

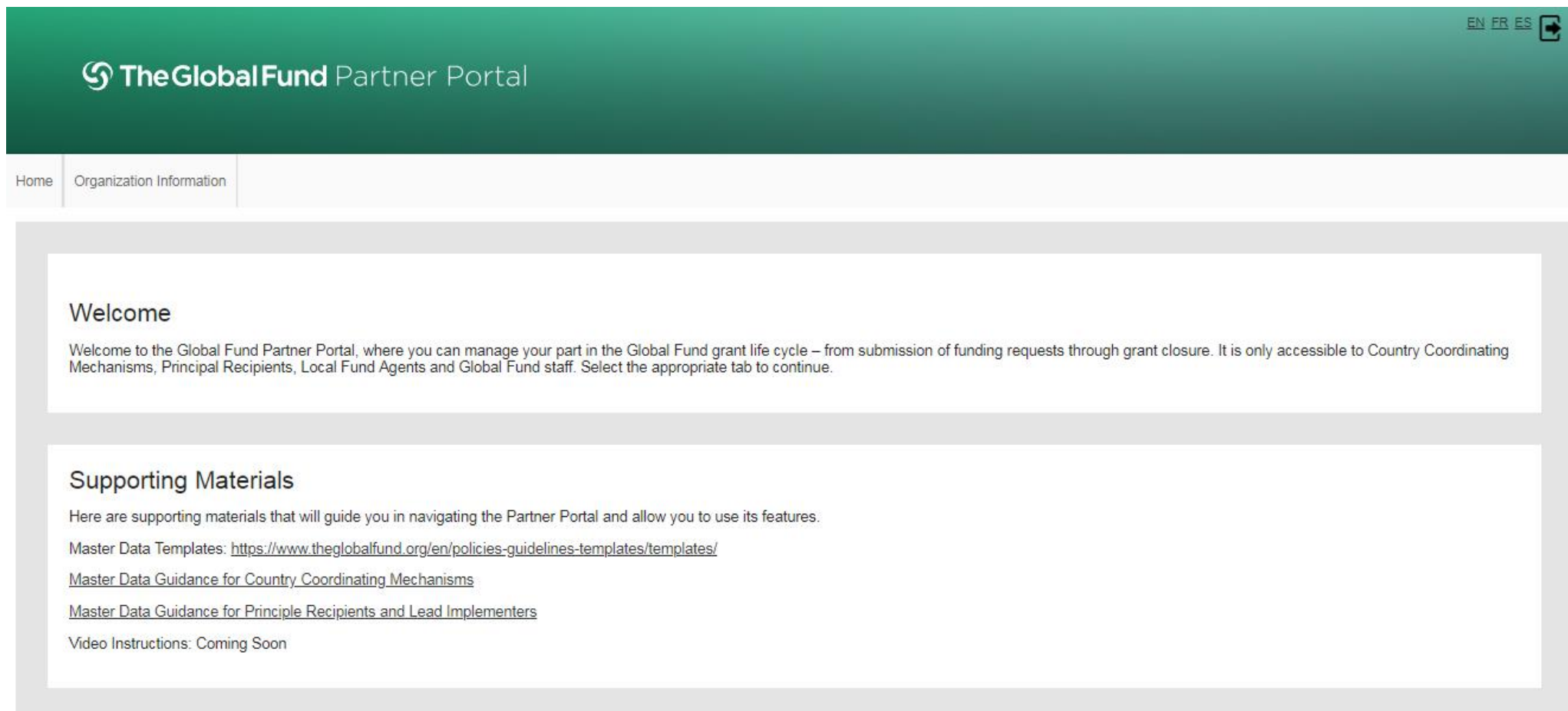
Managing Master Data in the Global Fund's Partner Portal

A Guide for Principal Recipients

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 a critical input into Grant Signing and Disbursements.



Organization Information

Organization name, address...

Information appearing on Grant Confirmation



Contact Information

Name, role, contact information...

Up-to-date contact information for communications



Authorization Rights for Contacts

Assignment of authorization rights

Signatories appearing on Grant Confirmation and Disbursement Requests, person designated as representative for official notices



Access Rights for Contacts

Assignment of access to the Partner Portal



Banking Information

Bank name, address, account number...

Banking information used for disbursements

Which PR members should have their contact information listed in the Partner Portal?

- *Not all members of the PR organization need to be listed in the Partner Portal.*
- *Signatories, the Organization Representative for Notices, and members with access to the Partner Portal should be listed.*
- *The same person can be assigned multiple roles.*

TheGlobalFund Partner Portal



Signatory for Legal Agreements

The authorized signatory on behalf of the PR that appears in legally-binding agreements such as Grant Confirmation and Implementation Letters.



Signatory for Disbursement Requests

The authorized signatory on behalf of the PR that appears on the signature page of the disbursement request



Organization Representative for Notices

The representative for notices is a person the Global Fund is in contact with on contractual matters, as set forth in the Grant Confirmation Table. Disbursement notifications are sent to the representative. This should be a person of certain seniority.

One only



Contacts with Access to the Partner Portal

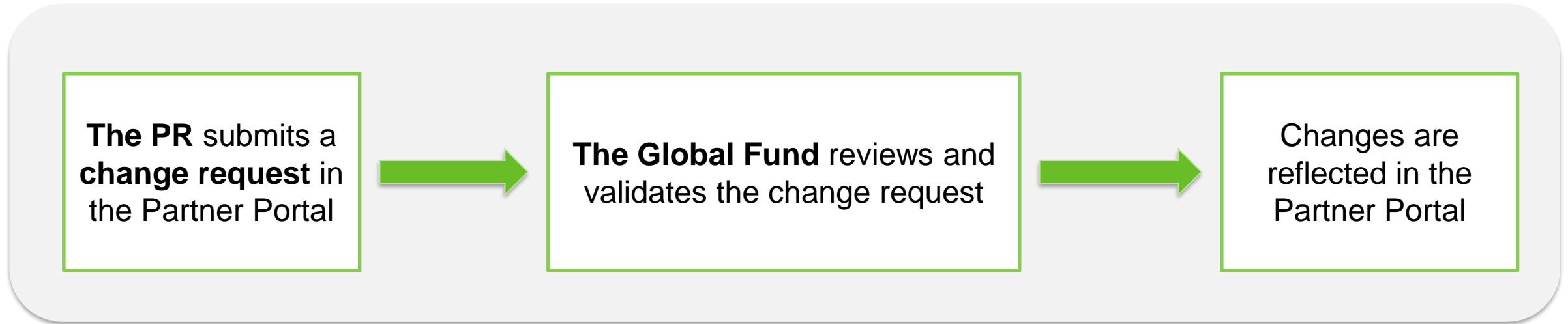
Contacts will be able to access the Global Fund Partner Portal to submit change requests to update Master Data.

Recommended to have more than one at any time

- For most grants the Principal Recipient is the implementer.
- However for some grants, there is a separate lead implementer:
 - When the grant is signed with the Headquarters Office, but implemented by the Country Office. In this case the Country Office is the **"lead implementer"**.
 - When the grant is signed with one Ministry (e.g. MOF), but implemented by another Ministry (e.g. MOH). In this case the MOH is the **"lead implementer"**.
- The Lead Implementer can be created in Master Data and personnel from this office can be given Partner Portal Access.
- However, the Authorized Signatories and Organization Representative for Notices should be personnel from the Principal Recipient.

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 PR to ensure their Master Data is correct and up-to-date. This is particularly important during the Grant Making stage.

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">• To add a new contact to the organization
Update Contact	<ul style="list-style-type: none">• To update personal information for a contact (e.g. email, role, phone number, etc.)• To remove a contact from an organization
Update Authorization & Access Rights	<ul style="list-style-type: none">• To update, remove, or add authorization rights (e.g. signatory for legal agreements) and access rights (e.g. access to Partner Portal) for contacts <u>already associated with the organization</u>• To link a contact already associated to the organization to additional grant(s)
Update Organization	<ul style="list-style-type: none">• To update organization information (e.g. name, abbreviation, address, website, etc.)
Create Bank Information	<ul style="list-style-type: none">• To provide bank account information for the organization

When do I need to attach supporting documents?

- *Supporting documents are required when requesting to add authorization rights, to create banking information, or to make significant changes e.g. changing the official name of the organization*

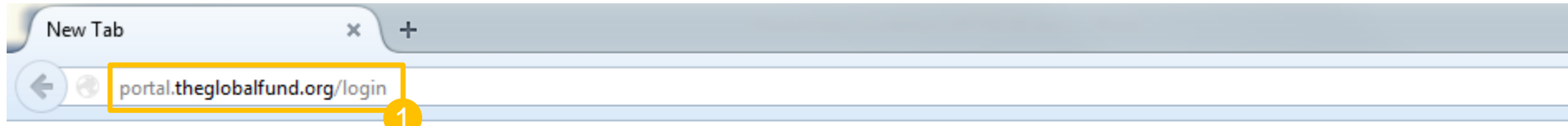
Type of change requested	Supporting document required	Template
Assigning Signatory for Legal Agreements	Completed 'Principal Recipient Signatory Information Template'	https://www.theglobalfund.org/en/documents-by-type/implementers/
Assigning Signatory for Disbursement Requests		
Assigning Organization Representative for Notices	Free format documentation confirming the proposed contact is employed by the PR organization	n/a
Creating Bank Information	Completed 'Principal Recipient Banking Information Template'	https://www.theglobalfund.org/en/documents-by-type/implementers/
Changing Organization Name	NGO / private sector PR : Copy of the PR's constitutional documents (e.g. Articles of Association) and / or registration documents. Government PR: Documentation noting the change in name (e.g. a related press release).	n/a

- ✓ **Do not overwrite contacts** – e.g. if the Signatory for Legal Agreements changes, do not change the name of the existing contact. Instead, create a new contact and remove the old contact from the organization.
- ✓ 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**.
- ✓ Attach **relevant and supporting documents** to the change request in the Document Management section at the bottom of the page
- ✓ When assigning **authorization and access rights**, each PR should have:
 - One (or more if required) **Signatory for Legal Agreements**
 - One (or more if required) **Signatory for Disbursement Requests**
 - Only one **Organization Representative for Notices**
 - At least two contacts with **Partner Portal access**

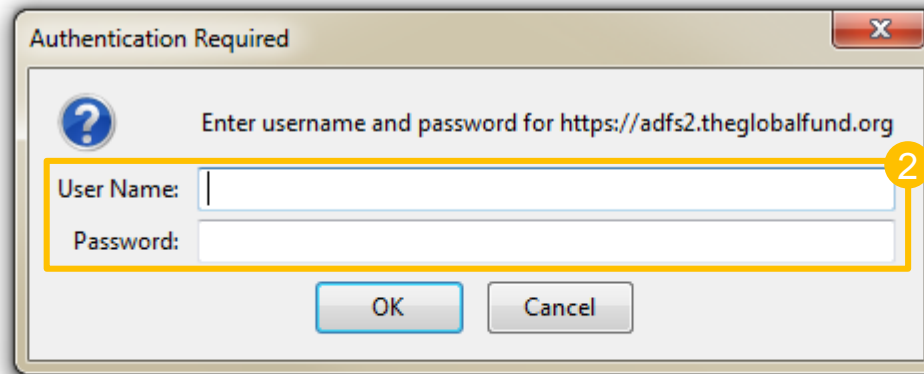
- *The Partner Portal is optimized for Google Chrome*



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



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

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).

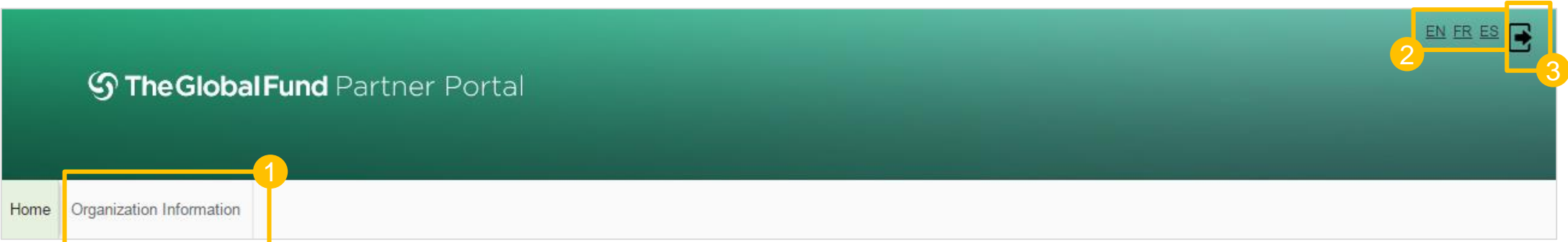
Cancel

To leave the page without saving any changes.

- Navigating in the Portal:..... slides 15-18
- Request to Update Organization.....slides 19-21
- Request to Create a New Contact.....slides 22-23
- Request to Update a Contact.....slides 24-25
- Request to Update Authorization & Access Rights (of existing contacts)....slides 26-27
- Request to Create Bank Information.....slides 28-29

The following slides contain fictitious data

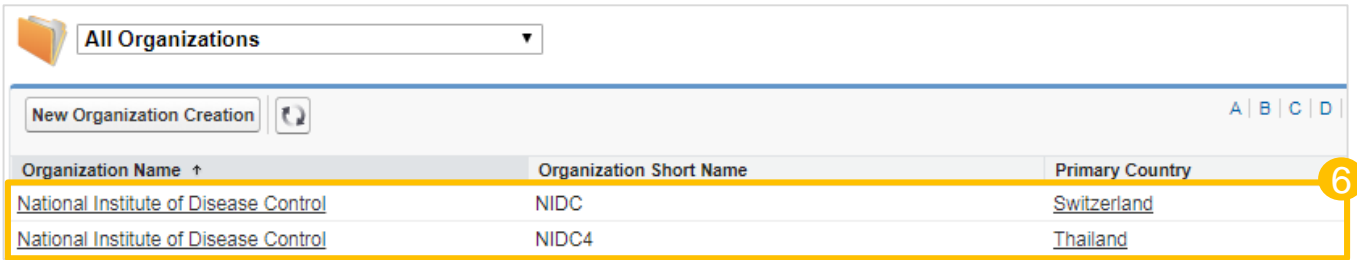
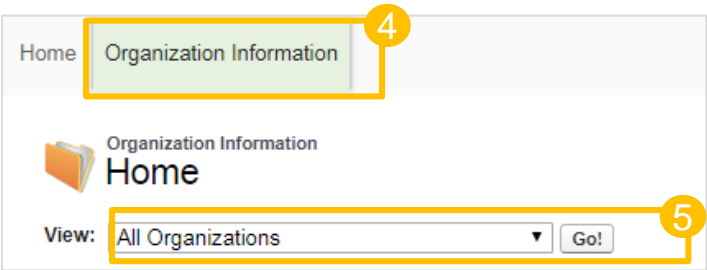
Navigating in the Portal (1/4)



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

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

3 Click on this icon to log out of the Portal



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)

1

Organization Information

National Institute of Disease Control

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

[Printable View](#)

[Organization Roles \[3\]](#)

Organization Information Detail

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

Organization Name: National Institute of Disease Control [\[View Hierarchy\]](#)

Organization Short Name: NIDC

Parent Account:

Primary Country: [Switzerland](#)

IATI Organization Identifier:

External GFS ID Vendor: Vendor_26513

External GFS ID Vendor Site: VendorSite_407577

Email Address: nidc@lestolva.com

Telephone Number: +12 (345) 678-1111

Website: <http://www.nidc.le>

3

2

▼ Contacts

Action	Contact Salutation	Contact Name	Contact Gender	Organization Name	Organization Abbreviation	Official Job Title
	Mrs.	Amy Dean	Female	National Institute of Disease Control	NIDC4	
Request Contact Update	Miss	Emma Jones	Female	National Institute of Disease Control	NIDC	Africa Team Leader, HIV, Health and Development
	Prof.	John Smith	Male	National Institute of Disease Control	NIDC2	
	Ms.	Mary Genevois	Female	National Institute of Disease Control	NIDC3	Programme Manager, Global Fund Africa Regional Grant
	Mr.	Robert Johnson	Male	National Institute of Disease Control	NIDC1	
Go to list (6) >>						

1

The key organization information is displayed.

2

All the contacts associated to this organization 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. Please contact GFSupport@theglobalfund.org to request changes.)

3

Click on the buttons to launch different types of change request.

Navigating in the Portal (3/4)

1

Authorization and Access Rights by Grant

Organization Abbreviation	Sub Type	Grant Name	Active
NIDC	GOV	SWT-H-NIDC	✓

▼ Positions (7)

Organization Abbreviation	Contact Name	Role	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
NIDC4	Amy Dean			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	✓
NIDC3	Mary Genevols		Programme Manager, Global Fund Africa Regional Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	✓
NIDC2	John Smith			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	✓
NIDC1	Robert Johnson			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	✓
NIDC	William Muller		Assistant Secretary General	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NIDC	Emma Jones		Africa Team Leader, HIV, Health and Development	<input type="checkbox"/>	✓	✓	<input type="checkbox"/>	✓	✓
NIDC	Swami Muniz	Assistant manager		<input type="checkbox"/>	<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 ▼

Copyright © 2010-2017 Primal Cause, Inc.

1

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

1

Organization Roles

Action	Organization Role	Grant Name	Sub Type	Also Implementer	Payee	Active
	PR	SWT-H-NIDC	GOV	<input type="checkbox"/>	<input type="checkbox"/>	✓
	Lead Implementer	SWT-H-NIDC	GOV	<input type="checkbox"/>	<input type="checkbox"/>	✓

2

Change Requests

Action	Change Request	Case Record Type	Owner	Request Status	Date Opened
Edit CIs 00006541		Update Organization Information for PR	Amy Dean	Request for Global Fund CT Review	7/26/2018
Edit CIs 00001094		Update Organization Information for PR	Amy Dean	Draft	4/10/2017

1

At the bottom of the page, the organization roles are displayed. This indicates for which grants the organization acts as a PR (or Lead Implementer).

2

All change requests raised for this organization 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 PR

National Institute of Disease Control

UNDP

NIDC

<http://www.nidc.le>

Primary Address Information

Primary Address Line 1

Primary Address Line 2

Stevenson St. 5

Proposed Information

Request Status

Draft

Organization Name

Organization Grant Abbreviation

Organization Short Name

IATI Organization Identifier

Website

Communication Language

Description

National Institute of Disease

UNDP

NIDC

www.nidc.le

--None--

Primary Address Line 1

Primary Address Line 2

Stevenson St. 5

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)

Secondary Address Information

Secondary Address Line 1
Secondary Address Line 2
Secondary Address Line 3
Secondary Address Line 4
Secondary Zip/Postal Code
Secondary City
Secondary Country
Secondary Email Address
Secondary Telephone Number

Tertiary Address Information

Tertiary Address Line 1
Tertiary Address Line 2
Tertiary Address Line 3
Tertiary Address Line 4
Tertiary Zip/Postal Code
Tertiary City
Tertiary Country
Tertiary Email Address
Tertiary Telephone Number

Save Submit Cancel

Document Management Section

Choose Files No file chosen

Open

File name: Document to be Attached.docx

File type: All Files

Open Cancel

Document Management Section

Choose Files No file chosen

Tip: You can attach multiple documents at once by holding "Ctrl" and selecting multiple attachments in the pop-up window

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

Save Submit Cancel

Document Management Section

Choose Files Document t...ached.docx

1

Change Request

00006541

Printable View

Hide Feed

Post

File

New Task

More

Write something...

Share

+ Follow

Followers

No followers.

Show All Updates

Amy Dean (Partner) created this change request.

00006541

Request Status: Request for Global Fund CT Review

Case Number: 00006541

Comment

Like

Today at 12:13 PM

Back to List: Organization Information

Document Management Section [1]

Case History [2]

Change Request Detail

Edit

Submit

Case Number

00006541

Request Status

Request for Global Fund CT Review

Organization Short Name

NIDC4

Request Record Type

Update Organization Information for PR

- 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 Create a New Contact (1/2)

Request Edit
New Request

Contact Creation [Save] [Submit] [Cancel]

Contact Details

Case Number
Case Record Type: Create Contact for PR

Salutation: --None--
First Name
Middle Name
Last Name
Gender: --None--
Role: --None--
Official Job Title

Request Status: Draft

Business Email Address
Alternate Email Address
Mobile Phone Number
Business Phone Number
Fax Number
Principal Nationality: --None--
Communication Language: English
Description

Signatory for Legal Agreements
Signatory for Disbursement Requests
Organization Representative for Notices
Allow info to be published on website?
Access to Global Fund Partner Portal
Recipient of Automatic Notifications

Grant

Grant: [SWT-T-NIDC] [SWT-H-NIDC]
To which grant should the changes apply?

[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 mandatory fields (marked with a red bar).

3 Tick the boxes to assign authorization and access rights as applicable.

4 Select the grants the contact should be linked to.

5 Attach supporting documents (see slide 8 for further details).

6 Click “Submit”

Request to Create a New Contact (2/2)

The screenshot shows a user interface for creating a change request. At the top, a callout box labeled '1' highlights the 'Change Request' header and the ID '00005152'. Below this is a 'Hide Feed' button and a row of icons for 'Post', 'File', 'Link', and 'Poll'. A text input field with the placeholder 'Write something...' is followed by a green 'Share' button. To the right, there is a '+ Follow' button and a 'Followers' section showing 'No followers.' Below the input field, a search icon and a 'Show All Updates' link are visible. The main content area shows a post by 'Amy Dean (Partner)' stating 'created this change request.' Below the post is a callout box labeled '2' that highlights the 'Request Status' field, which contains the text 'Request for Global Fund CT Review'. Below the status field, the 'Case Number: 00005152' is displayed. At the bottom of the post, there are links for 'Comment' and 'Like', and a timestamp 'Today at 1:28 PM'. At the very bottom of the page, there is a link that says '« Back to List: Organization Information'.

1

Change Request
00005152

Hide Feed

Post File Link Poll

Write something...

Share

+ Follow

Followers

No followers.

Search | Show All Updates

Amy Dean (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 PR
Salutation: Miss
First Name: Emma
Middle Name:
Last Name: Jones
Gender: Female
Role:
Official Job Title: Africa Team Leader, HIV, Health and Development
Organization Name: National Institute of Disease Control
Business Email Address: jones@emma.com
Alternate Email Address:
Mobile: +22 (333) 444-4556
Business Phone Number: +12 (432) 543-7654
Fax: +251115170898
Principal Nationality: Switzerland
Communication Language: French
Access to Wambo Portal: ☐

Proposed Information

Request Status: Draft
Salutation: Miss
First Name: Emma
Middle Name:
Last Name: Jones
Gender: Female
Role: --None--
Official Job Title: Africa Team Leader, HIV, H
Business Email Address: jones@emma.com
Alternate Email Address:
Mobile Phone Number: +22 (333) 444-4556
Business Phone Number: +12 (432) 543-7654
Fax Number: +251115170898
Principal Nationality: Switzerland
Communication Language: French
Description:
Allow info to be published on website? ☐

Deactivation

Remove Contact from Organization ☐ Deactivate Access to Partner Portal ☐

[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 Tick this box to remove an existing contact from the organization.

5 Click "Submit"

Request to Update an Existing contact (2/2)

Change Request
00009166

Printable View

Hide Feed

PostFileLinkPoll

Write something...

Share

Follow

Followers

No followers.

Amy Dean (Partner) created this change request.

00009166

Request Status: Request for Global Fund CT Review

Case Number: 00009166

CommentLikeToday at 5:25 PM

Back to List: Organization Information

Document Management Section [1] | Case History [2]

Change Request Detail

EditSubmit

Case Number	00009166	Request Status	Request for Global Fund CT Review
Salutation	Miss	Request Record Type	Update Contact information for PH
First Name	Emma	Business Email Address	jones@emma.com
Middle Name		Alternate Email Address	
Last Name	Jones	Mobile Phone Number	+22 (333) 444-4556
Gender	Female	Business Phone Number	+12 (432) 543-7654
Role	Assistant manager	Fax Number	+251115170898
Official Job Title	Africa Team Leader, HIV, Health and Development	Principal Nationality	Switzerland
Signatory for Legal Agreements	<input type="checkbox"/>	Description	
Signatory for Disbursement Requests	<input checked="" type="checkbox"/>	Clarification Comments History	
Recipient of Automatic Notifications	<input checked="" type="checkbox"/>		
Organization Representative for Notices	<input checked="" type="checkbox"/>		
Access to Global Fund Partner Portal	<input checked="" type="checkbox"/>		
Allow info to be published on website?	<input type="checkbox"/>		
Country Team	Multiple		

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 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

English

Request Status

Draft

Organization Name

National Institute of Disease Control

Signatory Template

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

Grant

Grant	Name	To which grant should the changes apply?
SWT-H-NIDC	PR	<input checked="" type="checkbox"/>

Authorization and Access Rights

Contact	Role	Grant	Signatory for Legal Agreements	Signatory for Disbursement Requests	Organization representative for notices	Access to Global Fund Partner Portal	Recipient of Automatic Notifications
Amy Dean	PR	QPA-H-UNDP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mary Genevois	PR	QPA-H-UNDP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
John Smith	PR	QPA-H-UNDP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Robert Johnson	PR	QPA-H-UNDP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
William Muller	PR	QPA-H-UNDP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emma Jones	PR	QPA-H-UNDP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Document Management Section

Choose Files

No file chosen

Save

Submit

Cancel

Note

Add Existing Contacts To Grant

Tom Dowler

Aya Stone

Aditi Mira

Confirm

Cancel

Note

If an existing contact associated to the organization needs to be linked to another grant, click the “Add Existing Contacts to Grant” button. In the pop-up window, select the contact names that require linkage to the grant and then click “Confirm”. The names will then appear in the ‘Authorization and Access Rights’ section below

- 1

After clicking on “Update Authorization and Access Rights”, a New Request page is displayed.
- 2

Follow the link to access the PR Signatory Information template.
- 3

The grants linked to the organization are displayed. Select the grants you would like to update.
- 4

Contacts associated to each grant are displayed with their authorization and access rights. Make the required updates by checking and unchecking boxes.
- 5

Attach any supporting documents (see slide 8 for further details).
- 6

Click “Submit”

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

1

Change Request
00009165

Hide Feed

Post

File

New Lead

More

Write something...

Share

Follow

Followers

No followers.

Show All Updates

Amy Dean (Partner) created this change request.

00009165

Request Status: Request for Global Fund CT Review

Case Number: 00009165

Comment

Like

Today at 11:03 AM

Back to List: Organization Information

Case History (2)

Change Request Detail

Edit

Submit

Case Number	00009165
Description	
Country Team	Multiple

Edit

Submit

Request Status

Request for Global Fund CT Review

Request Record Type

Update Authorization and Access Rights

Signatory Template

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

Contact Name

Amy Dean

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 to Create Bank Information (1/2)

Home

Organization Information

Request Edit

New Request

Create/Update Bank Information

Save

Submit

Cancel

Please Select an action for bank information:

Create

Request Status Draft

Case Record Type

Create Banking Information

Tip! Banking Information Templates can be found [here](#)

I attached the banking info template

Save

Submit

Cancel

Document Management Section

Choose Files

No file chosen

- 1

After clicking on “Create/Update Bank Information”, a New Request page is displayed.
- 2

Select ‘Create’ from the dropdown menu.
- 3

Download the Banking Information Template.
- 4

Complete the Banking Information Template and attach in the Document Management Section.
- 5

Tick the box to confirm you have attached the template.
- 6

Click ‘Submit’.

Request to Create Bank Information(2/2)

1

Change Request
00009165

Hide Feed

Post

File

New Lead

More

Write something...

Share

Follow

Followers

No followers.

Amy Dean (Partner) created this change request.

00009165

Request Status: Request for Global Fund CT Review

Case Number: 00009165

Comment

Like

Today at 11:03 AM

Back to List: Organization Information

Case History (2)

Change Request Detail

Edit

Submit

Case Number	00009165	Request Status	Request for Global Fund CT Review
Description		Request Record Type	Create Banking Information
Country Team	Multiple	Signatory Template	https://www.theglobalfund.org/en/policies-guide...
		Contact Name	Amy Dean
		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.



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