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…**

### Contact Information
- **Name, role, contact information…**

### Authorization Rights for Contacts
- **Assignment of authorization rights**

### Access Rights for Contacts
- **Assignment of access to the Partner Portal**

### Banking Information
- **Bank name, address, account number…**

**Information appearing on Grant Confirmation**

**Up-to-date contact information for communications**

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

**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.

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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.

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.

One only

Recommended to have more than one at any time
Explaining ‘Lead Implementer’

- 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”

The PR submits a change request in the Partner Portal

The Global Fund reviews and validates the change request

Changes are reflected in the Partner Portal

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”**

<table>
<thead>
<tr>
<th>Type of Actions (“change requests”)</th>
<th>When to use them?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New Contact</td>
<td>- To add a <strong>new</strong> contact to the organization</td>
</tr>
</tbody>
</table>
| Update Contact | - 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 | - To **update, remove, or add authorization rights** (e.g. signatory for legal agreements) **and access rights** (e.g. access to Partner Portal) for contacts **already associated with the organization**  
- To link a contact already associated to the organization to additional grant(s) |
| Update Organization | - To **update organization information** (e.g. name, abbreviation, address, website, etc.) |
| Create Bank Information | - To provide **bank account information** for the organization |
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.

<table>
<thead>
<tr>
<th>Type of change requested</th>
<th>Supporting document required</th>
<th>Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigning Signatory for Disbursement Requests</td>
<td>Free format documentation confirming the proposed contact is employed by the PR organization</td>
<td>n/a</td>
</tr>
<tr>
<td>Assigning Organization Representative for Notices</td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Changing Organization Name</td>
<td>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).</td>
<td>n/a</td>
</tr>
</tbody>
</table>
Useful Tips

✓ **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**
User Guide: Submitting Change Requests
Getting started

- The Partner Portal is optimized for Google Chrome
To access the Global Fund Partner Portal, open an internet browser and type in the link: portal.theglobalfund.org/login

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?

**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.
Index of change requests

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

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.
After clicking on “Request Organization Update”, a New Request page is displayed. The current Organization information is displayed in the left side of the screen. 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).
Scroll down to the Document Management Section at the bottom of the screen. Click on “Choose Files”.

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.

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

Click ‘Submit’ to send the change request to the Global Fund for review.
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.
After clicking on “New Contact Request”, a New Request page is displayed.

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

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

Select the grants the contact should be linked to.

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

Click “Submit”
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 Update an Existing Contact (1/2)

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

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

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).

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

Click "Submit".
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.
After clicking on “Update Authorization and Access Rights”, a New Request page is displayed.

Follow the link to access the PR Signatory Information template.

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

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

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

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

1. Select ‘Create’ from the dropdown menu.
2. Download the Banking Information Template.
3. Complete the Banking Information Template and attach in the Document Management Section.
4. Tick the box to confirm you have attached the template.
5. Click ‘Submit’.
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.
If you experience any issues using the Partner Portal, please contact GFSupport@theglobalfund.org, specifying in the Subject line “Partner Portal Issue”.