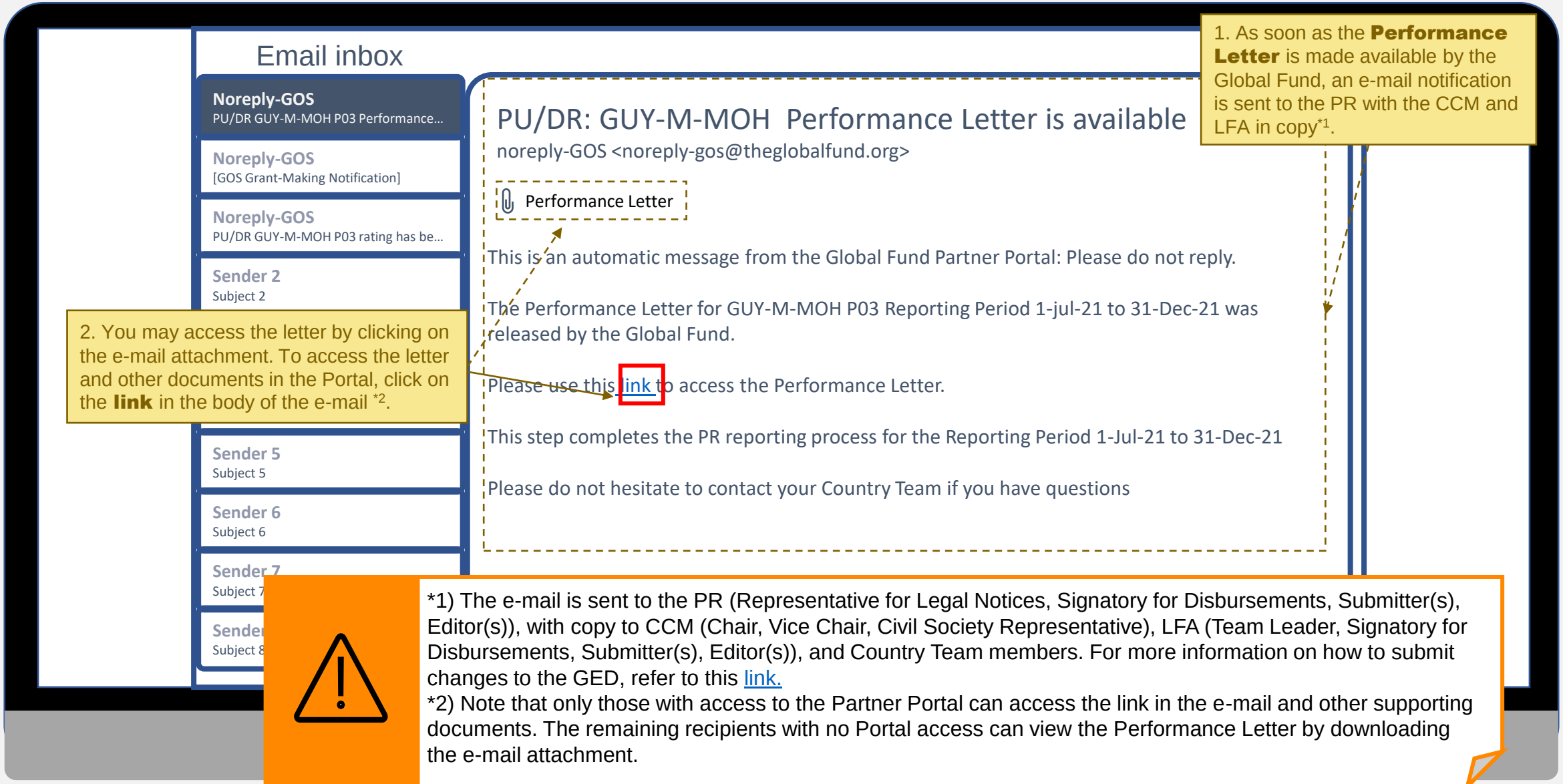
Home Page

Principal Recipient (PR)

Local Fund Agent (LFA)

This screen concludes **Step 4: PR attaches and submits the PU/DR in the Portal**.

Click here to return to the process page.



1. As soon as the **Performance Letter** is made available by the Global Fund, an e-mail notification is sent to the PR with the CCM and LFA in copy[*1].

2. You may access the letter by clicking on the e-mail attachment. To access the letter and other documents in the Portal, click on the **link** in the body of the e-mail [*2].

*1) The e-mail is sent to the PR (Representative for Legal Notices, Signatory for Disbursements, Submitter(s), Editor(s)), with copy to CCM (Chair, Vice Chair, Civil Society Representative), LFA (Team Leader, Signatory for Disbursements, Submitter(s), Editor(s)), and Country Team members. For more information on how to submit changes to the GED, refer to this link.

*2) Note that only those with access to the Partner Portal can access the link in the e-mail and other supporting documents. The remaining recipients with no Portal access can view the Performance Letter by downloading the e-mail attachment.

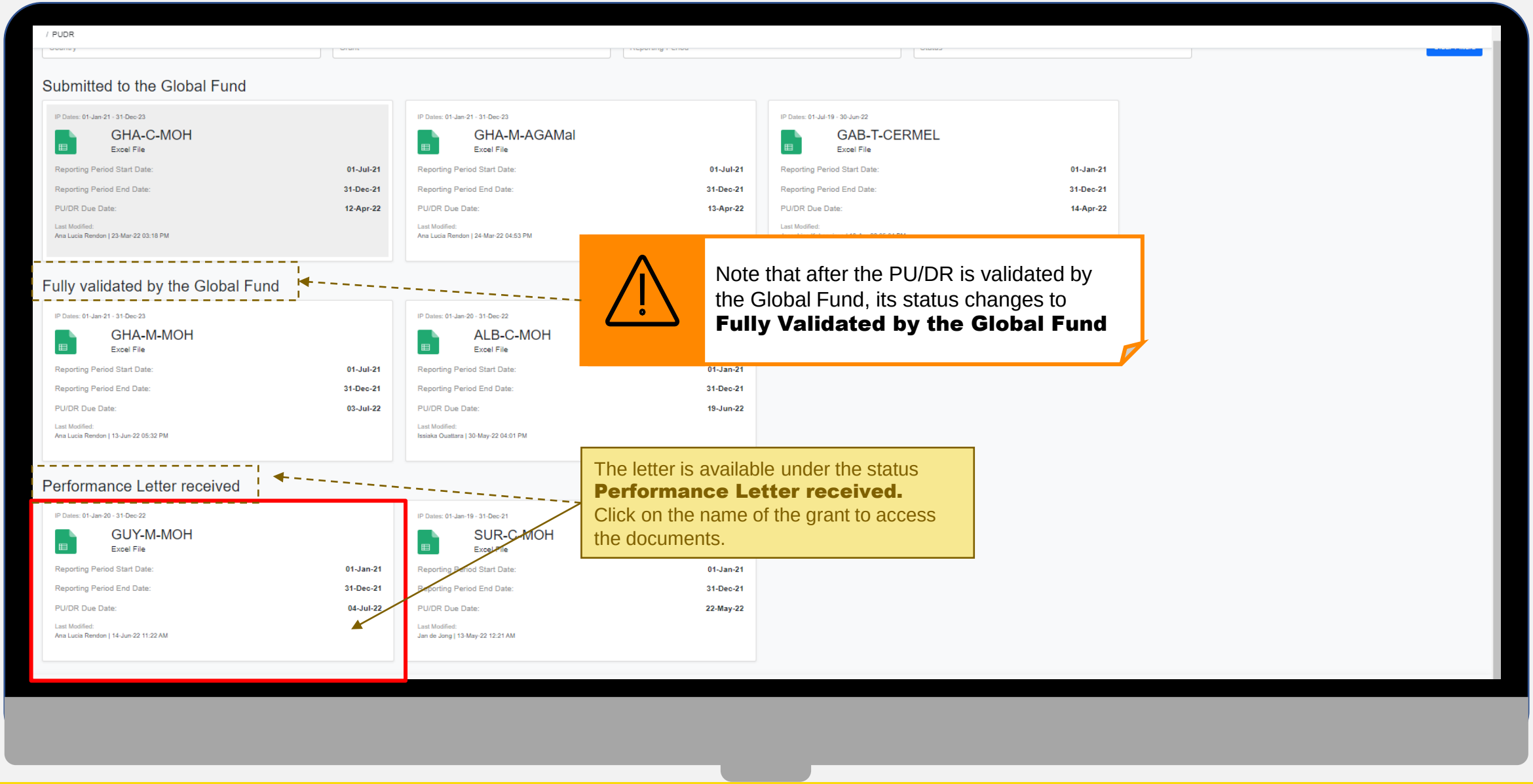
THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 11b |
The PR downloads the Performance Letter

Go back to the process page



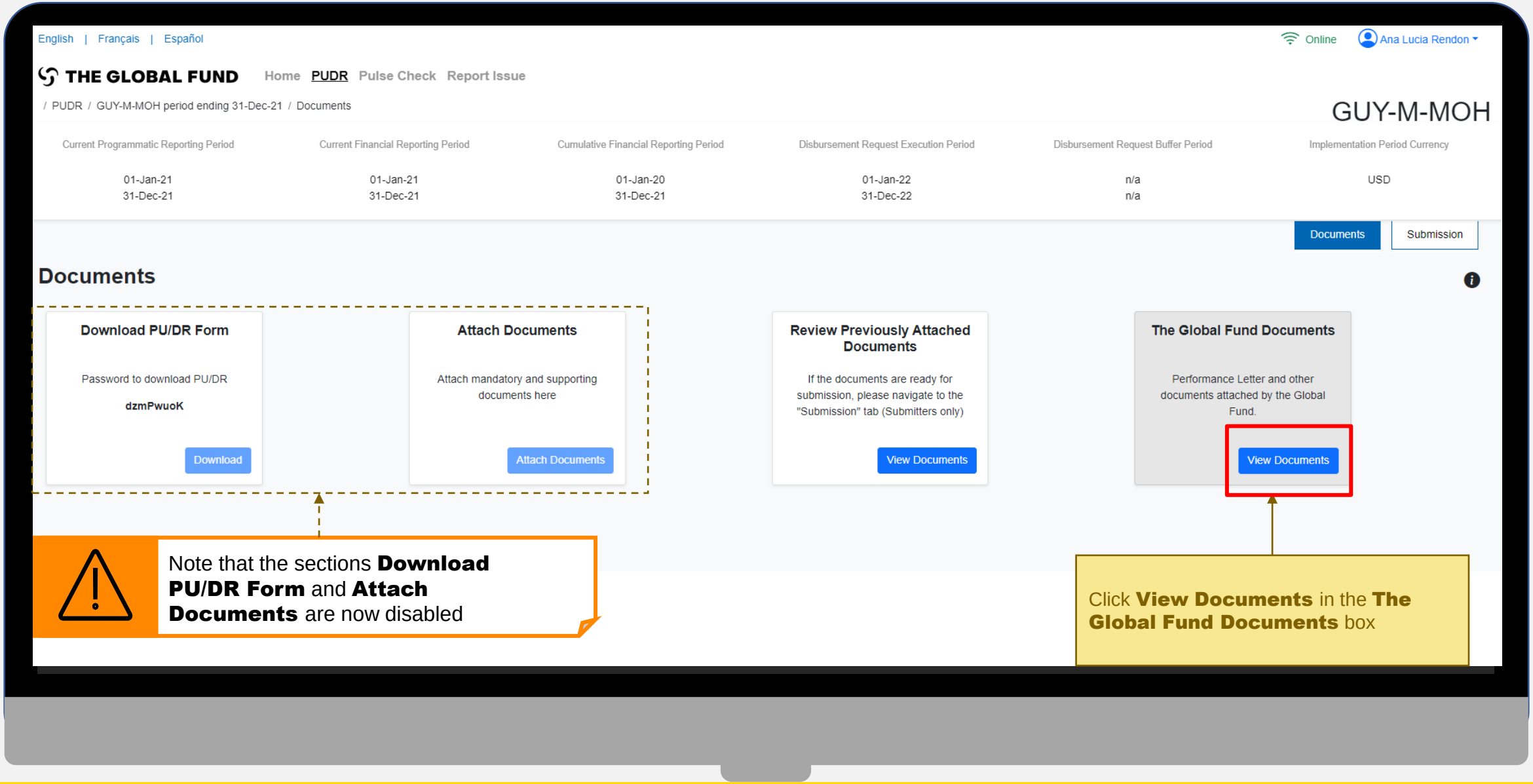
Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

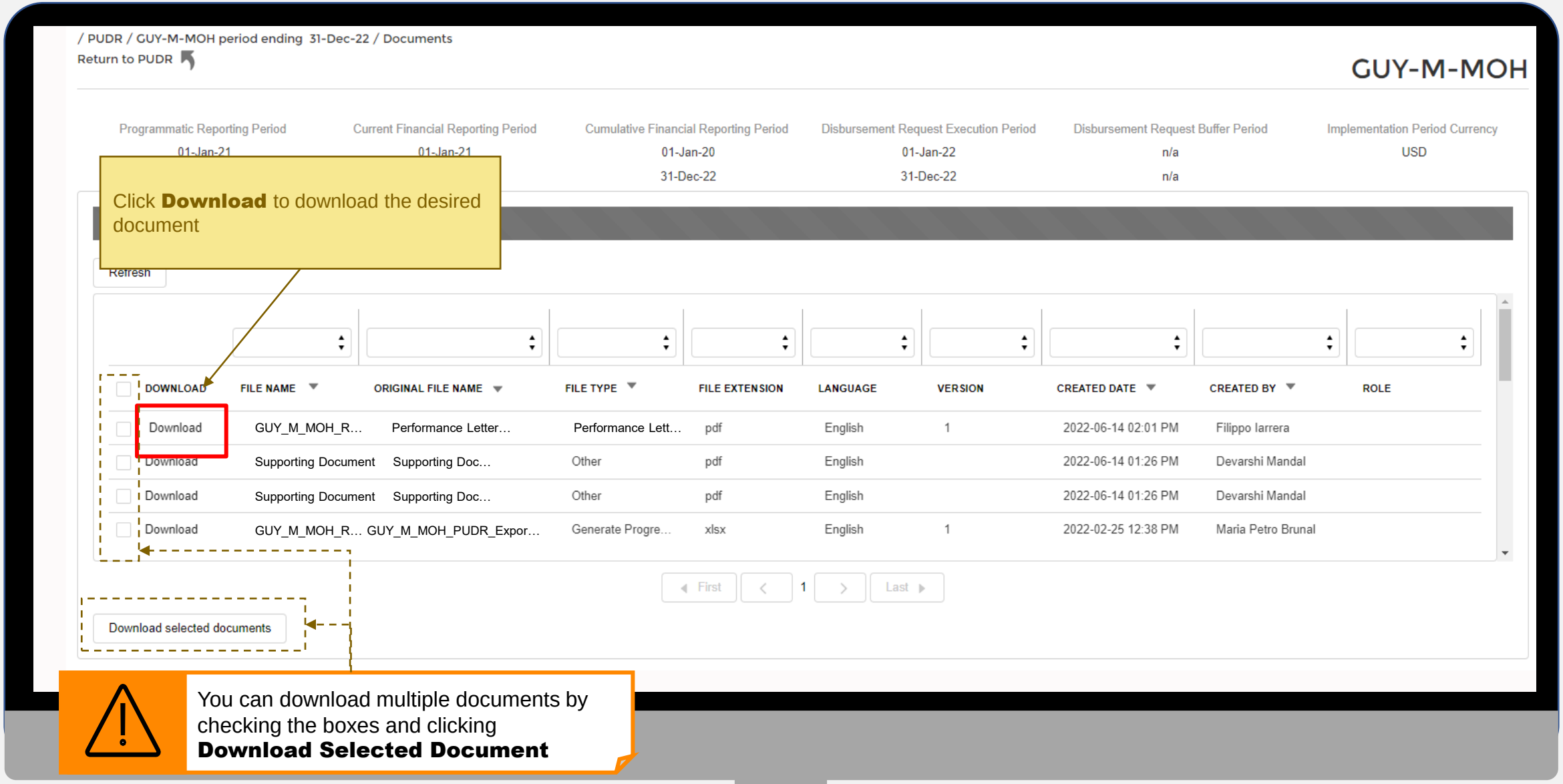
How to download and submit PU/DRs from the Partner Portal

| Step 11c |
The PR downloads the Performance Letter

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)


/ PUDR / GUY-M-MOH period ending 31-Dec-22 / Documents
Return to PUDR
GUY-M-MOH
Programmatic Reporting Period
01-Jan-21
Current Financial Reporting Period
01-Jan-21
Cumulative Financial Reporting Period
01-Jan-20
31-Dec-22
Disbursement Request Execution Period
01-Jan-22
31-Dec-22
Disbursement Request Buffer Period
n/a
n/a
Implementation Period Currency
USD
Click **Download** to download the desired document
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Download GUY_M_MOH_R... Performance Letter... Performance Lett... pdf English 1 2022-06-14 02:01 PM Filippo Iarrera
Download Supporting Document Supporting Doc... Other pdf English 2022-06-14 01:26 PM Devarshi Mandal
Download Supporting Document Supporting Doc... Other pdf English 2022-06-14 01:26 PM Devarshi Mandal
Download GUY_M_MOH_R... GUY_M_MOH_PUDR_Expor... Generate Progre... xlsx English 1 2022-02-25 12:38 PM Maria Petro Brunal
First
1
Last
Download selected documents
You can download multiple documents by checking the boxes and clicking **Download Selected Document**

This step completes the **PU/DR reporting process**. In case of questions on the Performance Letter and documents shared, please contact your Country Team.

Click here to return to the process page.

June 2022

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

PU/DR End-to-End Process

The highlighted steps are assigned to the LFA.

Step 1-4 The PR downloads, completes and shares the PU/DR with the Global Fund.

Step 5 On Global Fund request, the PU/DR is shared with the LFA through the Partner Portal. LFA Editors and Submitters receive an e-mail notification.

Click here to access TheGlobalFund Partner Portal

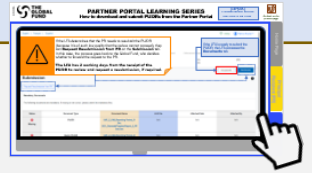
Step 6 The LFA downloads the PU/DR to review.

Click on the thumbnail for in-system instructions

Step 7 LFA reviews the PU/DR in Excel

Click on the thumbnail for in-system instructions

Step 8 LFA attaches and submits the PU/DR in the Portal.

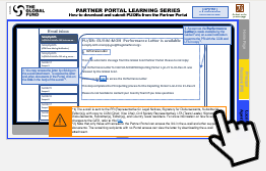


Click on the thumbnail for in-system instructions

Step 9 The Global Fund reviews the PU/DR.

Step 10 The Global Fund confirms the Performance Rating and issues the Performance Letter.

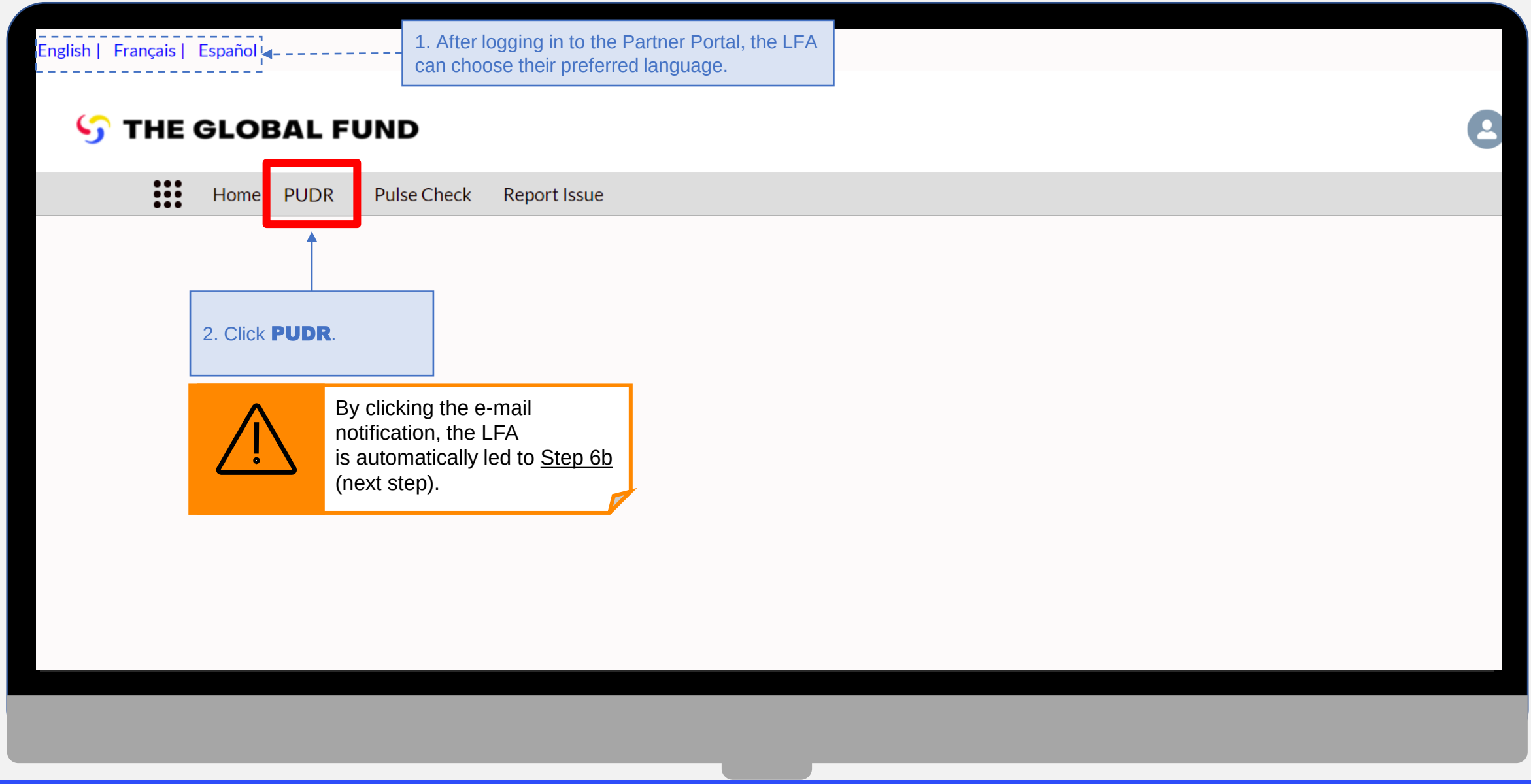
Step 11 LFA receives an email notification and accesses the Performance Letter through the Partner Portal.



Click on the thumbnail for in-system instructions

In Portal

In Excel file

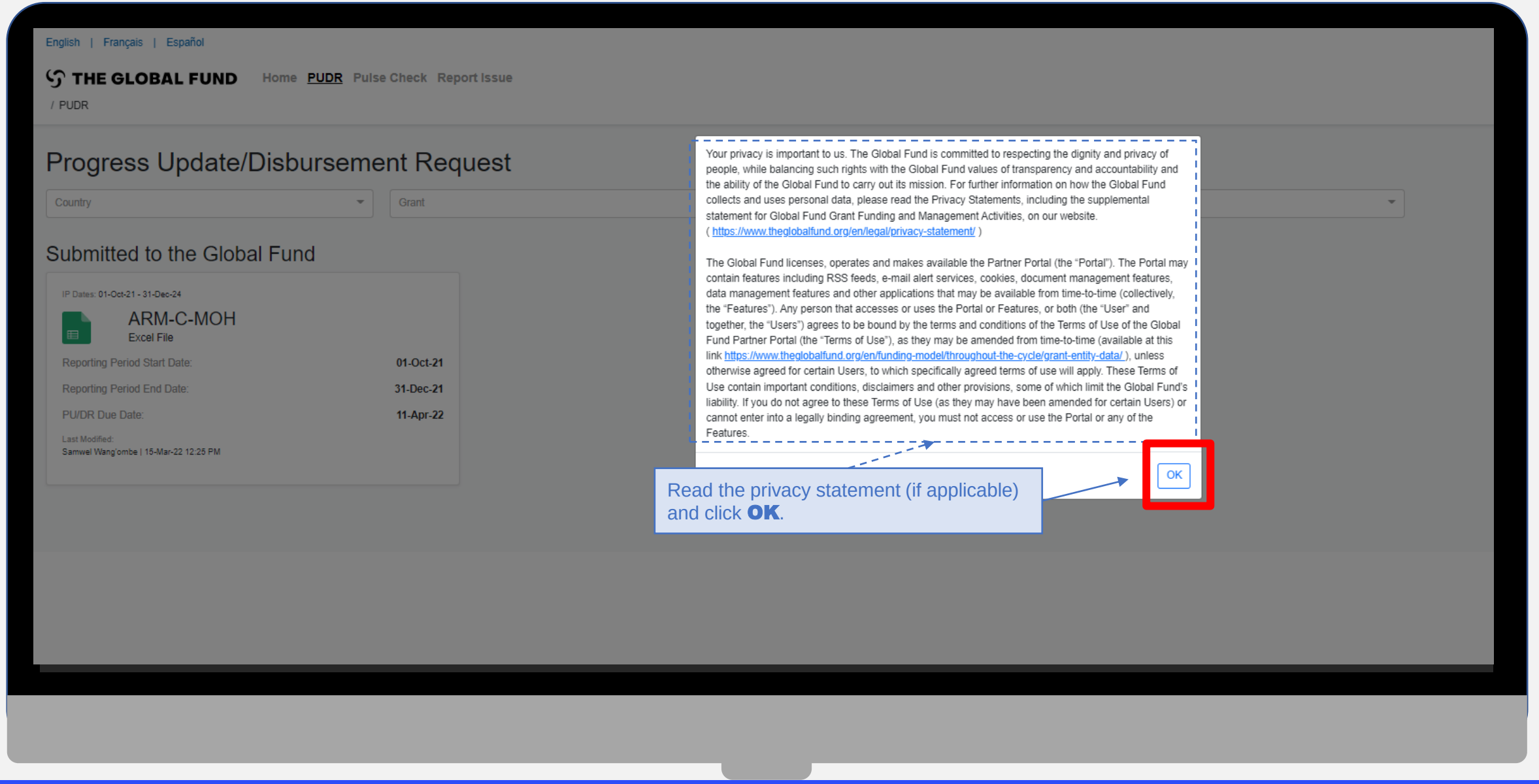

English | Français | Español
1. After logging in to the Partner Portal, the LFA can choose their preferred language.
THE GLOBAL FUND
Home
PUDR
Pulse Check
Report Issue
2. Click PUDR.
By clicking the e-mail notification, the LFA is automatically led to Step 6b (next step).

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 6b |
The LFA downloads the PU/DR to review.

Go back to the process page



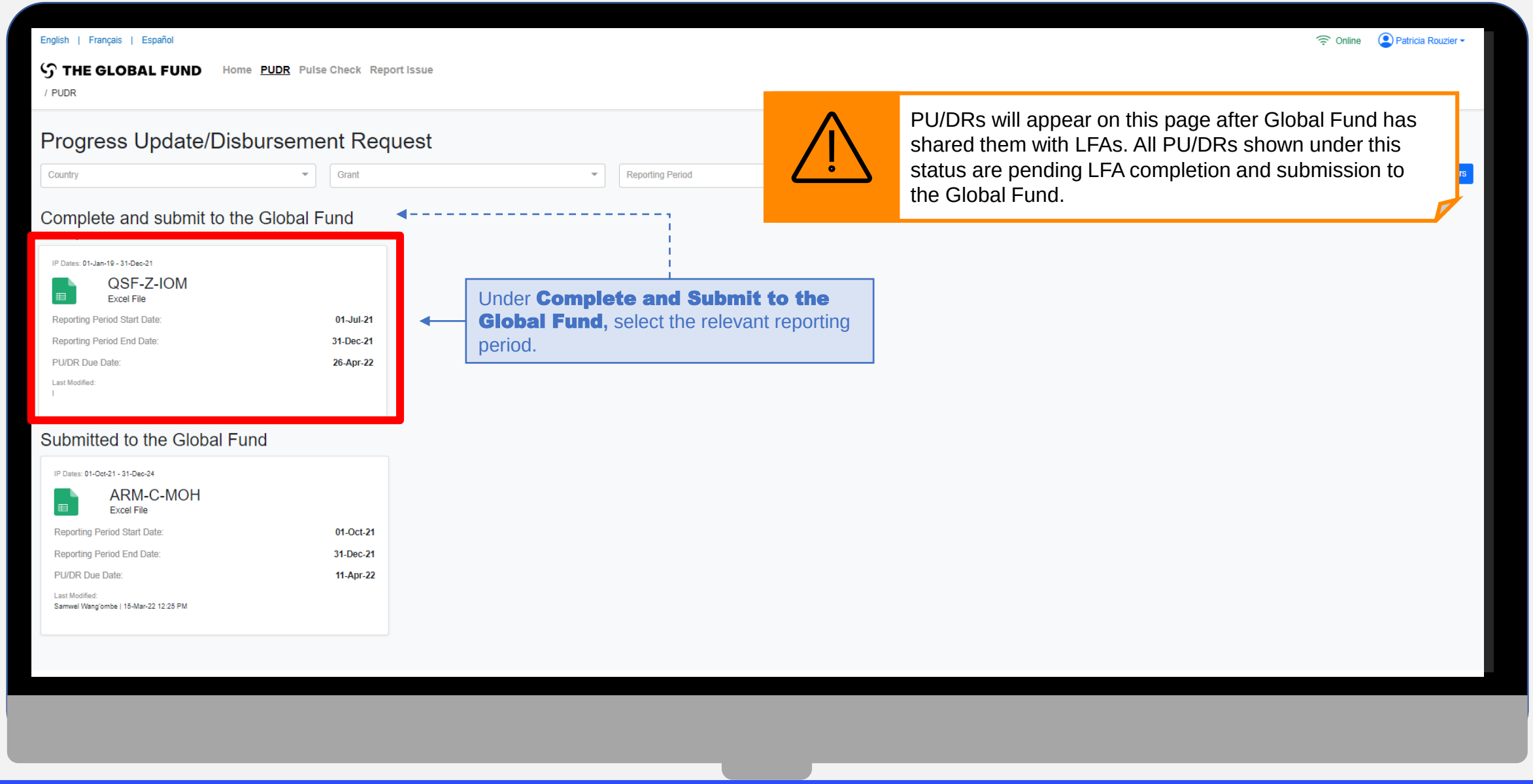
Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 6c | The LFA downloads the PU/DR to review.

Go back to the process page



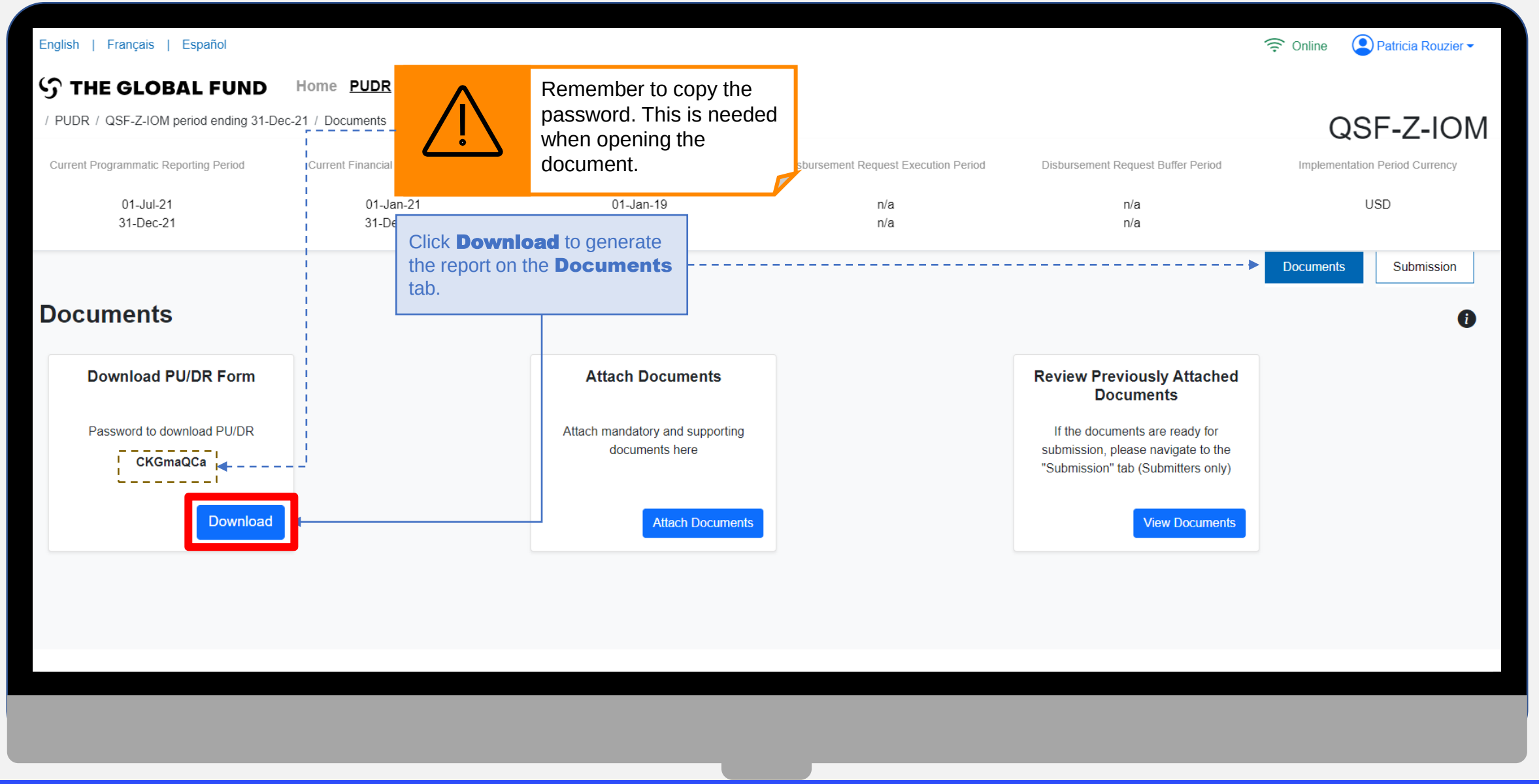
PU/DRs will appear on this page after Global Fund has shared them with LFAs. All PU/DRs shown under this status are pending LFA completion and submission to the Global Fund.

Under **Complete and Submit to the Global Fund**, select the relevant reporting period.

Home Page

Principal Recipient (PR)

Local Fund Agent (LFA)



Home Page

Principal Recipient (PR)

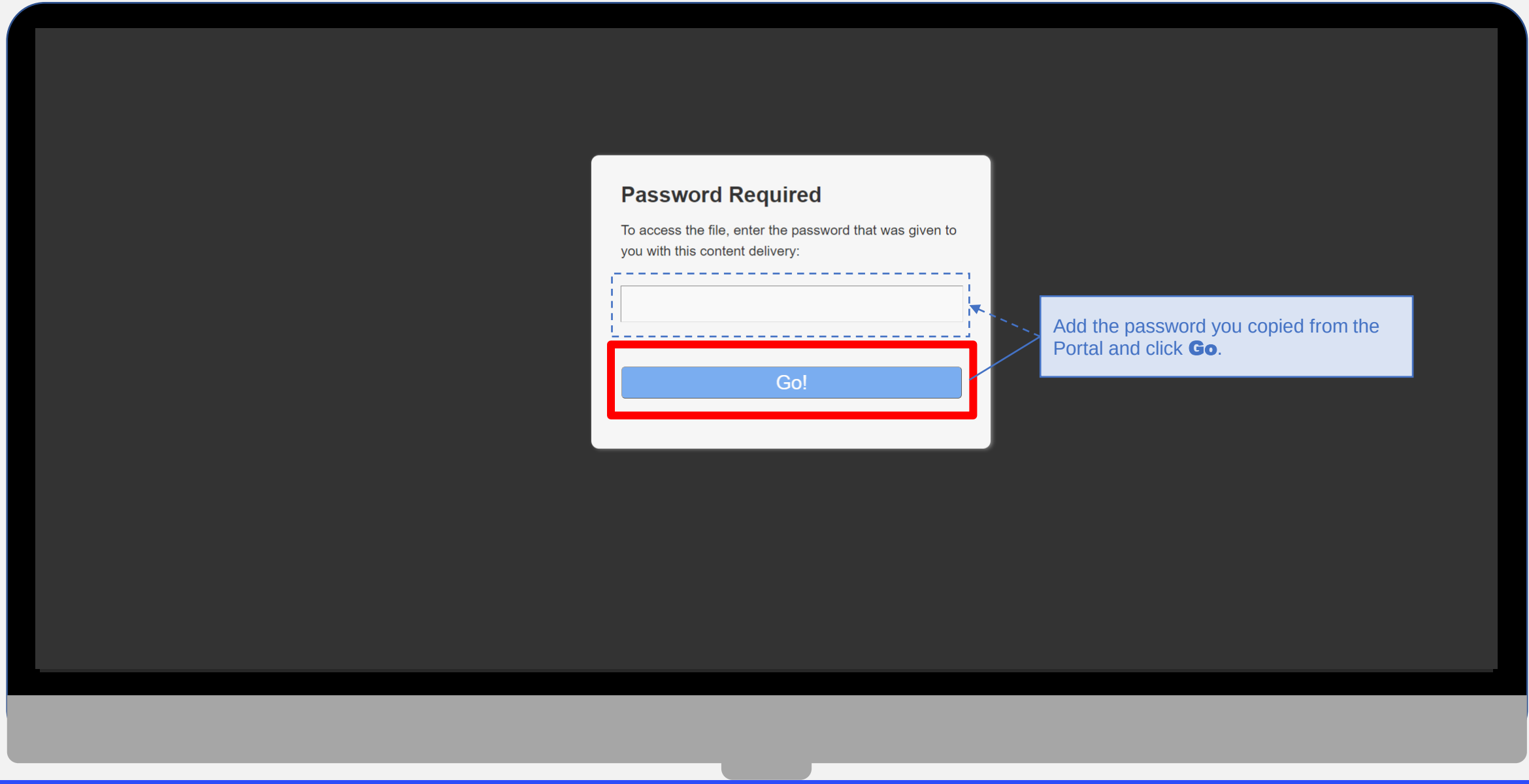
Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 6e |
The LFA downloads the PU/DR to review.

Go back to the process page



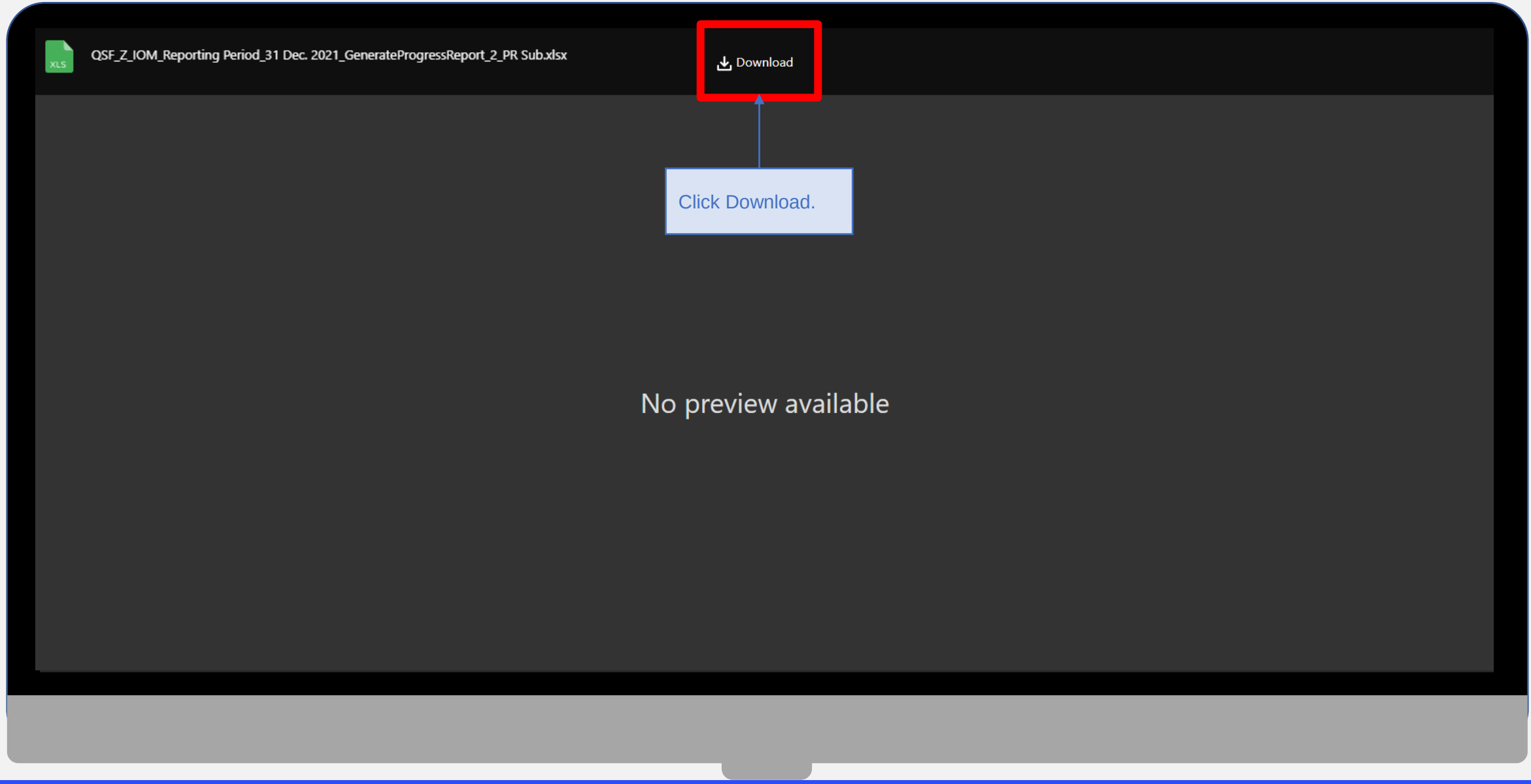
Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 6f |
The LFA downloads the PU/DR to review.

Go back to the process page



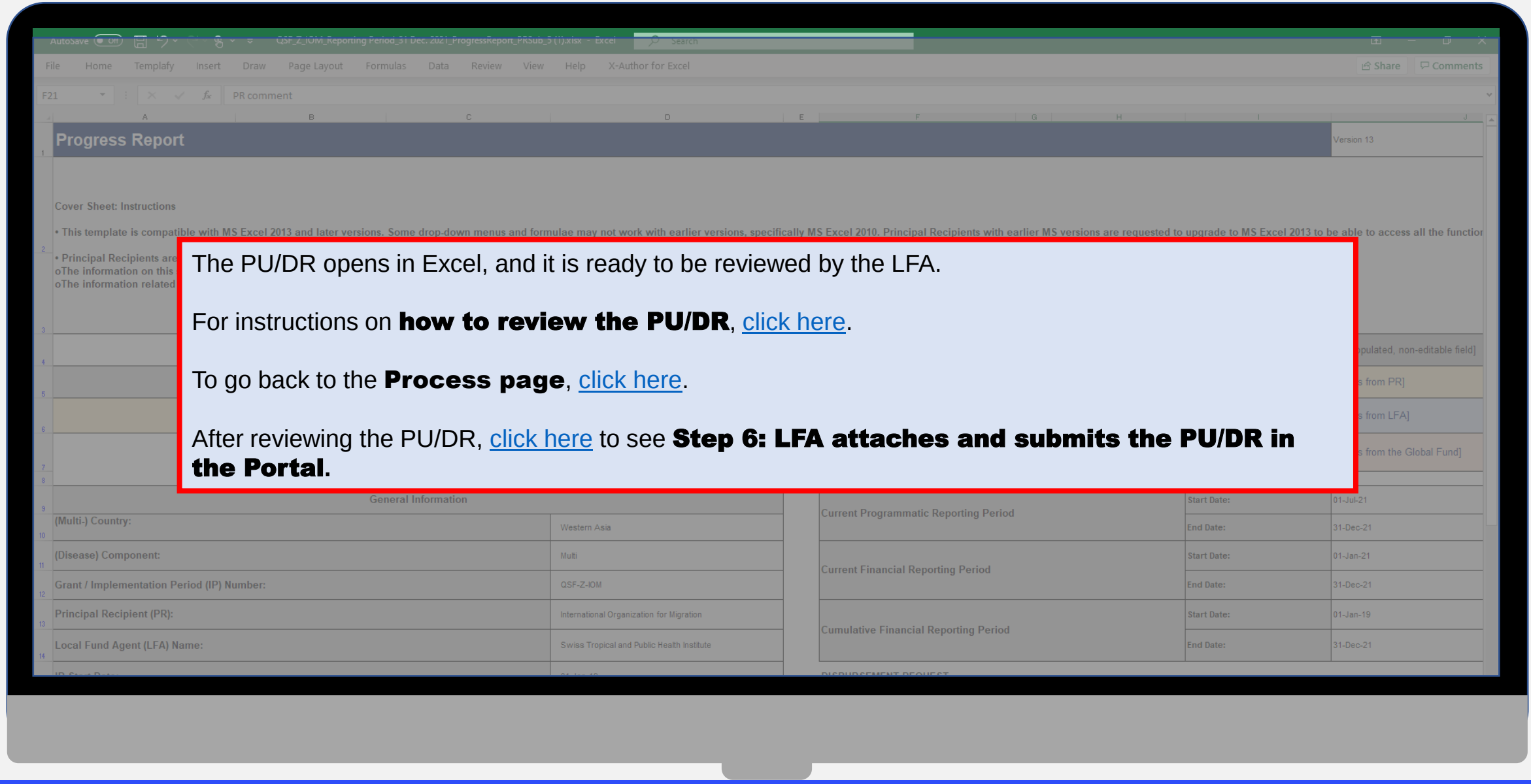
Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 6g |
The LFA downloads the PU/DR to review.

Go back to the process page



The PU/DR opens in Excel, and it is ready to be reviewed by the LFA.

For instructions on **how to review the PU/DR**, click here.

To go back to the **Process page**, click here.

After reviewing the PU/DR, click here to see **Step 6: LFA attaches and submits the PU/DR in the Portal.**

Home Page

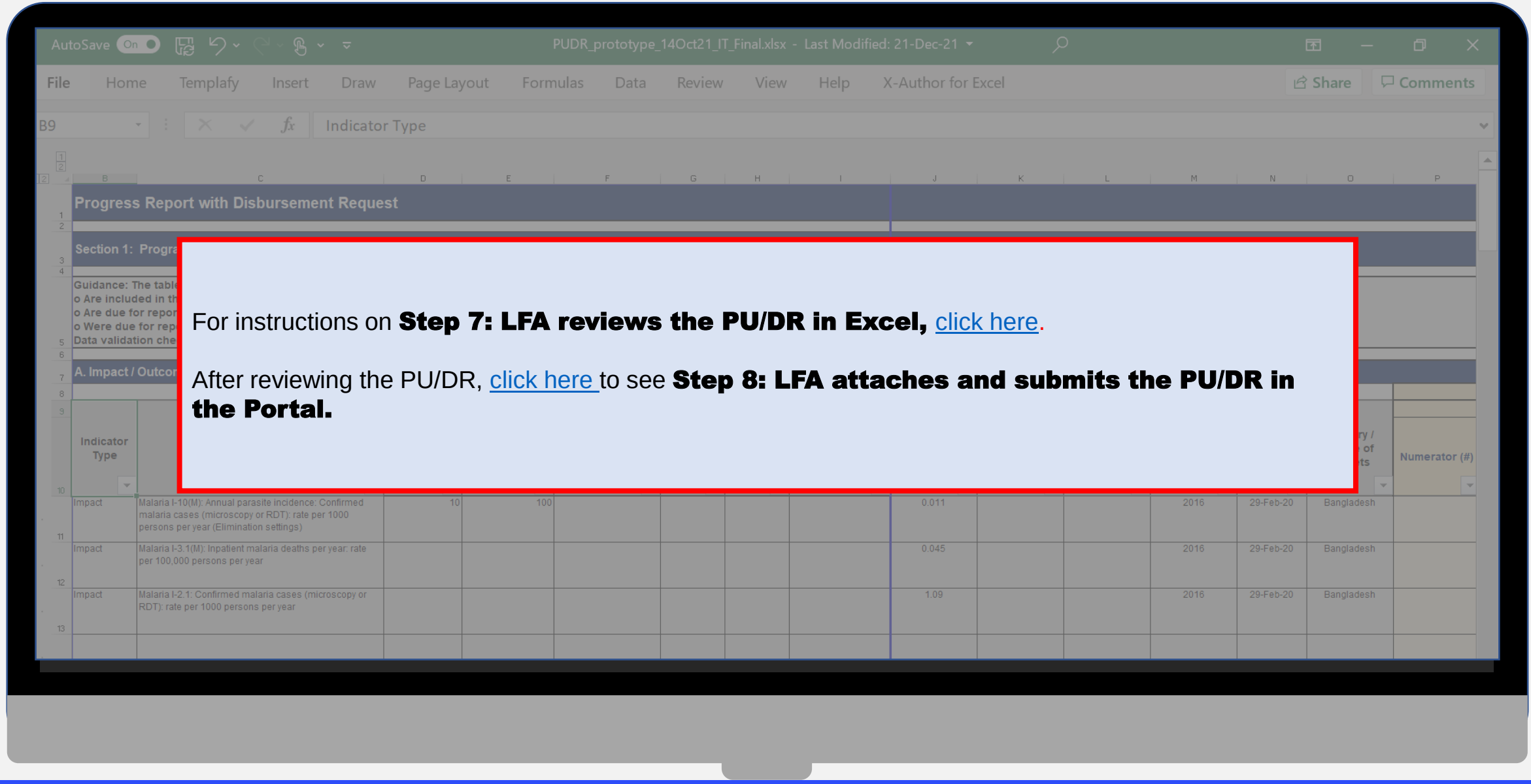
Principal Recipient (PR)

Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

Go back to the process page



For instructions on **Step 7: LFA reviews the PU/DR in Excel,** click here.

After reviewing the PU/DR, click here to see **Step 8: LFA attaches and submits the PU/DR in the Portal.**

Home Page

Principal Recipient (PR)

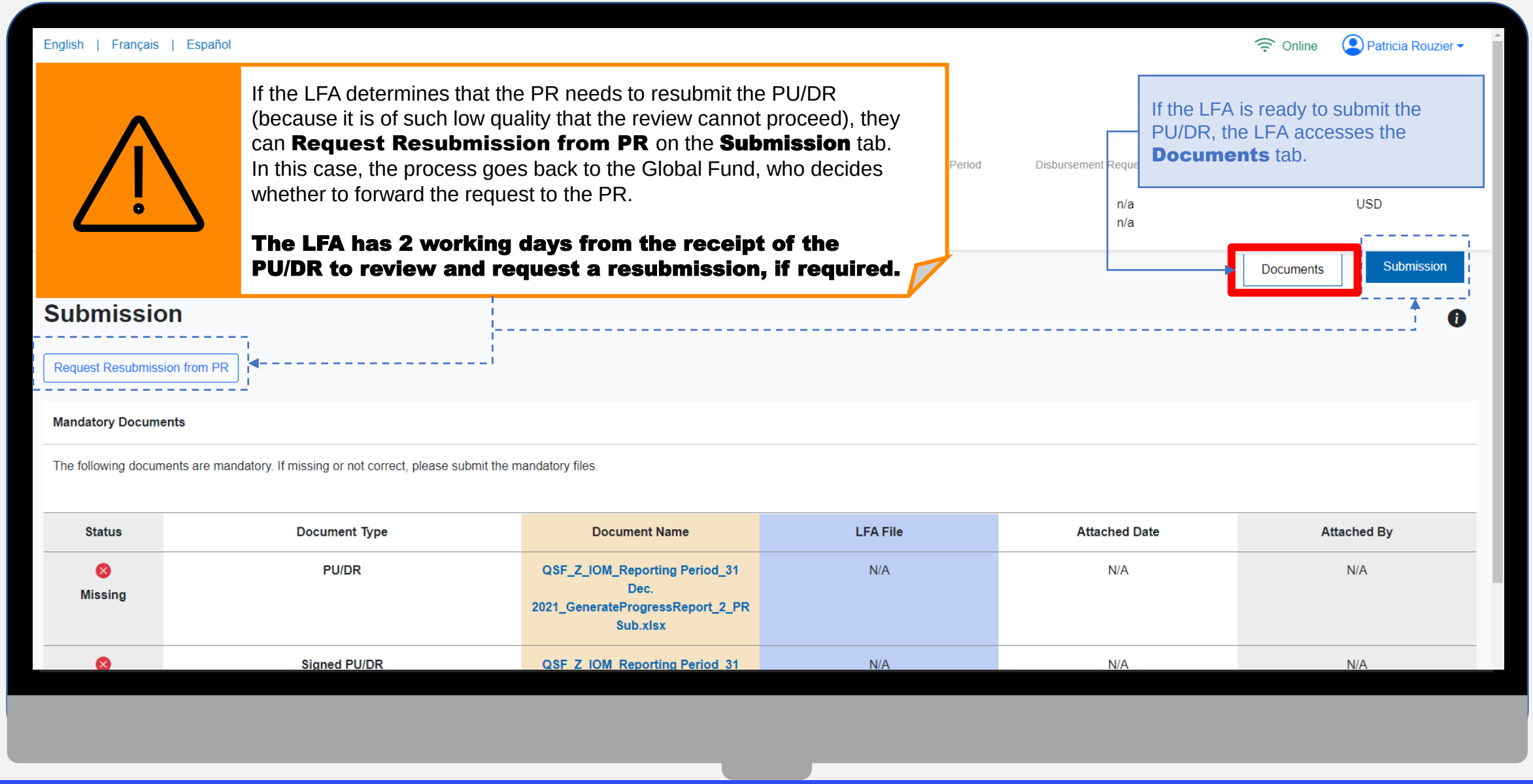
Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8a |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

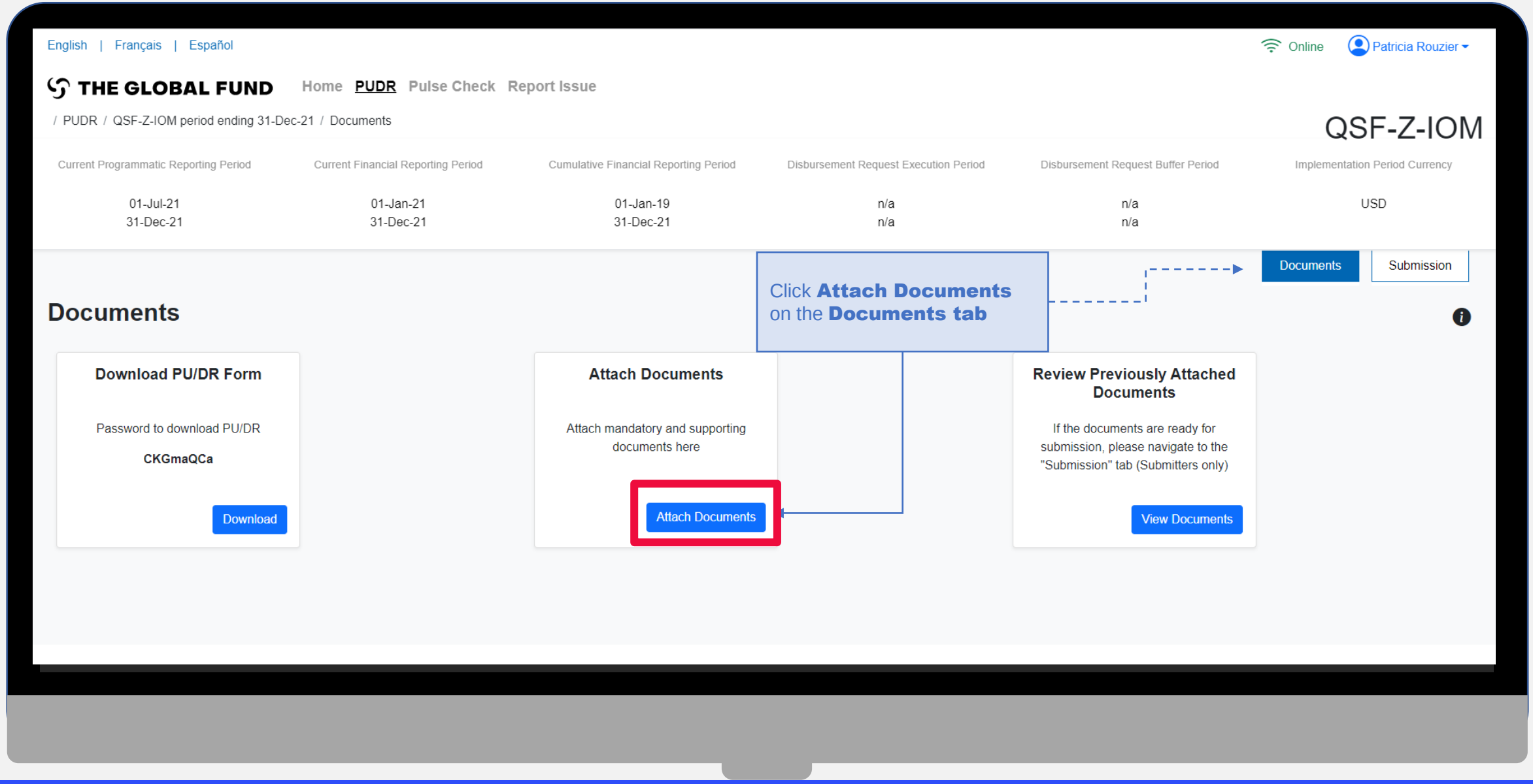
THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8b |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

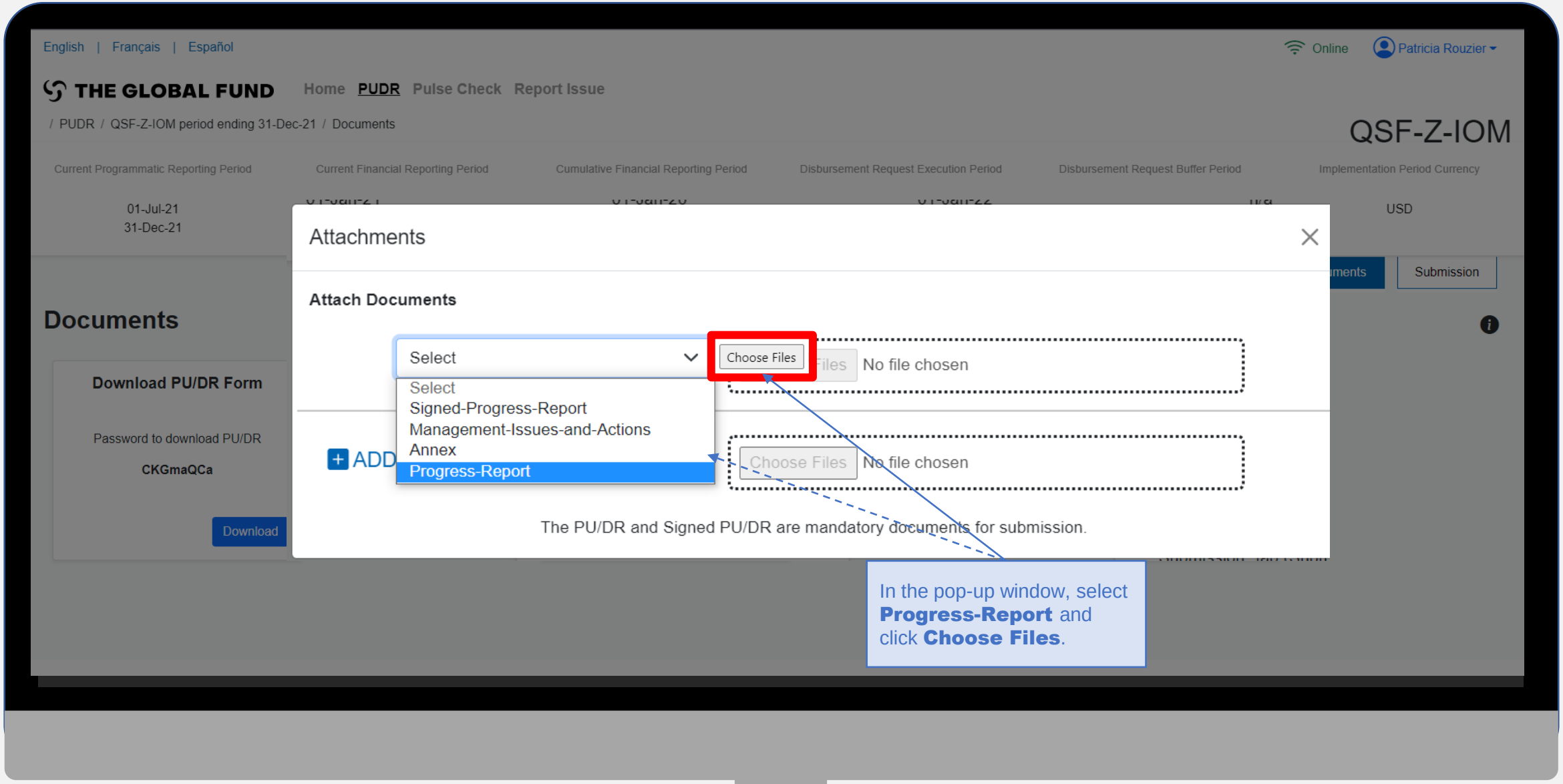
THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8c |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page



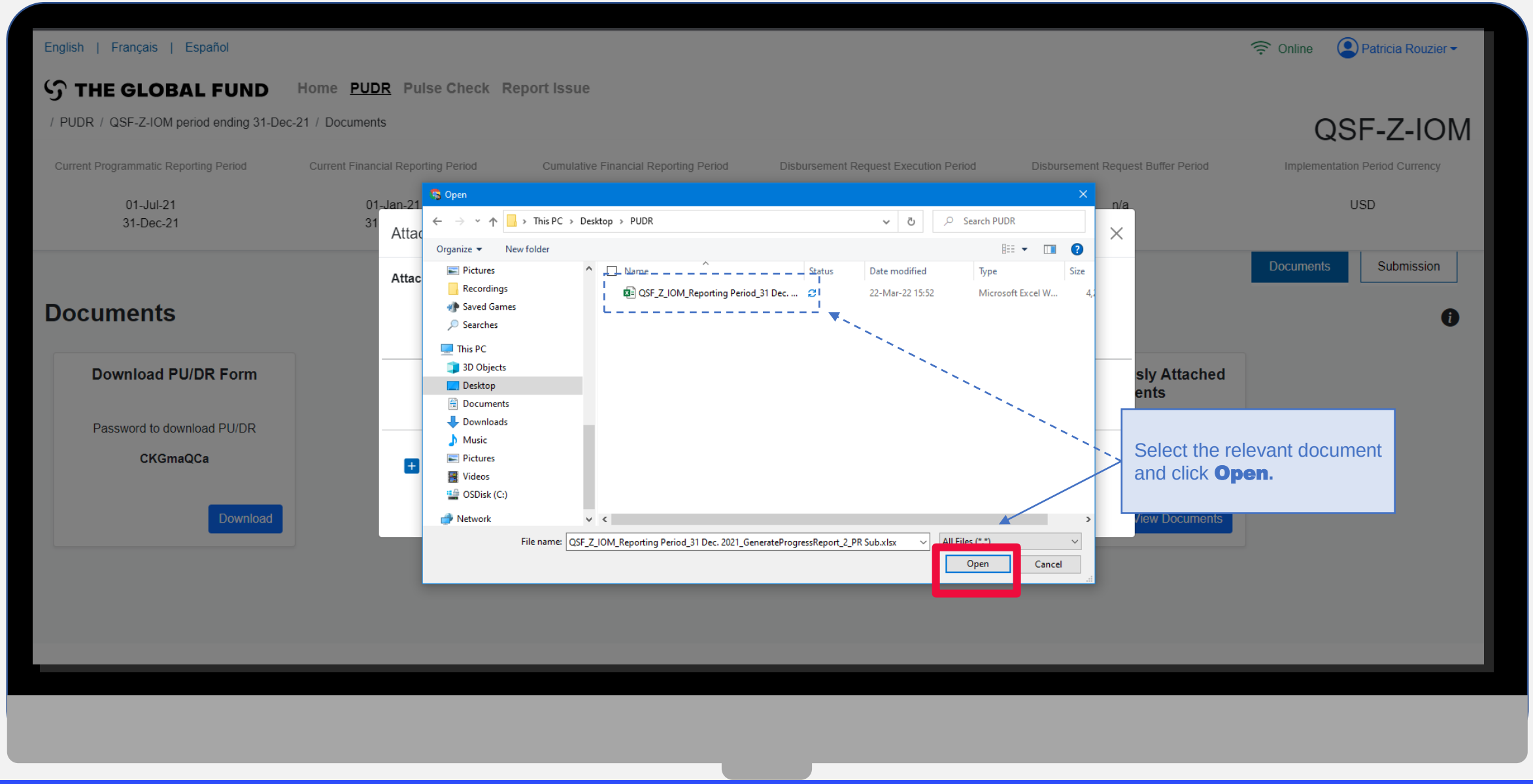
Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8d |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

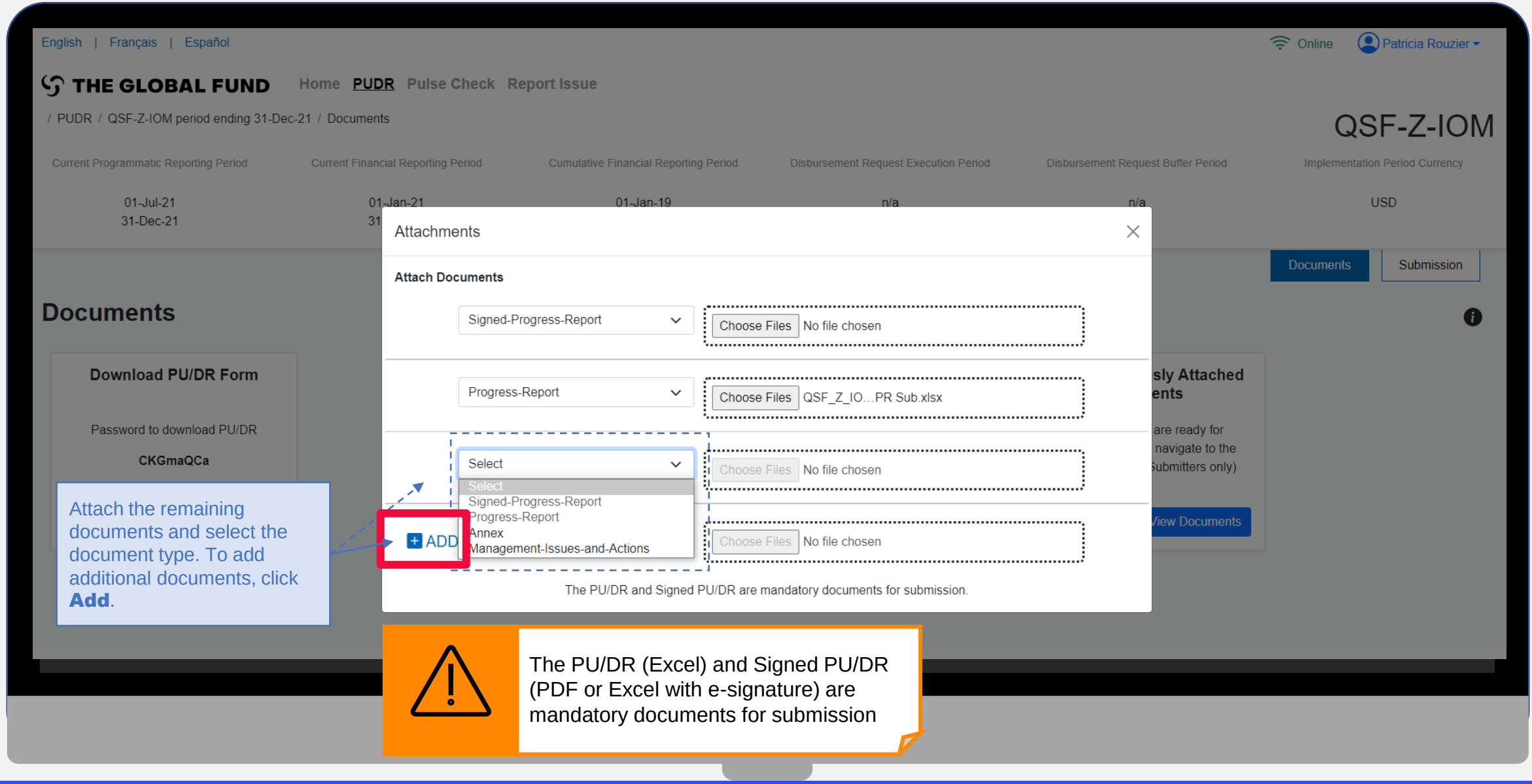
PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8e |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page

Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

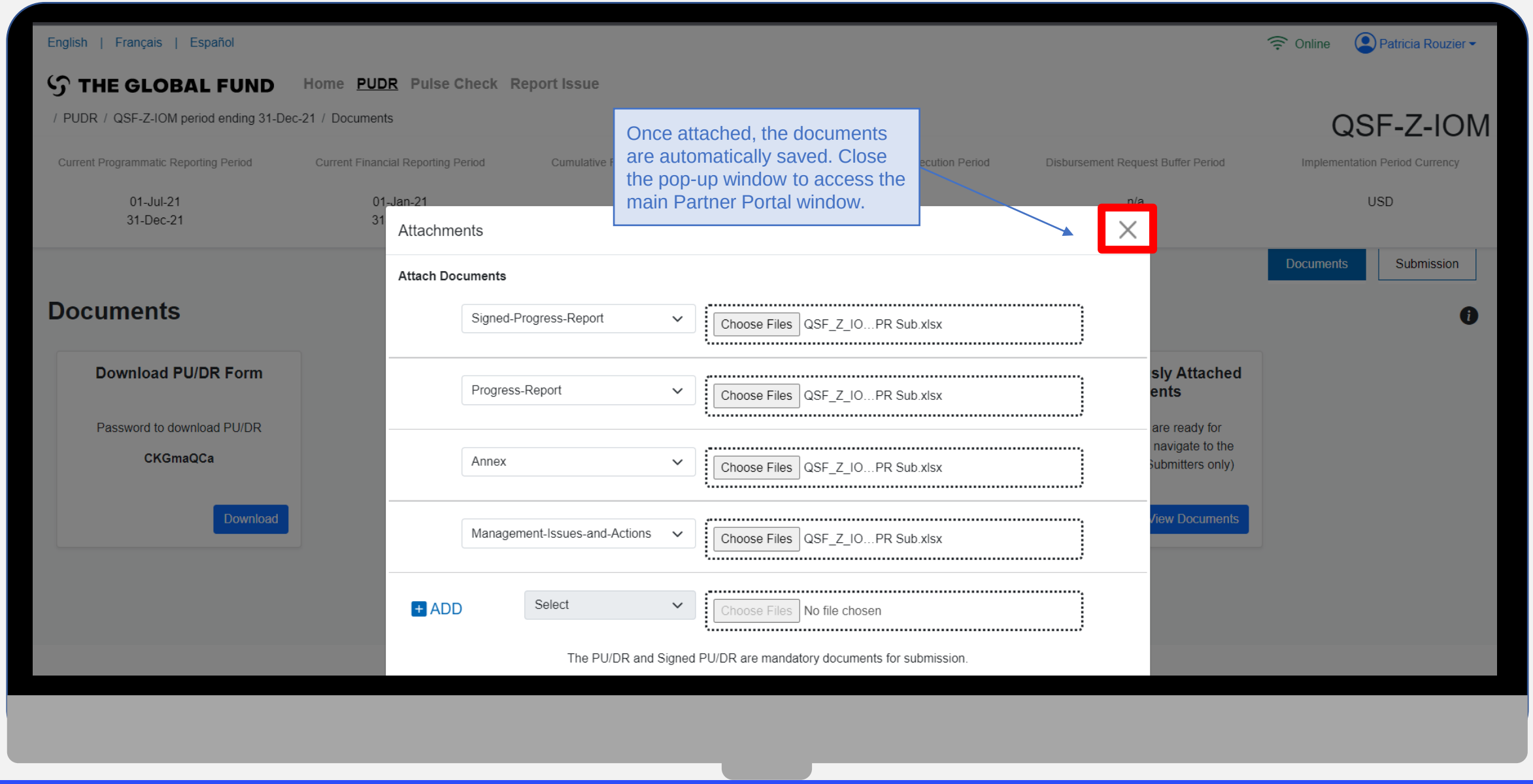


PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8f |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page



Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

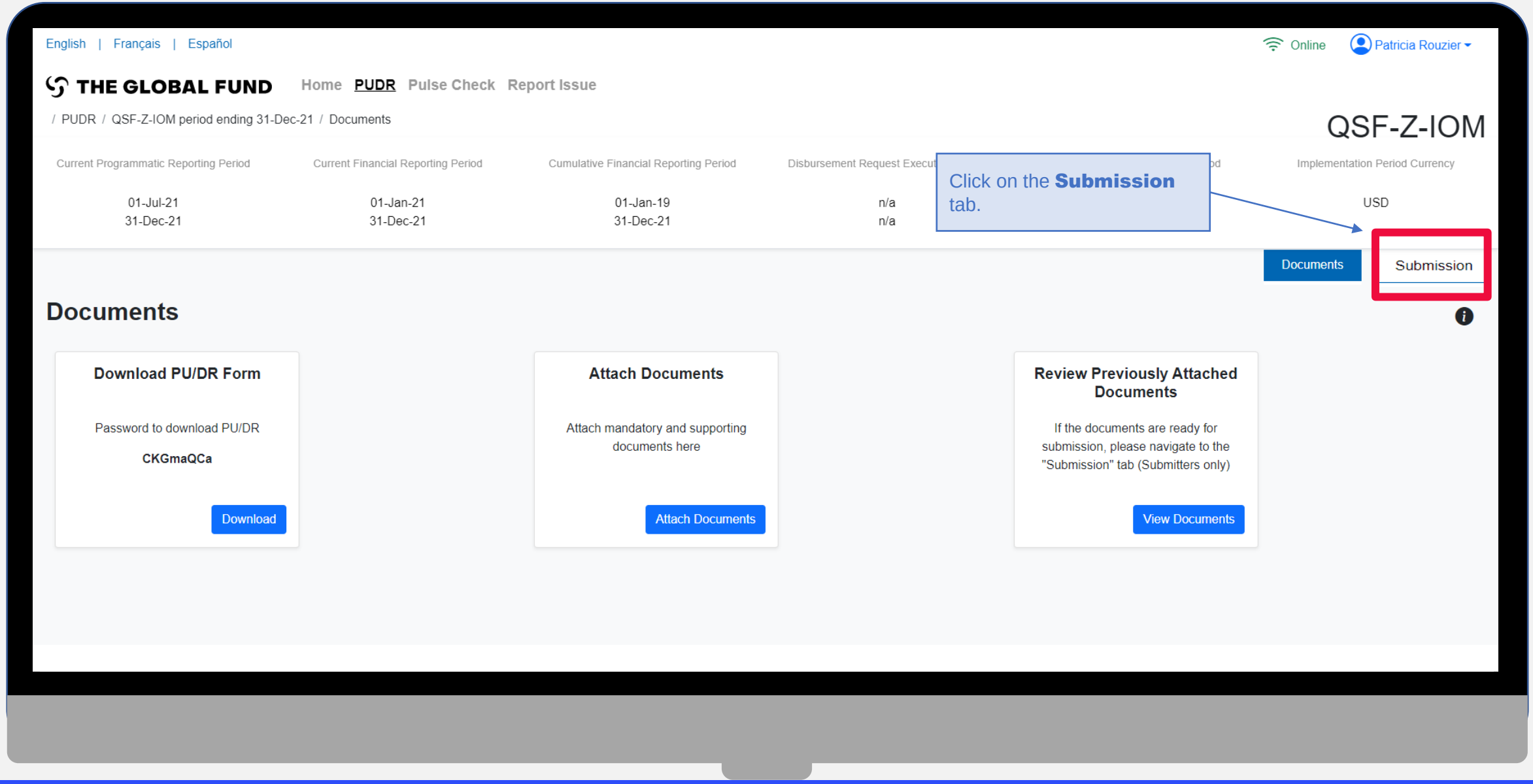
THE GLOBAL FUND

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8g |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page



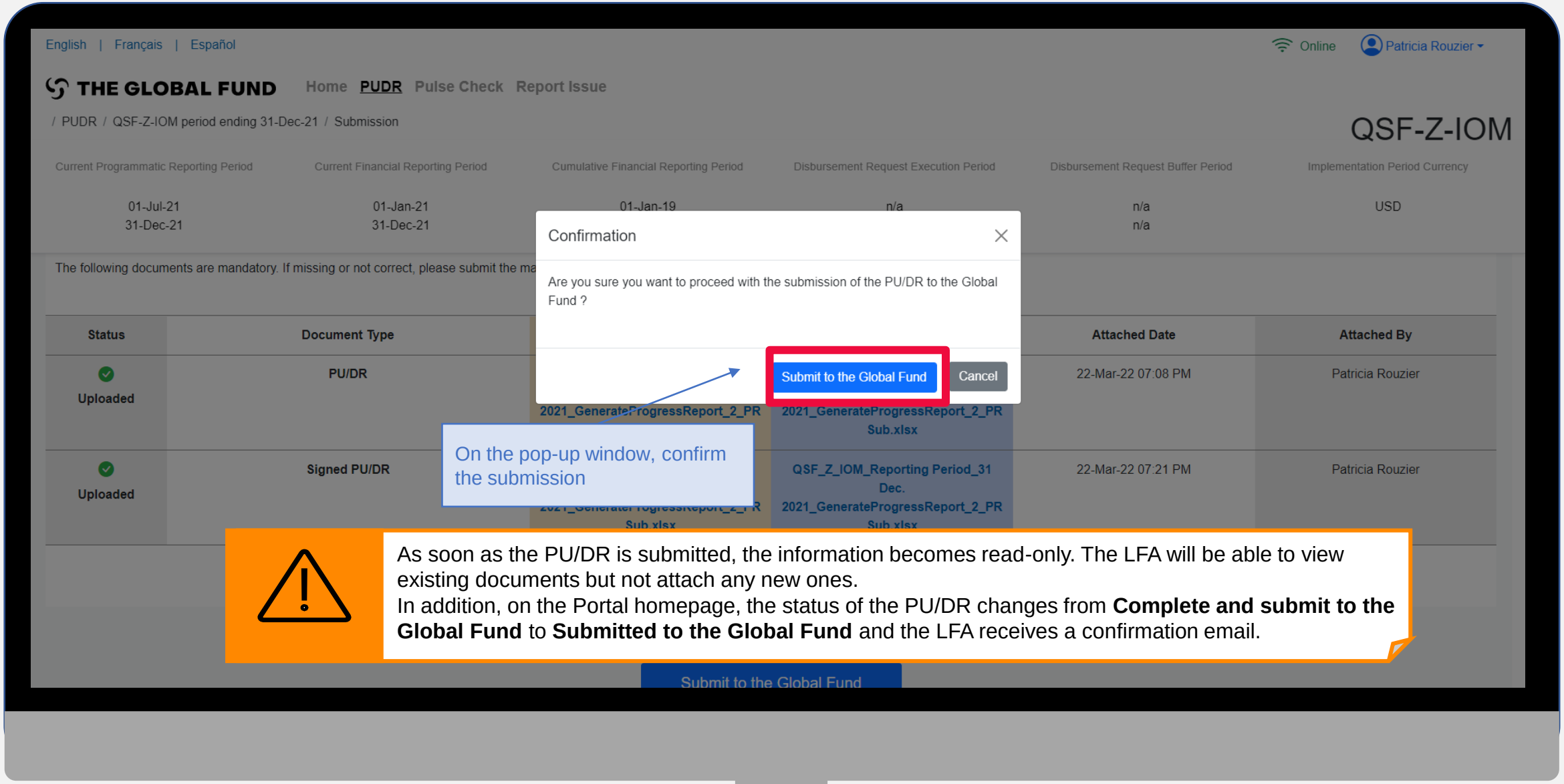
English | Français | Español
Online
Patricia Rouzier
THE GLOBAL FUND
Home
PUDR
Pulse Check
Report Issu
/ PUDR / QSF-Z-IOM period ending 31-Dec-21 / Submission
Current Programmatic Reporting Period
01-Jul-21
31-Dec-21
Current Financial Reporting Period
01-Jan-21
31-Dec-21
Only contacts with Submitter rights can press the button submit. This button will be disabled:
• For contacts with Editor rights.
• If the mandatory documents are not attached (PU/DR form and signed PU/DR form).
• If the PU/DR is already submitted.
For instructions on how to create or update a contact with Submitter rights, click here to access the Grant Entity Data interactive guide.
Check whether the documents are uploaded correctly and click Submit to the Global Fund.
The following documents are mandatory.
Status
Document Type
Document Name
LFA File
Attached Date
Attached By
Uploaded
PU/DR
QSF_Z_IOM_Reporting Period_31 Dec. 2021_GenerateProgressReport_2_PR Sub.xlsx
QSF_Z_IOM_Reporting Period_31 Dec. 2021_GenerateProgressReport_2_PR Sub.xlsx
22-Mar-22 07:08 PM
Patricia Rouzier
Uploaded
Signed PU/DR
QSF_Z_IOM_Reporting Period_31 Dec. 2021_GenerateProgressReport_2_PR Sub.xlsx
QSF_Z_IOM_Reporting Period_31 Dec. 2021_GenerateProgressReport_2_PR Sub.xlsx
22-Mar-22 07:21 PM
Patricia Rouzier
View all attached documents
If the documents are ready for submission, please click Submit to send the PU/DR to the Global Fund. You will no longer be able to edit the PU/DR after submission.
Submit to the Global Fund

PARTNER PORTAL LEARNING SERIES

How to download and submit PU/DRs from the Partner Portal

| Step 8i |
LFA attaches and submits the PU/DR in the Portal.

Go back to the process page

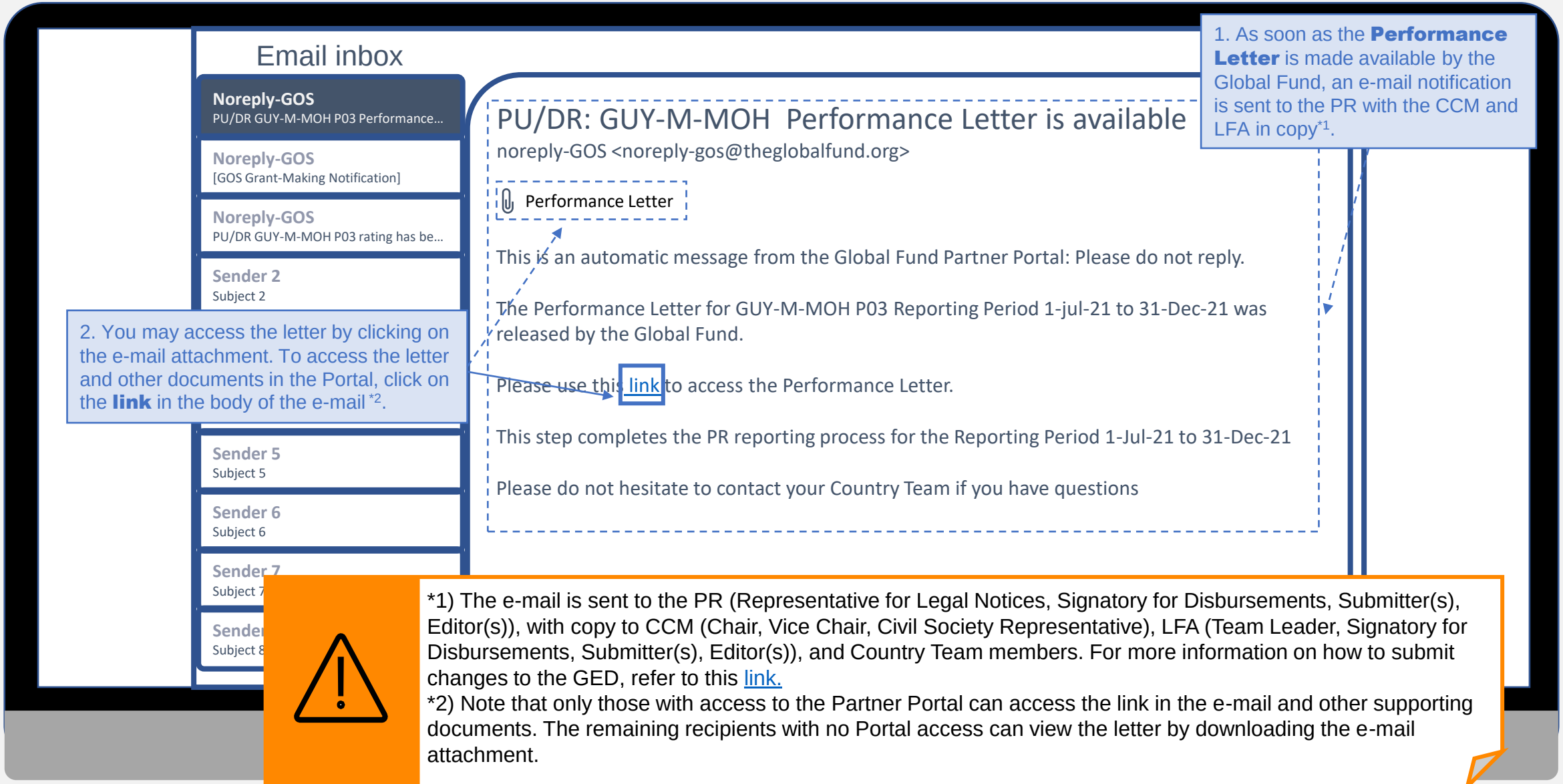


As soon as the PU/DR is submitted, the information becomes read-only. The LFA will be able to view existing documents but not attach any new ones.
In addition, on the Portal homepage, the status of the PU/DR changes from **Complete and submit to the Global Fund** to **Submitted to the Global Fund** and the LFA receives a confirmation email.

Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

This screen concludes **Step 8: LFA attaches and submits the PU/DR in the Portal.**

Click here to return to the process page.



*1) The e-mail is sent to the PR (Representative for Legal Notices, Signatory for Disbursements, Submitter(s), Editor(s)), with copy to CCM (Chair, Vice Chair, Civil Society Representative), LFA (Team Leader, Signatory for Disbursements, Submitter(s), Editor(s)), and Country Team members. For more information on how to submit changes to the GED, refer to this link.

*2) Note that only those with access to the Partner Portal can access the link in the e-mail and other supporting documents. The remaining recipients with no Portal access can view the letter by downloading the e-mail attachment.

THE GLOBAL FUND

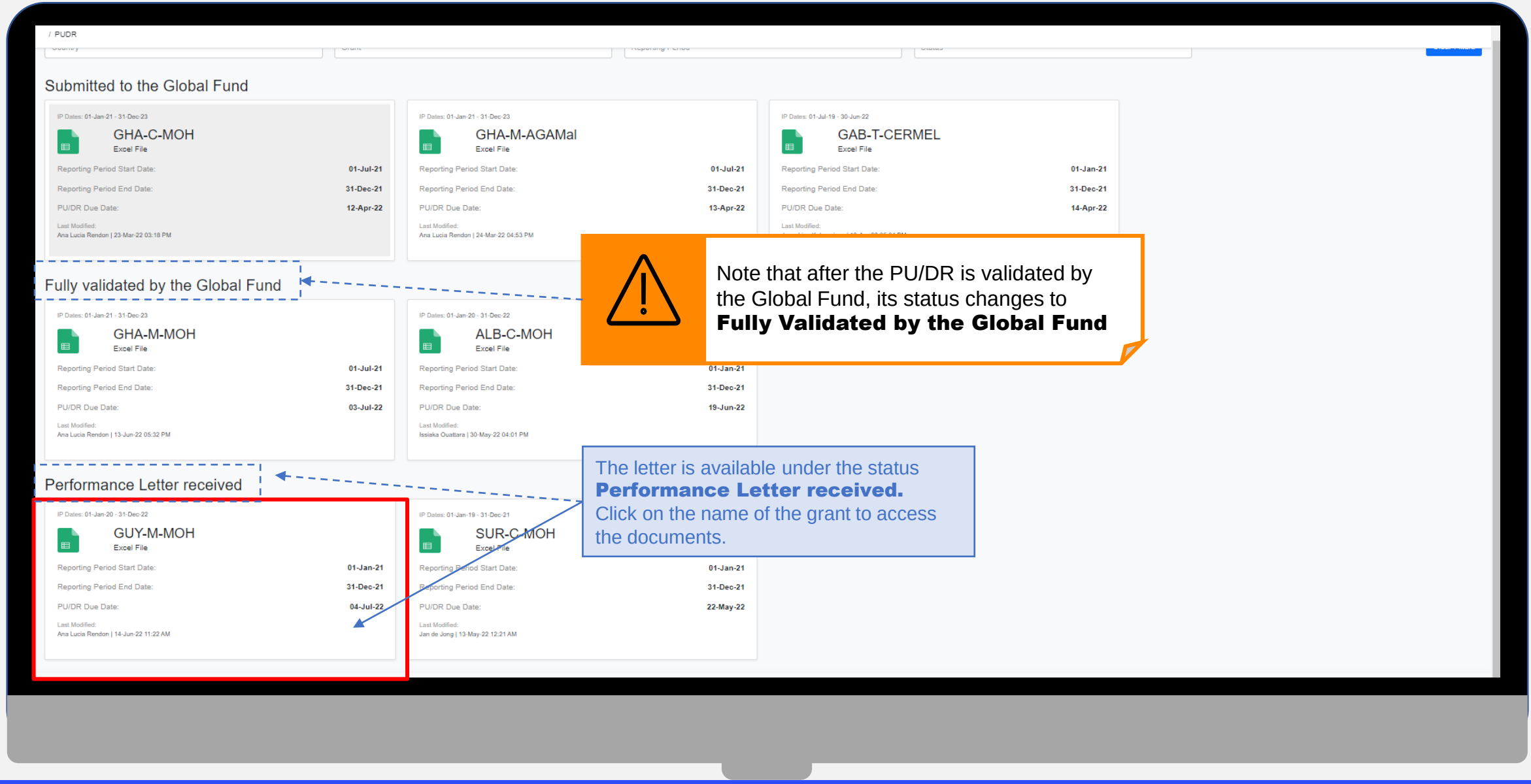
PARTNER PORTAL LEARNING SERIES

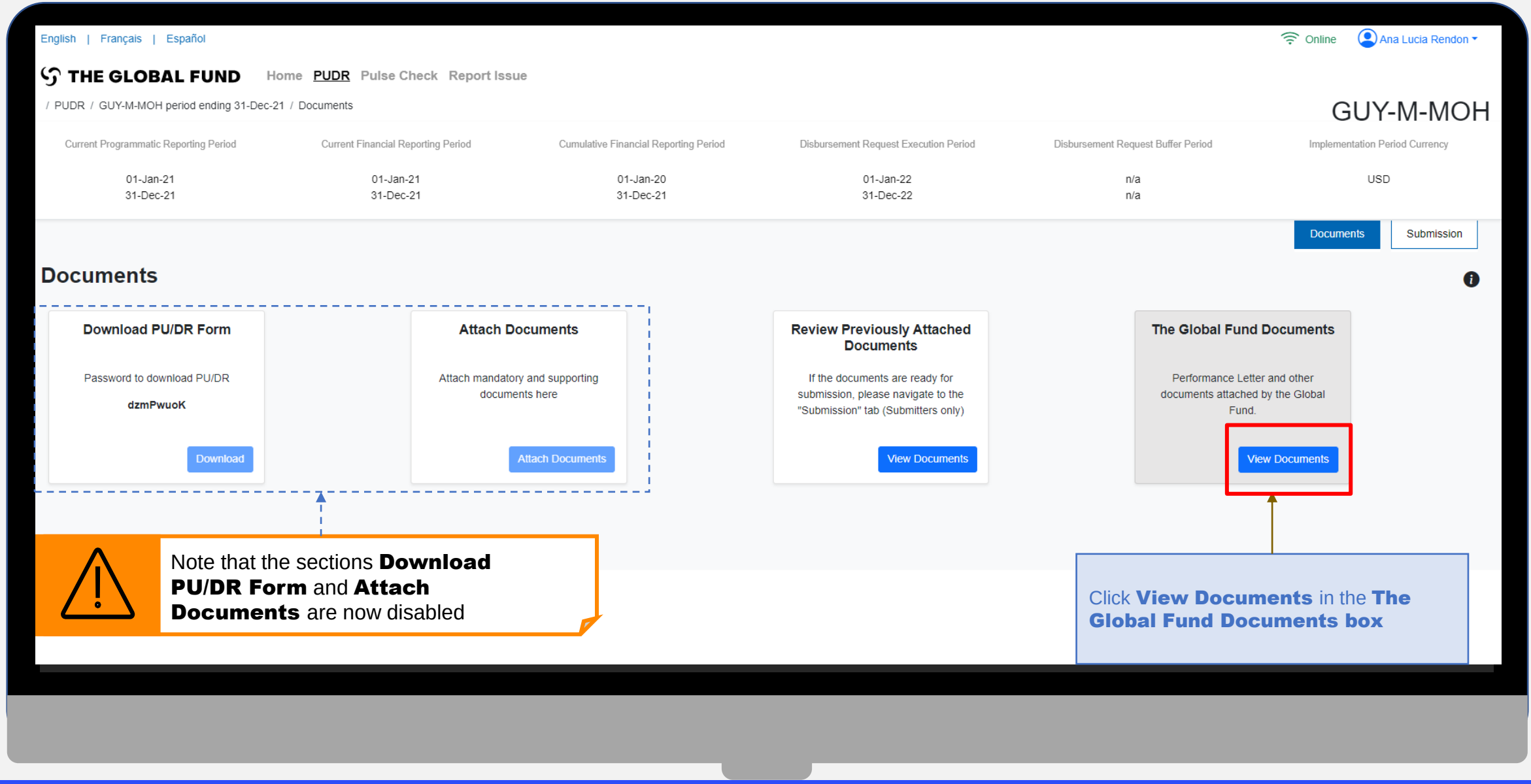
How to download and submit PU/DRs from the Partner Portal

| Step 11b |
LFA downloads the Performance Letter

Go back to the process page

Home Page
Principal Recipient (PR)
Local Fund Agent (LFA)

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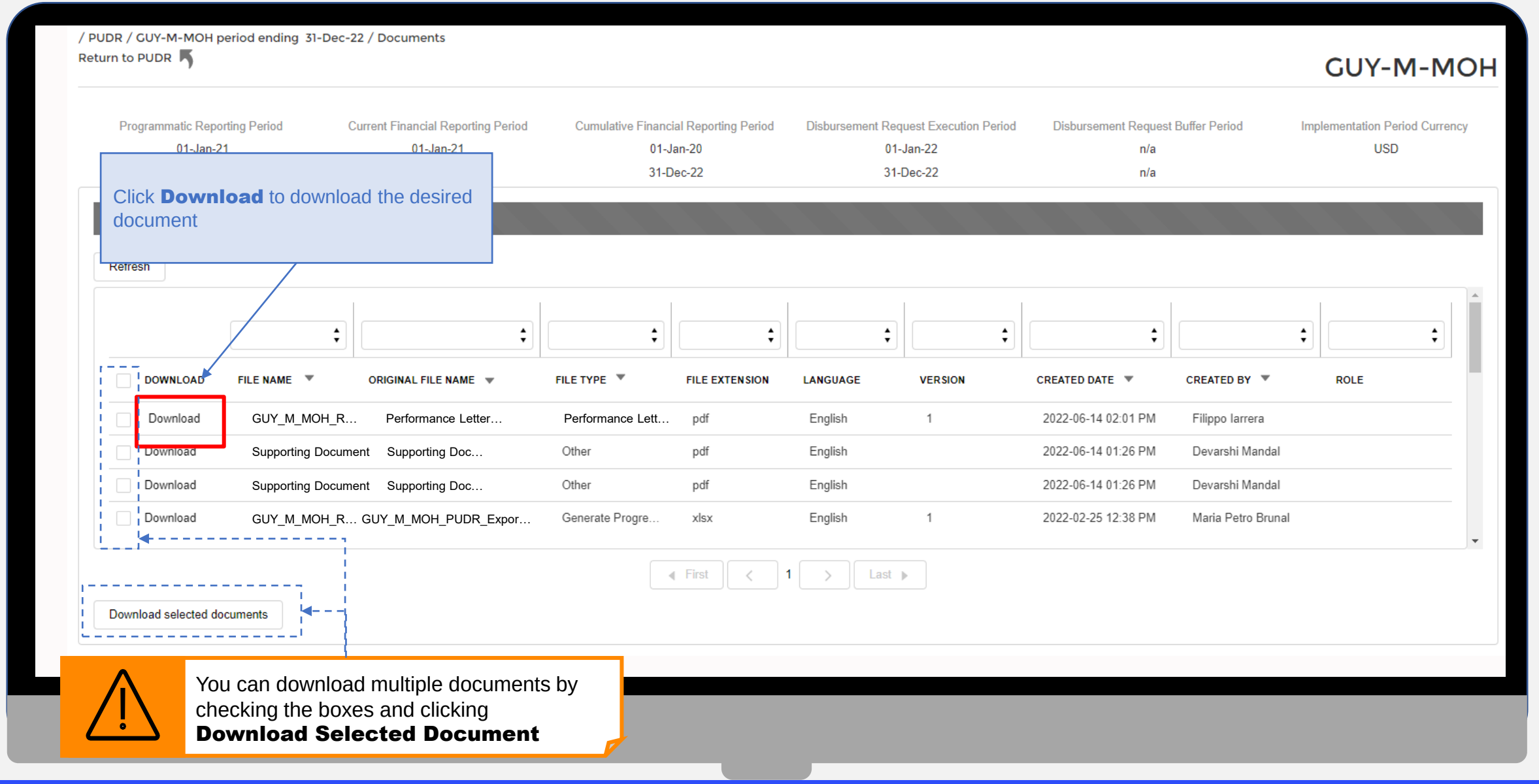
Online
Ana Lucia Rendon
THE GLOBAL FUND
Home
PUDR
Pulse Check
Report Issue
/ PUDR / GUY-M-MOH period ending 31-Dec-21 / Documents
GUY-M-MOH
Current Programmatic Reporting Period
Current Financial Reporting Period
Cumulative Financial Reporting Period
Disbursement Request Execution Period
Disbursement Request Buffer Period
Implementation Period Currency
01-Jan-21
31-Dec-21
01-Jan-21
31-Dec-21
01-Jan-20
31-Dec-21
01-Jan-22
31-Dec-22
n/a
n/a
USD
Documents
Submission
Documents
Download PU/DR Form
Password to download PU/DR
dzmPwuoK
Download
Attach Documents
Attach mandatory and supporting documents here
Attach Documents
Review Previously Attached Documents
If the documents are ready for submission, please navigate to the "Submission" tab (Submitters only)
View Documents
The Global Fund Documents
Performance Letter and other documents attached by the Global Fund.
View Documents
Note that the sections Download PU/DR Form and Attach Documents are now disabled
Click View Documents in the The Global Fund Documents box


/ PUDR / GUY-M-MOH period ending 31-Dec-22 / Documents
Return to PUDR
GUY-M-MOH
Programmatic Reporting Period
01-Jan-21
Current Financial Reporting Period
01-Jan-21
Cumulative Financial Reporting Period
01-Jan-20
31-Dec-22
Disbursement Request Execution Period
01-Jan-22
31-Dec-22
Disbursement Request Buffer Period
n/a
n/a
Implementation Period Currency
USD
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First
1
Last
Download selected documents
You can download multiple documents by checking the boxes and clicking **Download Selected Document**

This step completes the **PU/DR reporting process**. In case of questions on the Performance Letter and documents shared, please contact your Country Team.

Click here to return to the process page.