Revision

How to Process a Revision in the Partner Portal

Before you begin

Click here for instructions on how to use this guide

Click here for a list of abbreviations used in this guide
1. To navigate the different sections of this document, click on the tabs to the right. To navigate to the home page, click the home button in the bottom left corner of the screen.

2. On the right side of this page, on the “End-to-end high-level process” tab, the highlighted boxes show the revision steps that involve the PR. In-Portal icon (     ) indicates this step is in the Portal.

3. The icons marked with a brown highlight indicate actions to be taken in the system. To advance to the next step, click on them.

4. The information in dotted squares provides additional guidance.

5. On the right side of this page, the “Additional resources” tab provides access to extra resources.
The goal of a revision is to allow Global Fund investments to adjust to programmatic requirements during grant implementation, in order to ensure the continued effective and efficient use of Global Fund resources invested to achieve maximum impact in line with the Global Fund's 2017-2022 Strategy. A revision may also occur due to other changed circumstances and arrangements.

A number of critical revisions exchanges - including notifications and document submissions - between PRs and the Global Fund are facilitated through the Global Fund Partner Portal.

This document is an interactive guide for PRs to understand the process and system steps involved in receiving and submitting revisions documents.

Click here for instructions on how to use this guide.
Key Partner Portal Terms:

**Contacts with Signatory Rights**: refer to persons that are duly authorized by the organization to sign or acknowledge legally-binding documents and/or to sign disbursement requests.

**Contacts with Notice Rights**: refer to the persons that will serve as the contact point for Global Fund notices regarding contractual matters (as per the terms of the relevant Grant Agreement) and/or grant or portfolio-specific correspondences.

**Contacts with Access Rights**: refers to the person that will have access to the Global Fund Partner Portal to manage GED Contact with Grant Deliverables Access Rights – Editor: Contacts responsible for accessing, completing, and attaching grant deliverables (e.g., grant-making, pulse checks, PU/DRs) and any supporting documents through the Partner Portal. Editor rights are assigned per grant/portfolio, and one contact can be editor for either one or multiple grants/portfolios.

**Contact with Grant Deliverables Access Rights – Submitter**: Contacts responsible for submitting grant deliverables (e.g., grant-making, pulse checks, PU/DRs) to the Global Fund through the Partner Portal, in addition to having editor rights (access, complete and attach).

*For further in-system instructions on GED, refer to the [GED Interactive Guide](#).*
**PARTNER PORTAL LEARNING SERIES**

**Revisions: End-to-end High Level Process**

**Steps involving PR**

- **Step 1**: The Global Fund initiates the revisions process and shares documents with the PR.
- **Step 2**: PR accesses documents and online PF and collaborates with CT on the forms.
- **Step 3**: PR submits documents and forms.
- **Step 4**: The Global Fund analyzes documents and validates forms submitted by the PR.
- **Step 5**: The Global Fund generates IL and shares it with PR.
- **Step 6**: PR signs Implementation Letter (IL) and attaches it in the Partner Portal.
- **Step 7**: The Global Fund finalizes the process in the system and registers revision.

*The Global Fund may request PR to resubmit documents, if necessary.*

**August 2023**

**November 2023**
PARTNER PORTAL LEARNING SERIES
Revisions: System Steps

Step 2.1 – PR accesses documents and collaborates with CT on the forms

1. Click on the Revisions tab

2. Click on the relevant grant

Note!
- The revisions status is **PR to submit documents**
- This tab can be accessed directly via the link in the notification email.

Revisions

<table>
<thead>
<tr>
<th>MDG-H-PSI</th>
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<tbody>
<tr>
<td>IP Start Date:</td>
<td>01-Jan-21</td>
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<td>IP End Date:</td>
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<tr>
<td>Revision Type:</td>
<td>End-Date Revision</td>
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<td>Revision Status:</td>
<td>PR to submit documents</td>
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Home Page
Definition of Key Terms in Partner Portal
End-to-end high level process
Additional resources
Once the documents are downloaded, please save them on your computer and proceed with completion.

Once you have finished completing the documents, proceed to **Step 3: PR submits documents and forms**. If the grant has a C19RM PF, proceed to Step 3 to complete this in the Partner Portal.
Step 2.2 – PR accesses documents and collaborates with CT on the forms.

1. The list of documents appears on the table.

2. Click either the Download buttons for individual documents or the Download All button to retrieve all documents at once.
Step 3.1: PR submits documents and forms

If there is a C19RM PF required for the revision, access the C19RM Performance Framework tab.
PARTNER PORTAL LEARNING SERIES
Revisions: System Steps

1. If needed, you can click the edit buttons to change the Reporting Frequency or the Use by Date fields. Please note that adjusting the reporting frequency or C19RM funding use date will respectively update Indicator periods and targets and recalculate Indicator and Key Activity periods.

2. The Indicator Reporting Periods and Key Activity Periods are calculated according to the values input on the top.

3. Click Indicator.
PARTNER PORTAL LEARNING SERIES
Revisions: System Steps

Step 3.3: PR submits documents and forms

Click Add Indicator
Step 3.4: PR submits documents and forms

1. Fill in the necessary information

2. Click Save
Step 3.5: PR submits documents and forms

1. The new indicator is reflected on the main page.

2. To add a key activity, click WPTM.
Click Add Key Activity
Step 3.7: PR submits documents and forms

1. Fill-in the necessary information

2. Click Save
The new key activity is reflected on the main page.

Access the **Attach & Submit Revision Forms** tab.

Step 3.8: PR submits documents and forms.
Step 3.9: PR submits documents and forms

Click the Attach Documents button.
Note!
Please be aware that the C19RM PF is not included in the list of downloadable documents since it is completed using the online form in the Portal.
PARTNER PORTAL LEARNING SERIES
Revisions: System Steps

1. Select the relevant documents
2. Click Open

Step 3.10: PR submits documents and forms
To submit the documents, click on Submit to the Global Fund. You will need to select the final version by clicking on the Final PR Submission checkbox.
Indicate the documents you are submitting.

Click Submit.
Once the Global Fund has analyzed, validated, and generated the final documents based on the materials submitted by the PR, they will be available in the Partner Portal.

At this point, you move on to **Step 6: "PR Signs Implementation Letter (IL)" in the Partner Portal.**
Step 6.1: PR signs Implementation Letter (IL) in the Partner Portal

1. Click on the Revisions tab

2. Click on the relevant grant

Note!
- The Revisions status is PR to sign Implementation Letter
Step 6.2: PR signs Implementation Letter (IL) in the Partner Portal

On the list of documents, locate the Implementation Letter GF Shared and click Download.
Once the document is downloaded, please save it on your computer and proceed to sign it outside of the Partner Portal.

Once you have finished signing the document, proceed to the next screen to attach the signed file in the system.
PARTNER PORTAL LEARNING SERIES
Revisions: System Steps

Step 6.4: PR signs Implementation Letter (IL) in the Partner Portal

On the list Attach & Submit Revision Forms sub-tab, click Attach Documents.

Revision documents for submission to the Global Fund
Once attached, select the final documents to submit to the Global Fund. For the following document types, only one version can be attached: Regular Detailed Budget, C19RM Detailed Budget, Regular PF.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Original File Name</th>
<th>Attached Date</th>
<th>Attached By</th>
<th>Language</th>
<th>Version</th>
<th>Final PR Submission</th>
<th>Action</th>
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<td>V1</td>
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</table>
Step 6.5: PR signs Implementation Letter (IL) in the Partner Portal

1. Select the relevant document and click Open

Highlighted documents are attached by the Global Fund
Step 6.6: PR signs Implementation Letter (IL) in the Partner Portal

Select the Document Type as Implementation Letter – PR Signed, select the Language and click Save and Close.
PARTNER PORTAL LEARNING SERIES
Revisions: System Steps

Step 6.7: PR signs Implementation Letter (IL) in the Partner Portal

Revision documents for submission to the Global Fund

Once attached, select the final documents to submit to the Global Fund. For the following document types, only one version can be attached: Regular Detailed Budget, C19RM Detailed Budget, Regular PF.

Click Submit Implementation Letter to the Global Fund
Step 6.8: PR signs

Implementation Letter (IL) in the Partner Portal

To proceed, click **Submit**

1. **Submit Implementation Letter to The Global Fund**

Are you sure you want to submit the implementation letter to The Global Fund?

- **Cancel**
- **Submit**

Highlighted documents are attached by the Global Fund

Revision documents for submission to the Global Fund

Once attached, select the final documents to submit to the Global Fund. For the following document:

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Original File Name</th>
<th>Date/Time</th>
<th>Language</th>
<th>Version</th>
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<tr>
<td>Other</td>
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<td>16-Aug-23 04:05 PM</td>
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</tbody>
</table>

Download All

Guidance
This completes **Step 6: PR signs Implementation Letter (IL) in the Partner Portal**
• **GED Interactive Manual** – This document provides instructions on to manage Grant Entity Data in the Partner Portal.

• **Guidance for Developing and Reviewing Performance Frameworks** – This document describes the process for developing and reviewing the Performance Framework prior to grant signing.

• **Instructions for Completing the Detailed Budget Template** – This document provides guidance for the development and review of a Global Fund grant budget (and budget revisions when applicable), using the detailed budget template.

• **Modular Framework Handbook 2023-2025** – This document details the standard modules, interventions and performance indicators to support in the development of funding requests and grant documents for the Global Fund.

• **C19RM Guidelines** – This document provides guidance on the processes for the C19RM Additional Funding Requests, integration of the approved C19RM Additional Funds into grants, reinvestment, and implementation, following the Global Fund Board approval of the third C19RM extension.
## Abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Country Team – CT</td>
<td></td>
</tr>
<tr>
<td>Principal Recipient – PR</td>
<td></td>
</tr>
<tr>
<td>Progress Update and/or Disbursement Request – PU/DR</td>
<td></td>
</tr>
<tr>
<td>Performance Framework – PF</td>
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</tr>
<tr>
<td>Implementation Letter – IL</td>
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<td>Grant Entity Data – GED</td>
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<td>Global Fund – GF</td>
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</tr>
<tr>
<td>Workplan Tracking Measure - WPTM</td>
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