Who am I?
Select from the below

Global Fund
External Stakeholders

Principal Recipient (PR)
Local Fund Agent (LFA)
Country Coordinating Mechanism (CCM)
Third Party
Select the type of change request

**Organization information Change Requests**
- Create New Organization
- Update Organization Information

**Contact Information Change Requests**
- Create Contacts
- Update Contacts
- Deactivate Contacts

**Banking information Change Requests**
- Create banking information
- Update banking information
- Deactivate banking information
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.

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

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**

Update Organization Information
On the main page, click **Organization Information**.
Select the organization that you want to update by clicking on it.
Click Update Organization
1. Change the information that needs to be updated

2. Once all the changes are done, click **Next**
Back to the overview of the steps for this request

**PR | Update Org Info Step 2h**

**Step 2h:**
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.

**PR | Create Banking 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 *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.

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.
Click on the icon at the top left of the page (App Launcher)
Step 2c

Click Grant Entity Data

Create banking information
Step 2d

On the main page, click **Organization Information**

Create banking information
Step 2e
Select the organization you want to update by clicking on it.

Principal Recipient (PR)
Create banking information
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.

1. Fill in all the information fields.

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

**Note!**
It is mandatory to add either the BIC (SWIFT) or ABA Code.
Step 2i: Attach the supporting documents and click Next.
Step 2j
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 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.

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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).
Step 2c

PR | Update Banking Info

Click Grant Entity Data

Principal Recipient (PR)
Update banking information
<table>
<thead>
<tr>
<th>Step 2d</th>
<th>Principal Recipient (PR)</th>
<th>Update banking information</th>
</tr>
</thead>
</table>

On the main page, click on the **Organization Information** tab.
Select the organization that you want to update by clicking on it.
Step 2f
Principal Recipient (PR)
Update banking information

Click on the blue arrow and then click **Update Banking Details**
Select the Bank account you want to update and click Next.
Step 2h | Update Banking Info

Once you have updated all the necessary information, click Next.
Attach the supporting documents and click **Next**.
Step 2j
PR | Update Banking Info

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.
The steps assigned to you are highlighted in the red boxes

PR | Deactivate Banking Information

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: 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.

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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
Step 2d
Select the organization that you want to update by clicking on it.

Principal Recipient (PR)
Deactivate banking information
Click on the blue arrow and then click **Deactivate Banking Details**.
Step 2f

Select the Bank account you want to deactivate and click Next.
Step 2g

Attach the supporting documents and click **Next**
Step 2h
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.
Step 2j

Read the warning message carefully before confirming the Banking deactivation and click **Next**.
Step 2k

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.

Back to the overview of the steps for this request
Click here to go back to the overview 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.¹

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

¹ See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
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2. Should you agree, click OK to proceed.
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**
Step 2e
Principal Recipient (PR)
Create Contacts

Select the organization you want to update by clicking on it.
Click Create Contact
Enter the contact details and click Next.
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 andSubmitter 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 signatories are individuals or entities that are duly authorized to sign or sign in acknowledgment in 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.***

- **Grant Name**
- **Official Job Title**
- **Signatory for Legally-Binding Documents**

- NGA-M - NGA - M

Country Representative

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 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.

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2. Should you agree, click OK to proceed.
Click on the icon at the top left of the page (App Launcher)
Back to the overview of the steps for this request

Step 2c
Principal Recipient (PR)
Update Contacts

Click **Grant Entity Data**
On the main page, click **Organization Information**
Select the organization you want to update by clicking on it.
Step 2f
PR | Update Contacts

Click Update Contact
Select the contact you want to update and click Next.
Update the information and click **Next**
Select the grant you wish to edit
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
Update Contact

Guidance

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.

Signature for Legally Binding Documents - The organization's signatory(ies) for Legally Binding Documents is the person(s) that (are) duly authorized to sign, or sign in acknowledgment in 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.


Click Next
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.
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! You can click on the Details tab to see the contact information.
The steps assigned to you are highlighted in the red boxes.

Follow the steps below:

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

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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**.
Step 2e: PR | Deactivate Contacts

Select the organization you want to update by clicking on it.
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.
Step 2i

 Principal Recipient (PR)
 Deactivate Contacts

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.
Select the type of change request

Select from the below

**Organization information Change Requests**
- Create New Organization
- Update Organization Information

**Contact Information Change Requests**
- Create Contacts
- Update Contacts
- Deactivate Contacts
Grant Entity Data (GED) Interactive Manual

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

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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.
Grant Entity Data (GED) Interactive Manual

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.

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

Select Another External Stakeholder
Select Another CCM Change Request

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents
On the Home page, click Organization Information.
Step 2b
Country Coordinating Mechanism (CCM)
Update Organization Information

Click on the name of the organization you wish to update.
Step 2c

Click Update Organization
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
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.

Select Another External Stakeholder
Select Another CCM Change Request

Click to see detailed steps in the system.

1 See Operational Policy Manual (OPM) Annex 3 on required supporting documents.
Step 2a
Country Coordinating Mechanism (CCM)
Create Contacts

On the Home page, click Organization Information
Click on the name of the organization to which you wish to add a contact.
Step 2c
Country Coordinating Mechanism (CCM) Create Contacts

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

1. Fill in all the information

Note! Fields with (*) are mandatory

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 requests 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.

2. Click Next

Note! You can hover over the Info Icon to display more information on how to fill in the fields.
Step 2e
Country Coordinating Mechanism (CCM)
Create Contacts

1. Select the role and the sector represented

2. Click Next
1. Fill in the remaining information
   
   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

   Note that fields with (*) are mandatory
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

2. Click Next to proceed.

Note! Should you not want to share the details publicly, check this box.
Add the applicable supporting documents and click Next.
Check this box if you want to create more contacts. To proceed, click Next.
Create Contacts

Your request was successfully submitted. Click the link to open it.

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.

Note:
You can click on the Details tab to see the contact information.
Grant Entity Data (GED) Interactive Manual

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.

The steps assigned to you are highlighted in the red boxes.

Follow the steps below:

Step 2a
Country Coordinating Mechanism (CCM)
Update Contacts

On the Home page, click Organization Information
Step 2b

Country Coordinating Mechanism (CCM)

Update Contacts

Click on the name of the organization whose contact you wish to update.
Click **Update Contact**
Step 2d

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

CCM

Update Contacts

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

**Note!**
Fields with (*) are mandatory
Step 2f: CCM Update Contacts

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

Make the updates in the corresponding fields and click Next.
Step 2g

**Country Coordinating Mechanism (CCM)**

**Update Contacts**

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

**Note!**

Fields with (*) are mandatory.
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.

Updated GED reflected in [Global Fund Partner Portal](#).
Step 2a
Country Coordinating Mechanism (CCM)
Deactivate Contacts

On the Home page, click Organization Information
Click on the name of the organization from which you wish to deactivate a contact.
Click on the blue arrow and then click **Deactivate Contact**
Step 2d: 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
- Update Organization Information

**Contact Information Change Requests**

- Create Contacts
- Update Contacts
- Deactivate
  - Deactivate Contact
  - Deactivate Position
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.

---

** 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.

---

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.

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.
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)
Click **Grant Entity Data**
Step 2e
On the main page, click **Organization Information**
Step 2f
Select the organization you want to update by clicking on it.
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

Step 2h
Local Fund Agent (LFA)
Update Organization Information
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.

Click here to go back to the overview page.
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.

**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)
Click **Grant Entity Data**
On the main page, click **Organization Information**
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
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* and repeat previous steps

* 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
### Case History

<table>
<thead>
<tr>
<th>Date</th>
<th>Field</th>
<th>User</th>
<th>Original Value</th>
<th>New Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>28/05/2021 10:52</td>
<td>Created</td>
<td>Jane Doe</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Guidance

- Access to Work Plans
- Access to RFI
- Access to Grant History Data
- Access to Writable
- Deactivate Position

**Duplicate merge history**
Not applicable

**Re-submit case**
There is no clarification needed from your end at the moment.

### Details

#### Contact Information
- Solution
- First Name: Robert
- Last Name: Smith
- Organization Name: LFA Org Test
- Contacts: Credit
- Request Route: Pending LFA Coordination Team Review
- Comments: Requesting approval of Robert Smith as Finance Professional on my portfolio

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

Click here to go back to the overview page.
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 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.
Welcome!
Use App Launcher to choose what portal you want to open

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.

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.
### Organization Information

**LFA Org Test**

<table>
<thead>
<tr>
<th>Organization Short Name</th>
<th>Organization Grant Abbreviation</th>
<th>Integration Status</th>
<th>#Open Change Requests for Organization</th>
<th>#Open Change Requests for Contacts</th>
<th>#Open Change Requests for Banking</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### DETAILS

- **Organization Details**
  - **Organization Name**: LFA Org Test
  - **Organization Short Name**: LOT
  - **Parent Account**: 
  - **Website**: 
  - **Communication Language**: English

#### ADDRESS INFORMATION

- [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.


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
Click here to go back to the overview page

Step 2r
Local Fund Agent (LFA)
Update Contacts

Note!
You can access details of the newly created request, including the files uploaded, by clicking on the tabs and scrolling down the page.

Back to the overview of the steps for this request
The steps assigned to you are highlighted in the red boxes.

### LFA | Deactivate Contacts

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 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.

Username: janedoe7@yopmail.com

Password: [HIDE PASSWORD]

Log In

Forgot your password?

Are you an employee? Login here.
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 2e

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 Contacts
Step 2g

Click the arrow and select **Deactivate Contact**
Step 2h

Select the contact you wish to deactivate. Then, click Next.
Step 2i
Click Next to submit the request
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 here to go back to the overview page
LFA | Deactivate Position

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*.

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.

- **Username**: janedoe7@yopmail.com
- **Password**: 

**Log In**

Forgot your password?

Are you an employee? Login here.
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)
Local Fund Agent (LFA)

Deactivate Position

Step 2d

Click Grant Entity Data

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

Back to the overview of the steps for this request
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.
Step 2g
Local Fund Agent (LFA)
Deactivate Position

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. Click the link to see more details.
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
### Case History (1)

<table>
<thead>
<tr>
<th>Date</th>
<th>Field</th>
<th>User</th>
<th>Original Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>29/05/2021</td>
<td>Created</td>
<td>Jane Doe</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Positions

- **Guidance**
  - View All

### Details

- **Contact Information**
  - First Name: David
  - Last Name: Jones
  - Email: david@example.com
  - Phone: +44055555555

- **System Information (Technical Details)**

### Deactivate Position

- **Duplicate merge history**
  - Net applicable

- **Re-submit case**
  - There is no clarification needed from your end at the moment

---

**Back to the overview of the steps for this request**

**Click here to go back to the overview page**

**The deactivated field is highlighted**
Select the type of change request

Select from the below

**Organization information Change Requests**
- Create New Organization
- Update Organization Information
- Link Existing Third Party with PR

**Banking Information Change Requests**
- Create/Update Banking Information
Step 1

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

Step 2

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

Updated GED reflected in Global Fund Partner Portal.

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

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.
Grant Entity Data (GED) Interactive Manual

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

Step 2
Global Fund reviews and creates the link between Third Party and PR in Global Fund systems.

Third Party | Link Existing Third Party With PR

Follow the steps below:

- Select Another External Stakeholder
- Select Another Third Party Change Request

Updated GED reflected in Global Fund Partner Portal
Grant Entity Data (GED) Interactive Manual

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.