

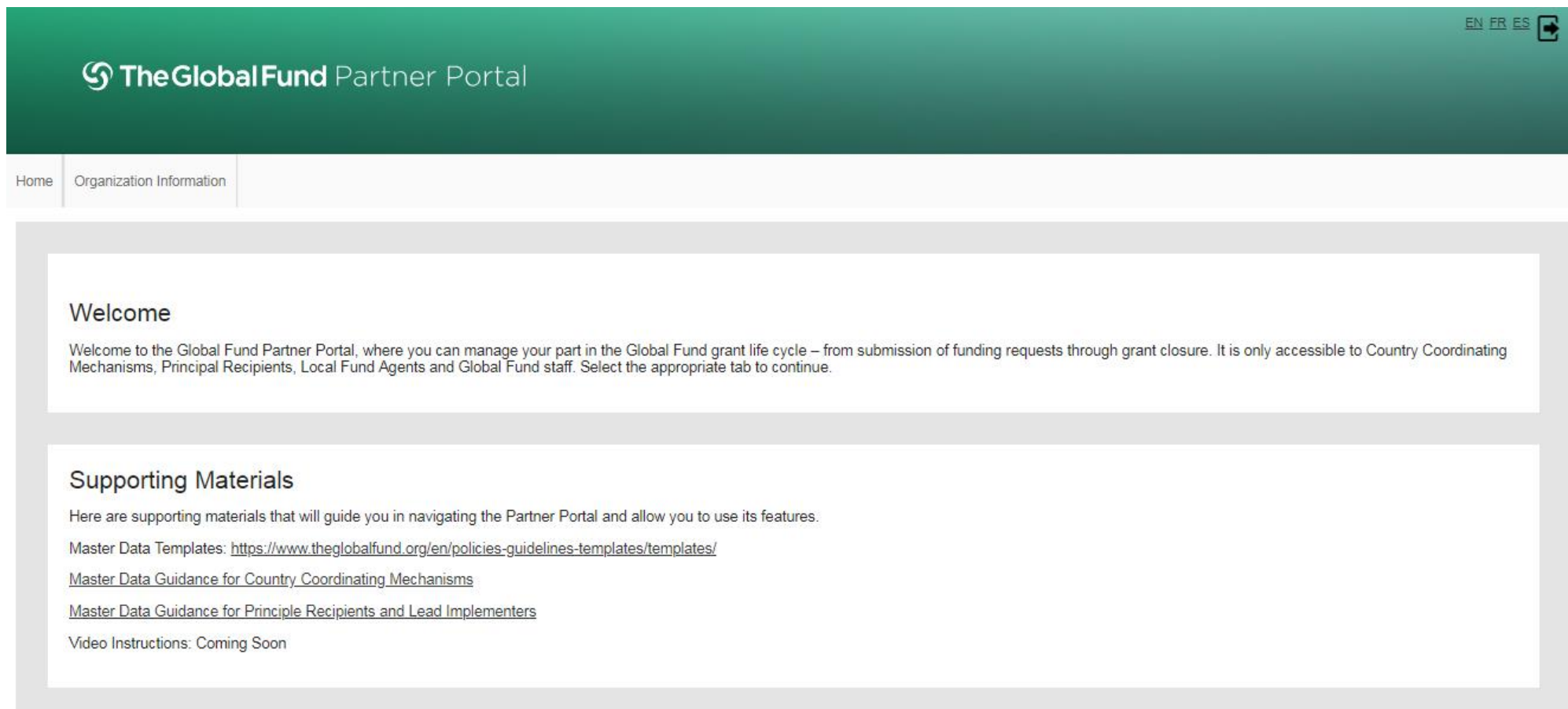
# Managing Master Data in the Global Fund's Partner Portal

## A Guide for CCMs & RCMs

February 2019

# What is the Global Fund's Partner Portal?

- *The Global Fund's "Partner Portal" is an online platform which serves as unified system for Coordinating Mechanisms, implementers, Local Fund Agents, and the Global Fund Secretariat.*
- *Currently, the Partner Portal is used for managing Master Data.*




# What is Master Data and why is it important?




- *Master Data is key information relating to the Global Fund's in-country actors (PR, CCM & RCM, LFA).*
- *Master Data is an important input into Funding Request & Grant Making stages of the grant life cycle.*



# What are the roles of CCM/RCM members in the Partner Portal?

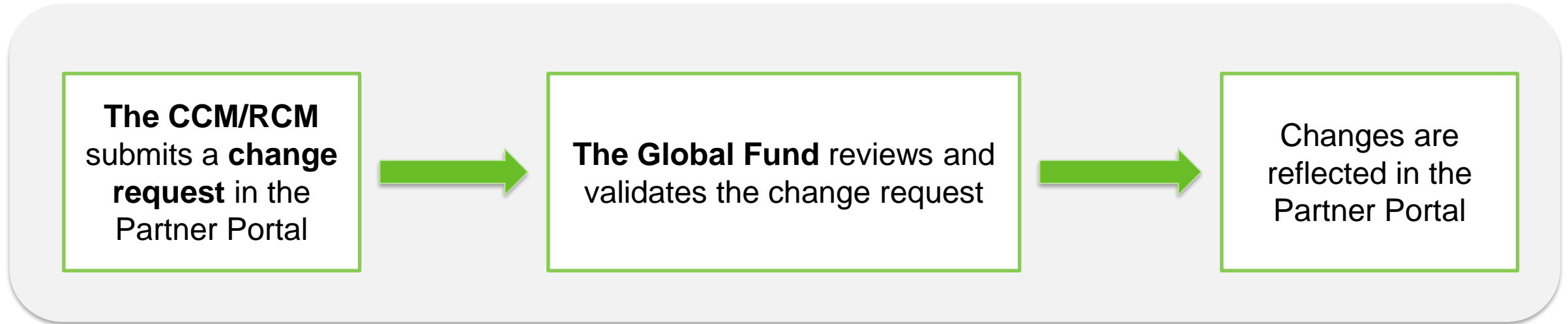
- The contact information for **all** CCM/RCM members need to be listed in the Partner Portal.
- It is important to select the correct 'Role' when creating or updating each contact.
- Only Admin Focal Points have access to the Partner Portal.



		
<b>Role: Admin Focal Point</b>	<b>Chair Vice Chair Civil Society Signatory</b>	<b>Member, Alternate... (all other Roles)</b>
Only contacts with the role 'Admin Focal Point' are granted <b>access to the Partner Portal</b> .	Contacts with the role 'Chair', Vice Chair', or 'Civil Society Signatory' can be selected as <b>Signatories for Legal Agreements</b> , who sign the Grant Agreement on behalf of the CCM/RCM.	
There should be <u>more than one</u> at any time	There should be <u>one member with each role</u> .	

## How do I update information or make changes to Master Data?

- *Master Data can be created or updated through “**change requests**”*



It is the responsibility of the CCM/RCM to ensure their Master Data is correct and up-to-date. This is particularly important during the Funding Request and Grant Making stages.

# What change request should I use?

➤ *Master Data can be created or updated through “**change requests**”*

Type of Actions (“change requests”)	When to use them?
Create New Contact	<ul style="list-style-type: none"><li>• To add a <b>new</b> contact to the CCM/RCM.</li></ul>
Update Contact	<ul style="list-style-type: none"><li>• To <b>update personal information</b> for a contact (e.g. email, role, phone no.)</li><li>• To <b>remove</b> a contact from the CCM/RCM.</li></ul>
Mass Edit CCM/RCM Contacts	<ul style="list-style-type: none"><li>• To make <b>multiple changes</b> to contacts in one CCM/RCM (e.g. edit some members, remove old members, add new members).</li></ul>
Update Authorization & Access Rights	<ul style="list-style-type: none"><li>• To <b>update, remove, or add authorization rights</b> (e.g. signatory for legal agreements) for contacts already associated with the CCM/RCM.</li></ul>
Update Organization	<ul style="list-style-type: none"><li>• To <b>update organization information</b> (e.g. name, abbreviation, address, website).</li></ul>

- ✓ **Do not overwrite contacts** – e.g. if the Chair changes, create a new contact with the role Chair, and for the old Chair either change the role or remove the contact as applicable.
- ✓ Whenever possible, avoid using the same e-mail address for multiple contacts.
- ✓ Enter **telephone numbers** using international phone number format: +xx (xxx) xxx-xxxx
- ✓ Provide a **complete address**, with correct street address / PO box plus number, zip code, city and country.
- ✓ Fill in all **mandatory fields** (marked with a red bar).
- ✓ Check for **typos or irregularities**.
- ✓ When assigning **authorization and access rights**, each CCM/RCM should have:
  - One member with the role 'Chair', ticked for 'Signatory for Legal Agreements'
  - One member with the role 'Civil Society Signatory', ticked for 'Signatory for Legal Agreements'
  - 2-3 members with the role 'Admin Focal Point' ('Access to Partner Portal' will be automatically ticked)

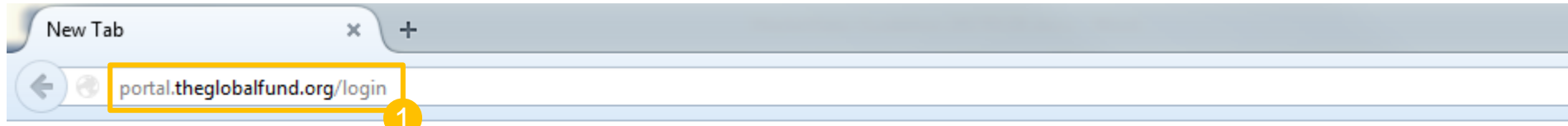




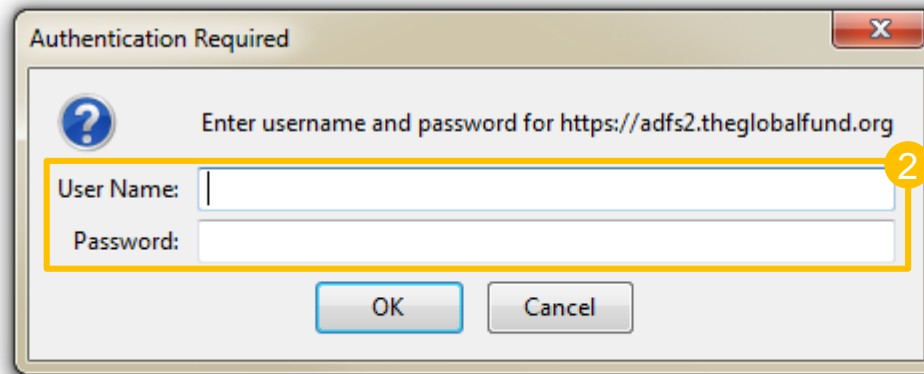
- *The Partner Portal is optimized for Google Chrome*



# Accessing the Global Fund Partner Portal



1 To access the Global Fund Partner Portal, open an internet browser and type in the link: [portal.theglobalfund.org/login](https://portal.theglobalfund.org/login)



2 Enter the User Name and Password sent to you by the Global Fund in two separate e-mails.



If you have a problem logging in, please send an e-mail to: [GFSupport@theglobalfund.org](mailto:GFSupport@theglobalfund.org)

# Once I start a change request, can I save it?



Contact Creation

Save Submit Cancel

## Save

To save information without submitting the request to the Global Fund; you can re-open and modify your request at any time.

Change request will stay in status 'Draft' and will NOT be sent to the Global Fund for review.

## Submit

To submit the proposed changes to the Global Fund for review.

Status will change to 'Request for [...] Review' and will be sent to the relevant Global Fund team for review.

No further edits can be made to the change request (unless the Global Fund requests clarification).


## Cancel

To leave the page without saving any changes.

- Navigating in the Portal.....slides 13-16
- Request to Update Organization.....slides 17-19
- Request to Create a New Contact.....slides 20-21
- Request to Update an Existing Contact.....slides 22-23
- Request to Update Authorization & Access Rights (of existing contacts)....slides 24-25
- Request Mass Edit CCM Contact List.....slides 26-32

*The following slides contain fictitious data*

# Navigating in the Portal (1/4)

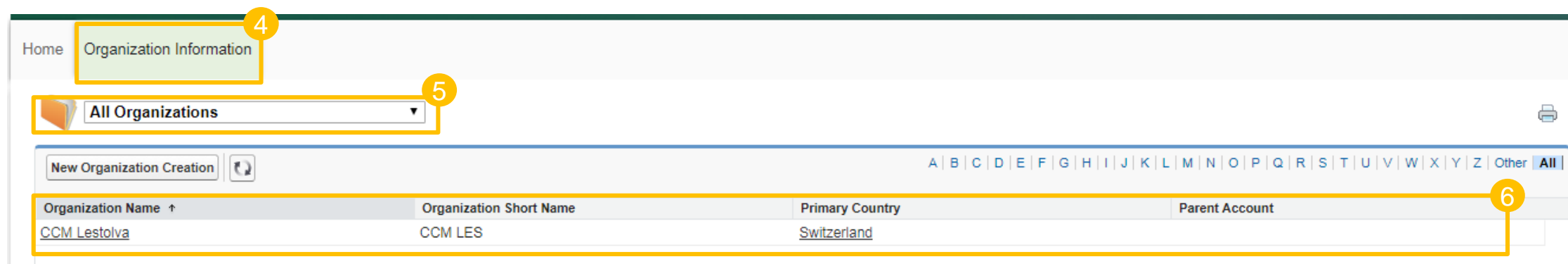


The screenshot shows the top section of the portal. The header is dark green with the logo and text 'TheGlobalFund Partner Portal'. In the top right corner, there are language links 'EN FR ES' and a logout icon. Below the header, there are two navigation tabs: 'Home' and 'Organization Information'. The 'Organization Information' tab is highlighted.

1 Click on this tab to access your Organization Information. Here you can view your organization's Master Data and launch change requests to create or update information.

2 To change the language in which the Portal is displayed, click on the link representing the desired language.

3 Click on this icon to log out of the Portal.



The screenshot shows the main content area of the portal. It includes a 'Home' tab and an 'Organization Information' tab. Below the tabs, there is a dropdown menu labeled 'All Organizations'. To the right of the dropdown is a 'New Organization Creation' button. Below these elements is a table with columns: 'Organization Name', 'Organization Short Name', 'Primary Country', and 'Parent Account'. The first row of the table shows 'CCM Lestolva', 'CCM LES', 'Switzerland', and a link. A alphabetical index bar is located above the table.

4 Select the "Organization Information" tab.

5 Select "All Organizations" from the drop down list and click "Go!"

6 The Organizations you are affiliated with are displayed. Click on the "Organization Name" to access the Organization details.

# Navigating in the Portal (2/4)

Organization Information  
CCM Lestolva  
« Back to List: Organization Information

Organization Roles [1] | Change Requests [5+]

## Organization Information Detail

Request Organization Update | Update Authorization and Access Rights | New Contact Request | Create/Update Bank Information

Organization Name CCM Lestolva [\[View Hierarchy\]](#)  
Organization Short Name CCM LES  
Parent Account  
Primary Country [Switzerland](#)  
IATI Organization Identifier  
External GFS ID Vendor  
External GFS ID Vendor Site ACCOUNT\_2768

Email Address [contact@lestolva.com](mailto:contact@lestolva.com)  
Telephone Number +12 (345) 678-9999  
Website <http://www.lestolva.com>

### ▼ Address Information

Primary Address Line 1 Broadway 34  
Primary Address Line 2  
Primary Address Line 3  
Primary Address Line 4

Primary Zip/Postal Code 54321  
Primary City Lestolva-City

## ▼ Contacts

Mass Edit CCM Contact List | Download CCM Endorsement Form

Action	Contact Salutation	Contact Name	Contact Gender	Organization Name	Organization Abbreviation	Official Job Title
<a href="#">Request Contact Update</a>	Mr.	Albert Einstein	Male	CCM Lestolva	CCM LES	Administrateur
<a href="#">Request Contact Update</a>	Dr.	Amel Kirkov	Female	CCM Lestolva	CCM LES	Hiv Programme Manager
<a href="#">Request Contact Update</a>	Mr.	Bill Doe	Male	CCM Lestolva	CCM LES	Professeur Chef De Services Des Maladies Infectieuses
	Mr.	Bill Patel	Male	CCM Lestolva	CCM LES	Directeur
<a href="#">Request Contact Update</a>	Dr.	Harry Kirov	Male	CCM Lestolva	CCM LES	Responsable Du Programme

3 Click on the buttons to launch change requests.  
("Create/Update Bank Information" is for PRs only)

1 The "Organization Information Detail" is displayed.

2 All the contacts associated to the CCM/RCM are displayed. Click on "Request Contact Update" if you wish to update a Contact information. (If "Request Contact Update" is not available, this contact has another primary organization e.g. they belong to a PR organization. Please contact [GFSupport@theglobalfund.org](mailto:GFSupport@theglobalfund.org) to request changes.)

4 Click on 'Mass Edit CCM Contact List' to launch a change request.

1

▼ Authorization and Access Rights by Grant

Organization Abbreviation ⚙	Sub Type ⚙	Grant Name ⚙	Active ⚙
CCM LES			✓

▼ Positions (17)

Organization Abbreviation ⚙	Contact Name ⚙	Role ⚙	Official Job Title ⚙	Signatory for Legal Agreements ⚙	Signatory for Disbursement Request ⚙	Organization Representative for Notices ⚙	Key Contact for GF Comms - CCM only ⚙	Access to Global Fund Partner Portal ⚙	Recipient of Automatic Notifications ⚙
CCM LES	John Doe	Member	Sous -Directrice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCM LES	Linda Patel	Member	Professeur Chef De Services Des Maladies Infectieuses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCM LES	Harry Kirov	Member	Responsable Du Programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCM LES	Mary Smith	Member	Président	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCM LES	Will Muller	Member	Président	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCM LES	Sally Smit	Member	Sous -Directrice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCM LES	Bill Doe	Member	Professeur Chef De Services Des Maladies Infectieuses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCM LES	Samuel	Member	Sous -Directrice Maladies Transmissibles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>

1 of 1 Organization Role Page 1 of 1 Organization Roles per page: 10 ▼

1

The Authorization and Access Rights information is displayed in the middle of the page.

1

Change Requests

Action	Change Request	Case Record Type	Owner	Request Status	Date Opened
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00005419</a>	Update Contact Information for CCM	<a href="#">Anne-Marie Ngo Tega</a>	Draft	3/12/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00005056</a>	Mass Edit of Contact List for CCM	<a href="#">Amel Kirkov</a>	Draft	2/18/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00005055</a>	Mass Edit of Contact List for CCM	<a href="#">Amel Kirkov</a>	Draft	2/18/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00005054</a>	Update Authorization and Access Rights CCM	<a href="#">Amel Kirkov</a>	Draft	2/18/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00005053</a>	Update Authorization and Access Rights CCM	<a href="#">Amel Kirkov</a>	Draft	2/18/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00004932</a>	Update Authorization and Access Rights CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	2/5/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00004930</a>	Update Authorization and Access Rights CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	2/5/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00004929</a>	Update Contact Information for CCM	<a href="#">Amel Kirkov</a>	Draft	2/5/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00004928</a>	Update Organization Information for CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	2/5/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00004927</a>	Update Organization Information for CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	2/5/2018
<a href="#">Show 3 more »</a>   <a href="#">Go to list (13) »</a>					

1

All change requests raised for this CCM / RCM are displayed, showing the status of the review process. Click on the change request number to see the details of the request.



# Request to Update Organization (1/3)

Request Edit  
New Request

Organization Update

Save Submit Cancel

Organization Details

Current Information

Case Number

Case Record Type

Organization Name

Organization Grant Abbreviation

Organization Short Name

IATI Organization Identifier

Website

Communication Language

Update Organization Information for CCM

CCM Lestolva

CCM LES

<http://www.lestolva.com>

English

Primary Address Information

Primary Address Line 1

Primary Address Line 2

Primary Address Line 3

Primary Address Line 4

Primary Zip/Postal Code

Primary City

Primary Country

Primary Email Address

Primary Telephone Number

Broadway 34

54321

Lestolva-City

Switzerland

[contact@lestolva.com](mailto:contact@lestolva.com)

+12 (432) 543-7654

Proposed Information

Request Status

Organization Name

Organization Grant Abbreviation

Organization Short Name

IATI Organization Identifier

Website

Communication Language

Description

Draft

CCM Lestolva

CCM LES

[www.lestolva.com](http://www.lestolva.com)

English

Primary Address Information

Primary Address Line 1

Primary Address Line 2

Primary Address Line 3

Primary Address Line 4

Primary Zip/Postal Code

Primary City

Primary Country

Primary Email Address

Primary Telephone Number

Broadway 34

54321

Lestolva-City

Switzerland

[contact@lestolva.com](mailto:contact@lestolva.com)

+12 (432) 543-7654

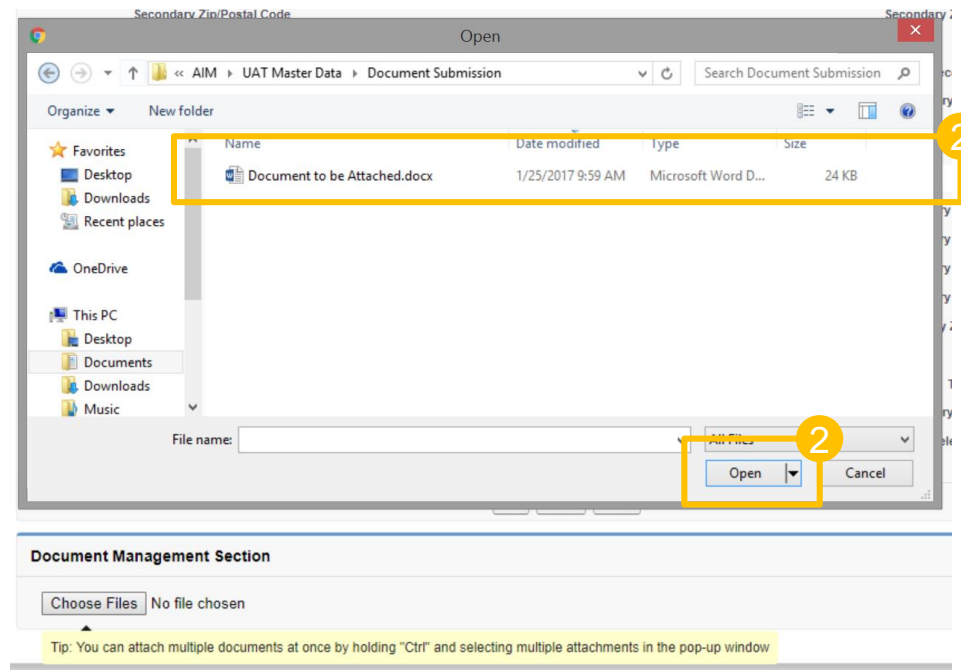
1 After clicking on “Request Organization Update”, a New Request page is displayed.

2 The current organization information is displayed in the left side of the screen.

3 On the right side of the screen, make any updates required, including adding required information that is currently missing (boxes marked with a red bar)

# Request to Update Organization(2/3)

The screenshot shows a form with two main sections: 'Secondary Address Information' and 'Tertiary Address Information'. Each section contains fields for address lines (1-4), Zip/Postal Code, City, Country (a dropdown menu), Email Address, and Telephone Number. At the bottom of the form, there are 'Save', 'Submit', and 'Cancel' buttons. Below the form, the 'Document Management Section' is visible, featuring a 'Choose Files' button and the text 'No file chosen'. A yellow box with the number '1' highlights the 'Choose Files' button.



This screenshot shows the 'Request to Update Organization' form with the 'Document Management Section' at the bottom. The 'Choose Files' button is now labeled 'Document t...ached.docx'. A yellow box with the number '3' highlights this button. To the right of the form, there are 'Save', 'Submit', and 'Cancel' buttons. A yellow box with the number '4' highlights the 'Submit' button.

1 Scroll down to the Document Management Section at the bottom of the screen. Click on "Choose Files".

2 Select the file to be attached and click "Open". If you want to attach multiple documents at once, hold "Ctrl" and then select multiple attachments in the pop-up window.

3 The name(s) of the documents selected will appear beside the 'Choose Files' button.

4 Click 'Submit' to send the change request to the Global Fund for review.

# Request to Update Organization (3/3)

1

Change Request

00009158

Hide Feed

Post

File

New Lead

More

Write something...

Share

Follow

Followers

No followers.

Show All Updates

Amel Kirkov (Partner)

created this change request.

2

00009158

Request Status: Request for Global Fund CT Review

Case Number: 00009158

Comment

Like

Today at 2:57 PM

Back to List: Organization Information

Case History (2)

Change Request Detail

Edit

Submit

Case Number	00009158
Organization Short Name	CCM LES
Website	www.lestolva.com
Primary Email Address	contact@lestolva.com
Primary Telephone Number	+12 (432) 543-7654
Communication Language	English
Contact Name	Amel Kirkov
Description	
IATI Organization Identifier	
Country Team	CT Algeria

Edit

Submit

2

Update Organization Information for CCM

Status

Request for Global Fund CT Review

Request Record Type	Update Organization Information for CCM
Primary Address Line 1	Lexington avenue 14
Primary Address Line 2	
Primary Address Line 3	
Primary Address Line 4	
Primary Zip/Postal Code	54321
Primary City	Lestolva-City
Primary Country	Switzerland

Clarification Comments History

The change request is created with a number assigned to it.

The status of the change request has changed from 'Draft' to 'Request for Global Fund CT Review', indicating it is now under review by the Global Fund.

# Request to Create a New Contact (1/2)

1  
Request Edit  
New Request

Contact Creation

Save

Submit

Cancel

Contact Details

Case Number

Case Record Type

Salutation

Last Name

First Name

Gender

Principal Nationality

Entry date into CCM

Role

Official Job Title

Key Contact for GF communication

Public Sector or Non-Public Sector

Sector Represented

Component

KAP Detail

PR/SR Representation

Multilateral / Bilateral classification

Position Represented Country

Member of the oversight committee

Government Category

Signatory for Legal Agreements

Access to Global Fund Partner Portal

Recipient of Automatic Notifications

Create Contact for CCM

--None--

--None--

--None--

[ 3/5/2018 ]

--None--

☐

--None--

--None--

Available

HIV/AIDS

Tuberculosis

Malaria

Chosen

Available

Women and girls

Youth

MSM (Men who have sex with men)

Chosen

--None--

--None--

☐

None

☐

☐

Request Status

Draft

Business Email Address

Alternate Email Address

Business Phone Number

Mobile Phone Number

Fax Number

Primary Address Line 1

Primary Address Line 2

Primary Address Line 3

Primary Address Line 4

Primary City

Primary Zip/Postal Code

Primary Country

Communication Language

Description

Allow info to be published on website?

English

☐

Save

Submit

Cancel

Document Management Section

Choose Files

No file chosen

1  
After clicking on “New Contact Request”, a New Request page is displayed.

2  
Enter the new contact information and fill all the mandatory fields (marked with a red bar).

3  
Tick the ‘Signatory for Legal Agreements’ checkbox if the contact entered should have the authority to sign/acknowledge legally-binding documents on behalf of the CCM/RCM (only relevant for contacts with the Role Chair, Vice Chair or Civil Society Signatory).

4  
Click “Submit”

# Request to Create a New Contact (2/2)

The screenshot shows a Facebook interface. At the top, a yellow box with a '1' in a circle highlights the 'Change Request' header and the ID '00005152'. Below this is a 'Hide Feed' button. The main post area has a text input field with the placeholder 'Write something...', a 'Share' button, and a '+ Follow' button. Below the input field is a search bar and a 'Show All Updates' link. The post itself is from 'Amel Kirkov (Partner)' and says 'created this change request.' Below this is a detailed view of the change request, which is highlighted with a yellow box and a '2' in a circle. This detailed view shows the ID '00005152', the status 'Request Status: Request for Global Fund CT Review', and the case number 'Case Number: 00005152'. At the bottom of the post are links for 'Comment', 'Like', and the time 'Today at 1:28 PM'. At the very bottom is a link that says '« Back to List: Organization Information'.

Change Request  
00005152

Hide Feed

Post File Link Poll

Write something...

Share

+ Follow

Followers

No followers.

Amel Kirkov (Partner) created this change request.

00005152

Request Status: Request for Global Fund CT Review

Case Number: 00005152

Comment · Like · Today at 1:28 PM

« Back to List: Organization Information

1

The change request is created with a number assigned to it.

2

The status of the change request has changed from 'Draft' to 'Request for Global Fund CT Review', indicating it is now under review by the Global Fund.

# Request to Update an Existing Contact (1/2)

**Request Edit New Request**

**Contact Update** [Save] [Submit] [Cancel]

**Contact Details**

**Current Information**

Case Number  
Case Record Type Update Contact Information for CCM

Salutation Mr.  
Last Name Einstein  
First Name Albert  
Gender Male  
Principal Nationality Switzerland  
Entry date into CCM  
Role Member  
Official Job Title Administrateur  
Organization Name CCM Lesotho  
Key Contact for GF Comm - CCM only ☒  
Public Sector or Non-Public Sector  
Sector Represented GOV [Government]  
Component  
KAP Detail  
PRI/BR Representation

**Proposed Information**

Request Status Draft

Salutation Mr.  
Last Name Einstein  
First Name Albert  
Gender Male  
Principal Nationality Switzerland  
Entry date into CCM [1/22/2019]  
Role Member  
Official Job Title Administrateur  
Key Contact for GF communication ☐  
Public Sector or Non-Public Sector --None--  
Sector Represented GOV [Government]  
Component  
Available  
HIV/AIDS  
Tuberculosis  
Malaria  
Chosen  
KAP Detail  
Available  
Women and girls  
Youth  
MSM (Men who have sex with men)  
Chosen  
PRI/BR Representation --None--

**Deactivation**

Remove Contact from Organization ☐

[Save] [Submit] [Cancel]

1 After clicking on "Request Contact Update", a New Request page is displayed.

2 The current contact information is displayed in the left side of the screen.

3 On the right side of the screen, make any updates required, including adding required information that is currently missing (boxes marked with a red bar).

4 At the bottom of the page, tick this box to remove an existing contact from the CCM/RCM.

5 Click "Submit"

# Request to Update an Existing Contact (2/2)

1

Change Request

00009159

Hide Feed

Post

File

Link

Poll

Write something...

Share

Follow

Followers

No followers.

Show All Updates

Amel Kirkov (Partner) created this change request.

00009159

Request Status: Request for Global Fund CT Review

Case Number: 00009159

Comment

Like

Today at 3:57 PM

« Back to List: Organization Information

Case History (2)

Change Request Detail

Edit

Submit

Case Number	00009159	Request Status	Request for Global Fund CT Review
Salutation	Mr.	Request Record Type	Update Contact Information for CCM
Last Name	Einstein	Business Email Address	touil.merouane.mj@gmail.com
First Name	Albert	Alternate Email Address	
Gender	Male	Business Phone Number	2.14E+11
Principal Nationality	Turkey	Mobile Phone Number	2.14E+11
Entry date into CCM	1/6/2019	Fax Number	21338861494
Role	Member	Primary Address Line 1	Broadway 34
Official Job Title	Administrateur	Primary Address Line 2	
Key Contact for GF communication	✓	Primary Address Line 3	
Public Sector or Non-Public Sector		Primary Address Line 4	
Sector Represented	GOV [Government]	Primary City	Lestolva-City
Component		Primary Country	Switzerland
KAP Detail		Primary Zip/Postal Code	54321
PR/SR Representation	PR - Principal Recipient	Description	
Multilateral / Bilateral classification		Clarification Comments History	

1

The change request is created with a number assigned to it.

2

The status of the change request has changed from 'Draft' to 'Request for Global Fund CT Review', indicating it is now under review by the Global Fund.

The Global Fund

Le Fonds mondial

El Fondo Mundial

Глобальный фонд

全球基金

الصندوق العالمي

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# Request to Update Authorization & Access Rights(1/2)

Request Edit

New Request

Save

Submit

Cancel

Generic Information

Case Number

Case Record Type

Communication Language

Description

Update Authorization and Access Rights CCM

English

Request Status

Organization Name

Signatory Template

Draft

CCM Lestolva

<https://www.theglobalfund.org/en/policies-guide...>

Authorization and Access Rights

Contact	Role	Signatory for Legal Agreements	Key Contact for Communications
<a href="#">John Doe</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Linda Patel</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Harry Kirov</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Mary Smith</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Will Muller</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Sally Smit</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Bill Doe</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Samuel Simple</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Susan Amari</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Notna Ivanov</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Sally Doe</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">John Muller</a>	Coordinating Mechanism	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Robert Fall</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">William Frost</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Bill Patel</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Amel Kirkov</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Albert Einstein</a>	Coordinating Mechanism	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save

Submit

Cancel

Document Management Section

Choose Files

No file chosen

- 1 After clicking on “Update Authorization and Access Rights”, a New Request page is displayed.
- 2 All CCM/RCM contacts are displayed with their associated authorization rights. Make the required updates by checking and unchecking boxes.
- 3 Attach any supporting documents (not required).
- 4 Click “Submit”



# Request to Update Authorization & Access Rights (2/2)

Change Request  
00009160

Hide Feed

Post File New Lead More

Write something...

Share

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Followers

No followers.

Amel Kirkov (Partner) created this change request.

00009160

Request Status: Request for Global Fund CT Review

Case Number: 00009160

Comment Like Today at 4:14 PM

Back to List: Organization Information

Case History (2)

Change Request Detail

Edit Submit

Case Number	00009160
Description	
Country Team	CT Algeria

Edit Submit

Request Status	Request for Global Fund CT Review
Request Record Type	Update Authorization and Access Rights CCM
Signatory Template	<a href="https://www.theglobalfund.org/en/policies-guide...">https://www.theglobalfund.org/en/policies-guide...</a>
Contact Name	Amel Kirkov
Contact Phone	
Clarification Comments History	

1 The change request is created with a number assigned to it.

2 The status of the change request has changed from 'Draft' to 'Request for Global Fund CT Review', indicating it is now under review by the Global Fund.

# Request Mass Edit CCM Contact List (1/7)

 Organization Information

**CCM Lestolva**

[« Back to List: Organization Information](#)

[Organization Roles \[1\]](#) | [Change Requests \[10+\]](#)

Organization Information Detail

[Request Organization Update](#) [Update Authorization and Access Rights](#) [New Contact Request](#) [Create/Update Bank Information](#)

Organization Name	CCM Lestolva <a href="#">[View Hierarchy]</a>	Email Address	<a href="mailto:contact@lestolva.com">contact@lestolva.com</a>
Organization Short Name	CCM LES	Telephone Number	+12 (345) 678-9999
Parent Account		Website	<a href="http://www.lestolva.com">http://www.lestolva.com</a>
Primary Country	<a href="#">Switzerland</a>		
IATI Organization Identifier			
External GFS ID Vendor			
External GFS ID Vendor Site	ACCOUNT_2768		

▼ Address Information

Primary Address Line 1	Broadway 34	Primary Zip/Postal Code	54321
Primary Address Line 2		Primary City	Lestolva-City
Primary Address Line 3			
Primary Address Line 4			


▼ Contacts

<div><div><div>1</div><div><a href="#">Mass Edit CCM Contact List</a></div></div><div><a href="#">Download CCM Endorsement Form</a></div></div>						
Action	Contact Salutation	Contact Name	Contact Gender	Organization Name	Organization Abbreviation	Official Job Title
<a href="#">Request Contact Update</a>	Mr.	Albert Einstein	Male	CCM Lestolva	CCM LES	Administrateur
<a href="#">Request Contact Update</a>	Dr.	Amel Kirkov	Female	CCM Lestolva	CCM LES	Hiv Programme Manager
<a href="#">Request Contact Update</a>	Mr.	Bill Doe	Male	CCM Lestolva	CCM LES	Professeur Chef De Services Des Maladies Infectieuses
<a href="#">Request Contact Update</a>	Mr.	Bill Patel	Male	CCM Lestolva	CCM LES	Directeur
<a href="#">Request Contact Update</a>	Dr.	Harry Kirov	Male	CCM Lestolva	CCM LES	Responsable Du Programme
<a href="#">Go to list (17) &gt;&gt;</a>						

1

From the Organization Information page in the Partner Portal, click “Mass Edit CCM Contact List”.

# Request Mass Edit CCM Contact List (2/7)

 Request Edit  
New Request

Step 1: CCM Submits Requests   **Step 2: CT Generates & Shares Latest List**   Step 3: CCM Edits CCM Contact List   Step 4: CT Reviews & Imports Updated List

**Mass Edit CCM Contact List**  

Instructions: By pressing "Submit", I am requesting an excel spreadsheet of the most up-to-date CCM membership list, as per information in the Partner Portal. Once this excel spreadsheet is received, I can then make multiple changes to CCM members' information in one change request.

Communication Language English  

Case Number  
Case Record Type   Mass Edit of Contact List for CCM  
Request Status   Draft

**Document Management Section**

No file chosen

1

Indicate the preferred language in the "Communication Language" drop down menu.

2

Fill in relevant details regarding the request, if any, in the 'Description' box.

3

Press "Submit" to request an Excel document containing the current CCM membership list based on the information stored in the Partner Portal.

4

The Global Fund Country Team will then generate the list and attach it to the change request and send it back to you.

# Request Mass Edit CCM Contact List (3/7)

Change Requests					
Action	Change Request	Case Record Type	Owner	Request Status	Date Opened
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00009167</a>	Mass Edit of Contact List for CCM	<a href="#">Amel Kirkov</a>	Request for Clarification	1/22/2019
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00009163</a>	Mass Edit of Contact List for CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	1/2/2019
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00009162</a>	Mass Edit of Contact List for CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	12/21/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00009161</a>	Mass Edit of Contact List for CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	12/20/2018
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">00009160</a>	Update Authorization and Access Rights CCM	<a href="#">Amel Kirkov</a>	Request for Global Fund CT Review	12/20/2018

Change Request  
00009167

[Hide Feed](#)

[Post](#) [File](#) [New Lead](#) [More](#)

Write something...

[Share](#)

[+ Follow](#)

Followers

No followers.

[Show All Updates](#)

[Amel Kirkov](#) (Partner) created this change request.

[00009167](#)  
Request Status: Request for Global Fund CT Review  
Case Number: 00009167

[Comment](#) [Like](#) Today at 6:32 PM

[Back to List: Organization Information](#)

[Document Management Section](#) (2) | [Case History](#) (4)

## Change Request Detail

[Edit](#) [Submit](#)

Case Number 00009167  
Description  
Country Team CT Algeria

Request Status Request for Global Fund CT Review  
Request Record Type Mass Edit of Contact List for CCM  
Signatory Template <https://www.theglobalfund.org/en/policies-guide...>  
Contact Name [Amel Kirkov](#)  
Contact Phone  
Clarification Comments History [Amel Kirkov](#) 2019-01-22 17:56:46

[The Global Fund](#) 2019-01-22 17:52:06  
go

[Edit](#) [Submit](#)

## Document Management Section

Action Document Type

[Edit](#) [Documents Uploaded by The Global Fund](#)

1

You will receive a notification email when the Global Fund has shared the latest list. Click on the link to open the change request. Alternatively, scroll down to the bottom of the Organization Information page and click on the relevant change request.

2

On the change request page, scroll down to the Document Management Section and find the CCM list by clicking on “Documents Uploaded by the Global Fund”. Download the Excel file and save it to your computer.

# Request Mass Edit CCM Contact List (4/7)

1

## CCM, Sub-CCM or RCM Membership Details

CCM Name CCM Lestolva

Version 5.0.0.2

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1

Open the Excel file and make the required changes to the list. Starting from the top, proceed line by line and identify the action required for each existing contact. At the bottom of the list, you can add the information for new contacts. Do not delete rows, change positions of rows, or otherwise tamper with the template as this will block the upload of the Excel file to the Partner Portal.

2

For each existing contact listed, define whether to "Edit" "Delete", or "No Change". Add new contacts at the bottom of the list – select "Create New" and type the information into the empty row.

3

Ensure all columns listed as 'mandatory' are filled in correctly (e.g. entry date is in the correct format). The orange highlight shows where information is missing.

# Request Mass Edit CCM Contact List (5/7)

1

Change Request  
00009167

Hide Feed

Post

File

New Lead

More

Write something...

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Followers

No followers.

Show All Updates

Amel Kirkov (Partner) created this change request.

00009167

Request Status: Request for Global Fund CT Review

Case Number: 00009167

Comment

Like

Today at 6:32 PM

« Back to List: Organization Information

Document Management Section (2) | Case History (4)

Change Request Detail

2

Edit

Submit







Case Number	00009167	Request Status	Request for Global Fund CT Review
Description		Request Record Type	Mass Edit of Contact List for CCM
Country Team	CT Algeria	Signatory Template	<a href="https://www.theglobalfund.org/en/policies-guide...">https://www.theglobalfund.org/en/policies-guide...</a>
		Contact Name	<a href="#">Amel Kirkov</a>

1

Once you have made the necessary edits to the Excel CCM list and saved the file to your computer, return to the change request Page.

2

Click “Edit”.

 The Global Fund  Le Fonds mondial  El Fondo Mundial  Глобальный фонд  全球基金  الصندوق العالمي

30

# Request Mass Edit CCM Contact List (6/7)

Request Edit  
00009167

Step 1: CCM Submits Requests

Step 2: CT Generates & Shares Latest List

Step 3: CCM Edits CCM Contact List

Step 4: CT Reviews & Imports Updated List

Mass Edit CCM Contact List

Save Submit Cancel

Additional Information/Clarification

Clarification Comments History

The Global Fund 2019-01-22 17:52:06 go

Instructions: Please download the attached CCM membership list and make any required updates to the CCM contacts and associated details. In the document, please identify which contacts are added as “New Members”, which contacts are being edited (“Edit”), and which contacts are being removed from the membership of the CCM (“Remove”). Once completed, please re-attach to this change request and press “Submit” to allow the Global Fund to review the updates.

Document Management Section

Document Type

Documents Uploaded by The Global Fund

Choose Files

Mass CCM L...Jan19.xlsx

1 Select “Chose Files” under the Document Management Section and attach the updated Excel file.

2 Once your updated Excel file is attached, click on “Submit”.

# Request Mass Edit CCM Contact List (7/7)

1

Change Request  
00009167

Hide Feed

Post

File

New Lead

More

Write something...

Share

+ Follow

Followers

No followers.

Show All Updates

Amel Kirkov (Partner) created this change request.

2

00009167  
Request Status: Request for Global Fund CT Review  
Case Number: 00009167

Comment

Like

Today at 6:32 PM

« Back to List: Organization Information

Document Management Section (2)

Case History (4)

Change Request Detail

Edit

Submit

Case Number	00009167	Request Status	Request for Global Fund CT Review
Description		Request Record Type	Mass Edit of Contact List for CCM
Country Team	CT Algeria	Signatory Template	<a href="https://www.theglobalfund.org/en/policies-guide...">https://www.theglobalfund.org/en/policies-guide...</a>
		Contact Name	Amel Kirkov

Document Management Section

Action	Document Type
<a href="#">Edit</a>	<a href="#">Documents Uploaded by The Global Fund</a>
<a href="#">Edit</a>	<a href="#">Documents Uploaded by Requester</a>

1

The change request still has the same number assigned to it.

2

The status of the change request changes to 'Request for Global Fund CT Review', indicating it is now under review by the Global Fund. Once the Global Fund validates the information, it will be imported into the Partner Portal.





If you experience any issues using the Partner Portal, please contact [GFSupport@theglobalfund.org](mailto:GFSupport@theglobalfund.org), specifying in the Subject line “Partner Portal Issue”.