Who am I?
Select from the below

- **Global Fund**
- **External Stakeholders**

- **Principal Recipient (PR)**  ...  Go to page 2
- **Local Fund Agent (LFA)**  ...  Go to page 149
- **Country Coordinating Mechanism (CCM)**  ...  Go to page 108
- **Third Party**  ...  Go to page 231
Select the type of change request

Select from the below

**Organization information Change Requests**
- Create New Organization  ... page 3
- Update Organization Information  ... page 4

**Contact Information Change Requests**
- Create Contacts  ... page 56
- Update Contacts  ... page 76
- Deactivate Contacts  ... page 97

**Banking information Change Requests**
- Create banking information  ... page 15
- Update banking information  ... page 29
- Deactivate banking information  ... page 43
PR | Create New Organization

Follow the steps below

Step 1
PR emails Organization Information Form** & supporting documents¹ to Country Team.

Step 2
Global Fund creates new organization in Partner Portal.

Step 3
Designated PR contact with Access Rights receives login details to the Global Fund Partner Portal via email.

Step 4
PR Focal Point contact with Access Rights is able to submit change requests.

¹ See Operational Policy Manual (OPM) Annex 3 on required supporting documents

** Organization Information Form (EN | ES | FR). Please note! Spanish and French versions are courtesy translations only. Please complete and submit the English version of this template.
The steps assigned to you are highlighted in the red boxes.

**PR | Update Organization Information**

Follow the steps below:

**Step 1**
PR contact with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
PR contact with Access Rights submits change request to update organization information, including supporting documents.

**Step 3**
Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal.

---

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
1. **Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use**

   The Global Fund licenses, operates and makes available the Partner Portal (the "Portal"). The Portal may contain features including RSS feeds, e-mail alert services, cookies, document management features, data management features and other applications that may be available from time-to-time (collectively, the "Features"). Any person that accesses or uses the Portal or Features, or both (the "User" and together, the "Users") agrees to be bound by the terms and conditions of the Terms of Use of the Global Fund Partner Portal (the "Terms of Use"), as they may be amended from time-to-time (available at this link: http://www.theglobalfund.org/en/partner-portal/). These Terms of Use contain important conditions, disclaimers and other provisions, some of which limit the Global Fund's liability. If you do not agree to these Terms of Use or cannot enter into a legally binding agreement, you must not access or use the Portal or any of the Features.

2. **Should you agree, click OK to proceed**
Click on the icon at the top left of the page (App Launcher)
Step 2c

Click **Grant Entity Data**

Back to the overview of the steps for this request
On the main page, click **Organization Information**
### Step 2e

Select the organization that you want to update by clicking on it.

**Principal Recipient (PR)**

Update Organization Information
PR | Update Org Info Step 2f

Step 2f
Click Update Organization

Click Update Organization Information
1. Change the information that needs to be updated

2. Once all the changes are done, click **Next**
Attach the supporting documents and click Next.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Note! You can access details on the newly created request by clicking on the tabs and scrolling down the page.
Follow the steps below

Step 1
PR contact with Access Rights accesses the Global Fund Partner Portal.

Step 2
PR contact with Access Rights submits change request to create, update or deactivate banking information, including supporting documents.

Step 3
PR contact with Access Rights confirms additional information.

Step 4
The Global Fund Secretariat reviews and validates the changes.

The steps assigned to you are highlighted in the red boxes.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use

2. Should you agree, click OK to proceed
Click on the icon at the top left of the page (App Launcher)
Click Grant Entity Data
Step 2d

Back to the overview of the steps for this request

On the main page, click Organization Information
<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Organization Short Name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Malaria Program</td>
<td>NMPN</td>
<td>Nigeria</td>
</tr>
</tbody>
</table>

Select the organization you want to update by clicking on it.
Step 2f: Click on the blue arrow and then click **Create Banking Details**.
Step 2g

Click on the arrow to scroll down and see the remaining fields.

Create Banking Details

Section - Primary Bank Information

1. Fill in all the information fields.

Note! Fields with (*) are mandatory
Once you have added all the information, click **Next**.
Step 2i

Attach the supporting documents and click **Next**
Answer the security questions (if applicable) and click **Next**.
A security code of 6 digits will be sent to your email address. Copy and paste the code on the appropriate field and click **Next**.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Note! You can access details on the newly created request by clicking on the tabs and scrolling down the page.
Follow the steps below:

Step 1: PR contact with Access Rights accesses the Global Fund Partner Portal.

Step 2: PR contact with Access Rights submits a change request to update banking information, including supporting documents.

Step 3: PR contact with Access Rights confirms additional information.

Step 4: The Global Fund Secretariat reviews and validates the changes.

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

Your privacy is important to us. The Global Fund is committed to respecting the dignity and privacy of people, while balancing such rights with the Global Fund values of transparency and accountability and the ability of the Global Fund to carry out its mission. For further information on how the Global Fund collects and uses personal data, please read the Privacy Statements, including the supplemental statement for Global Fund Grant Funding and Management Activities, on our website. (https://www.theglobalfund.org/en/legal/privacy-statement/)

The Global Fund licenses, operates and makes available the Partner Portal (the "Portal"). The Portal may contain features including RSS feeds, e-mail alert services, cookies, document management features, data management features and other applications that may be available from time-to-time (collectively, the "Features"). Any person that accesses or uses the Portal or Features, or both (the "User" and together, the "Users") agrees to be bound by the terms and conditions of the Terms of Use of the Global Fund Partner Portal (the "Terms of Use"), as they may be amended from time-to-time (available at this link http://www.theglobalfund.org/en/partner-portal/). These Terms of Use contain important conditions, disclaimers and other provisions, some of which limit the Global Fund’s liability. If you do not agree to these Terms of Use or cannot enter into a legally binding agreement, you must not access or use the Portal or any of the Features.

2. Should you agree, click OK to proceed.
Click on the icon at the top left of the page (App Launcher).

Welcome!
Use App Launcher to choose what portal you want to open.
Click Grant Entity Data
On the main page, click on the **Organization Information** tab.
Select the organization that you want to update by clicking on it.
Click on the blue arrow and then click **Update Banking Details**.
Select the Bank account you want to update and click Next.
Once you have updated all the necessary information, click **Next**.
Step 2i

Upload Banking Details

Please attach Bank Letter using TGF Template (stamped and signed)

Upload Files Or drop files

The attached supporting documents will be visible in the Files tab of the change request upon submission.

Attach the supporting documents and click Next
Answer the security questions (if applicable) and click Next.
A security code of 6 digits will be sent to your email address. Copy and paste the code on the appropriate field and click **Next**.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

**Note!** You can access details on the newly created request by clicking on the tabs and scrolling down the page.
Step 1  PR contact with Access Rights accesses the Global Fund Partner Portal.

Step 2  PR contact with Access Rights submits change request to deactivate banking information, including supporting documents.

Step 3  PR contact with Access Rights confirms additional information.

Step 4  Updated GED reflected in Global Fund Partner Portal. The Global Fund Secretariat reviews and validates the changes.

The steps assigned to you are highlighted in the red boxes.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

2. Should you agree, click **OK** to proceed.
Click on the icon at the top left of the page (App Launcher).
Step 2c
Click Grant Entity Data

Deactivate banking information
Select the organization that you want to update by clicking on it.
Step 2e: Click on the blue arrow and then click **Deactivate Banking Details**.
Step 2f
Select the Bank account you want to deactivate and click Next
Attach the supporting documents and click **Next**
Back to the overview of the steps for this request

Step 2h

Principal Recipient (PR)
Deactivate banking information

Answer the security questions (if applicable) and click **Next**
Step 2i

A security code of 6 digits will be sent to your email address. Copy and paste the code on the appropriate field and click Next.
Step 2j

Read the warning message carefully before confirming the Banking deactivation and click **Next**.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Note! You can access details on the newly created request by clicking on the tabs and scrolling down the page.
Follow the steps below:

**Step 1**
PR contact with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
PR contact with Access Rights submits change request to create a contact, including supporting documents.

**Step 3**
Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal.

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

2. Should you agree, click **OK** to proceed.
Step 2b
Principal Recipient (PR)
Create Contacts

Click on the icon at the top left of the page (App Launcher)
Step 2c
Principal Recipient (PR)
Create Contacts

Click Grant Entity Data
On the main page, click **Organization Information**.
<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Organization Short Name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Malaria Program</td>
<td>NM-PRN</td>
<td>Nigeria</td>
</tr>
</tbody>
</table>

Select the organization you want to update by clicking on it.
Step 2f: PR | Create Contacts

Click Create Contact
Enter the contact details and click Next.

Note: Fields with (*) are mandatory.
Select the grant you wish to edit
1. List the official job title
2. Select the appropriate signatory, notice and access rights
3. If you selected Access to Grant Deliverables Portal, choose whether the new contact is an editor or submitter.

*Note! For more information on the Editor and Submitter roles, click [here](#).*

4. Once you have selected all the necessary information, click **Update/Save**
Create Contact

Guidance

Access to Grant Deliverables - *** By clicking this box, you will allow this contact to view or edit Grant Deliverables for this organization and its contacts via the Global Fund Partner Portal.

Access to GED Portal - By clicking this box, you will allow this contact to view and edit GED for this organization and its contacts via the Global Fund Partner Portal.

Signatory for Legally Binding Documents - The organization's signatory is the person(s) that is/are duly authorized to sign, or sign in acknowledgment in the case of CMs, legally binding documents that are valid and enforceable, as per signatory specimen.

Official Job Title - Indicate the individual's job title within the organization. This job title will be displayed on official documents if the contact is assigned signatory or notice rights for this grant/country.

*** Select the row in order to create a position for this contact.

<table>
<thead>
<tr>
<th>Grant Name</th>
<th>Official Job Title</th>
<th>Signatory for Legally-Binding Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>NGA-M-NGA-M</td>
<td>Country Representat...</td>
<td></td>
</tr>
</tbody>
</table>

Click Next
1. If the contact requires access to the Partner Portal, it is mandatory to enter a mobile number.

2. Click Next.
For Global PRs only, potential duplicate contacts are identified by the system. Use the Action icon to view the details of the contact and determine whether the contact being created is a duplicate of an existing one.

Click here to skip this step.
Following the Action icon click View. This will bring you to another window with detailed information about the potential duplicate contact.
1. Under Details and Positions and Access tabs, you can view all the information on the potential duplicate contact.

2. Click on the arrow to go back to the main page of the change request.
If the contact is not a duplicate, you can go further with the request by clicking Next.
1. Attach the supporting documents if needed

2. Click Next
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Click on the arrow to scroll down the screen and see the details of the change request raised.
The new rights are updated according to the color legend.

Note! You can click on the Details tab to see the contact information.
Follow the steps below:

**Step 1**
PR contact with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
PR contact with Access Rights submits change request to **update a contact**, including supporting documents¹.

**Step 3**
Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal.

¹ See Operational Policy Manual (OPM) Annex 3 on required supporting documents

The steps assigned to you are highlighted in the red boxes.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

2. Should you agree, click OK to proceed.
Click on the icon at the top left of the page (App Launcher)
Click Grant Entity Data
On the main page, click **Organization Information**
Select the organization you want to update by clicking on it.
Step 2f
Principal Recipient (PR)
Update Contacts

Click Update Contact
Select the contact you want to update and click **Next**.
Update Contacts

* Salutation: Mr.
First Name: George
* Last Name: Edwards
* Email Address: george.edwards@yopmail.com
Mobile Phone: +1323456000

Update the information and click Next.
Select the grant you wish to edit.
Step 2j
Principal Recipient (PR)
Update Contacts

1. Update the relevant information

2. If you selected Access to Grant Deliverables Portal, choose whether the new contact is an editor or submitter.

Note! For more information on the Editor and Submitter roles, click here

3. Once you have updated all the necessary information, click Update/Save
Click Next
Update Contact

As this contact requires access to the Partner Portal, a mobile number will be required to send a verification message for logging in.

1. If the contact requires access to the Partner Portal, it is mandatory to enter a mobile number.

2. Click Next
If requesting Submitter rights, attach the signed authorization letter and click Next.
For Global PRs only, potential duplicate contacts are identified by the system. Use the Action icon to view the details of the contact and determine whether the contact being created is a duplicate of an existing one.

Click here to skip this step.
Following the Action icon click View. This will bring you to another window with detailed information about the potential duplicate contact.
Step 2p

1. Under **Details** and **Positions and Access** tabs, you can view all the information on the potential duplicate contact.

2. Click on the arrow to go back to the main page of the change request.
If the contact is not a duplicate, you can go further with the request by clicking **Next**.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Click on the arrow to scroll down the screen and see the details of the change request raised.
The new rights are updated according to the color legend.

Note! There is no clarification needed from your end at the moment.

You can click on the Details tab to see the contact information.
Follow the steps below:

**Step 1**
PR contact with Access Rights accesses the [Global Fund Partner Portal](https://www.globalfund.org).

**Step 2**
PR contact with Access Rights submits change request to *deactivate contacts*.

**Step 3**
Global Fund reviews and validates the changes.

Updated GED reflected in [Global Fund Partner Portal](https://www.globalfund.org).
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

The Global Fund licenses, operates and makes available the Partner Portal (the "Portal"). The Portal may contain features including RSS feeds, e-mail alert services, cookies, document management features, data management features and other applications that may be available from time-to-time (collectively, the "Features"). Any person that accesses or uses the Portal or Features, or both (the "User" and together, the "Users") agrees to be bound by the terms and conditions of the Terms of Use of the Global Fund Partner Portal (the "Terms of Use"). As they may be amended from time-to-time (available at this link http://www.theglobalfund.org/en/partner-portal/). These Terms of Use contain important conditions, disclaimers and other provisions, some of which limit the Global Fund’s liability. If you do not agree to these Terms of Use or cannot enter into a legally binding agreement, you must not access or use the Portal or any of the Features.

2. Should you agree, click OK to proceed.
Click on the icon at the top left of the page (App Launcher)
Step 2c

Click **Grant Entity Data**
On the main page, click **Organization Information**.
Select the organization you want to update by clicking on it.

Step 2e
Principal Recipient (PR)
Deactivate Contacts
Click on the blue arrow and then click **Deactivate Contact**.
Select the contact you want to deactivate and click **Next**.
Read the warning message carefully before confirming the deactivation and click **Next**.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Note!
You can access details on the newly created request by clicking on the tabs and scrolling down the page.

Click here to go back to the overview page.
Select the type of change request

Select from the below

**Organization Information Change Requests**

- Create New Organization  ... page 109
- Update Organization Information  ... page 110

**Contact Information Change Requests**

- Create Contacts  ... page 118
- Update Contacts  ... page 131
- Deactivate Contacts  ... page 141
CCM | Create New Organization

Follow the steps below

Step 1
CCM emails Organization Information Form & supporting documents to Access to Funding.

Step 2
Global Fund creates new organization in Partner Portal.

Step 3
Designated CCM focal point with Access Rights receives login details to the Global Fund Partner Portal via email.

Step 4
CCM Focal Point contact with Access Rights is able to submit change requests.

Click here to get started

TheGlobalFund Partner Portal

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.

** Organization Information Form (EN | ES | FR). Please note! Spanish and French versions are courtesy translations only. Please complete and submit the English version of this template.
The steps assigned to you are highlighted in the red boxes.

**CCM | Update Organization Information**

Follow the steps below.

**Step 1**
CCM focal point with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
CCM focal point with Access Rights submits change request to update organization information, including supporting documents.\(^1\)

**Step 3**
Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal.

\(^1\) See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
On the Home page, click Organization Information
**Step 2b**

Click on the name of the organization you wish to update.

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Organization Short Name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinating Mechanism Nigeria</td>
<td>CM Nigeria</td>
<td>Nigeria</td>
</tr>
</tbody>
</table>
Step 2c

Back to the overview of the steps for this request

Click Update Organization

Update Organization Information
Step 2d
Change the information you wish to update and click **Next**

**Note!** Fields with (*) are mandatory
Back to the overview of the steps for this request

Step 2e

Attach supporting documents and click Next
Step 2f

The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Back to the overview of the steps for this request

Click here to go back to the overview page
The steps assigned to you are highlighted in the red boxes.

**CCM | Create Contacts**

Follow the steps below:

**Step 1**
CCM focal point with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
CCM focal point with Access Rights submits change request to create contacts, including supporting documents.

**Step 3**
Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal.

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
On the Home page, click Organization Information.
<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Organization Short Name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinating Mechanism Nigeria</td>
<td>CM Nigeria</td>
<td>Nigeria</td>
</tr>
</tbody>
</table>

Click on the name of the organization to which you wish to add a contact.
Step 2c

Country Coordinating Mechanism (CCM)

Create Contacts
Step 2d  
Country Coordinating Mechanism (CCM)  
Create Contacts

1. Fill in all the information

2. Click Next

Note! Fields with (*) are mandatory

Note! You can hover over the Info Icon to display more information on how to fill in the fields

Note! Every time you raise a change request to Create, Update or Deactivate CM Contacts, the system will create an umbrella Parent Change Request which includes all the individual change request the user is raising at the same time. When you click on the link, you will see the list of the individual change requests and their status
1. Select the role and the sector represented

2. Click Next
Step 2f

CCM | Create Contacts

1. Fill in the remaining information

Note that fields with (*) are mandatory

**Note!**
You can hover over the Info Icon to display more information on how to fill in the fields

Click on the arrow to scroll down the screen to see the remaining fields
1. Check the corresponding boxes if the contact is one of the following:
   - Signatory for Legally-Binding Documents
   - Member of the Oversight Committee
   - Member of the Executive Committee

Note! Should you not want to share the details publicly, check this box

2. Click Next to proceed
Add the applicable supporting documents and click Next.
Check this box if you want to create more contacts. To proceed, click **Next**.
The request is submitted! Click on the link for more details.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

**Note!**
The **Guidance for Success** highlights the major elements you need to pay attention to when raising a change request.

Click on the arrow to scroll down the screen and see the details of the change request raised.
The new rights are updated according to the color legend. 

**Guidance**

Color coding explanation:
- Green - Access was added
- Red - Access was removed
- Yellow - Details were changed (old value is crossed out)

Access to GED Portal - By clicking this box, you will allow this contact to view and edit GED for this organization and its contacts via the Global Fund Partner Portal.

**Signatory for Legally-Binding Documents** - The organization's signatory(ies) for Legally-Binding Documents is the person(s) that is/are duly authorized to sign, or sign in acknowledgment in case of CMs, legibly-binding documents that are valid and enforceable, as per signatory specimen.

**CM Secretariat Staff role** - Position (headcount) within the CM Secretariat. Attach the related Terms of Reference and Contract.

**Entry Date into CCM** - Indicate the election date as CM member. In case of consecutive mandates, please indicate the date of the first election.

- **Non-member role** - Specify the Coordinating Mechanism Committee this contact supports.
- **Recipient Status** - Indicate if the person represents an organization managing Global Fund grants. The option “Non-recipient” can be chosen only if the contact does not represent an organization managing Global Fund grants (PR/08/01).
- **Role** - Specify the role played in the CM.
- **Sector represented** - Country-level stakeholder groups involved in the fight against HIV, TB and malaria represented.

**Official Job Title** - Indicate the individual’s job title within the organization. This job title will be displayed on official documents if the contact is assigned signatory or notice rights for this grant/country.

<table>
<thead>
<tr>
<th>Organization Role</th>
<th>Role</th>
<th>Non-member role</th>
<th>CM Secretariat Staff role</th>
<th>Entry Date into the Coordinating Mechanism (CM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair</td>
<td></td>
<td></td>
<td></td>
<td>2023-05-04</td>
</tr>
</tbody>
</table>

**Note!**
You can click on the Details tab to see the contact information.
Step 1
CCM focal point with Access Rights accesses the Global Fund Partner Portal.

Step 2
CCM focal point with Access Rights submits change request to update contacts, including supporting documents.

Step 3
Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal.

Select Another External Stakeholder
Select Another CCM Change Request
On the Home page, click **Organization Information**
Click on the name of the organization whose contact you wish to update.
Click **Update Contact**
Select the contact you wish to update and click Next.

**Note!**
Every time you raise a change request to Create, Update or Deactivate CM Contacts, the system will create an umbrella Parent Change Request which includes all the individual change request the user is raising at the same time. When you click on the link, you will see the list of the individual change requests and their status.
Step 2e

Country Coordinating Mechanism (CCM) Update Contacts

Note!
Fields with (*) are mandatory

Make the updates in the corresponding fields and click **Next**
Step 2f: CCM

Update Contacts

Make the updates in the corresponding fields and click **Next**

**Note!** Depending on the CM selection or role of the contact on the CM, some fields (grayed) can't be modified.
**Step 2g**

**Country Coordinating Mechanism (CCM)**

**Update Contacts**

- **Note!** Fields with (*) are mandatory.

Make the updates in the corresponding fields and click **Next**.
The request is submitted! Click on the link for more details.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Note!
The Guidance for Success highlights the major elements you need to pay attention to when raising a change request.
The steps assigned to you are highlighted in the red boxes.

**Step 1**
CCM focal point with Access Rights accesses the [Global Fund Partner Portal](#).

**Step 2**
CCM focal point with Access Rights submits change request to **deactivate contacts**.

**Step 3**
Global Fund reviews and validates the changes.

Follow the steps below

- Select Another External Stakeholder
- Select Another CCM Change Request

Updated GED reflected in [Global Fund Partner Portal](#).
Step 2a

Country Coordinating Mechanism (CCM)

Deactivate Contacts

On the Home page, click **Organization Information**
### Step 2b: Deactivate Contacts

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Country</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinating Mechanism Nigeria</td>
<td>Nigeria</td>
<td>Coordinating Mechanism</td>
</tr>
</tbody>
</table>

**Instructions:**

- Click on the name of the organization from which you wish to deactivate a contact.
Step 2c: CCN

Click on the blue arrow and then click **Deactivate Contact**.
Step 2d

Country Coordinating Mechanism (CCM) - Deactivate Contacts

Select the contact(s) you want to deactivate and click **Next**

**Note!**
Multiple contacts can be deactivated within the same change request. When a contact is deactivated, the information does not appear under the CM. However, if the person returns to the CCM in the future, the system can recall the related information.
Read the warning message carefully before confirming the deactivation and click **Next**.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Note! The Guidance for Success highlights the major elements you need to pay attention to when raising a change request.
Select the type of change request

Select from the below

**Organization information Change Requests**

- Create New Organization  ... page 150
- Update Organization Information  ... page 151

**Contact Information Change Requests**

- Create Contacts  ... page 164
- Update Contacts  ... page 184
- Deactivate
  - Deactivate Contact  ... page 203
  - Deactivate Position  ... page 215
**LFA | Create New Organization**

Follow the steps below

**Step 1**
LFA emails Organization Information Form** & supporting documents to LFA Coordination Team.

**Step 2**
Global Fund creates new organization in Partner Portal.

**Step 3**
Once the Organization is created, the designated LFA contact with Access Rights receives login details to the Global Fund Partner Portal via email.

**Step 4**
LFA Focal Point contact with Access Rights is able to submit change requests.

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1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents

** Organization Information Form (EN | ES | FR). Please note! Spanish and French versions are courtesy translations only. Please complete and submit the English version of this template.
Follow the steps below

**Step 1**
LFA contact with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
LFA contact with Access Rights submits change request to update organization information, including supporting documents.1

**Step 3**
Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal

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1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
Enter your login details and click **Log in** to proceed.
Step 2b

1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of Use.

2. Should you agree, click OK to proceed.
Click on the icon at the top left of the page (App Launcher)
Step 2d

Click Grant Entity Data
On the main page, click **Organization Information**
Select the organization you want to update by clicking on it.

**Tip!** By clicking on the arrow, you can navigate different list views. **My Organizations** shows you all the organizations you have access to view.
**Local Fund Agent (LFA)**

**Update Organization Information**

Back to the overview of the steps for this request

---

**Step 2g**

Click **Update Organization**
1. Edit the information that needs to be updated

2. Scroll down to see all information and modify as applicable
Once all the changes are done, click **Next**
Attach the supporting documents and click Next.
The request is submitted. You can see more details by clicking on the blue link.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Note! You can access details on the newly created request by clicking on the tabs and scrolling down the page.
The steps assigned to you are highlighted in the red boxes.

Follow the steps below:

**Step 1**
LFA contact with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
LFA contact with Access Rights submits change request to create contacts, including supporting documents. See Operational Policy Manual (OPM) Annex 3 on required supporting documents.

**Step 3**
Global Fund reviews and validates/rejects the changes.

Updated GED reflected in Global Fund Partner Portal.
Enter your login details and click **Log in** to proceed.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

2. Should you agree, click OK to proceed.
Step 2c
Click on the icon at the top left of the page (App Launcher)
Click Grant Entity Data
On the main page, click **Organization Information**.
Local Fund Agent (LFA)  
Create Contacts

Back to the overview of the steps for this request

Step 2f

Select the organization you want to update by clicking on it

Tip! By clicking on the arrow, you can navigate different list views. My Organizations shows you all the organizations you have access to view.

Tip! You can also find your organization by typing its name on the search box and clicking Search.
Step 2g: Click **Create Contact**
Local Fund Agent (LFA)
Create Contacts

**Step 2h**
Enter the contact details and click **Next**

*Note! Fields with (*) are mandatory*
Step 2i: Read the Guidance information carefully before scrolling down.
1. Complete the **Guidance** fields by entering information or selecting from the drop-down menu, as relevant:
   a. Organization Role/Account Role
   b. LFA Role
   c. Proposed daily rate
   d. Location
   e. Dates Active

**Note!**
Fields with (*) are mandatory

2. Scroll down to view and complete remaining fields

**Note!**
Please ensure the **Proposed Rate** and **Dates Active** fields are completed for new and existing Experts.
1. Complete the fields by entering information or selecting from the drop-down menu, as relevant (continued):
   f. Official Job Title

2. Select the appropriate signatory, notice and access rights

3. If you selected **Access to Grant Deliverables Portal**, select whether the new contact is an editor or submitter.

**Note!**
*For more information on the Editor and Submitter roles, click [here](#)*

4. Once you have added all the information, click **Update/Save**
1. Depending on the rights selected, you may need to enter a mobile phone number.

2. Once you have added the information, click **Next**.
1. Check the box to add another portfolio*¹ and repeat previous steps

*¹ Should there be another portfolio covered by the same organization

2. Click **Next** to proceed
1. Attach the required supporting documents
2. Attach the Submitter Authorization Letter Template
3. Attach Signatory Template as relevant
4. Attach additional supporting documents as needed
5. Scroll down to refer to templates and additional tools and guidance via the links provided
1. Refer to templates and additional tools and guidance via the links provided

2. Once you have added all the information, click **Next** to submit the request
The request is submitted. You can see more details by clicking on the blue link.
Click on the change request number to view.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details
5. Scroll for more details
Note!
You can access details of the newly created request by clicking on the tabs and scrolling down the page.
The steps assigned to you are highlighted in the red boxes.

**Step 1**
LFA contact with Access Rights accesses the Global Fund Partner Portal.

**Step 2**
LFA contact with Access Rights submits change request to update contacts, including supporting documents.

**Step 3**
Global Fund reviews and validates/rejects the changes.

Updated GED reflected in Global Fund Partner Portal.

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
Enter your login details and click **Log in** to proceed.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

2. Should you agree, click OK to proceed.
Click on the icon at the top left of the page (App Launcher)
Step 2d

Local Fund Agent (LFA)
Update Contacts

Click Grant Entity Data
On the main page, click **Organization Information**
Select the organization you want to update by clicking on it.

Tip! By clicking on the arrow, you can navigate different list views. My Organizations shows you all the organizations you have access to view.

Tip! You can also find your organization by typing its name on the search box and clicking Search.
Step 2g

Local Fund Agent (LFA) Update Contacts

Click Update Contact
Select the contact you wish to update and click **Next**.
1. Update the necessary information on the contact as needed.

2. Provide a rationale for the request in the comments box.

3. Click Next.
1. To update an existing role, select the relevant position. A new dialogue box will appear.

2. To add a new position, click **Add new**. A new dialogue box will appear.

**Note!** You can both update an existing position and add a new position for a contact as relevant.
1. Complete the following fields* by entering information or selecting from the drop-down menu, as relevant:
   a. Organization Role/Account Role
   b. LFA Role
   c. Proposed daily rate
   d. Location
   e. Dates Active
   f. Official Job Title

   (*) If updating an existing position, some of these fields will not be editable

2. Scroll down to display all the possible access and rights menu

Note! Please ensure the Proposed Rate and Dates Active fields are completed for new and existing Experts
1. Select the appropriate Signatory, Notice and Access rights as relevant:
   If you selected Access to Grant Deliverables Portal, choose whether the new contact is an editor or submitter.

Note! For more information on the Editor and Submitter roles, click here

2. Once you have added all the information, click Update/Save
Once all new positions are added and/or existing positions are modified as relevant, click **Next**.
1. Attach the required supporting documents
2. Attach the Submitter Authorization Letter Template
3. Attach Signatory Template as relevant
4. Attach additional supporting documents as needed
5. Click **Next** to proceed to the next slide
The request is submitted. You can see more details by clicking on the blue link.
Click on the change request number to view.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details
5. Scroll for more details
Step 1
LFA contact with Access Rights accesses the Global Fund Partner Portal.

Step 2
LFA contact with Access Rights submits change request to deactivate contacts.

Step 3
Global Fund reviews and validates the changes.

Note!
Deactivating a contact will permanently deactivate a contact and all associated positions. To deactivate a single position, please follow the Deactivate Position process.

Updated GED reflected in Global Fund Partner Portal.
Enter your login details and click Log in to proceed.
1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

2. Should you agree, click OK to proceed.
Step 2c
Click on the icon at the top left of the page (App Launcher)
Step 2d
Click Grant Entity Data
On the main page, click **Organization Information**
Step 2f

Select the organization that you want to update by clicking on it.

Tip!
By clicking on the arrow, you can navigate different list views.

**My Organizations** shows you all the organizations you have access to view.

Tip!
You can also find your organization by typing its name on the search box and clicking **Search**.
Click the arrow and select **Deactivate Contact**
Step 2h

Select the contact you wish to deactivate. Then, click **Next**
Back to the overview of the steps for this request

Step 2i
Click Next to submit the request
The request is submitted. You can see more details by clicking on the blue link.

Your request was successfully submitted.

Click to open it.

Finish
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details

Click here to go back to the overview page

Back to the overview of the steps for this request
Follow the steps below

**Step 1**
LFA contact with Access Rights accesses the [Global Fund Partner Portal](#).

**Step 2**
LFA contact with Access Rights submits change request to *deactivate Position*. Click to see detailed steps in the system.

**Step 3**
Global Fund reviews and validates the changes. Updated GED reflected in [Global Fund Partner Portal](#).
Enter your login details and click **Log in** to proceed.
Step 2b

Local Fund Agent (LFA)
Deactivate Position

1. Read the information displayed carefully regarding the Global Fund Privacy Statement and the Partner Portal Terms of use.

2. Should you agree, click OK to proceed.

Welcome!

The Global Fund licenses, operates and makes available the Partner Portal (the "Portal"). The Portal may contain features, including RSS feeds, e-mail alert services, cookies, document management features, data management features and other applications that may be available from time-to-time (collectively, the "Features"). Any person that accesses or uses the Portal or Features, or both (the "User" and together, the "Users") agrees to be bound by the terms and conditions of the Terms of Use of the Global Fund Partner Portal (the "Terms of Use"), as they may be amended from time-to-time (available at this link http://www.theglobalfund.org/en/partner-portal/). These Terms of Use contain important conditions, disclaimers and other provisions, some of which limit the Global Fund’s liability. If you do not agree to these Terms of Use or cannot enter into a legally binding agreement, you must not access or use the Portal or any of the Features.
Click on the icon at the top left of the page (App Launcher)
Step 2d
Click Grant Entity Data
Back to the overview of the steps for this request
On the main page, click **Organization Information**
Step 2f

Select the organization that you want to update by clicking on it.

Tip!
By clicking on the arrow, you can navigate different list views.

My Organizations shows you all the organizations you have access to view.

Tip!
You can also find your organization by typing its name on the search box and clicking Search.
Local Fund Agent (LFA)
Deactivate Position

Step 2g
Click Update Contact

Back to the overview of the steps for this request
Select the contact you wish to deactivate and click **Next**
Provide mandatory comments and click Next.
1. Select the position you wish to deactivate. A new window appears.

2. Uncheck the **Active?** box and click **Update/Save**.
Other updates can also be done for this contact. Repeat the procedure by selecting the relevant position and updating the information in the pop-up window as applicable.

Once this is completed, click **Next** to submit the request.
The request is submitted. You can see more details by clicking on the blue link.
Click on the change request number to view.
You can now see the details of your successfully submitted change request:

1. Change request type
2. Change request status
3. Chevron status bar indicating the current status of the change request and an overview of the process
4. The change request details
5. Scroll to view more details
Local Fund Agent (LFA)

Deactivate Position

Step 2p

Click here to go back to the overview page

The deactivated field is highlighted

Back to the overview of the steps for this request
Select the type of change request

Select from the below

**Organization information Change Requests**
- Create New Organization
  - ... page 232
- Update Organization Information
  - ... page 233
- Link Existing Third Party with PR
  - ... page 234

**Banking Information Change Requests**
- Create/Update Banking Information
  - ... page 235

Select Another External Stakeholder
Step

Grant Entity Data (GED) Interactive Manual

Step 1

Third Party emails required information to Country Team, including supporting documents¹.

Step 2

Global Fund reviews and creates new organization in Global Fund systems.

Updated GED reflected in Global Fund Partner Portal

¹ See Operational Policy Manual (OPM) Annex 3 on required supporting documents
Step 1: Third Party emails required information to Country Team, including supporting documents.

Step 2: Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal.
Third Party emails required information to Country Team, including supporting documents. 

Global Fund reviews and creates the link between Third Party and PR in Global Fund systems.

Updated GED reflected in Global Fund Partner Portal

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents
Grant Entity Data (GED) Interactive Manual

Third Party | Banking Information: Create / Update

Follow the steps below

Step 1
Third Party emails required information to Country Team, including supporting documents.  

Step 2
Global Fund reviews and sends EcoSign MFA Letter to Third Party to ensure authenticity of request.

Step 3
Third Party completes and returns EcoSign MFA Letter to Country Team / Financial Services Team.

Step 4
Global Fund reviews and creates Third Party banking information in Global Fund systems.

Updated GED reflected in Global Fund Partner Portal.

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.