

### Who am I?

Select from the below

### Global Fund External Stakeholders



Principal Recipient (PR) ... Go to page 2



Local Fund Agent (LFA) ... Go to page 149



Country Coordinating Mechanism (CCM) ... Go to page 108



Third Party ... Go to page 231







Select from the below

### **Organization information Change Requests**



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**Update Organization** Information

... page 4

### **Contact Information Change Requests**



**Create Contacts** 

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**Update Contacts** 

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### **Banking information Change Requests**



Create banking information ... page 15



Deactivate banking information

... page 43



Update banking information ... page 29



The steps assigned to you are highlighted in the red boxes

#### **PR | Create New Organization**

External Stakeholder



Follow the steps below

PR emails Organization Information Designated PR contact with Access Global Fund creates new organization in Form\*\* & supporting documents1 to Rights receives login details to the Partner Portal. Global Fund Partner Portal via email. Country Team.



The Global Fund Partner Portal

PR Focal Point contact with Access Step Rights is able to submit change requests.

Via e-mail In the system

<sup>&</sup>lt;sup>1</sup> See Operational Policy Manual (OPM) Annex 3 on required supporting documents

<sup>\*\*</sup> Organization Information Form (EN | ES | FR). Please note! Spanish and French versions are courtesy translations only. Please complete and submit the English version of this template.



The steps assigned to you are highlighted in the red boxes

### **PR | Update Organization Information**





Follow the steps below

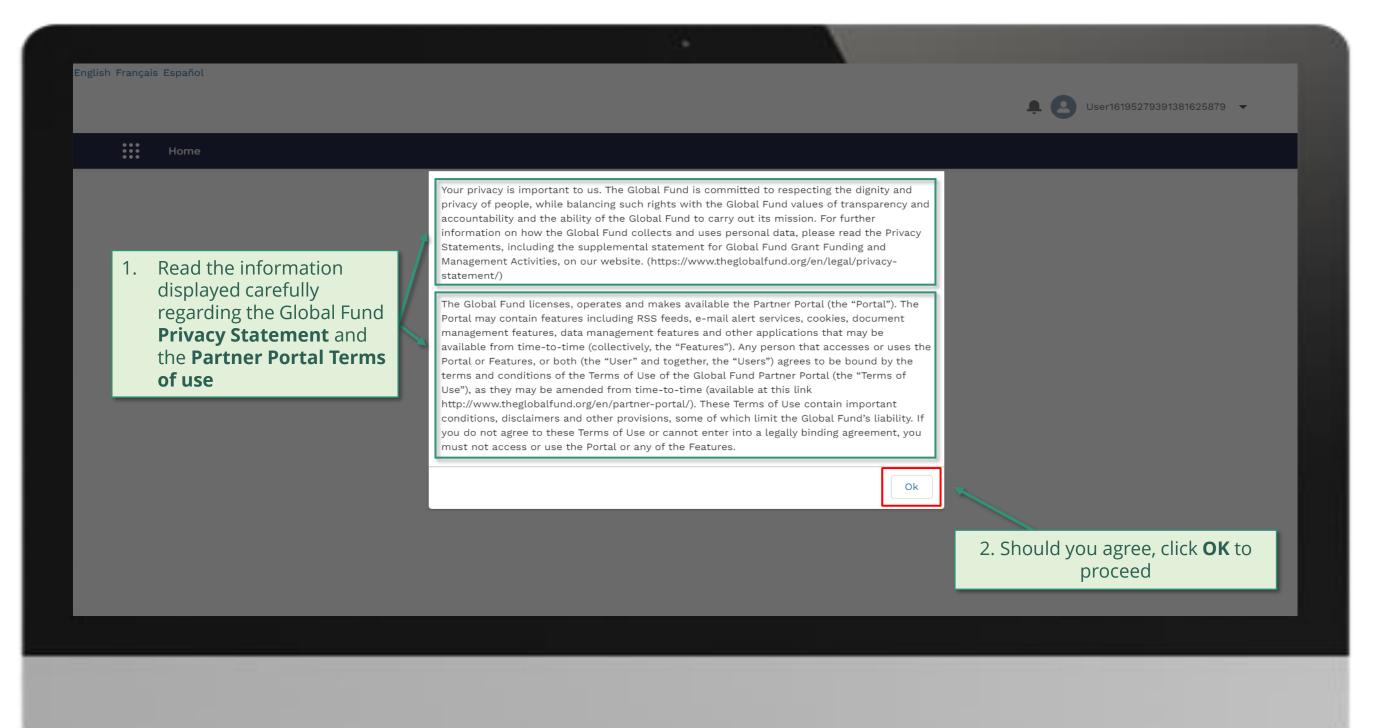
PR contact with Access Rights submits PR contact with Access Rights accesses change request to update organization Global Fund reviews and validates the changes. *information*, including supporting the Global Fund Partner Portal.

> Click to see detailed steps in

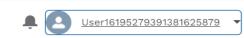
documents1.

Updated GED reflected in Global Fund Partner Portal











overview of the steps for this request

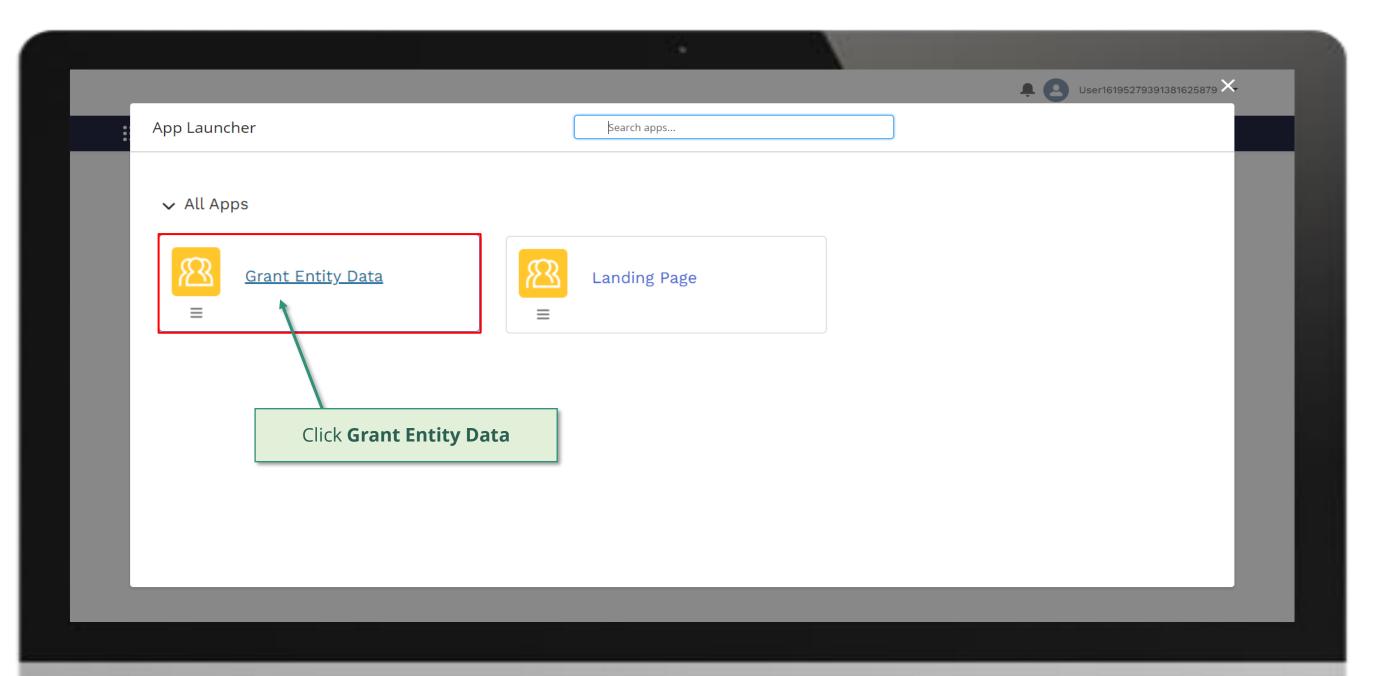
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Use App Launcher to choose what portal you want to open

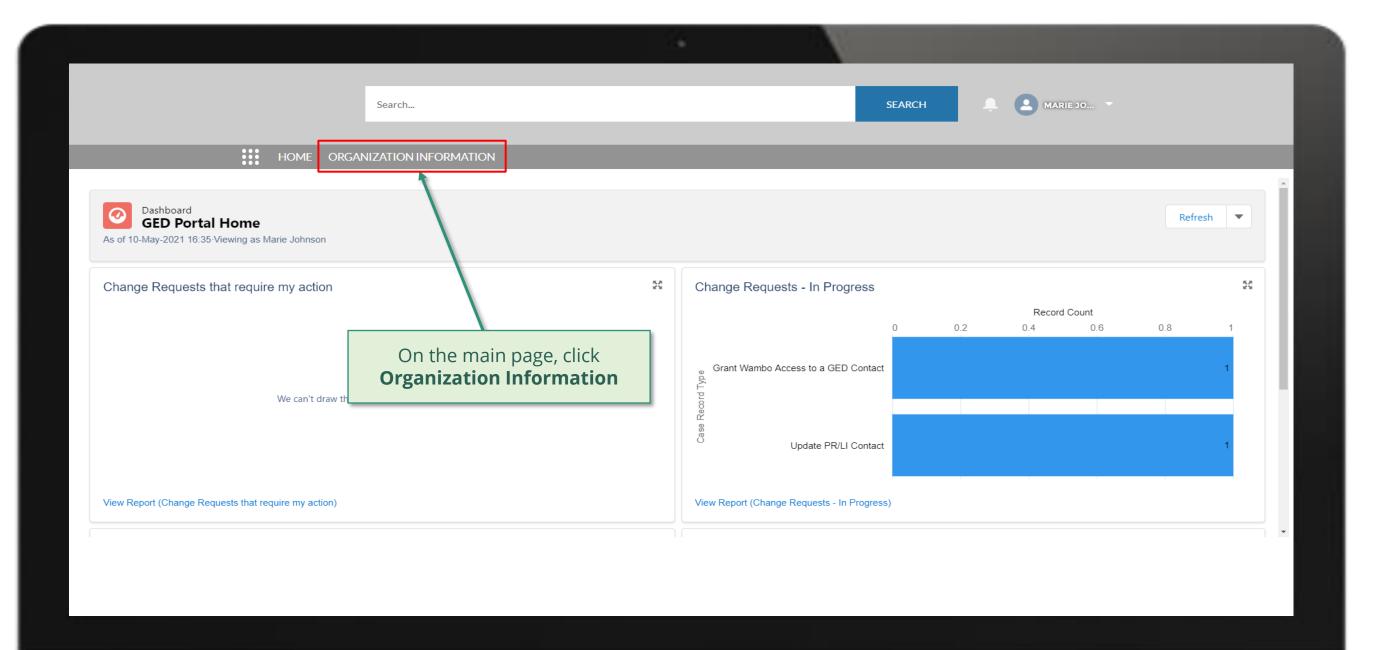
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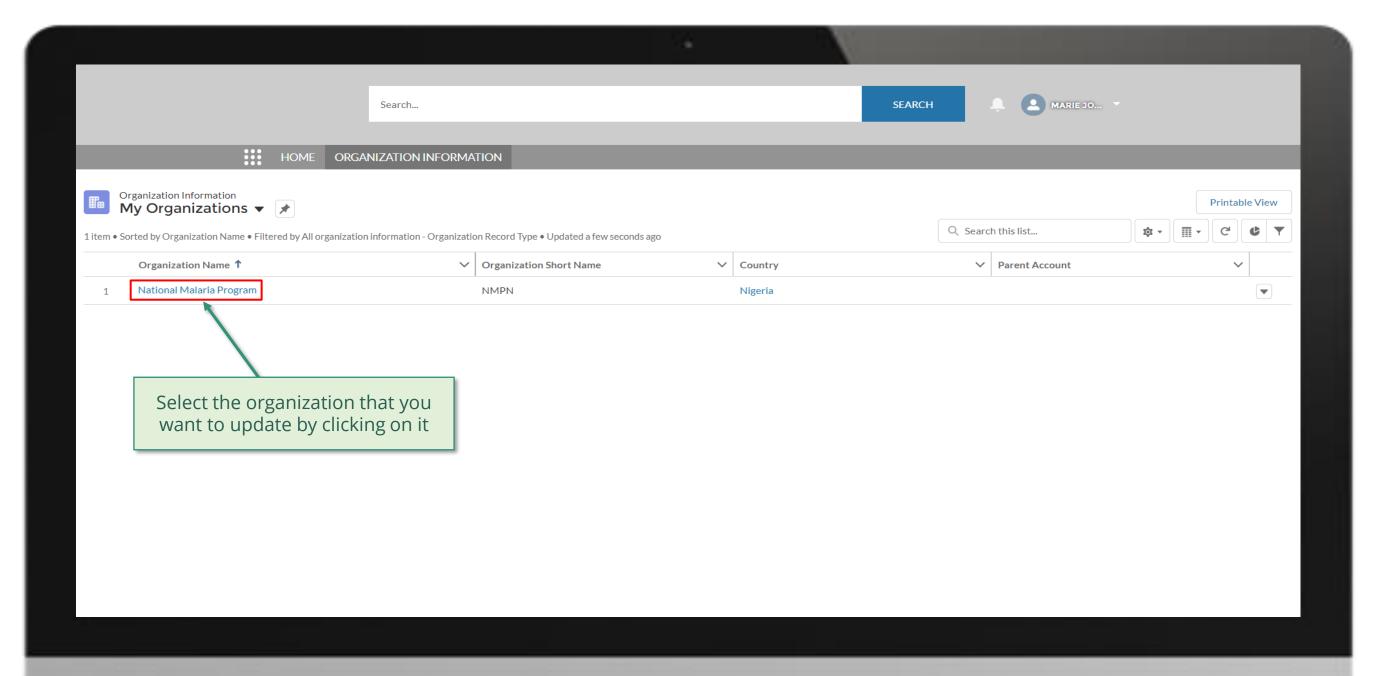
Home



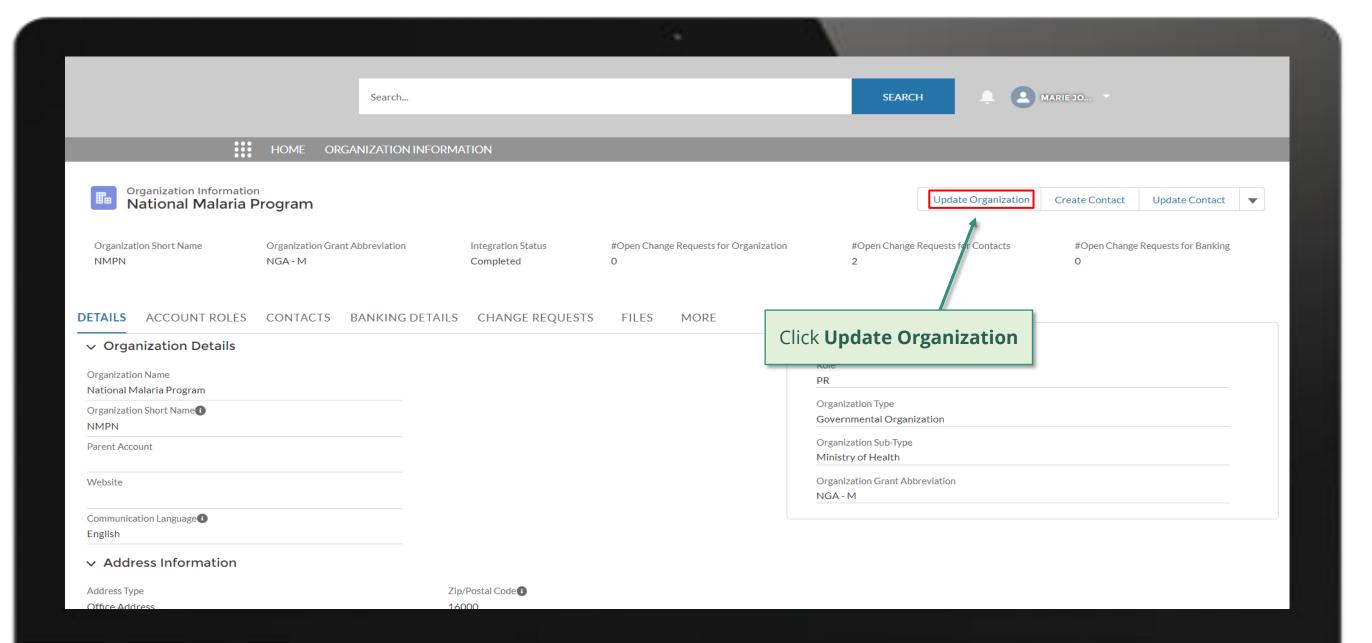




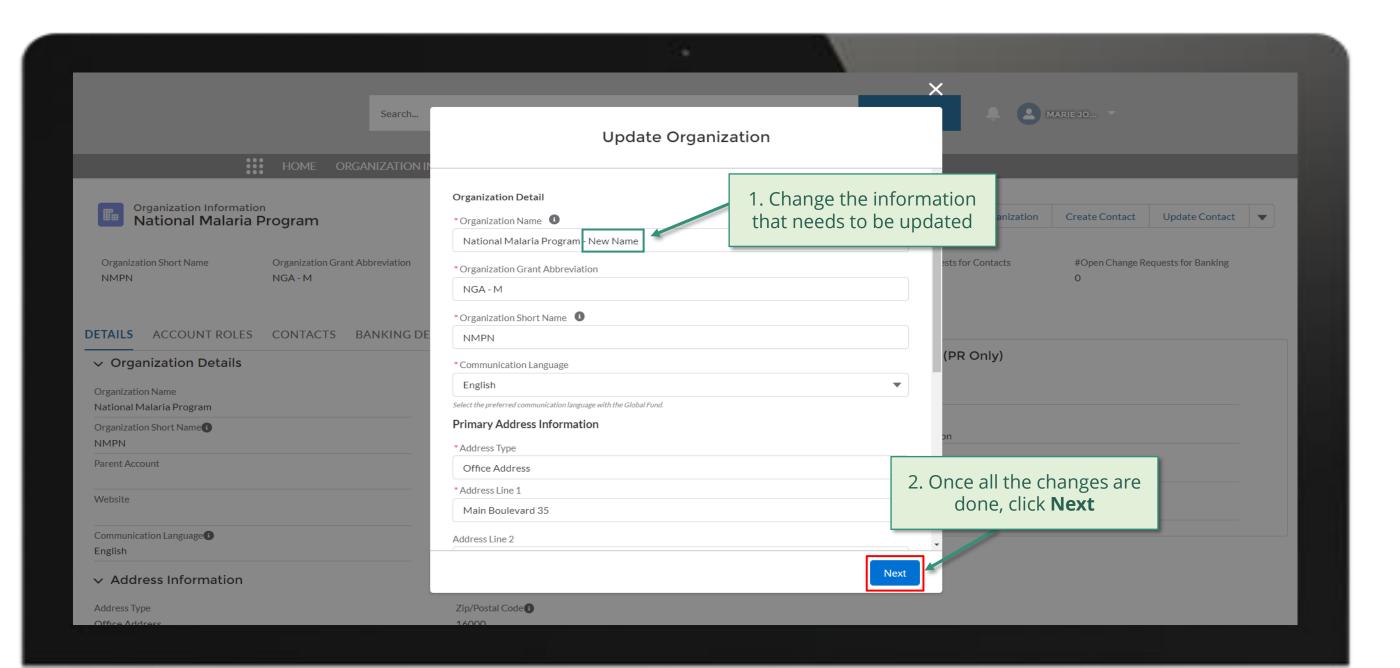




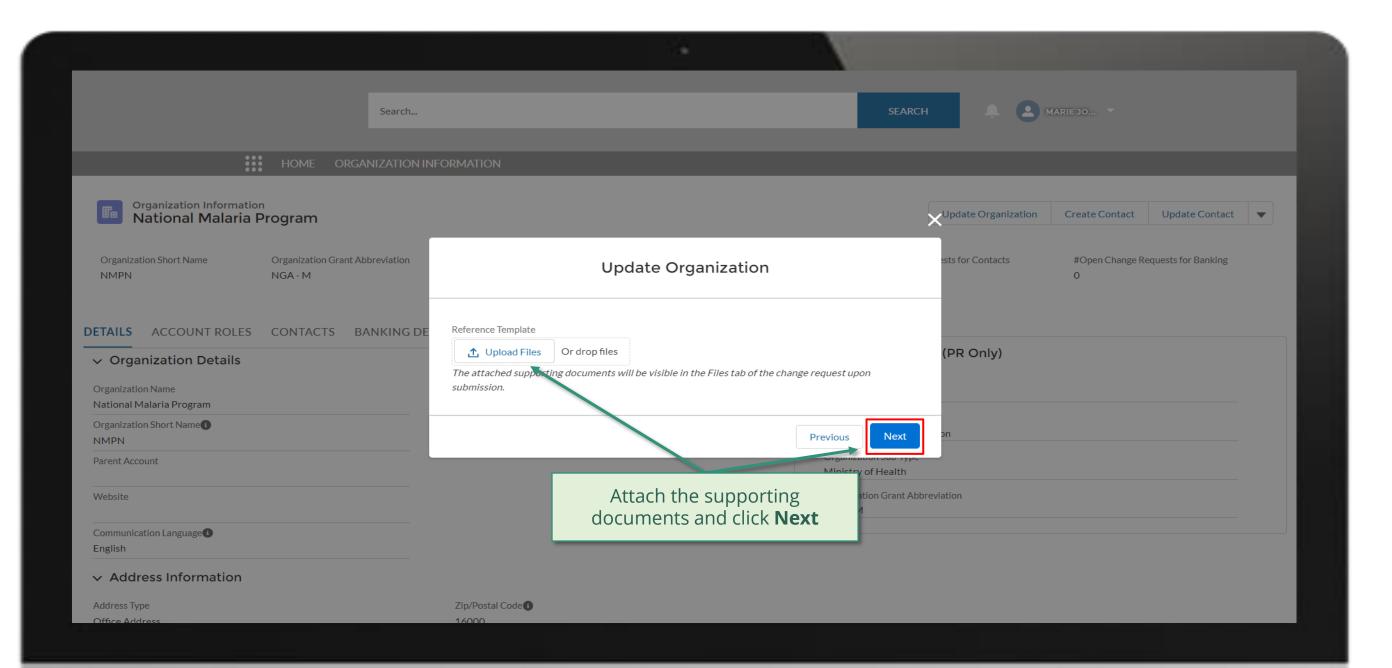






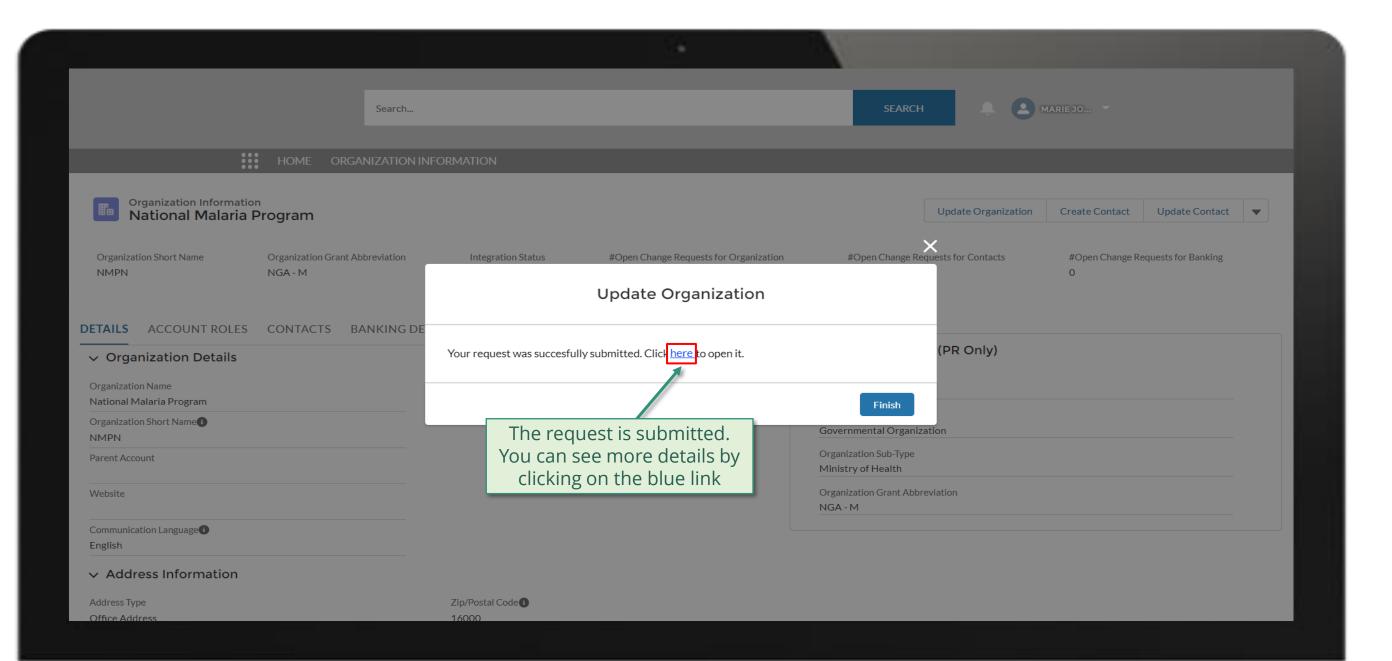






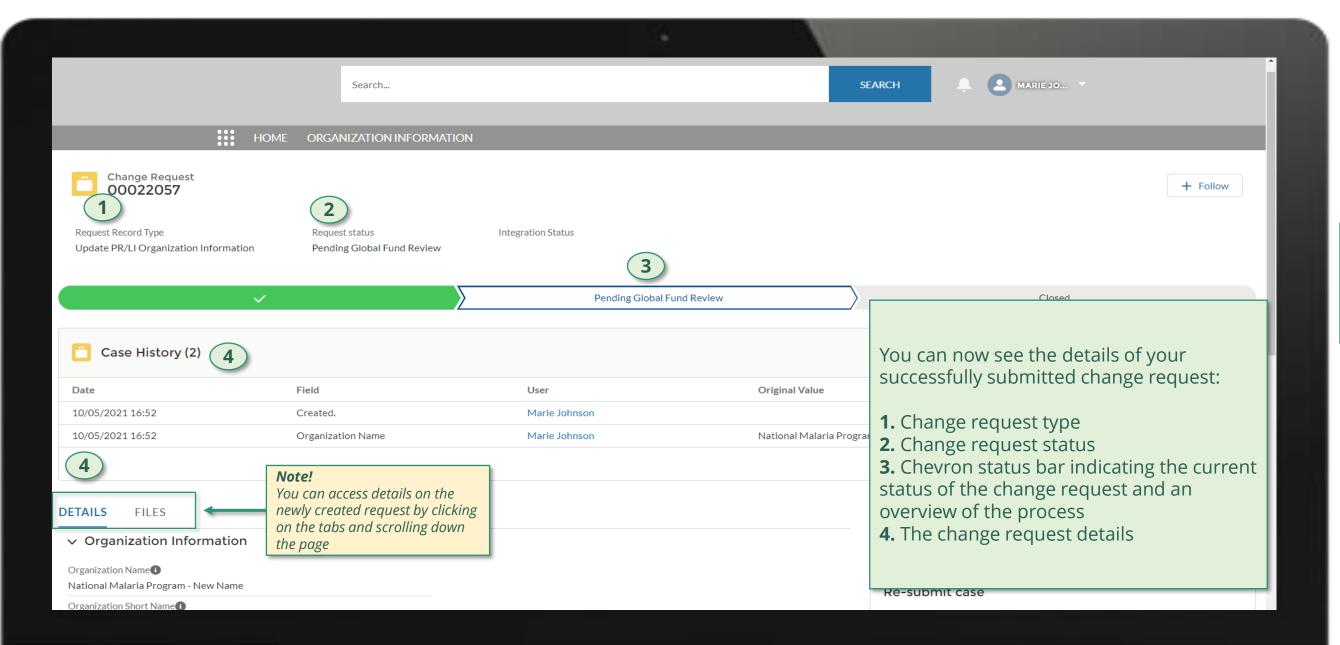


for this request





the steps for this request





Click here to go back to the overview page



The steps assigned to you are highlighted in the red boxes

#### **PR | Create Banking Information**

Select Anothe

External Stakeholder



Follow the steps below



Updated GED reflected in Global Fund Partner Portal



The Global Fund Secretariat reviews and validates the changes.









overview of the steps for this request

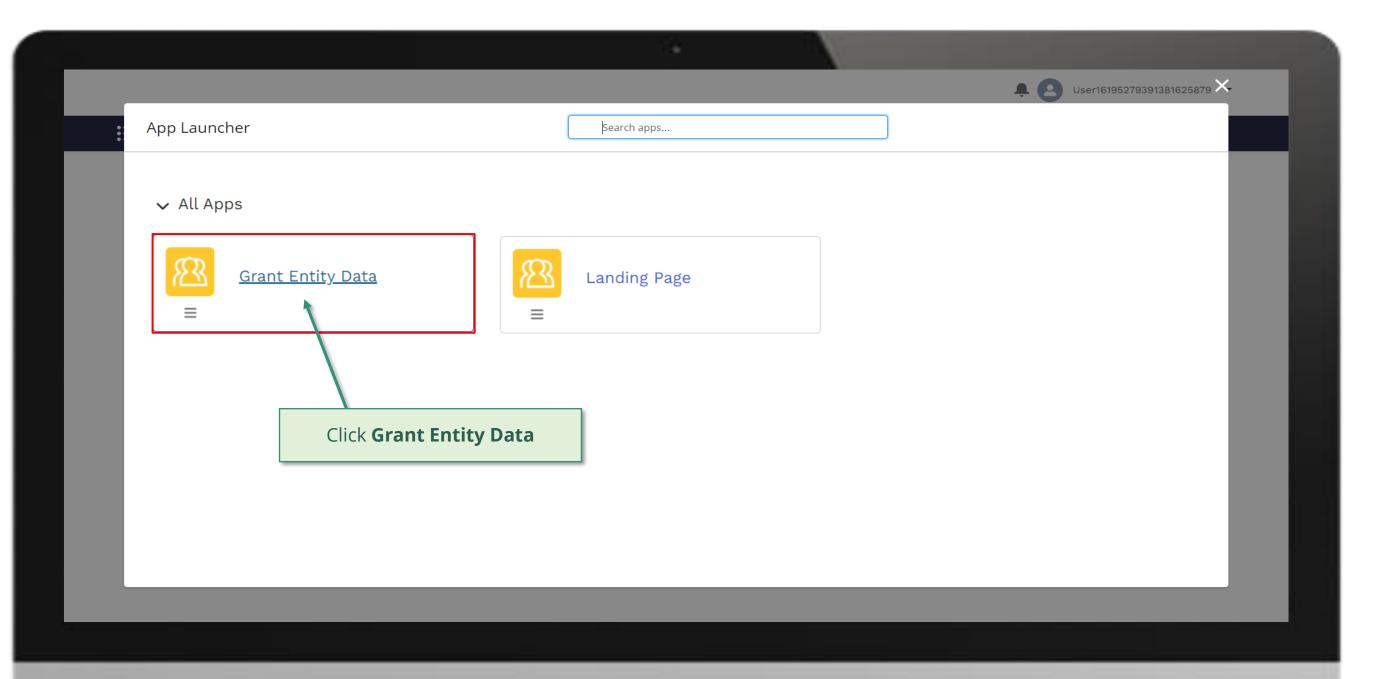
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Use App Launcher to choose what portal you want to open

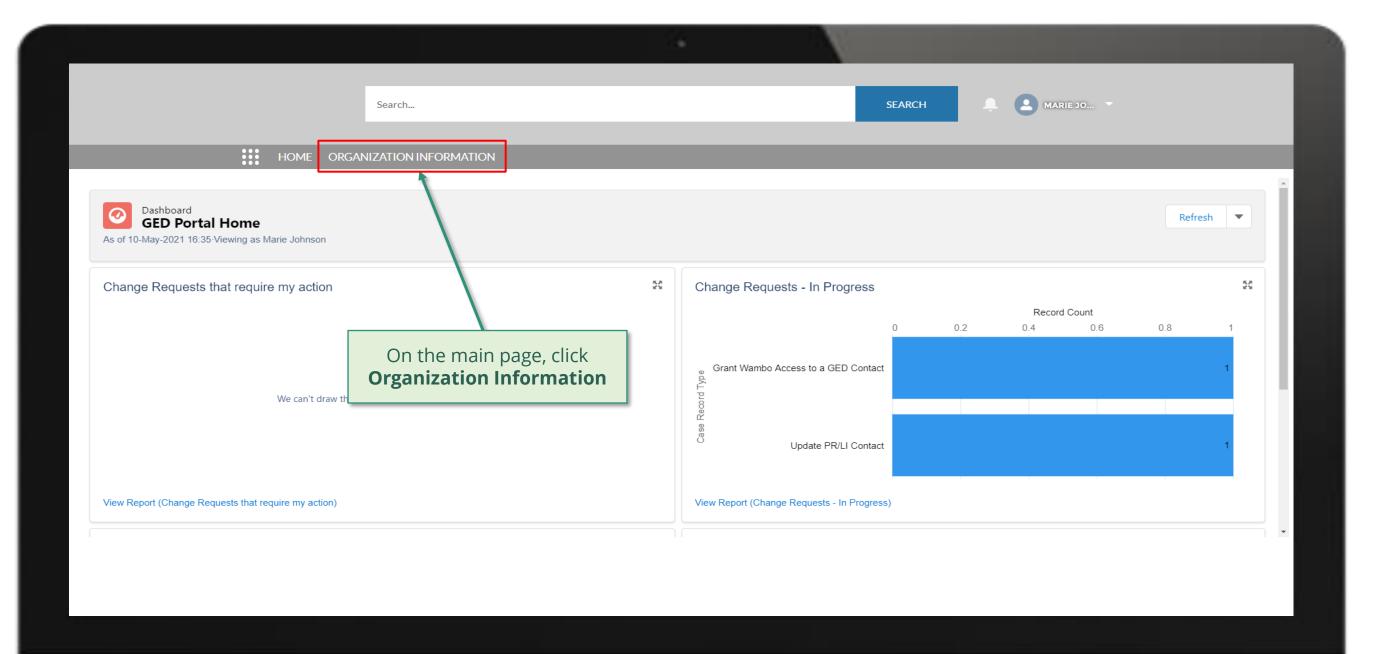
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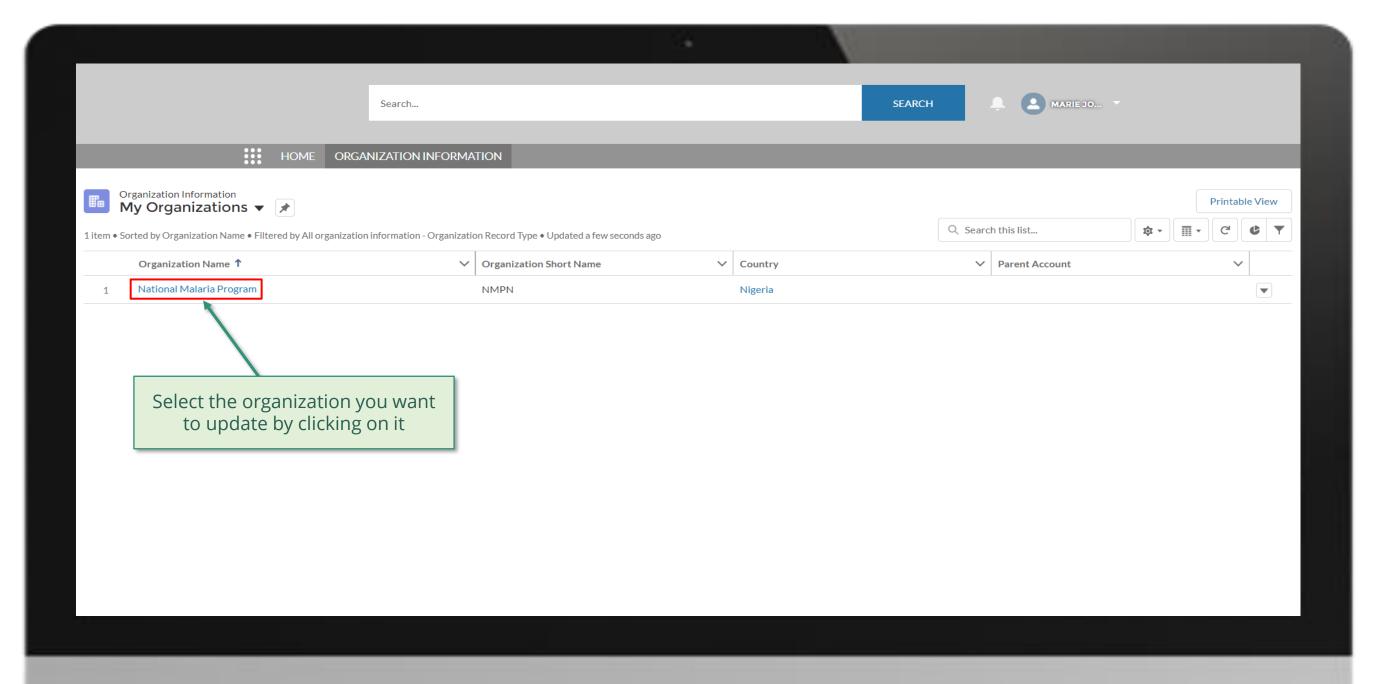
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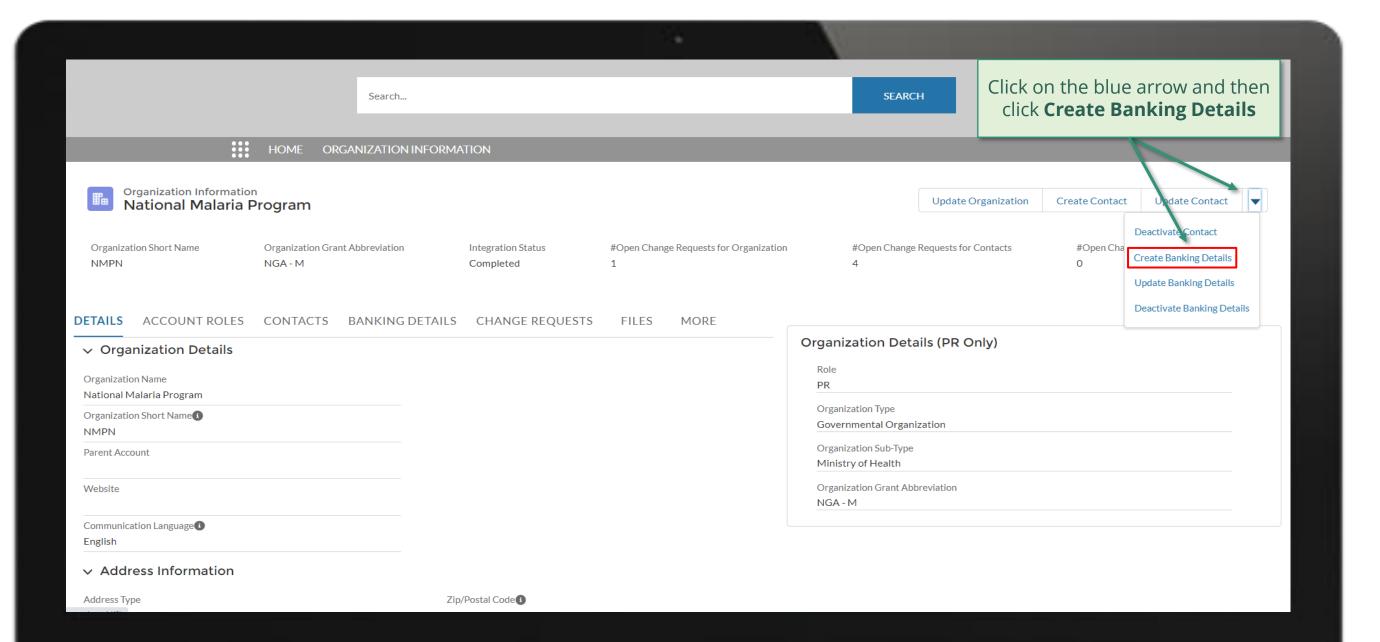








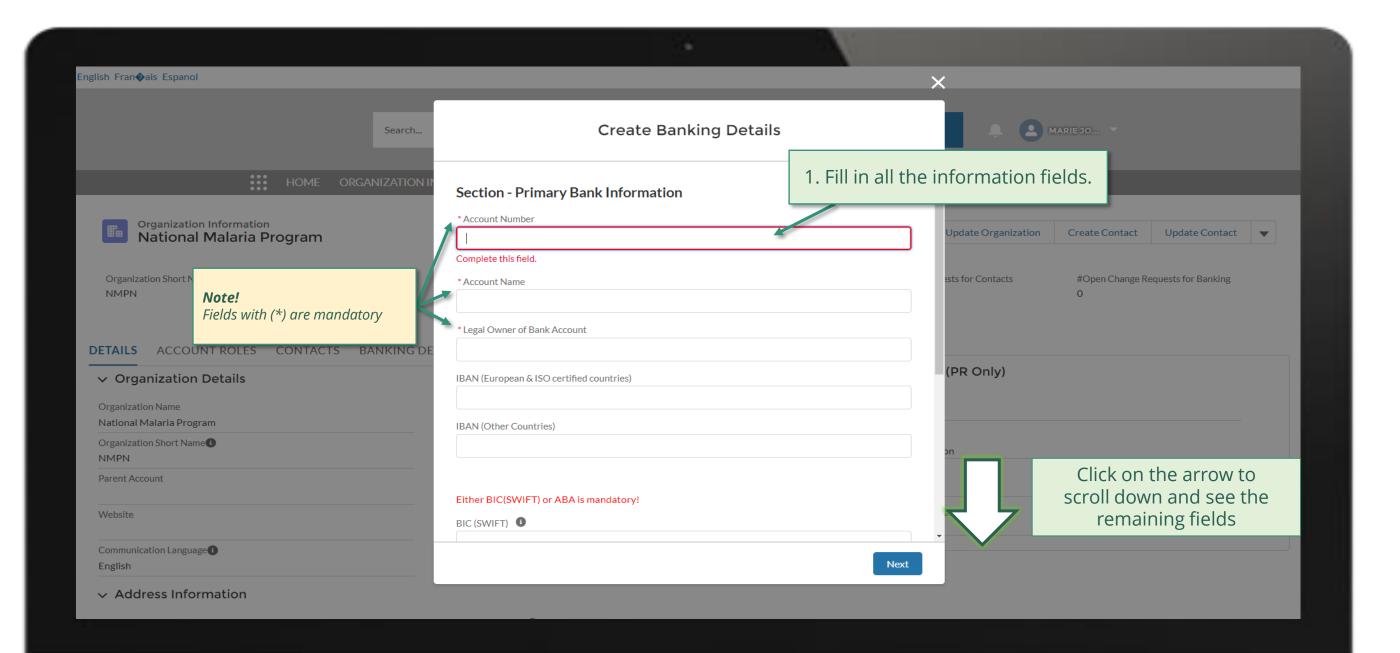






the steps

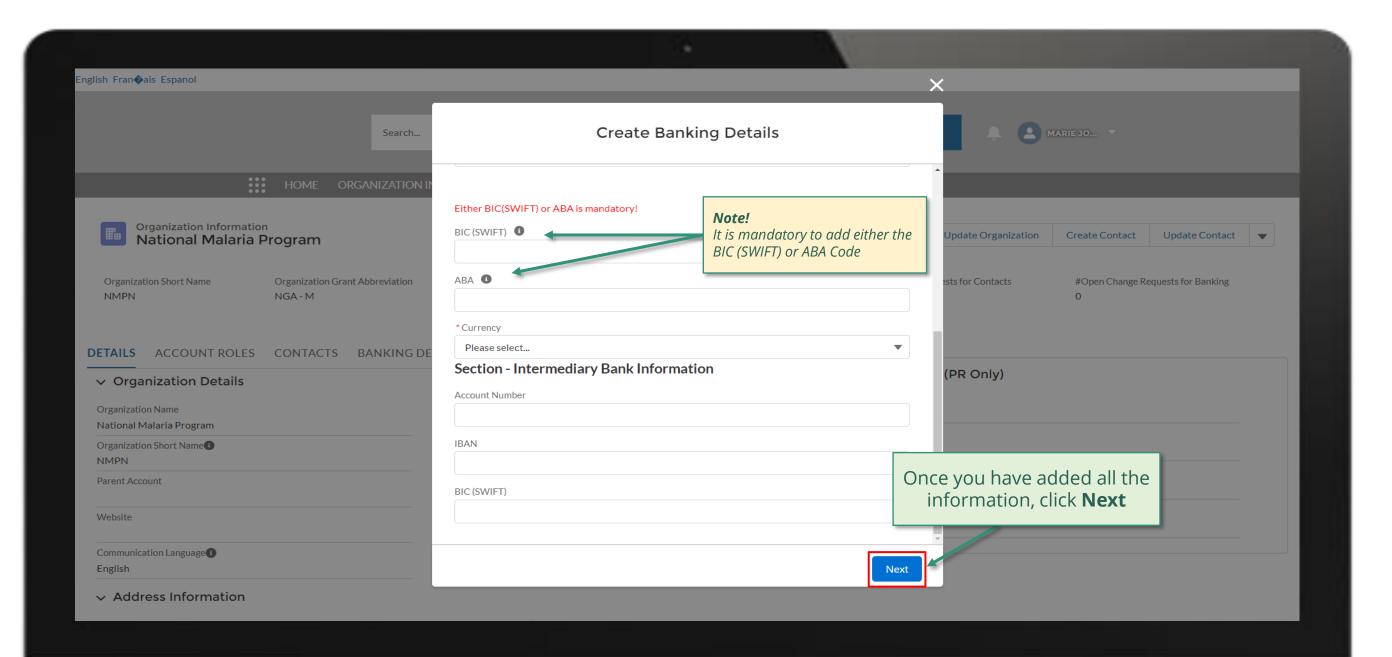
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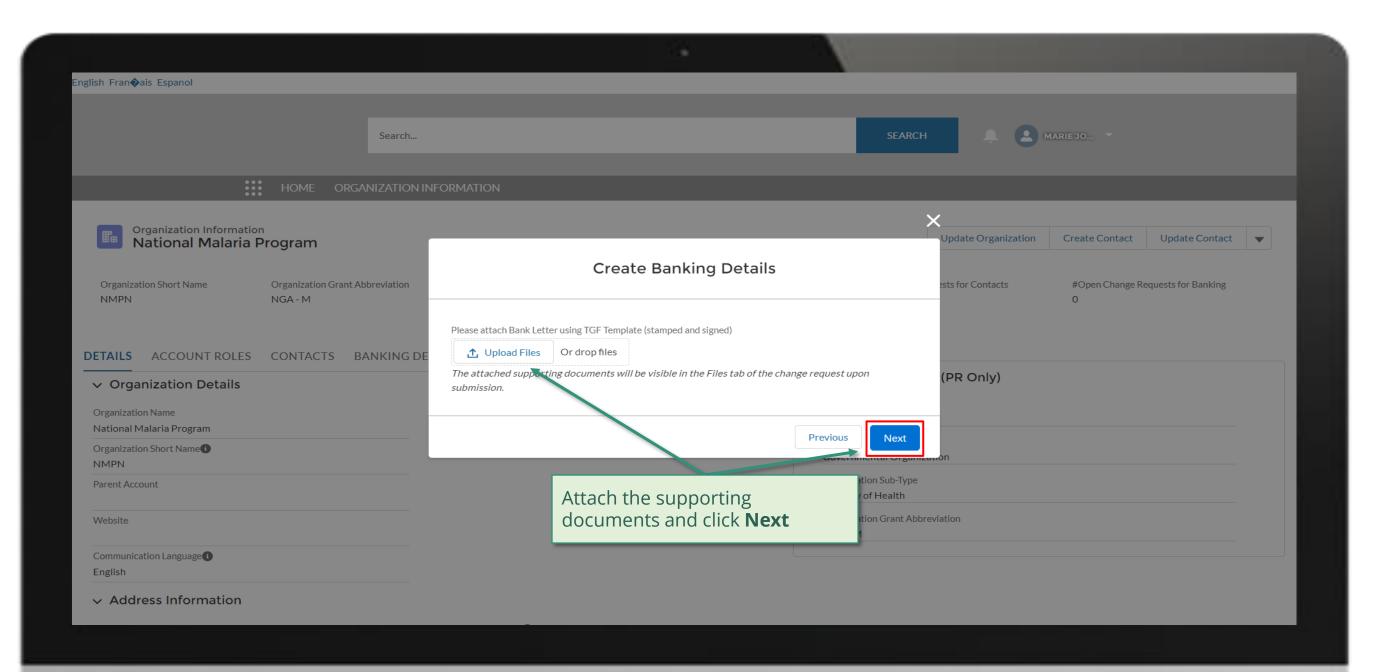
for this

<u>request</u>

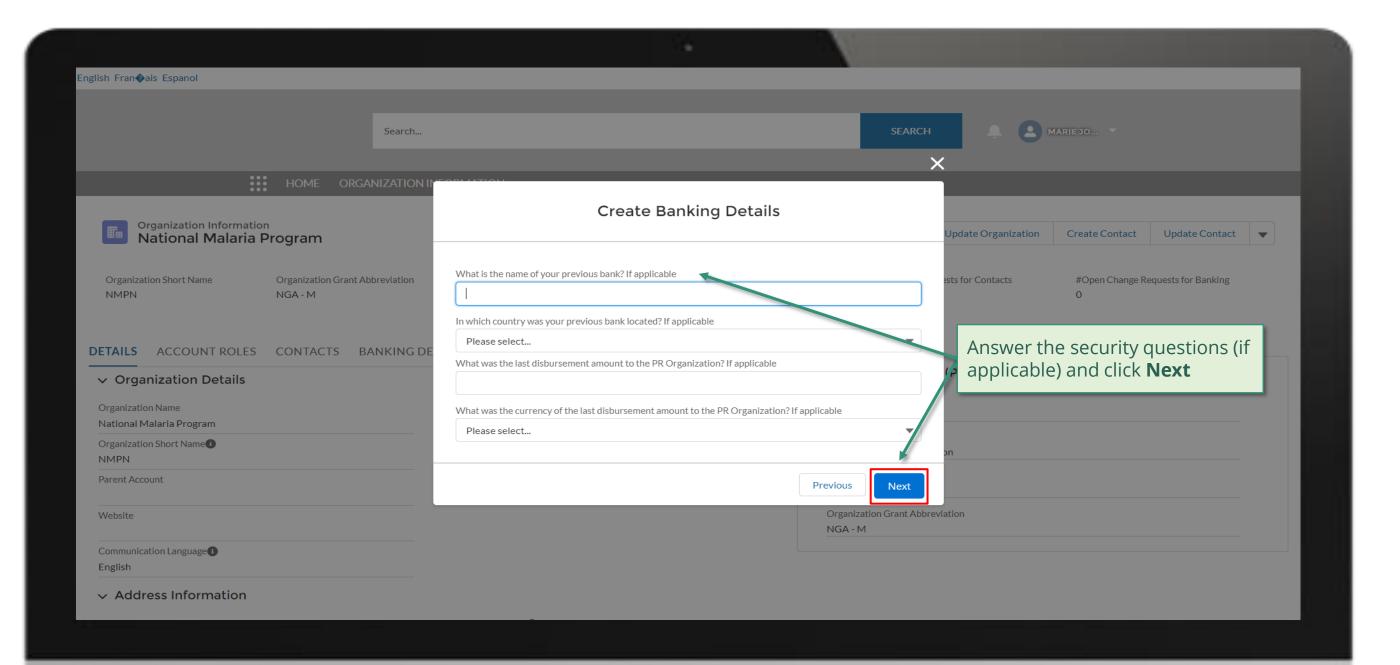




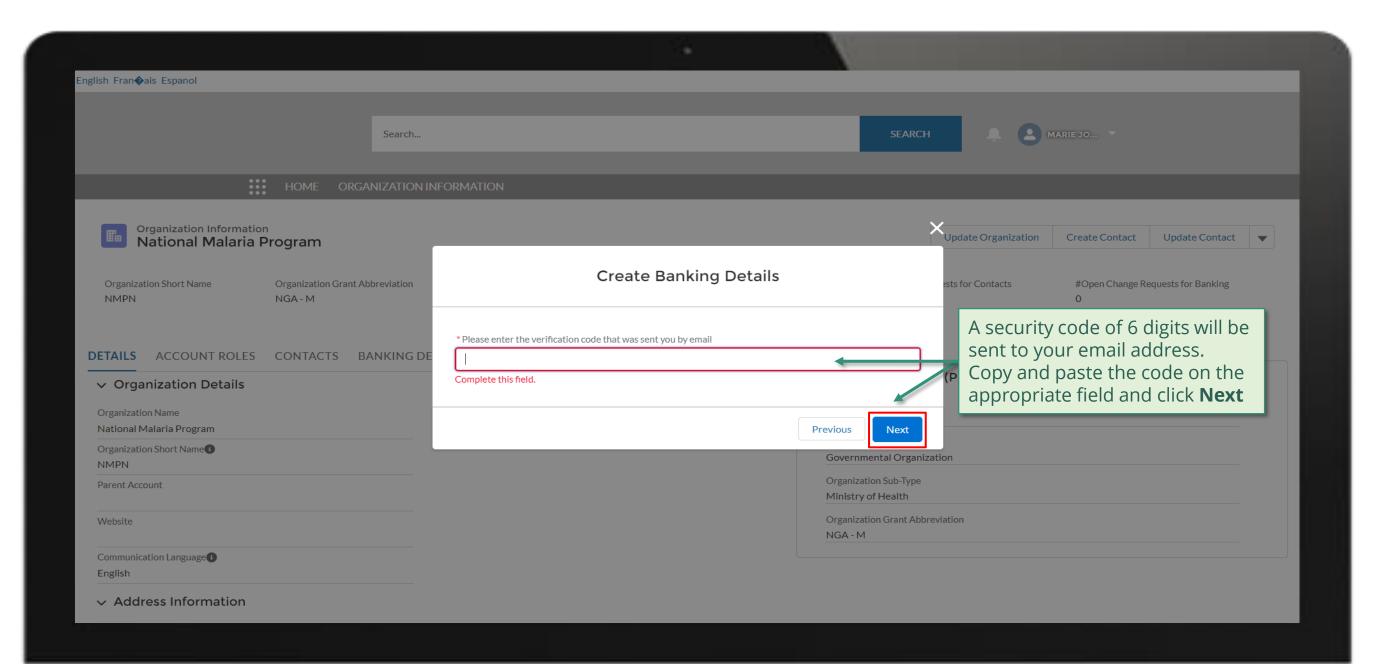
<u>request</u>





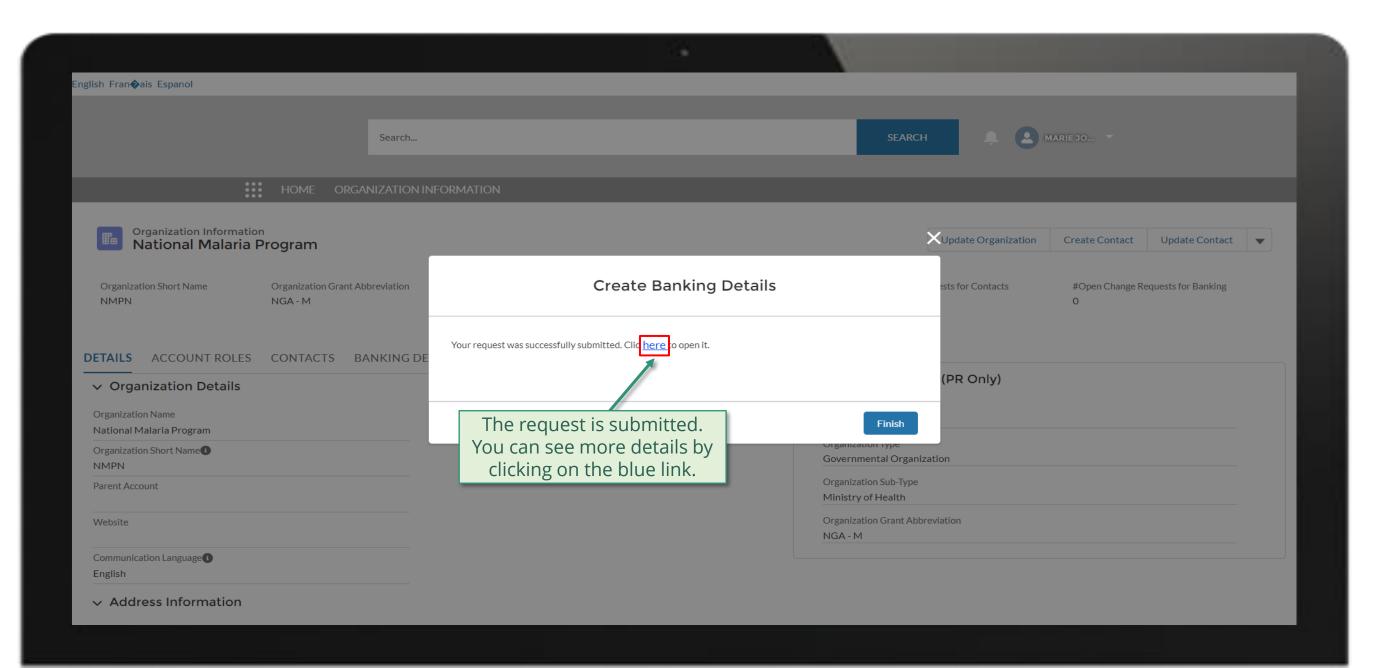






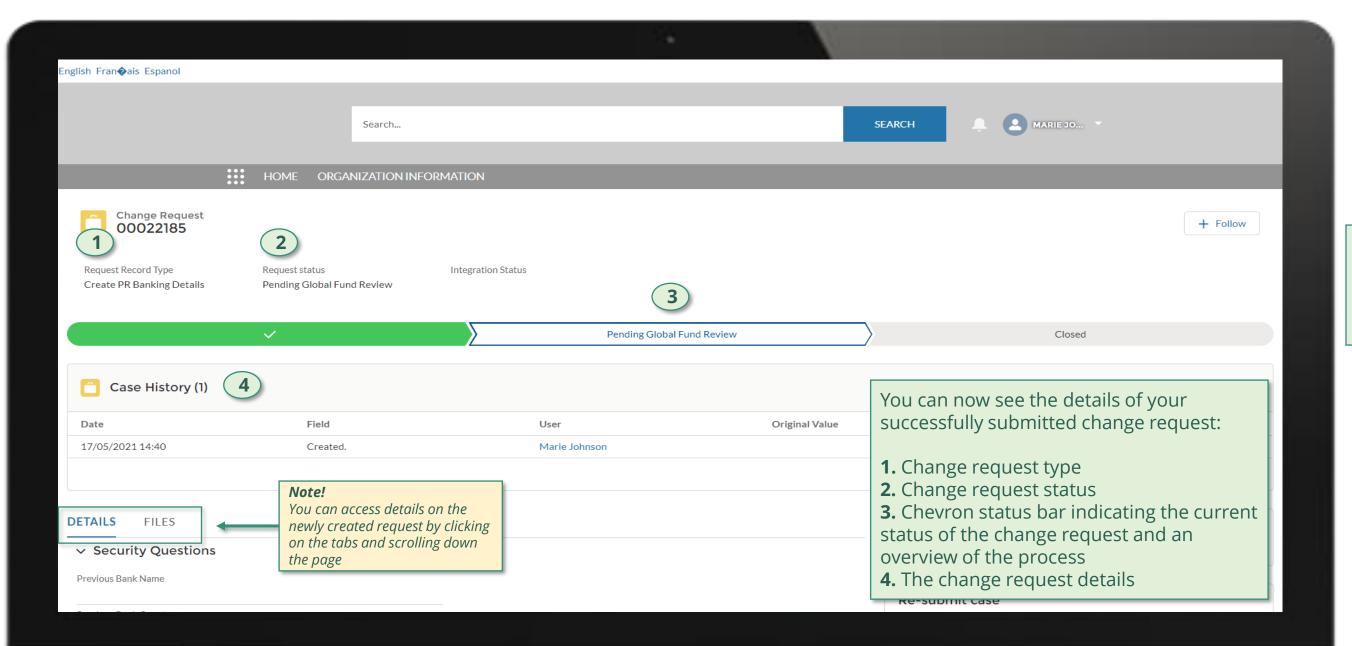


for this request





the steps for this request





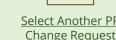
Click here to go back to the overview page



The steps assigned to you are highlighted in the red boxes

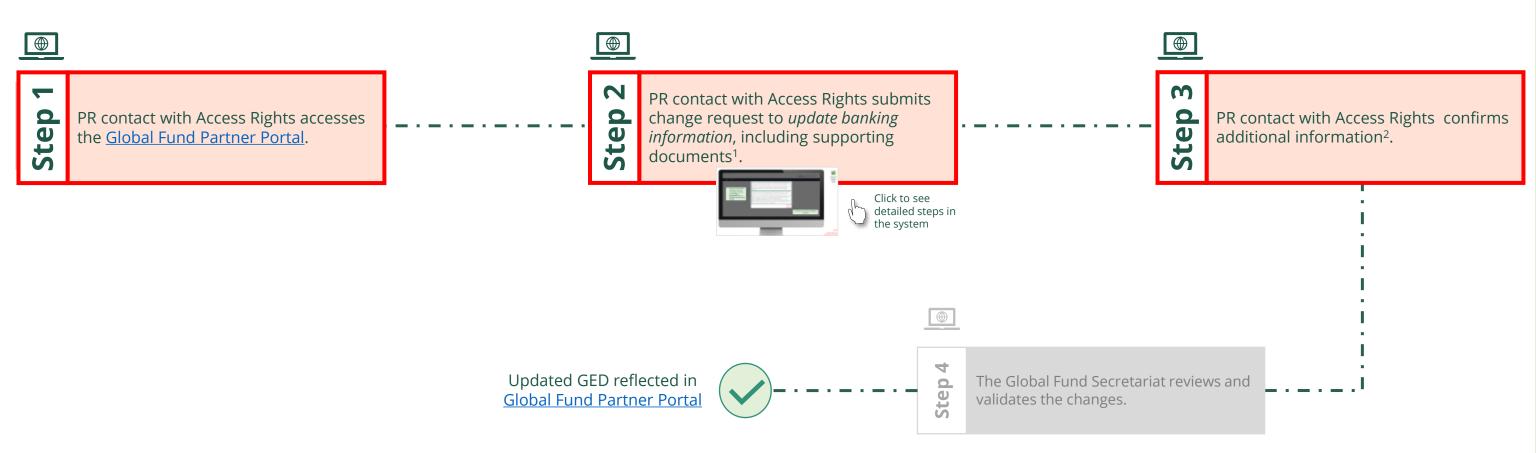
### **PR | Update Banking Information**





Follow the steps below

External Stakeholder









overview of the steps for this request

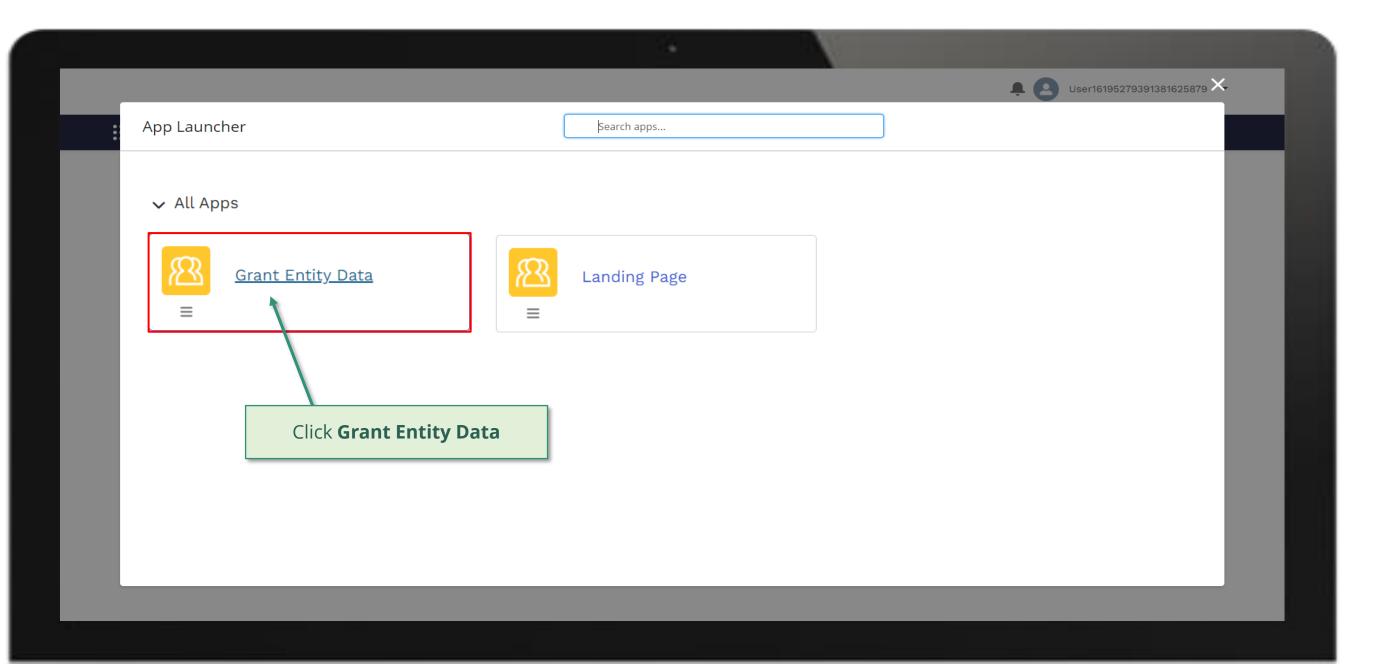
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Use App Launcher to choose what portal you want to open

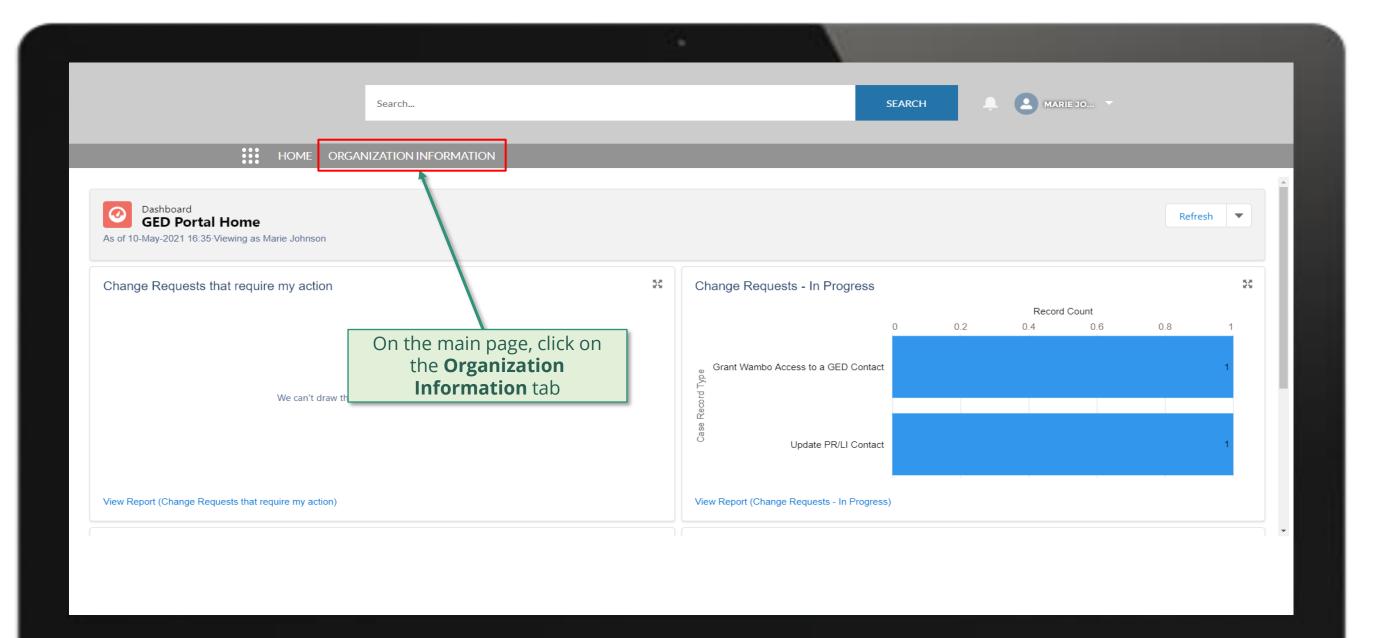
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**:::** 

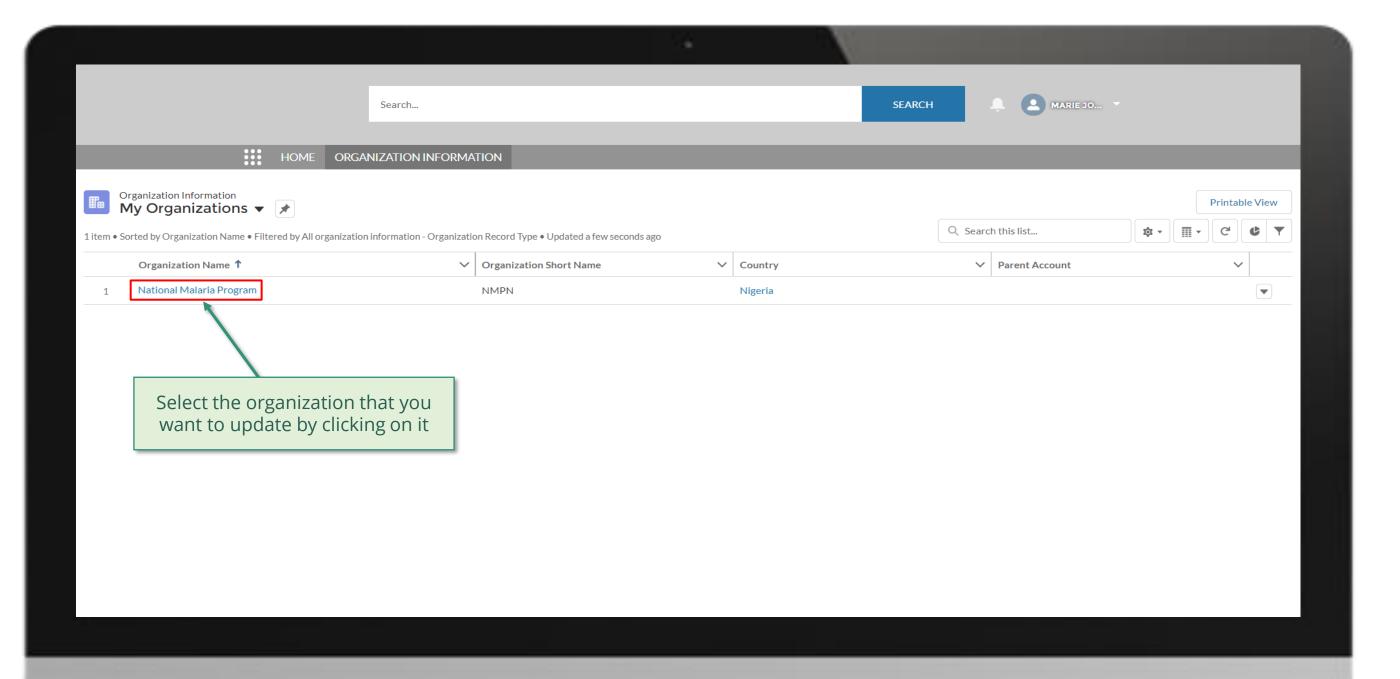
Home



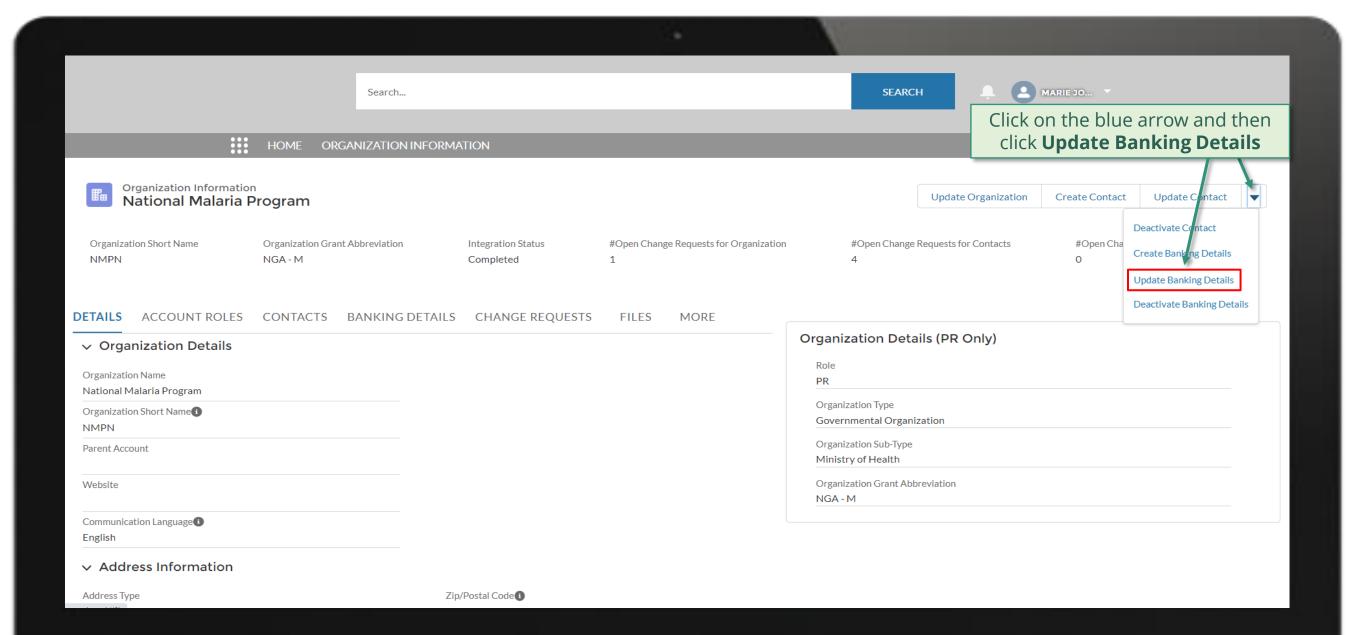




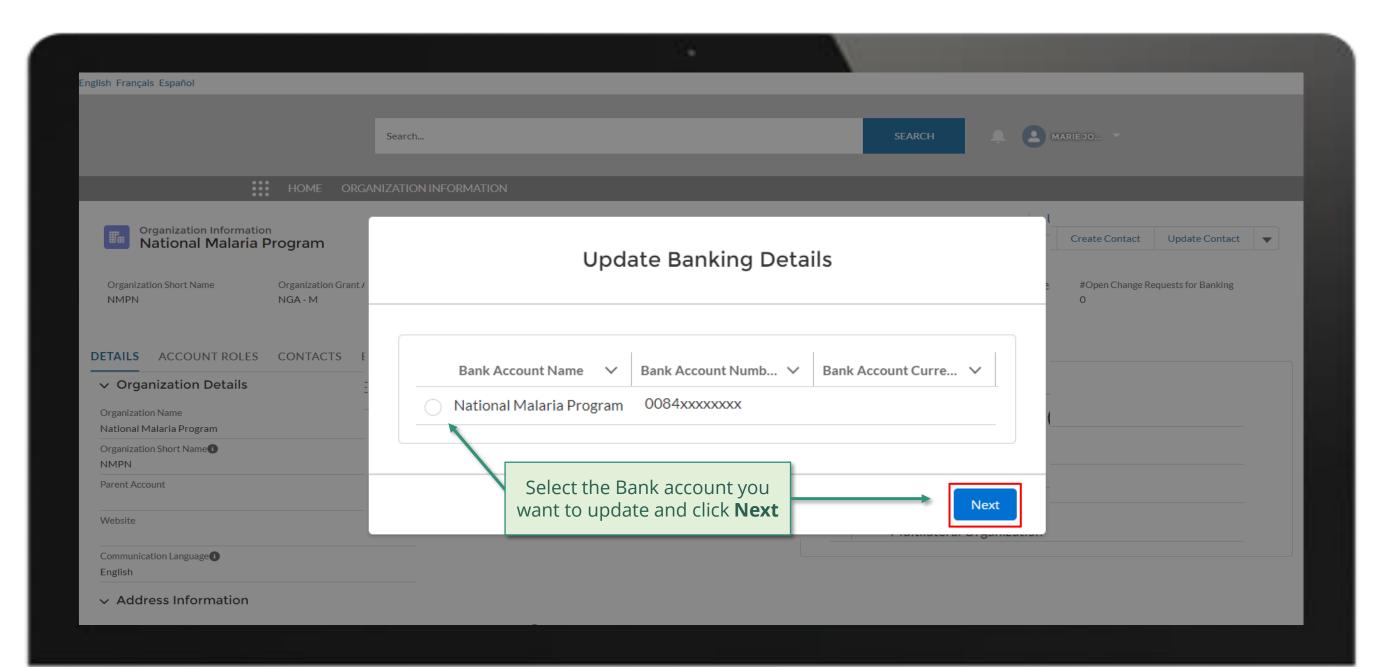






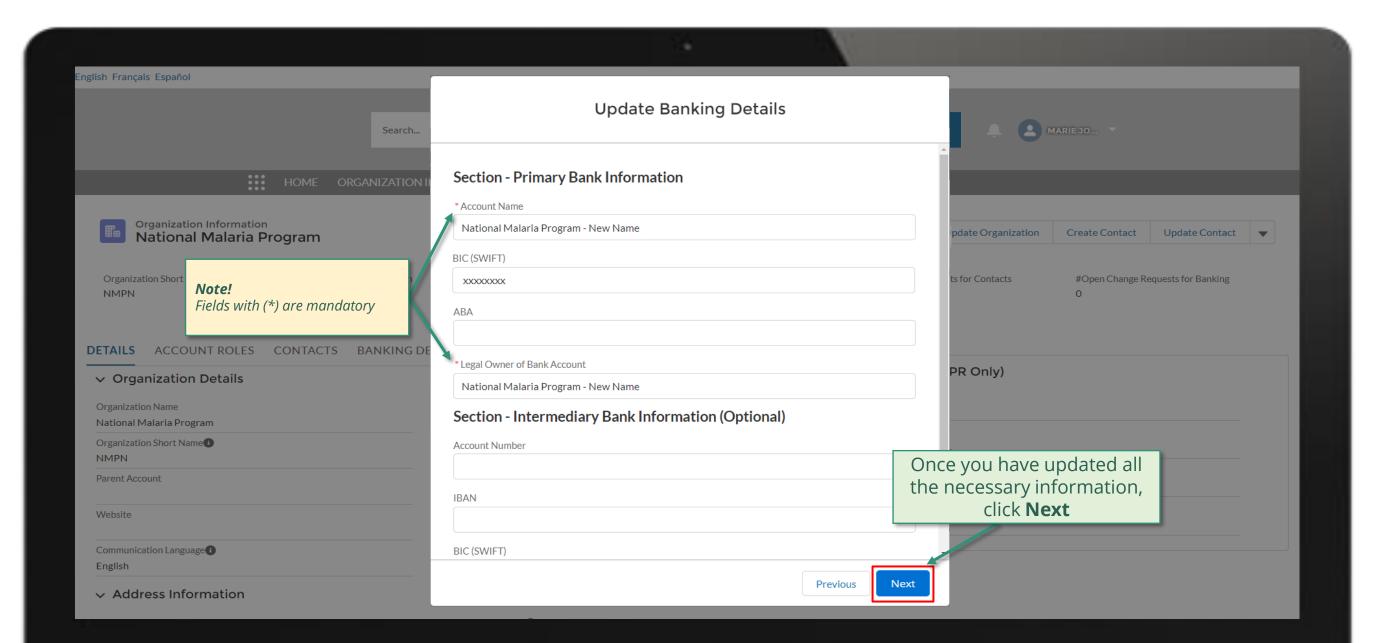




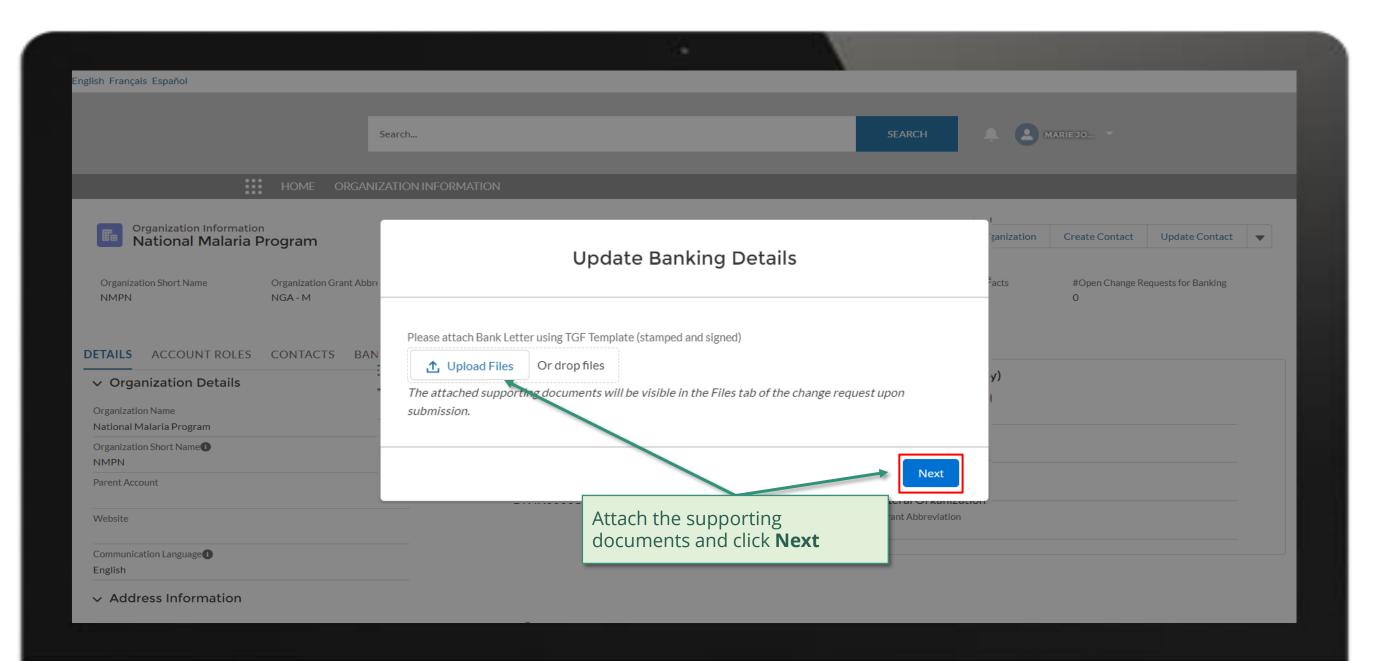




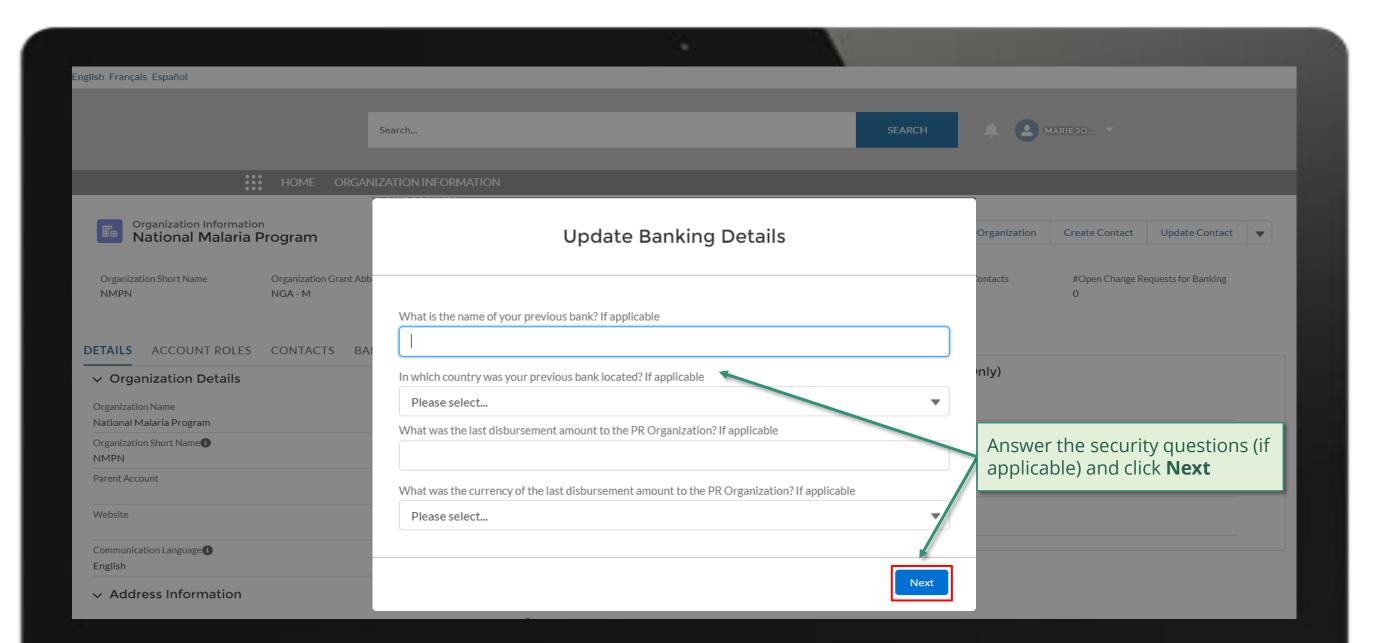
for this request



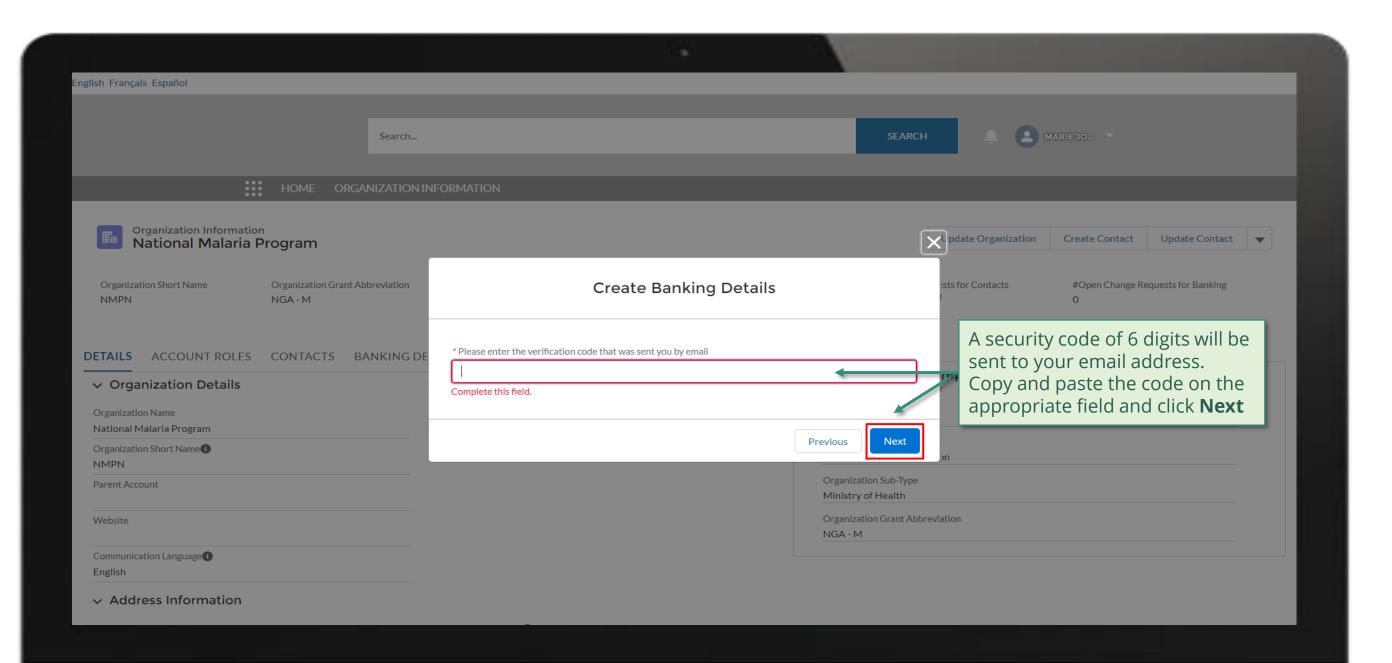






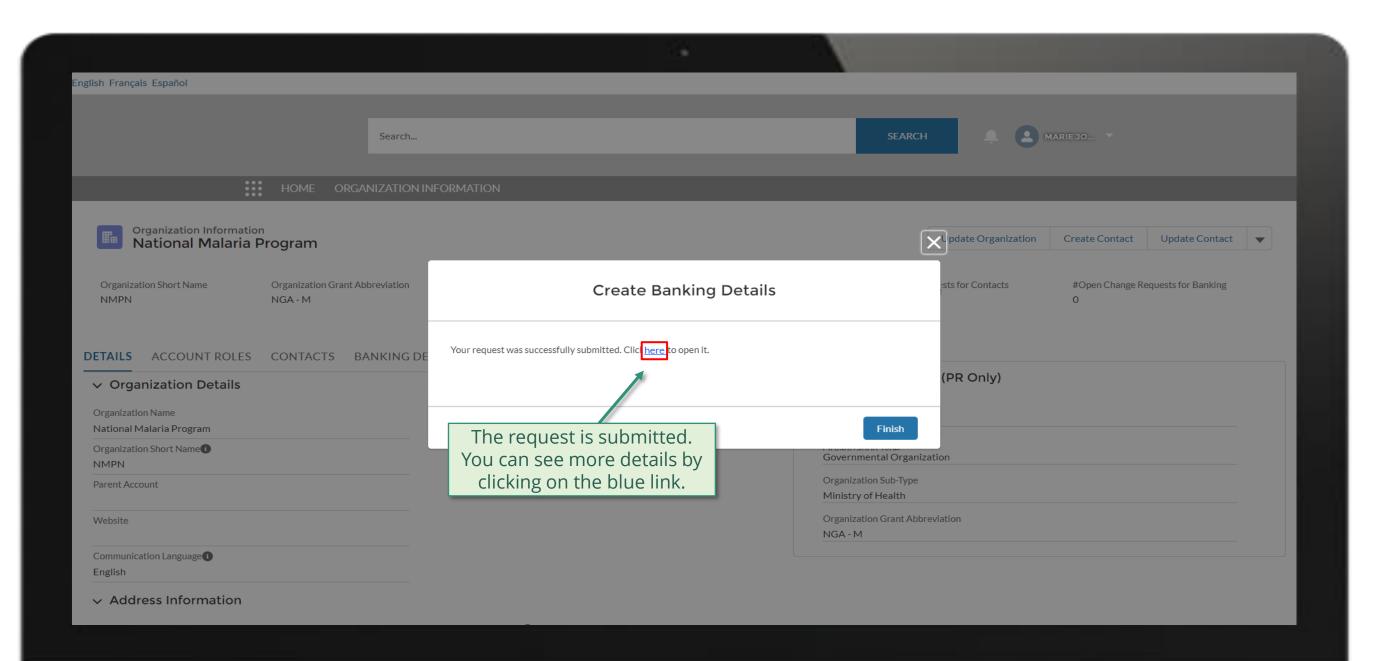




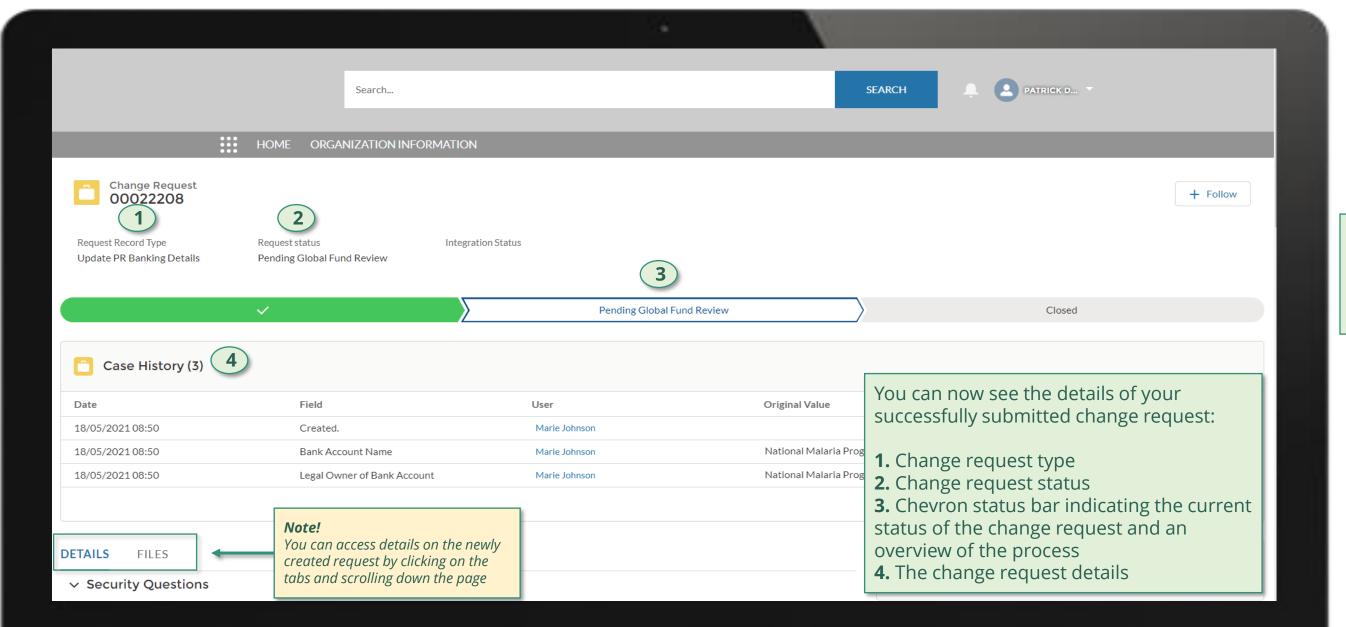




the steps for this request









Click here to go back to the overview page



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

## **PR | Deactivate Banking Information**



External Stakeholder



Follow the steps below



Updated GED reflected in **Global Fund Partner Portal** 



The Global Fund Secretariat reviews and validates the changes.







overview of the steps for this request

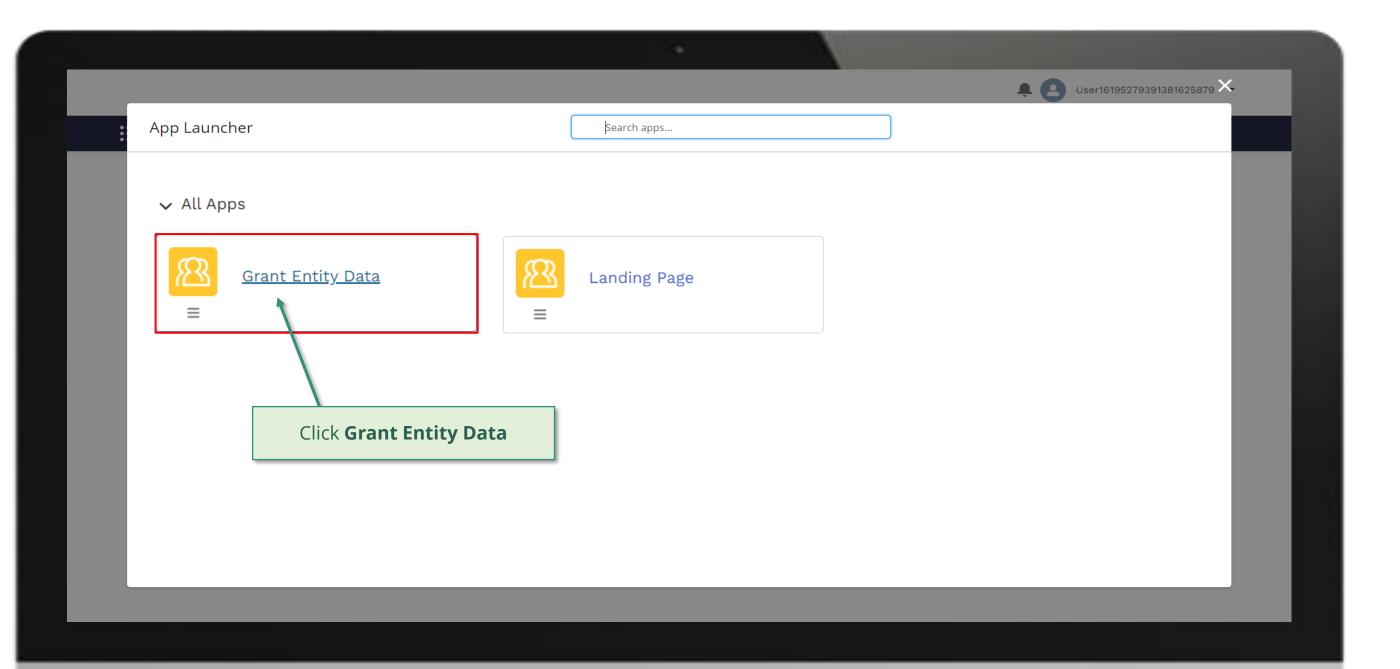
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Use App Launcher to choose what portal you want to open

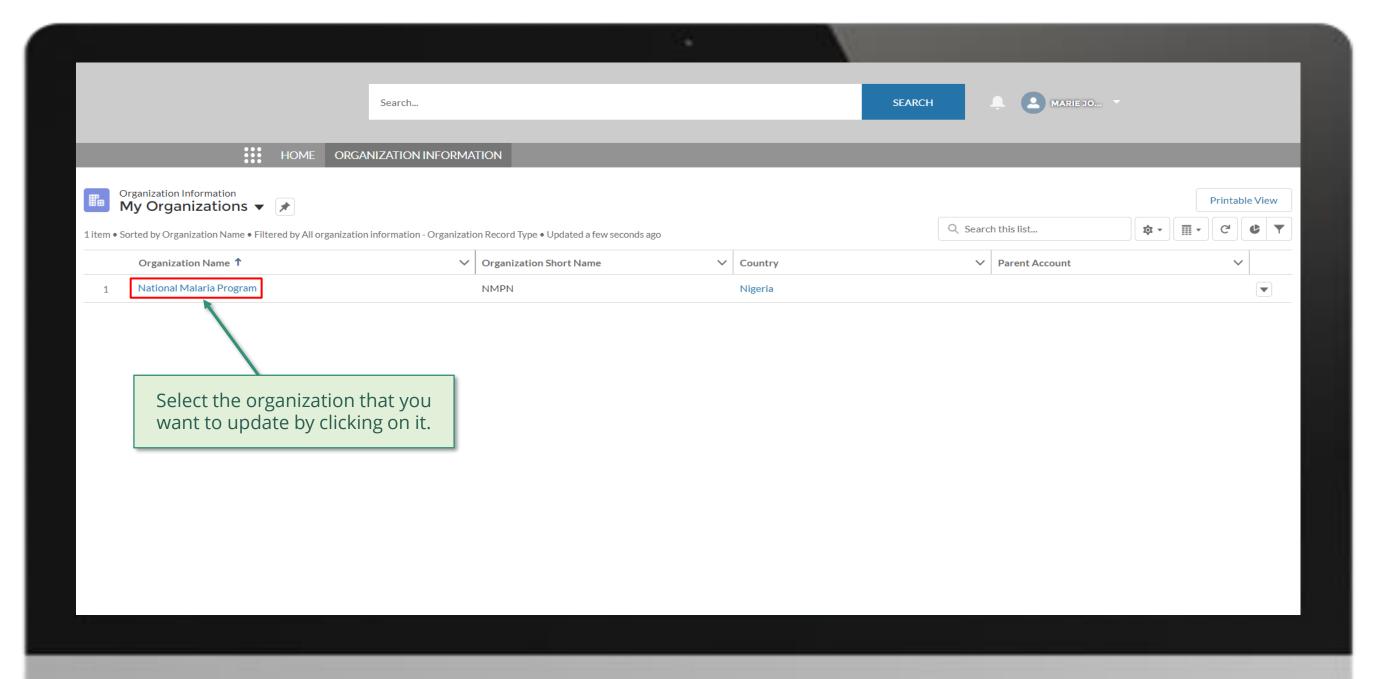
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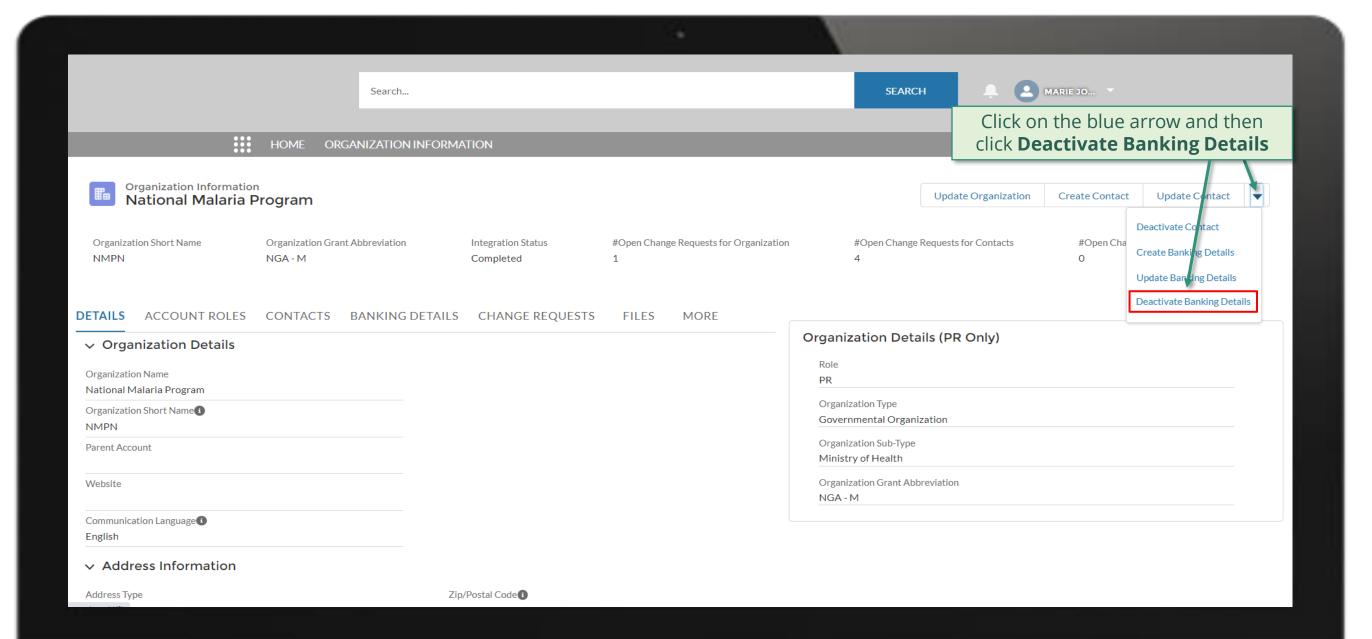
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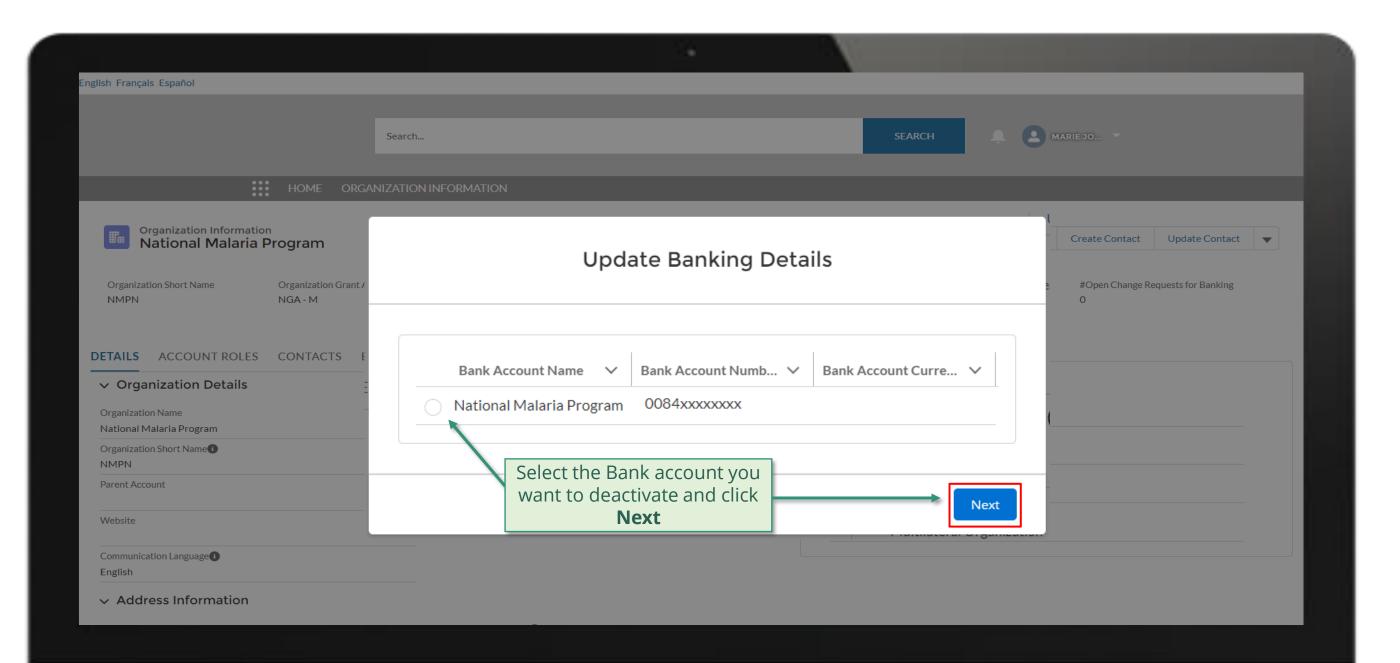




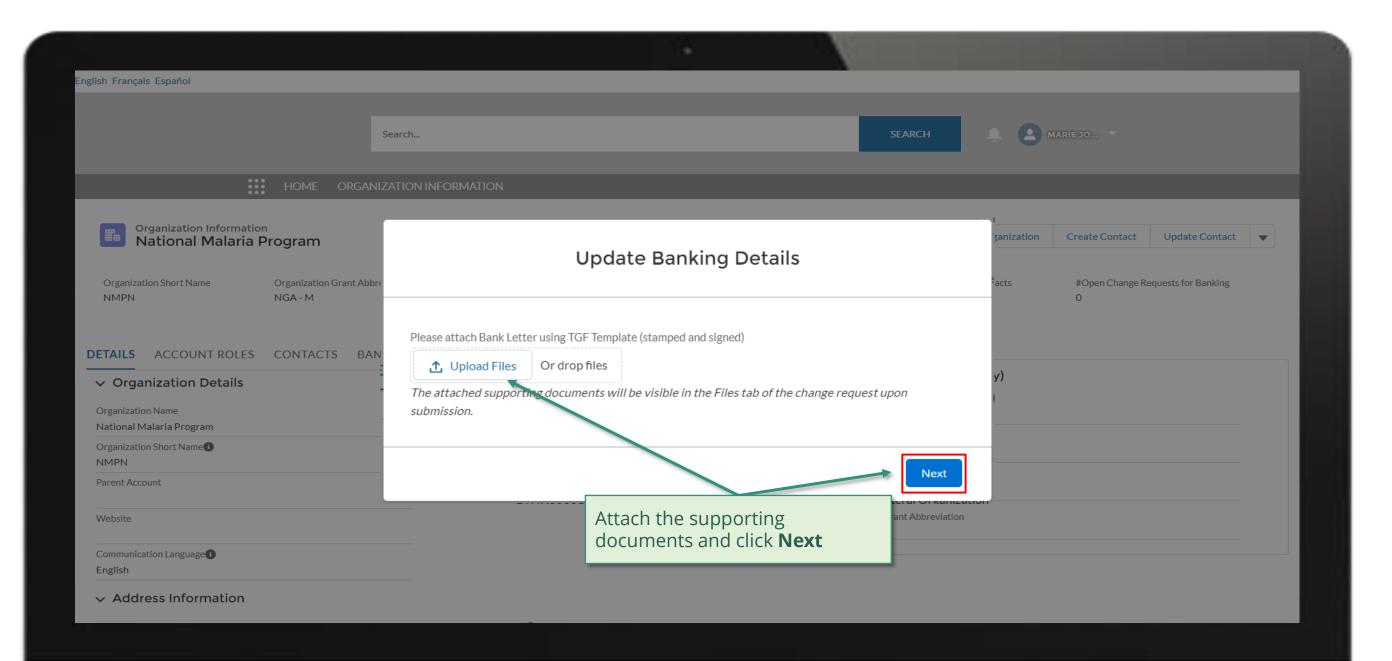




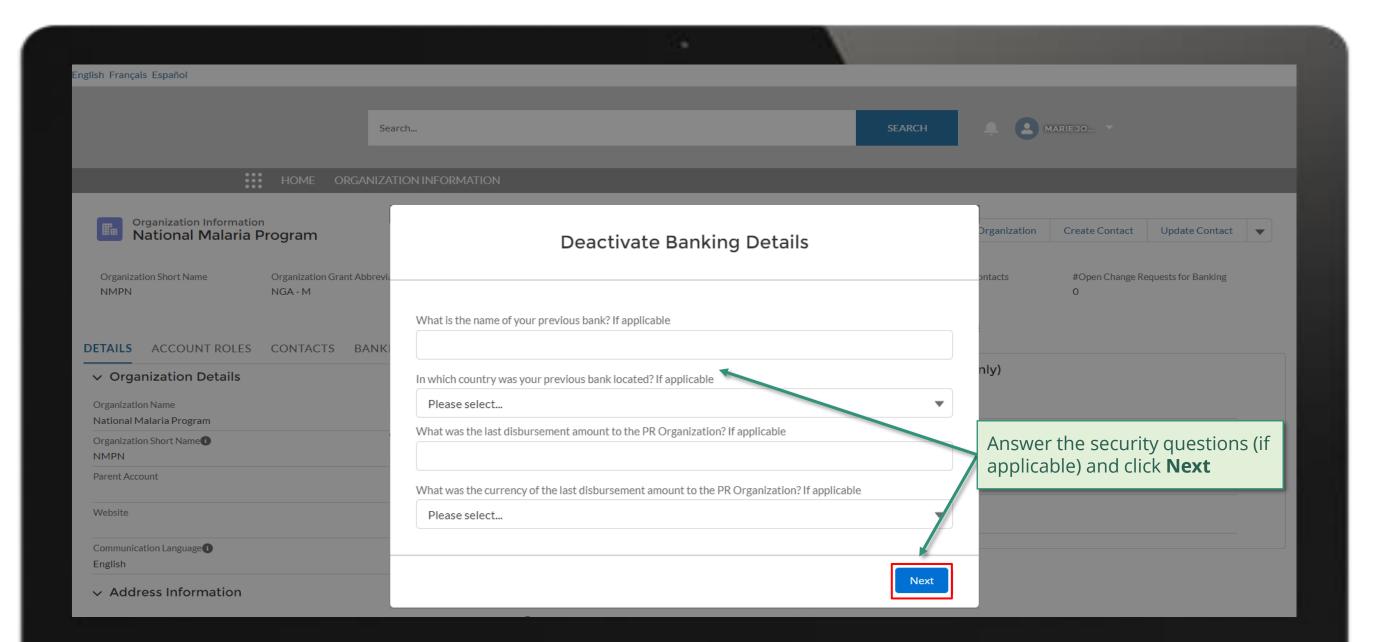




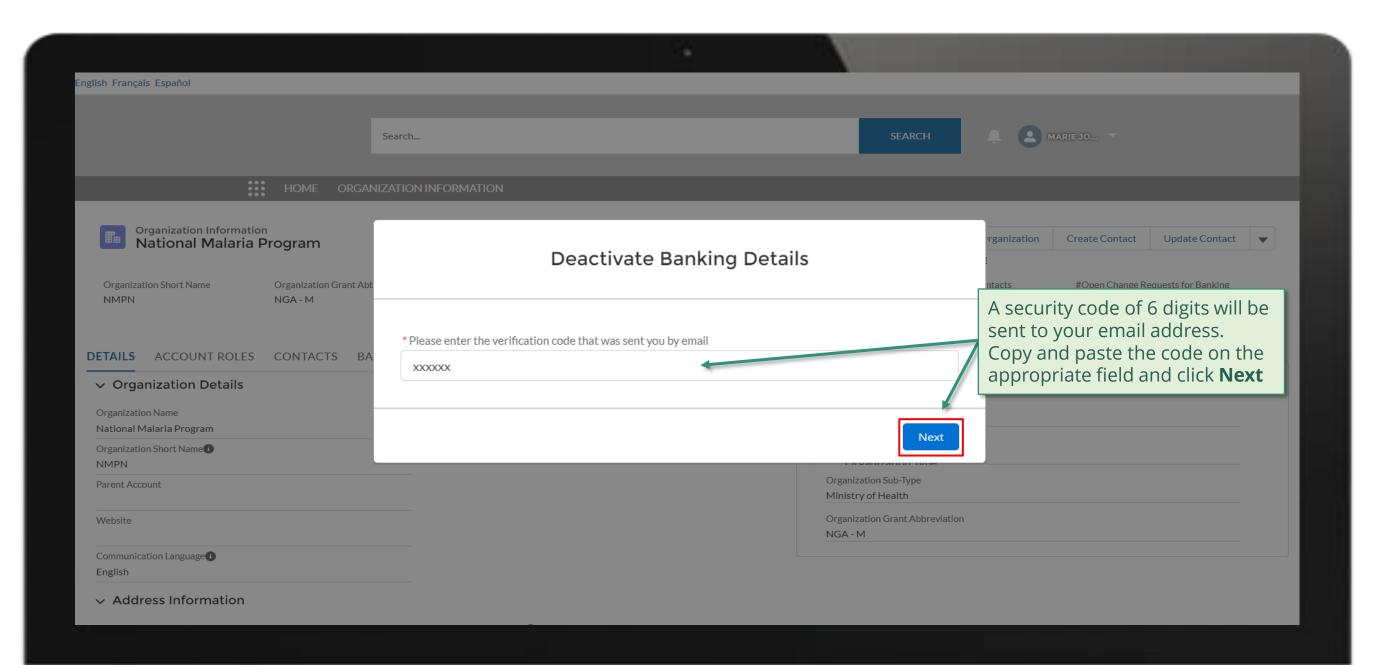




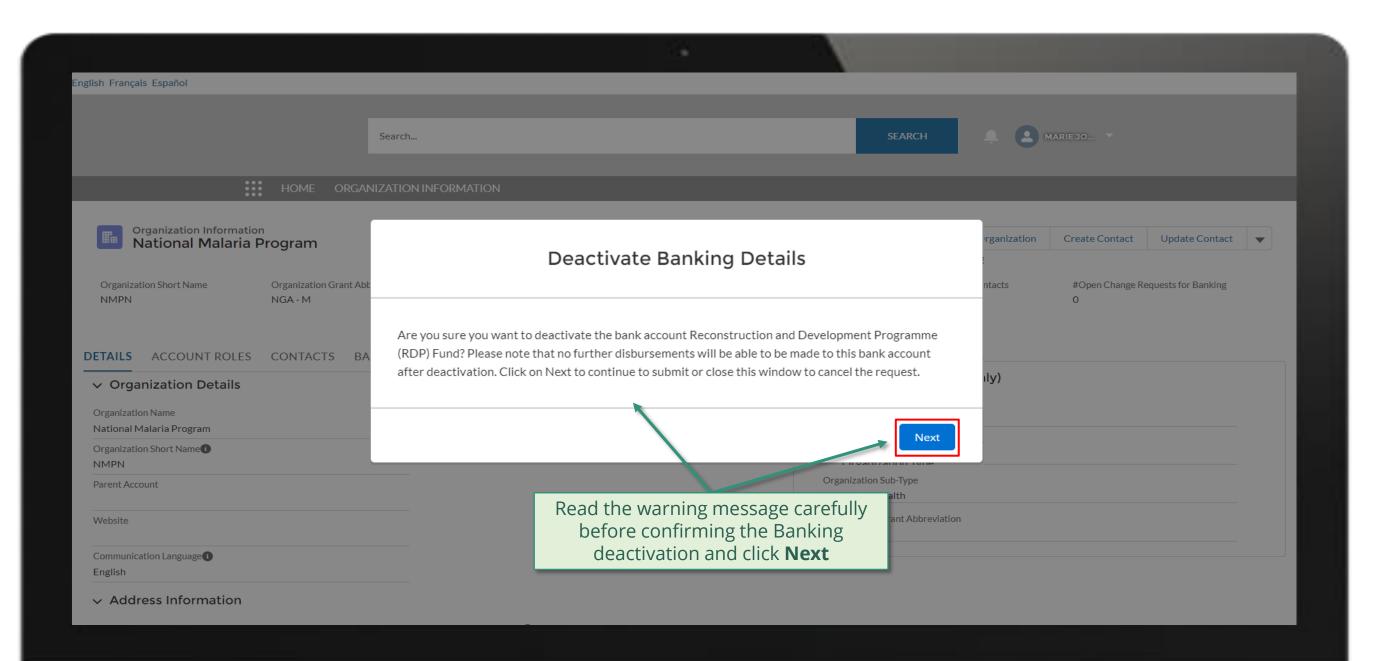




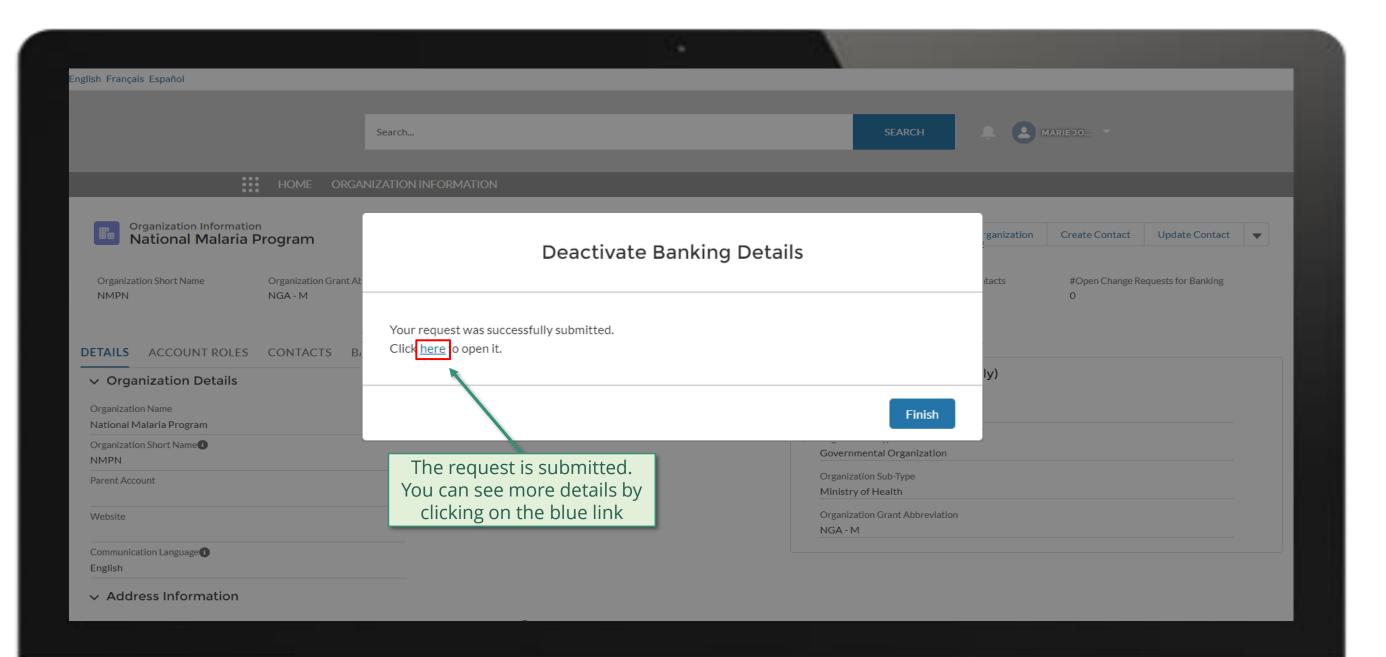






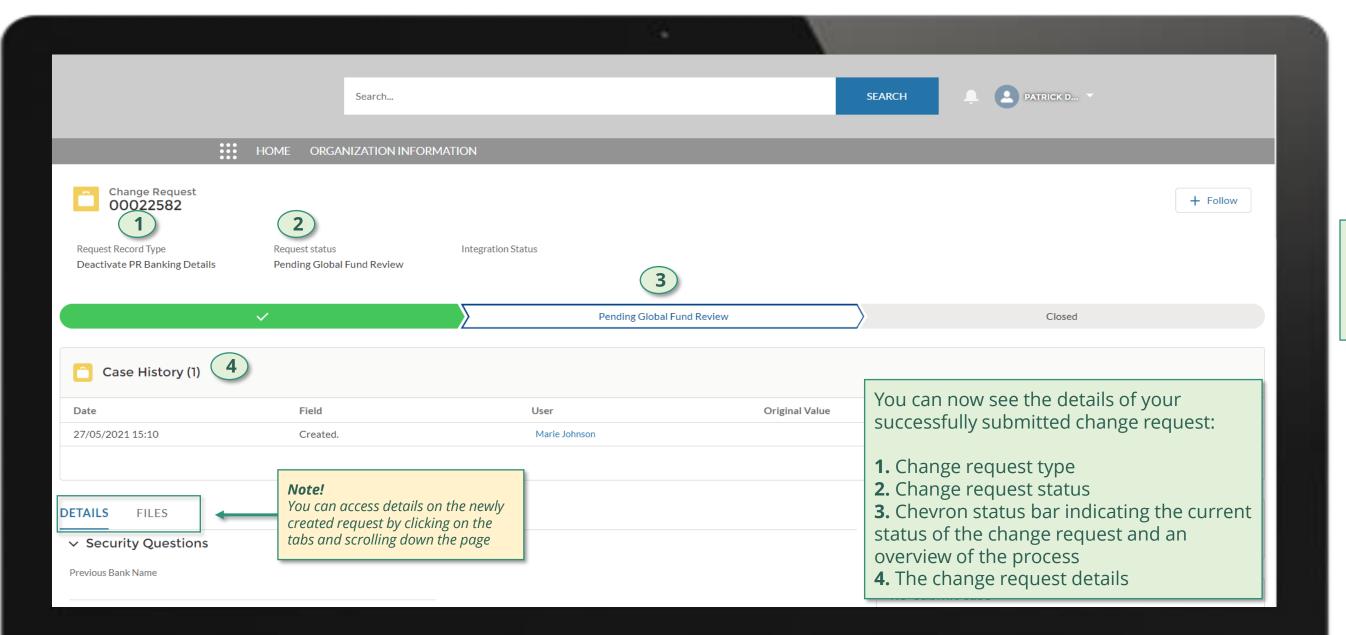








the steps for this request





Click here to go back to the overview page



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

### **PR | Create Contacts**

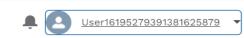


Follow the steps below

External Stakeholder Change Request









overview of the steps for this request

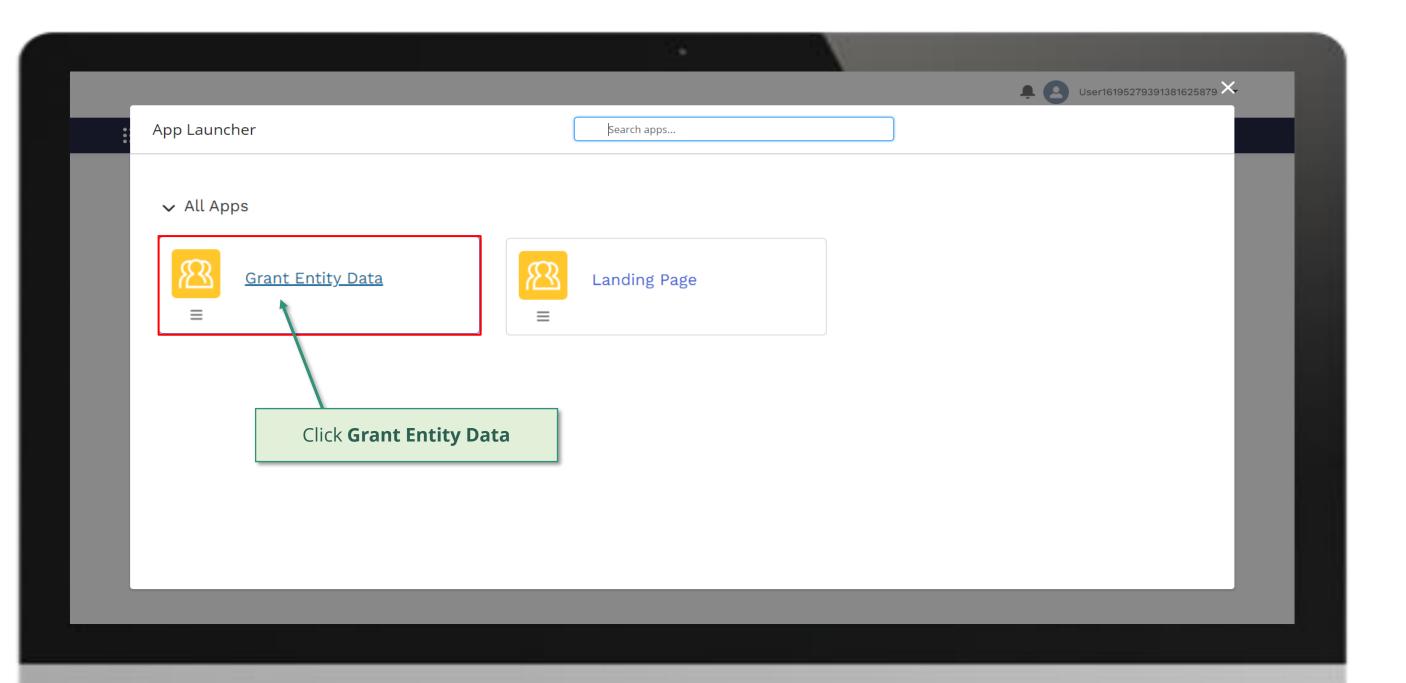
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Use App Launcher to choose what portal you want to open

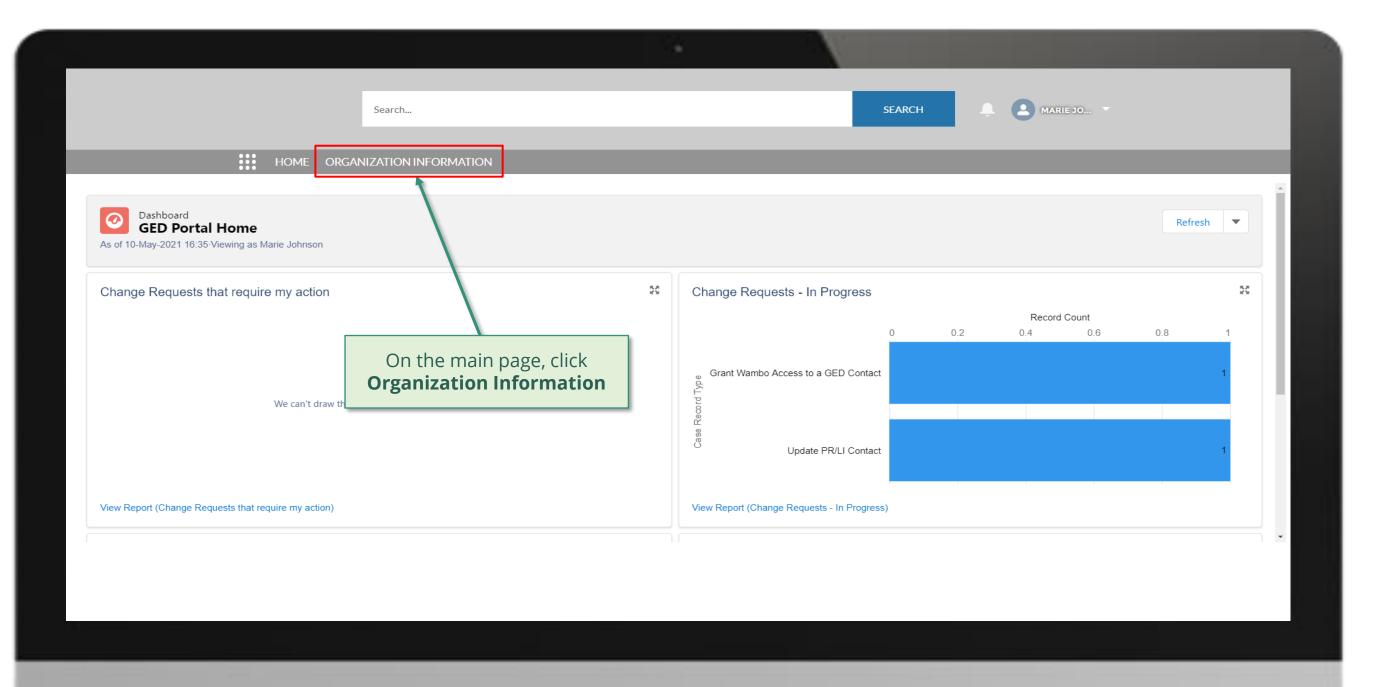
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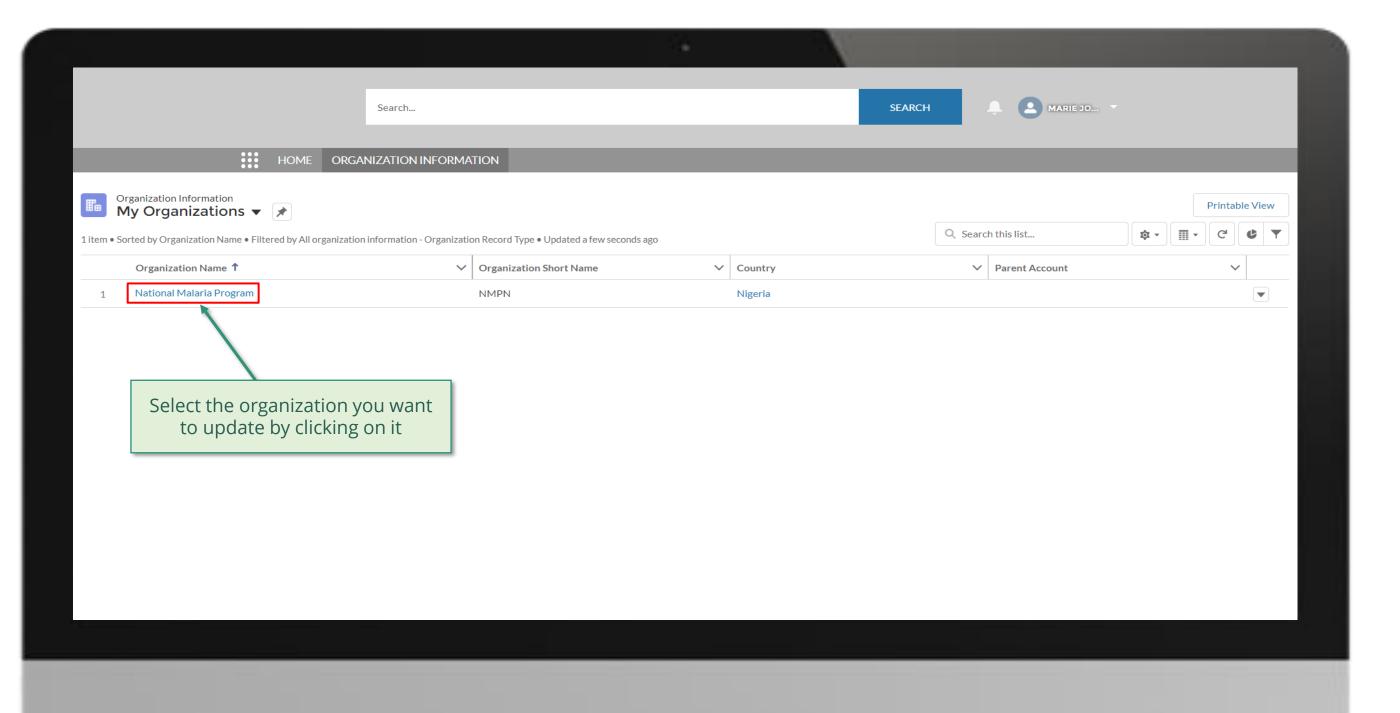
Home



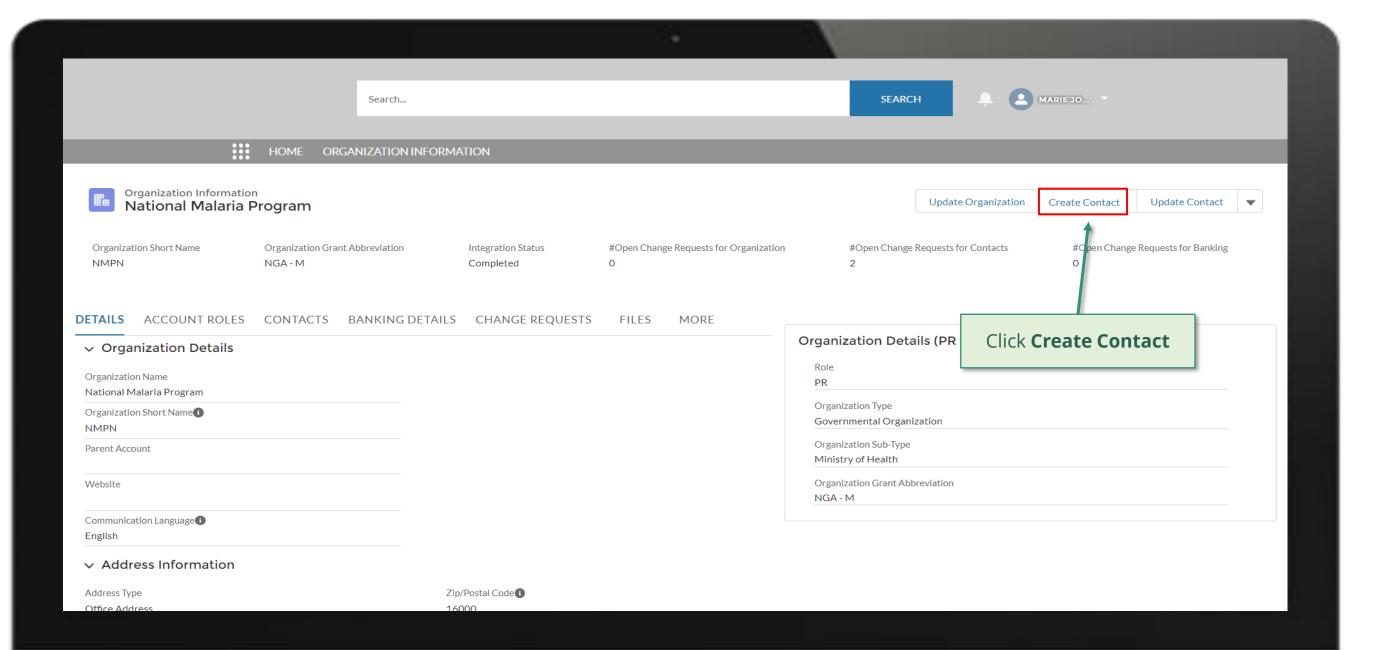




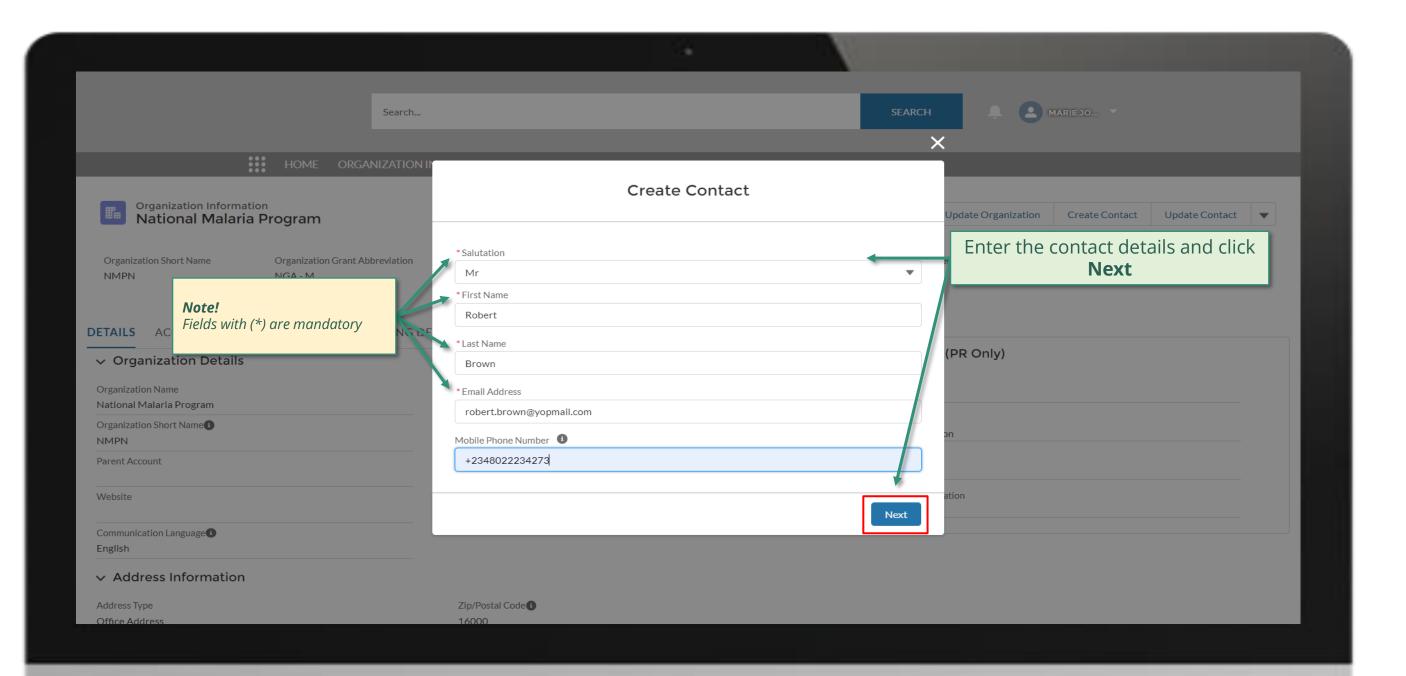








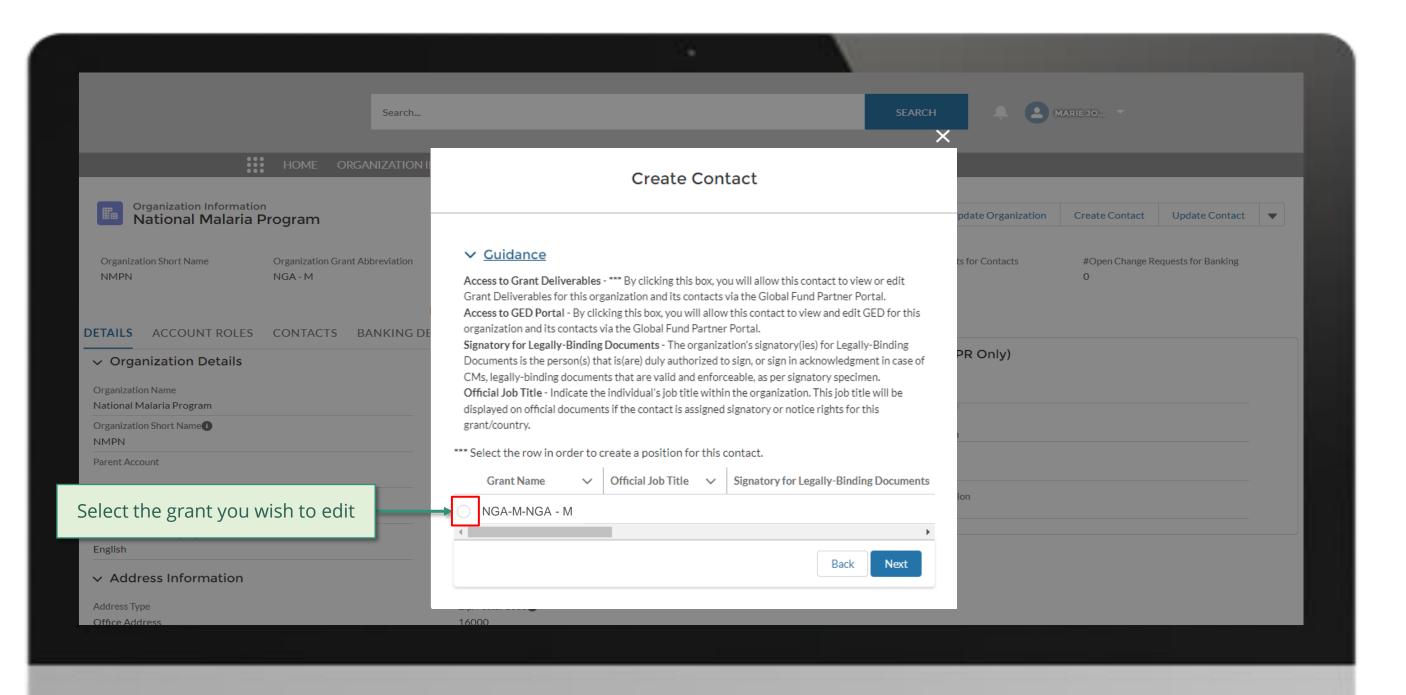






for this

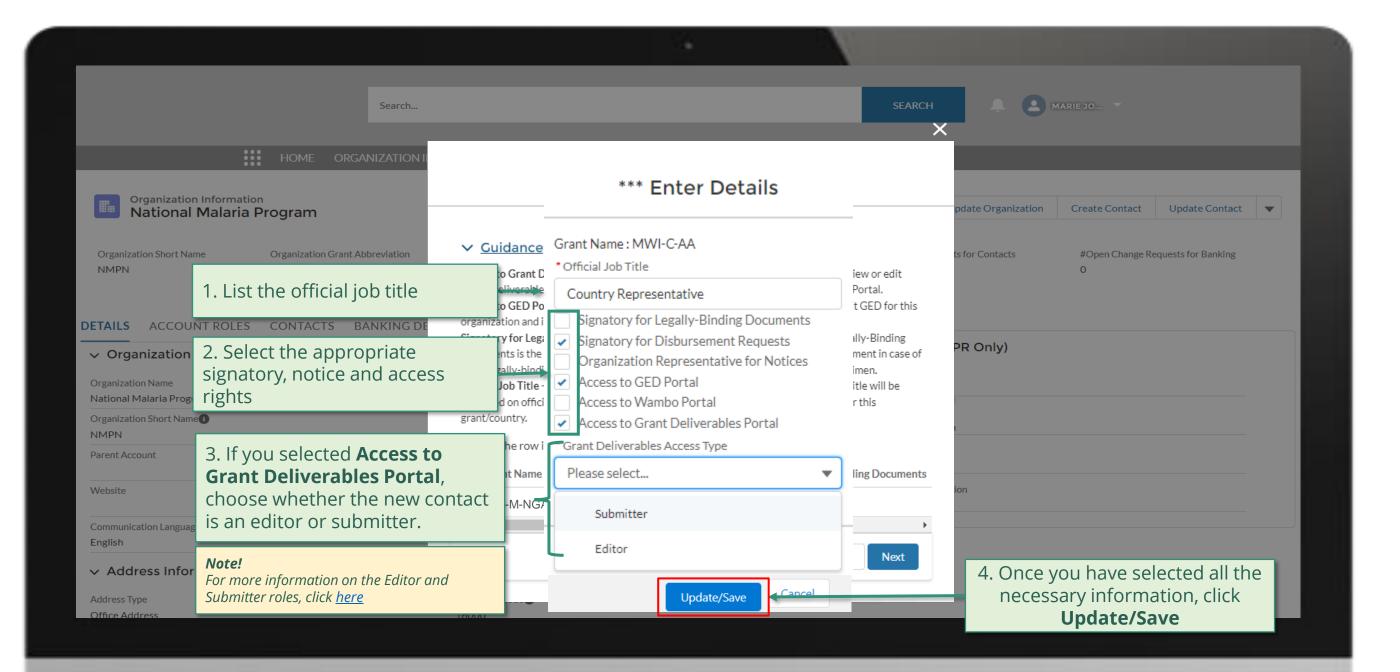
<u>request</u>





the steps for this

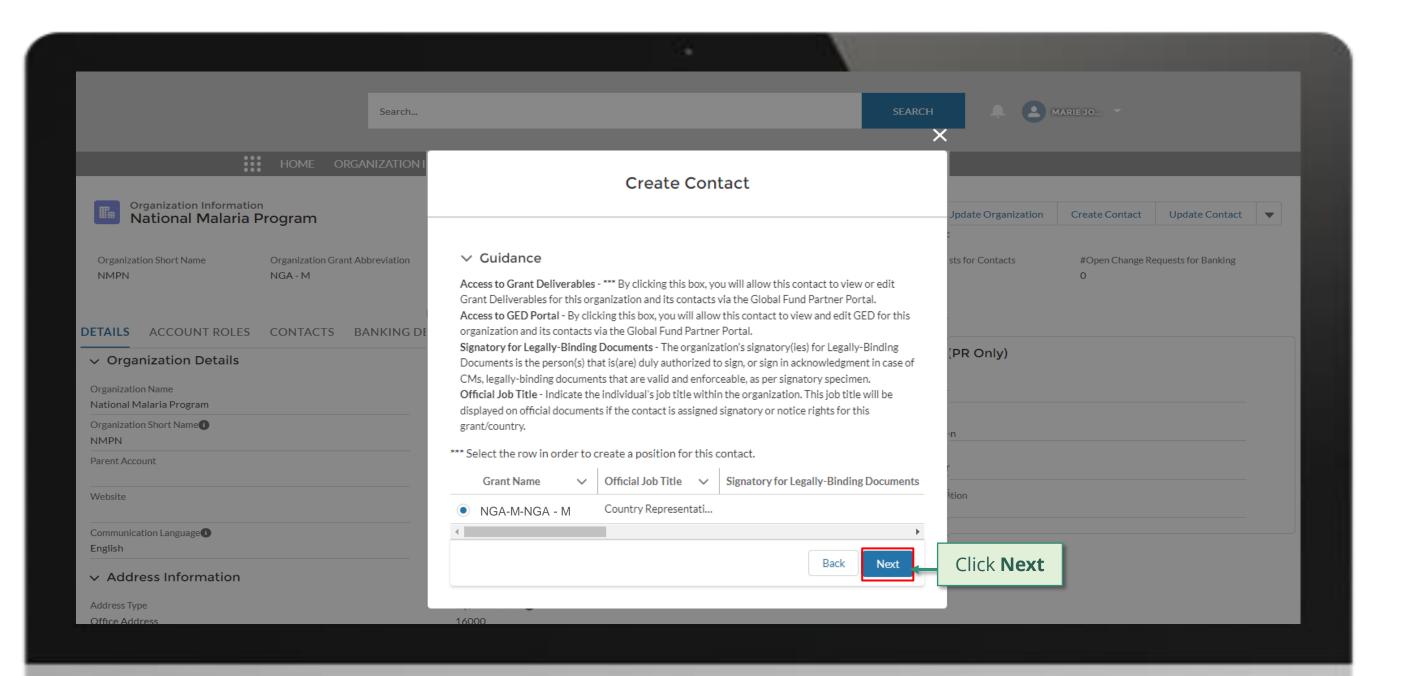
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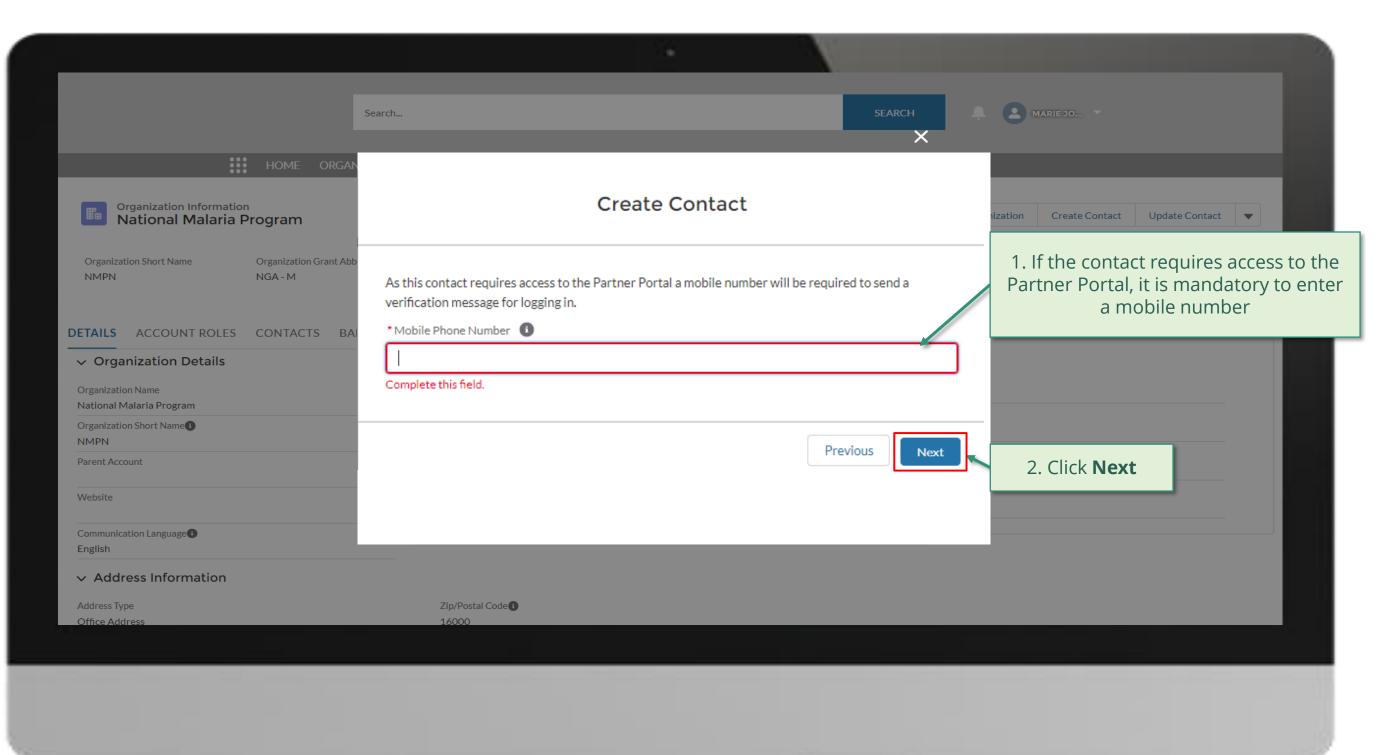


for this

request

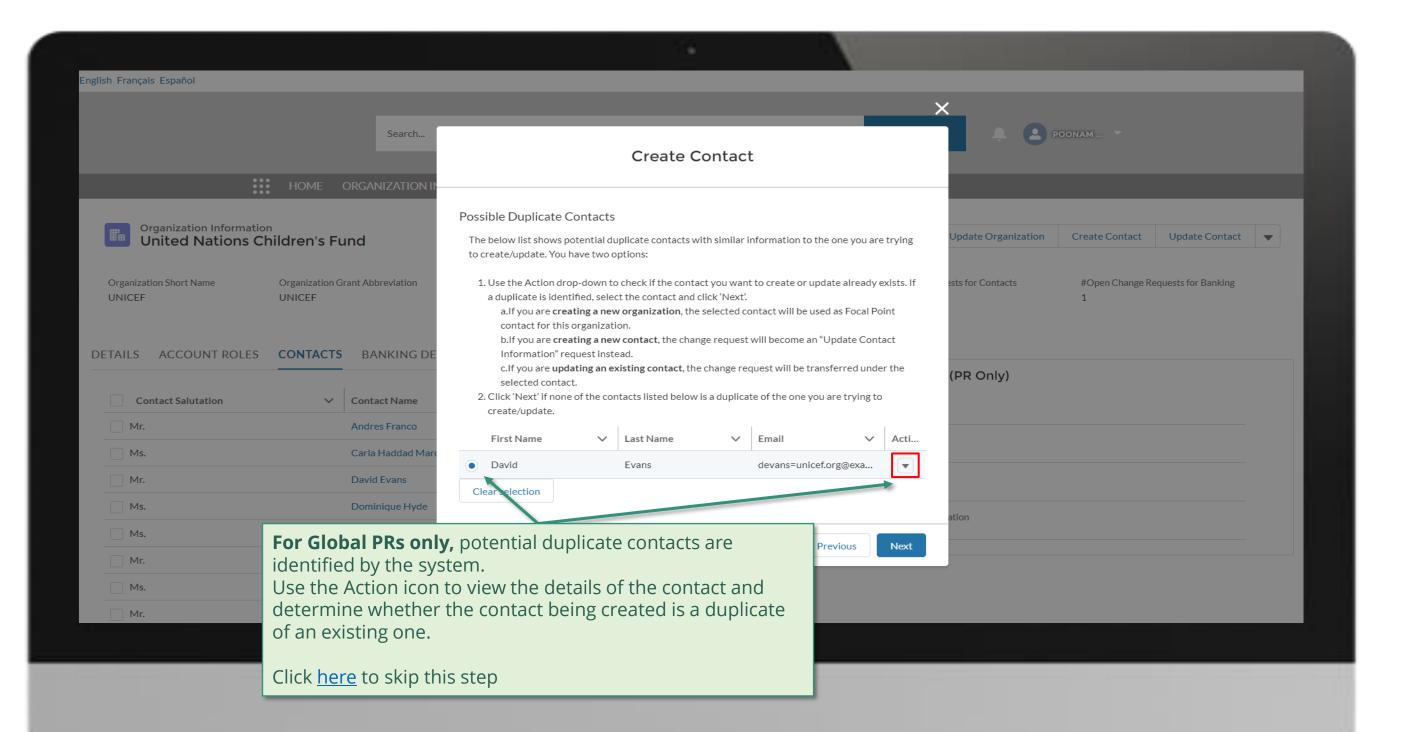




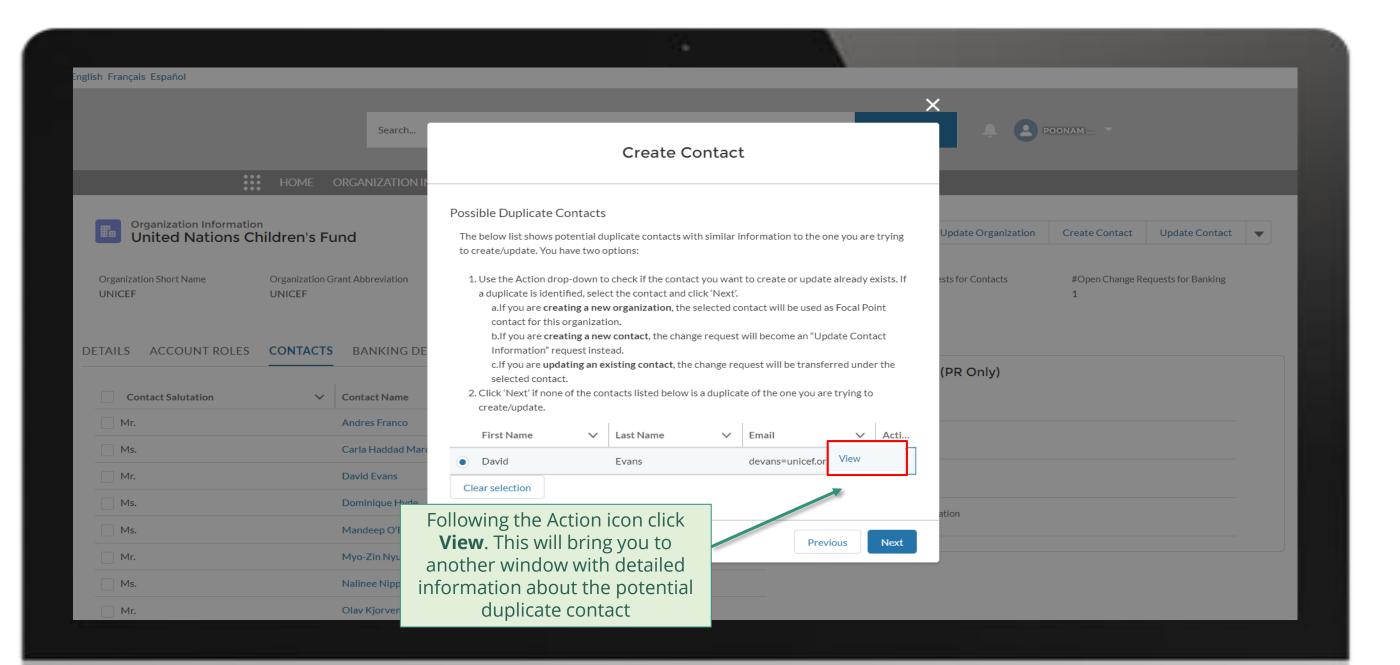




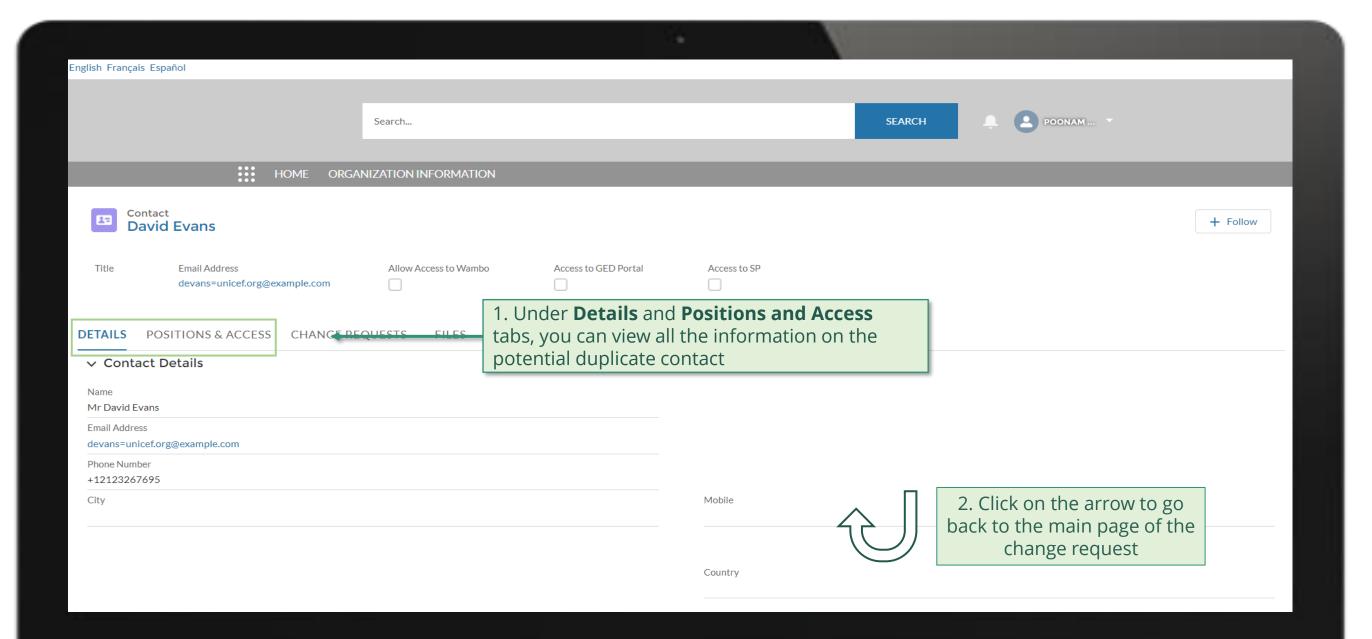
the steps for this request



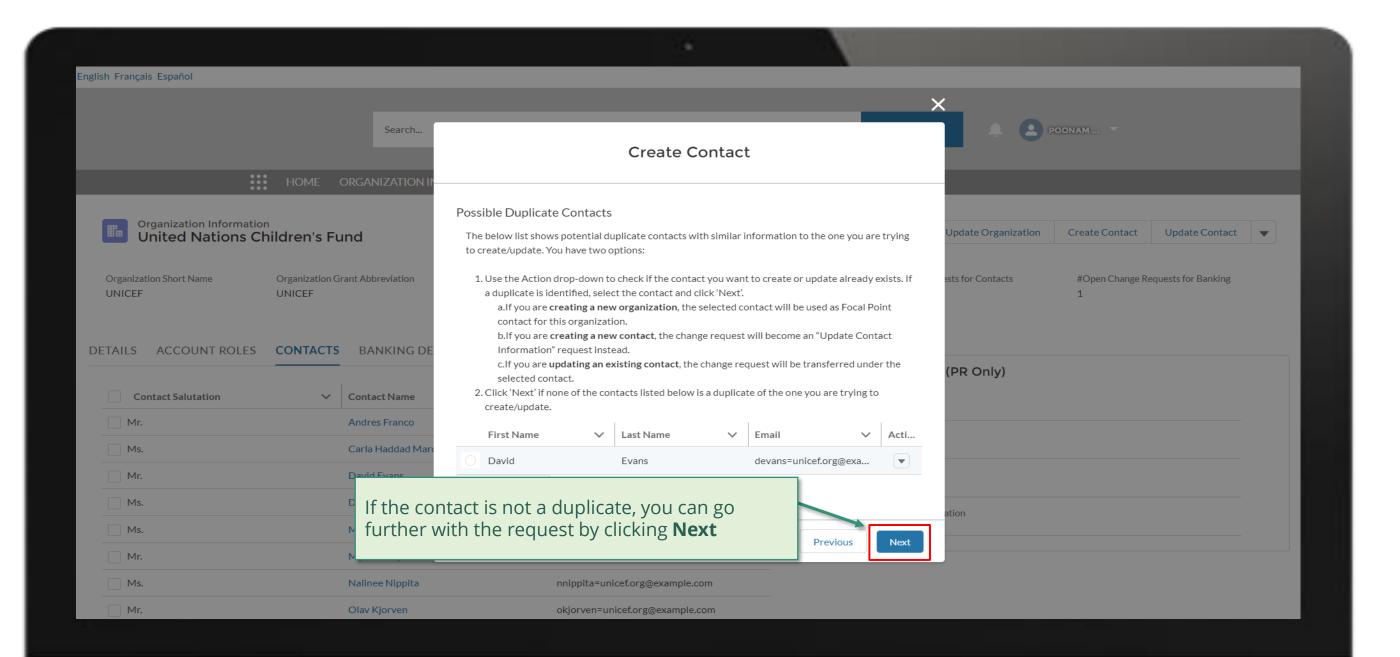




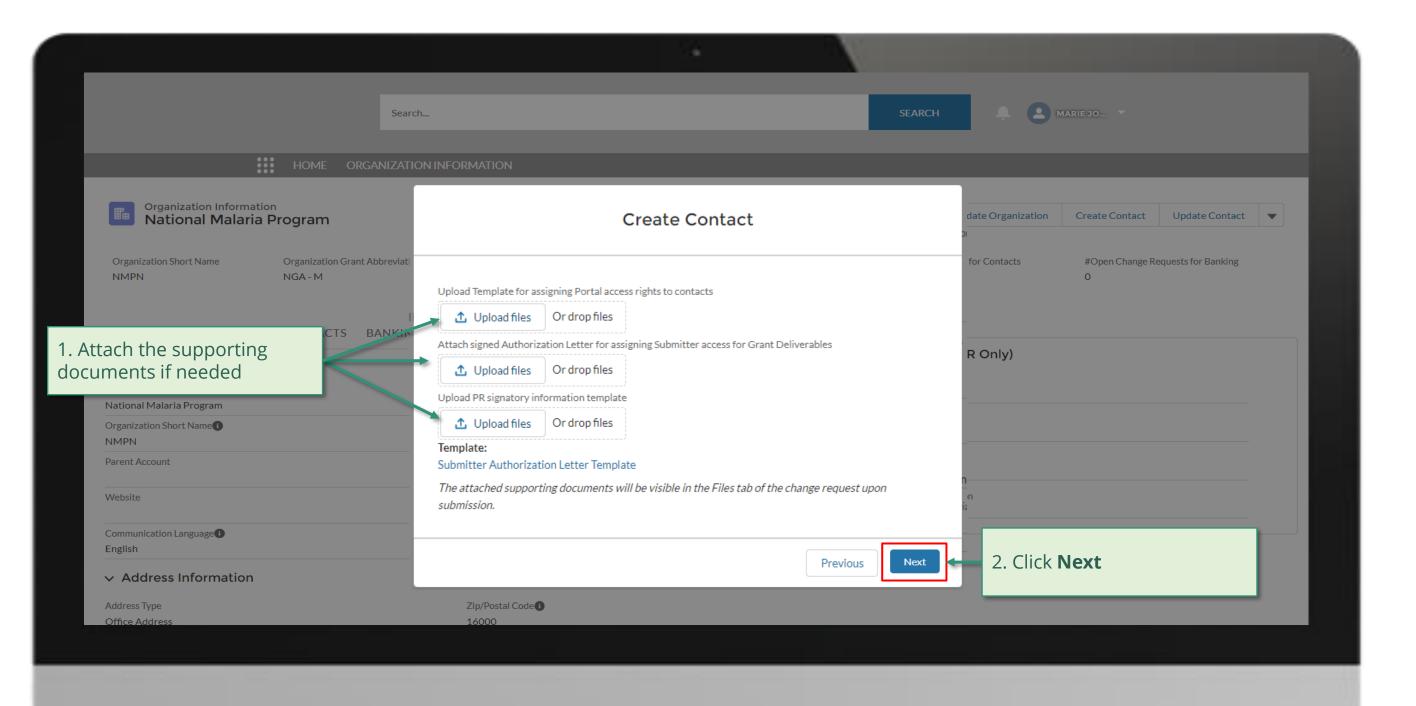




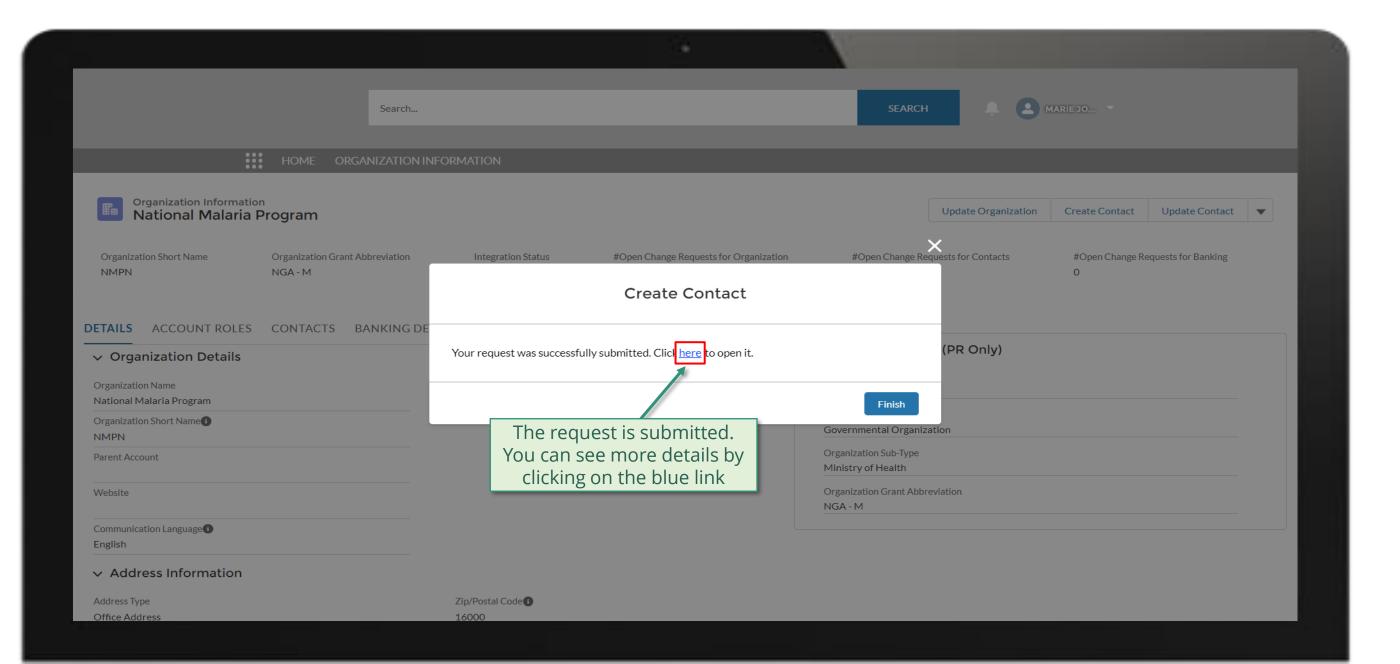




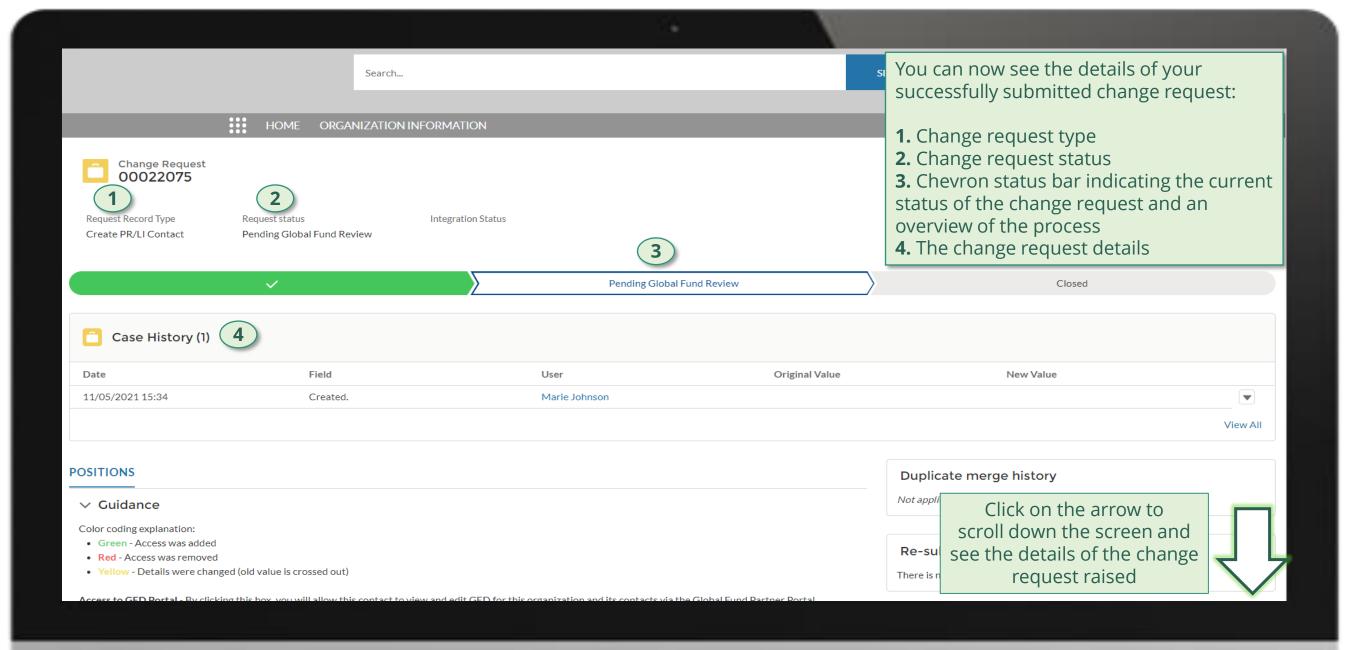






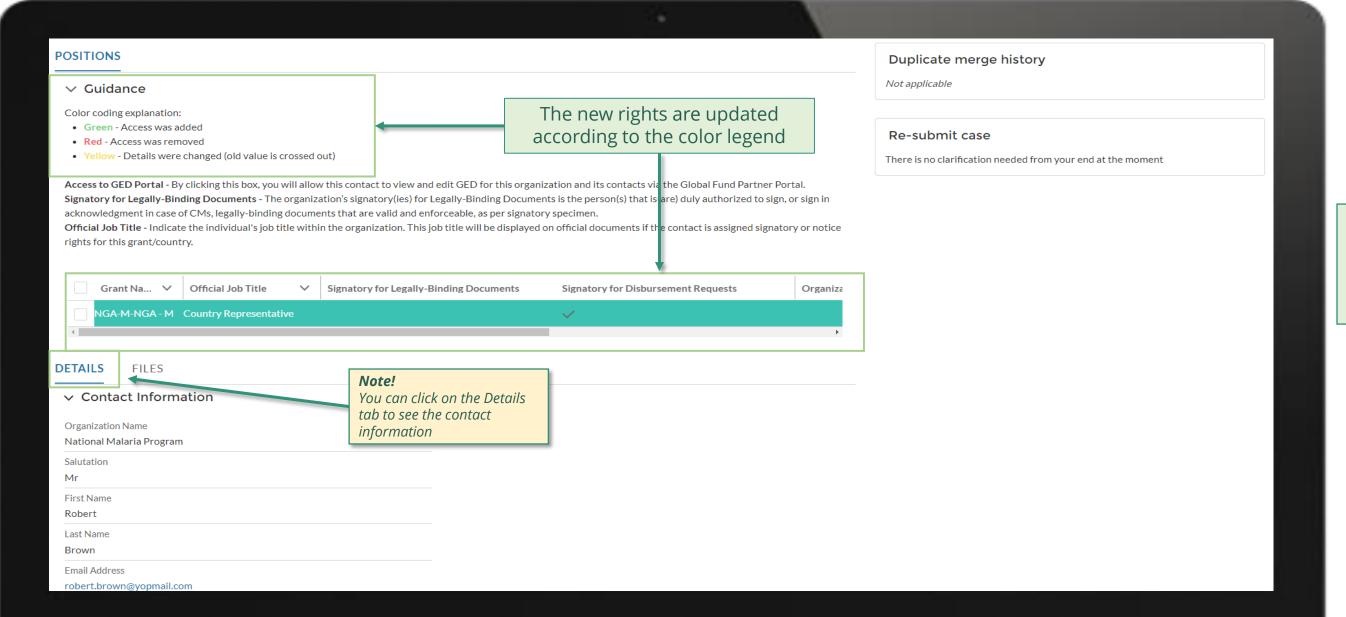








request





Click here to go back to the overview page



## **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

### **PR | Update Contacts**





Follow the steps below

bilow trie steps below



Updated GED reflected in Global Fund Partner Portal









overview of the steps for this request

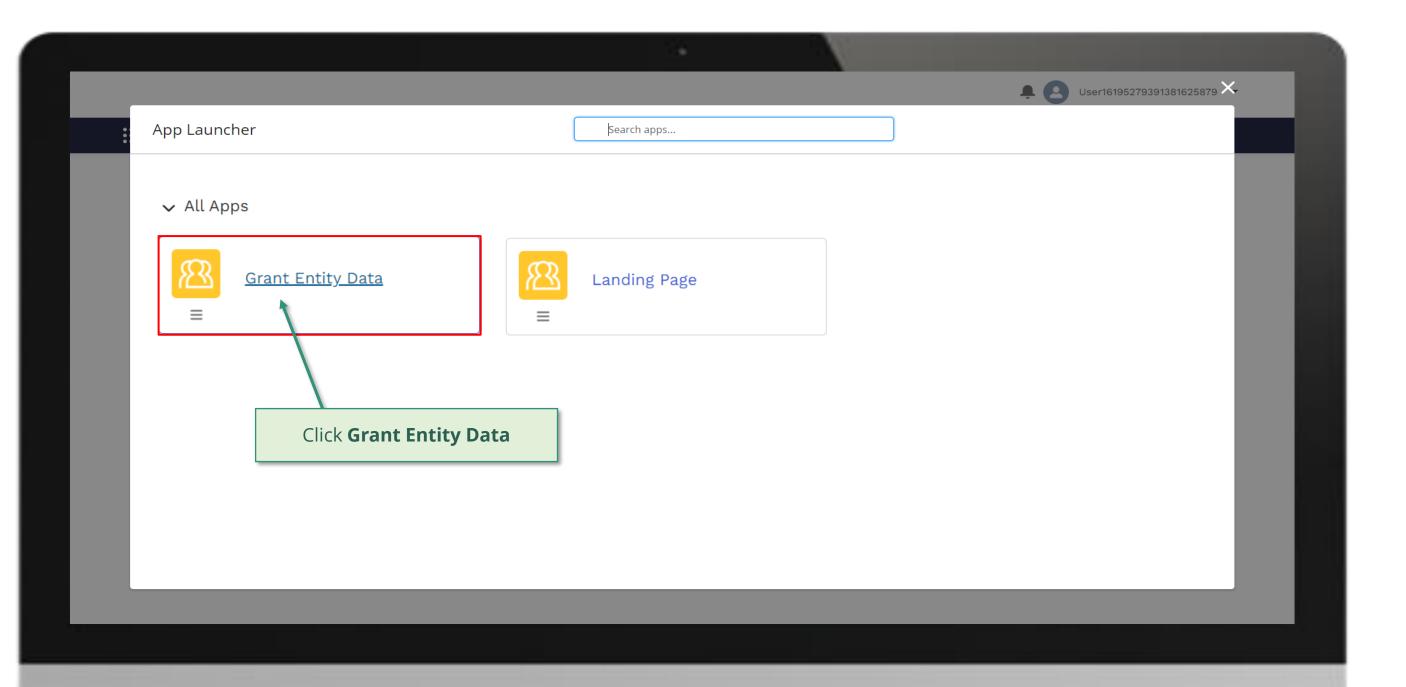
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Use App Launcher to choose what portal you want to open

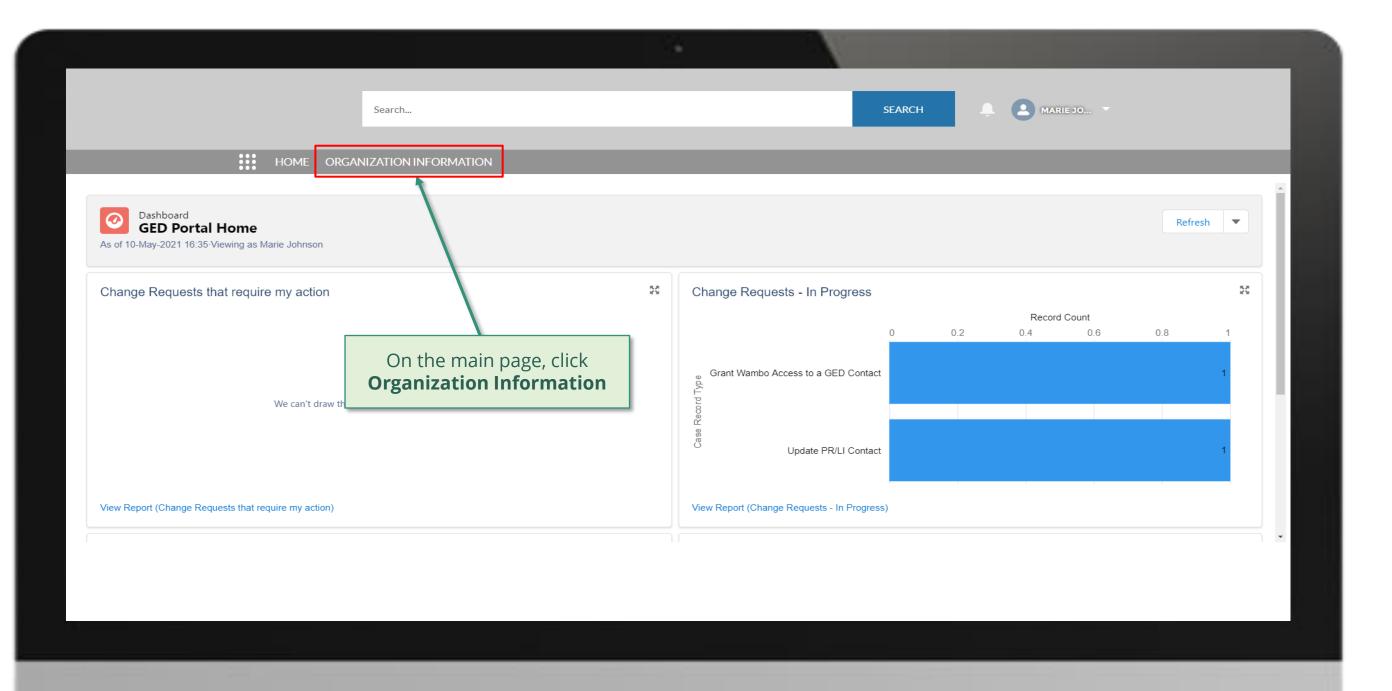
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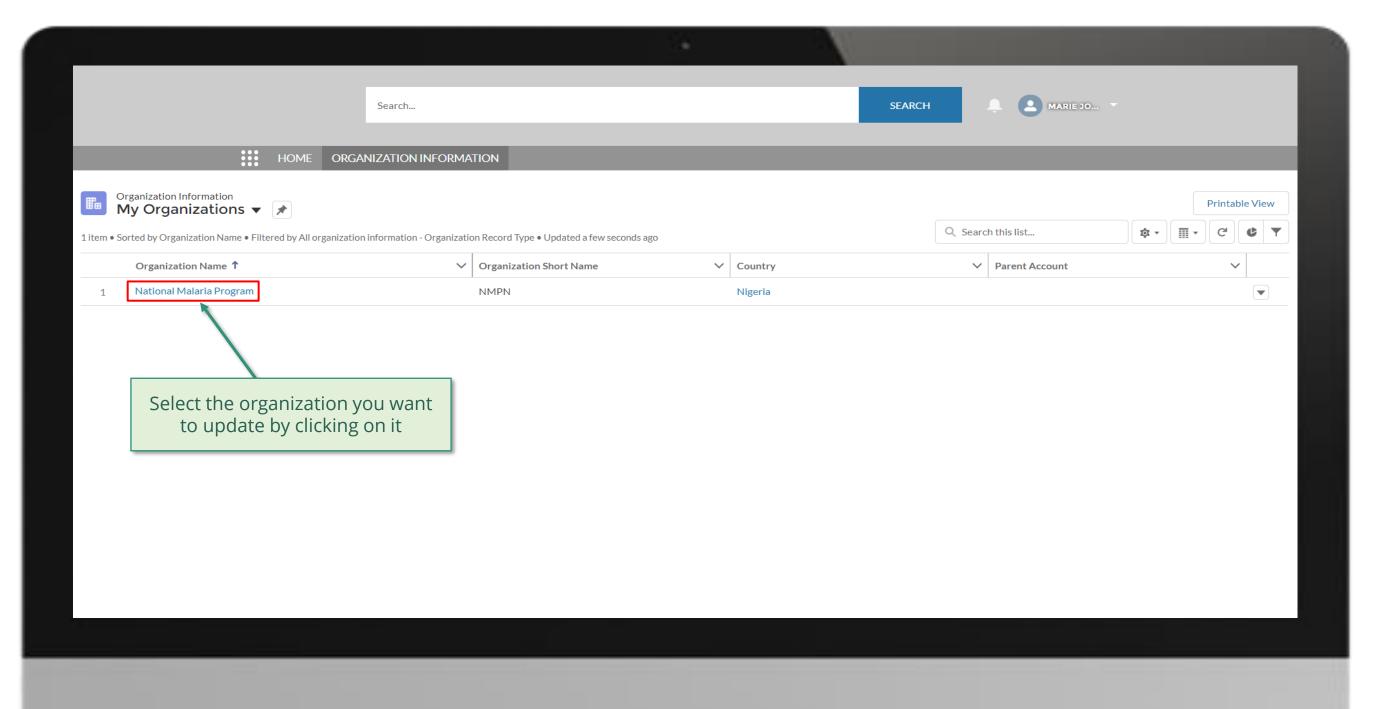
Home



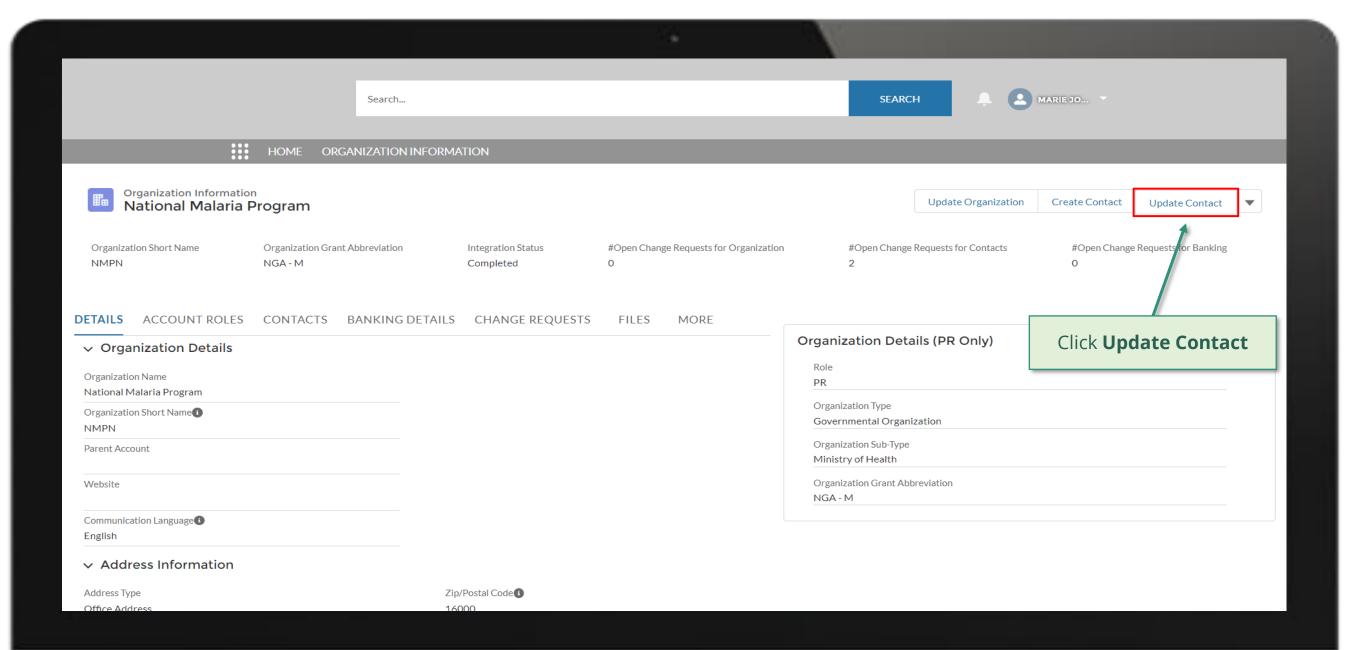




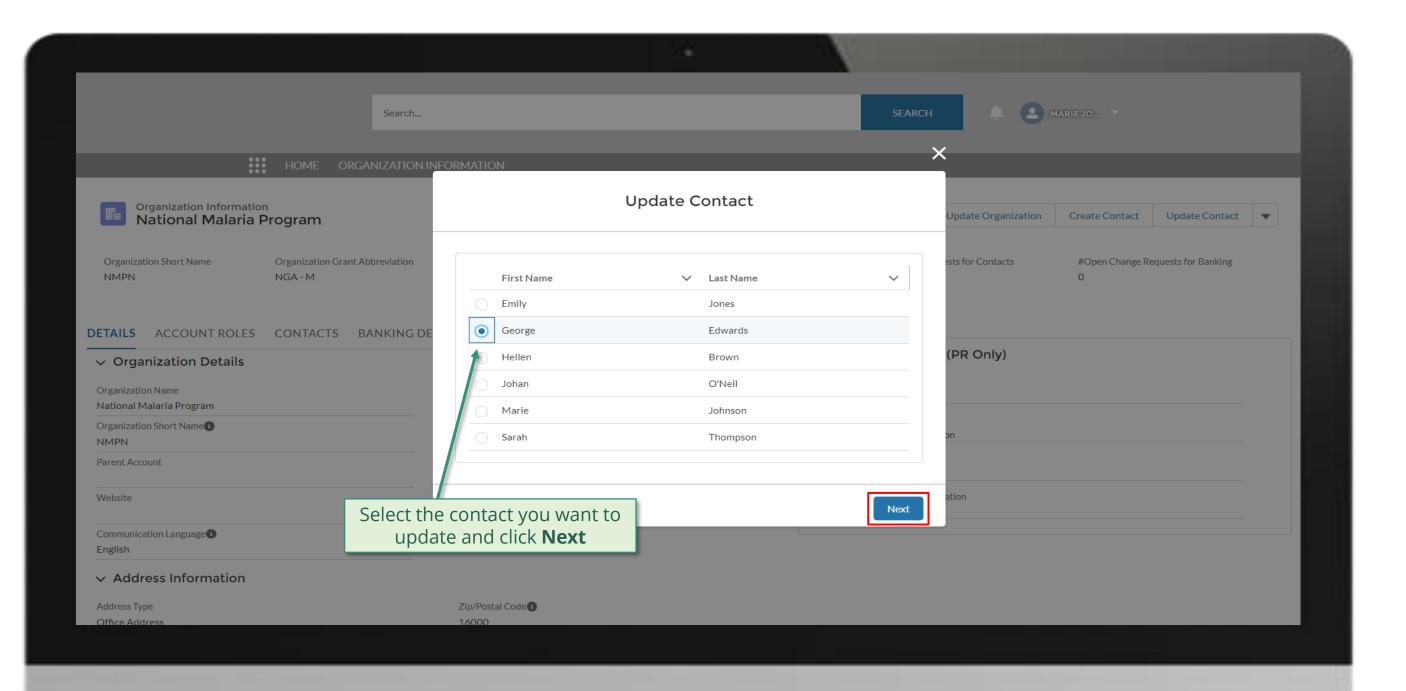






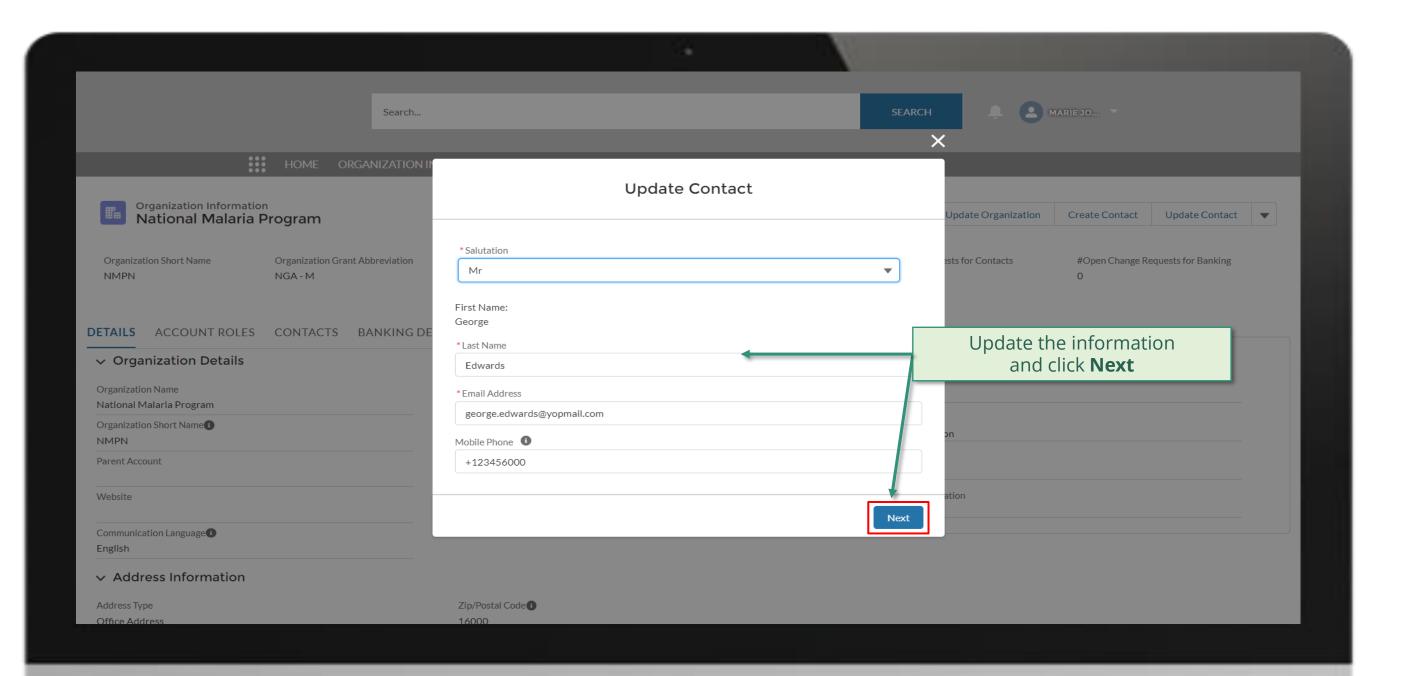






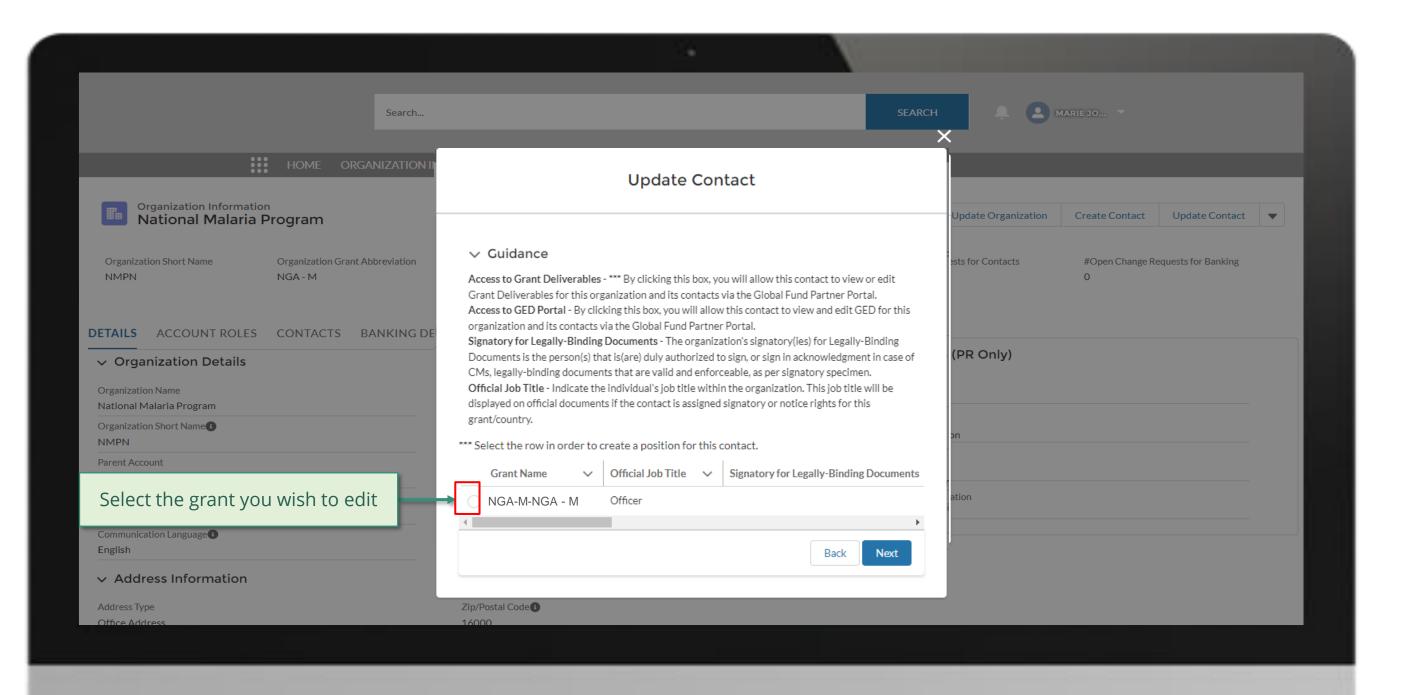


for this request

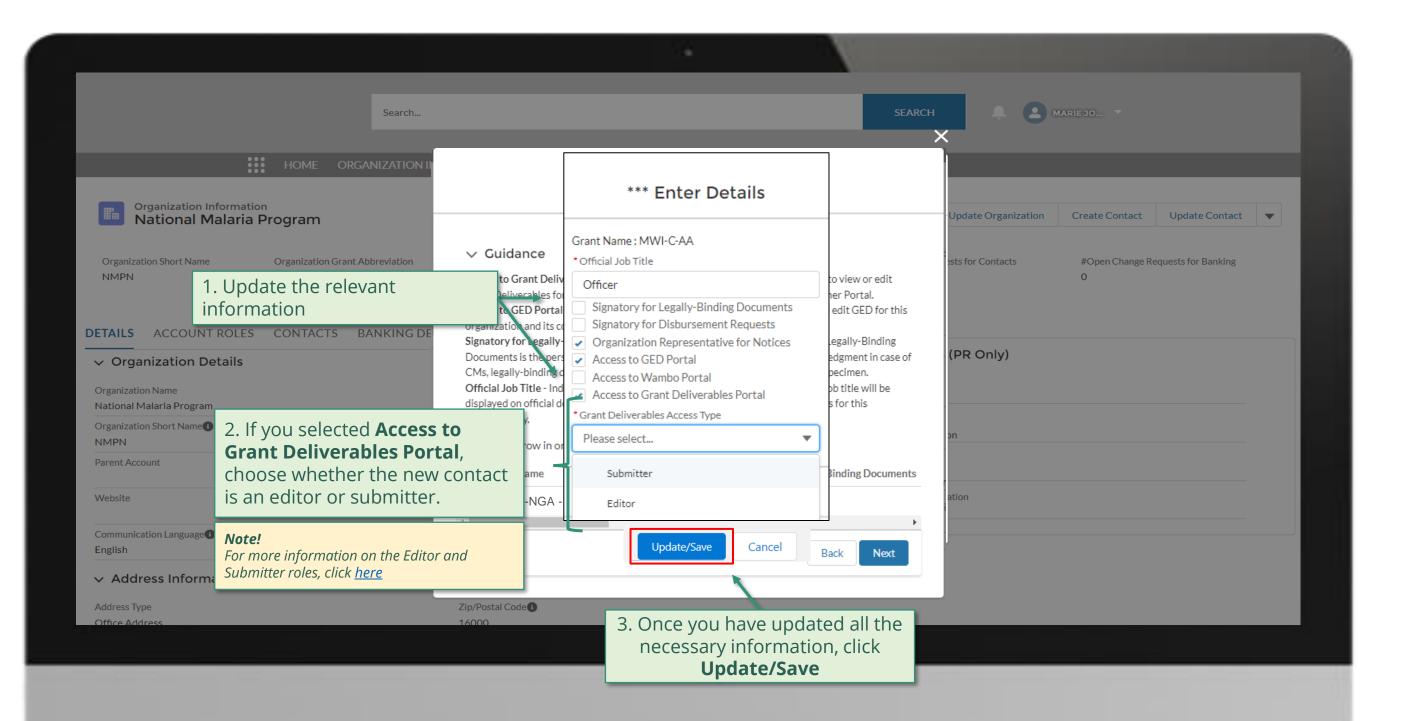




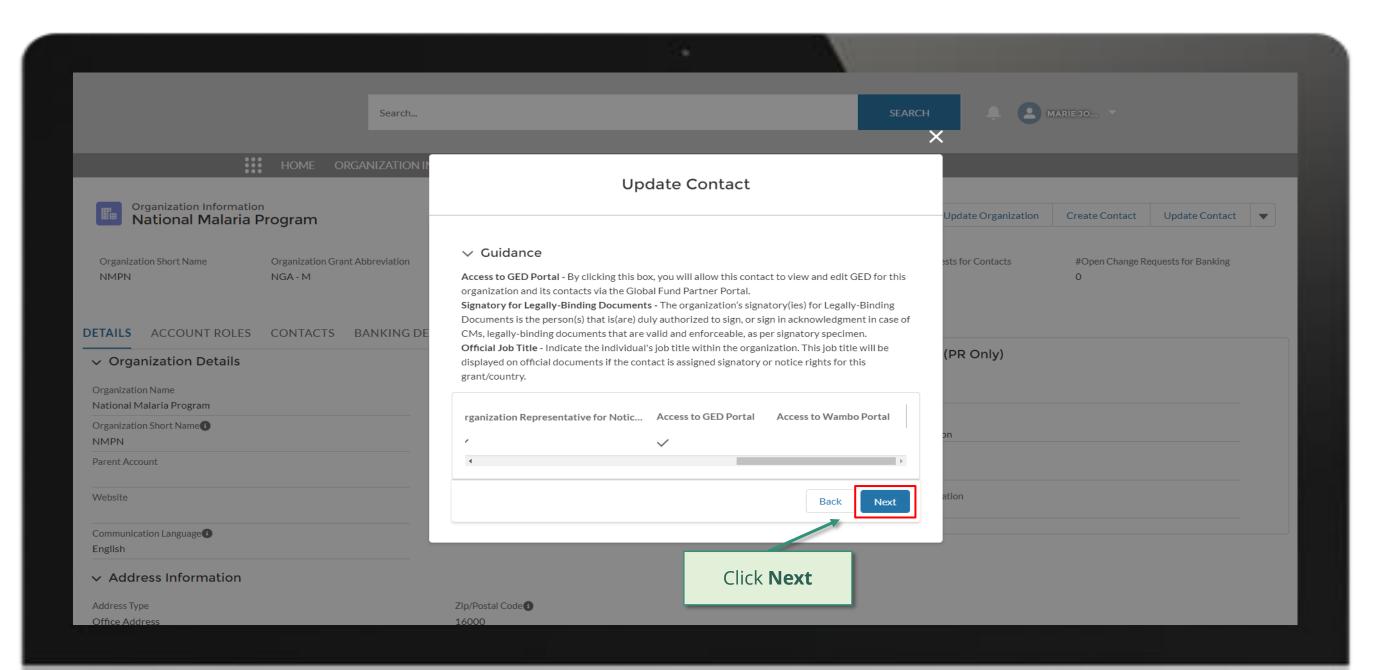
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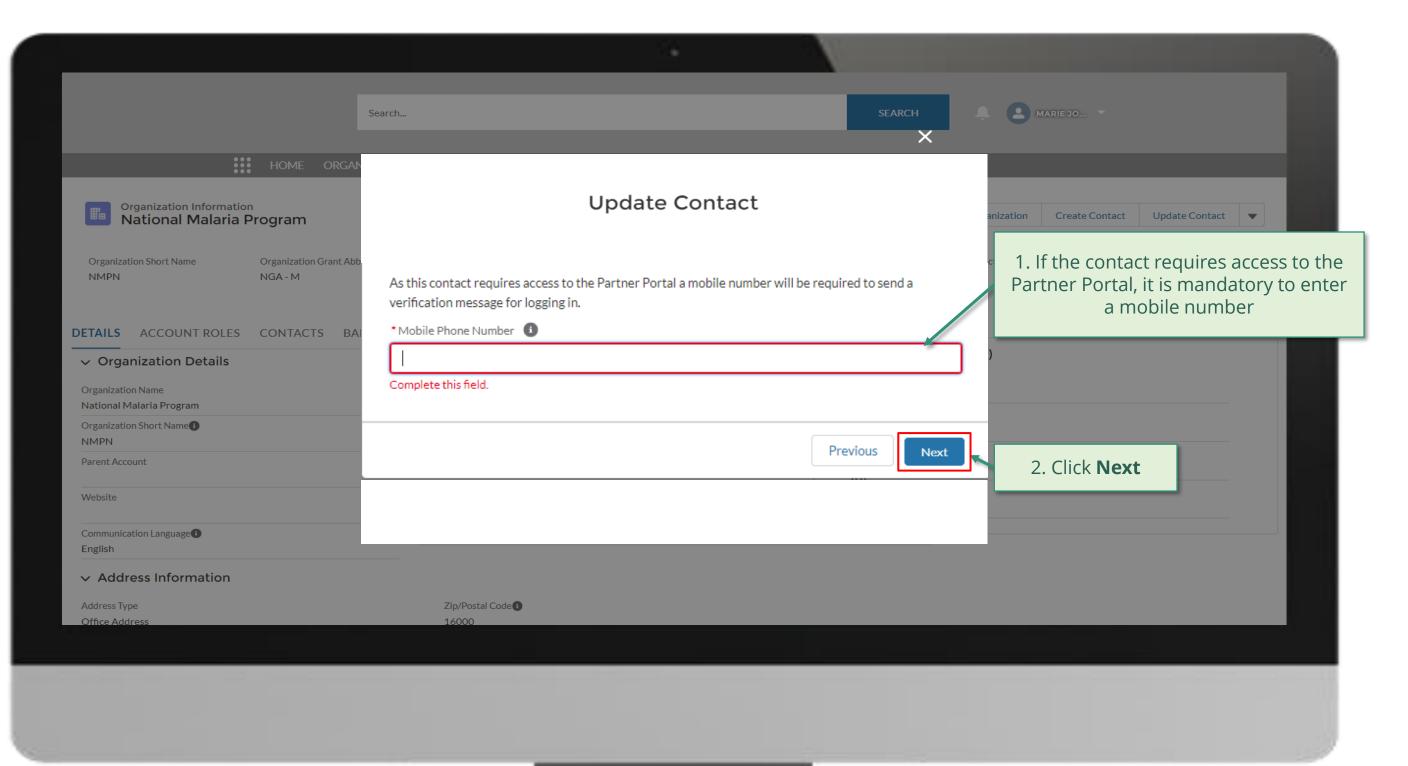




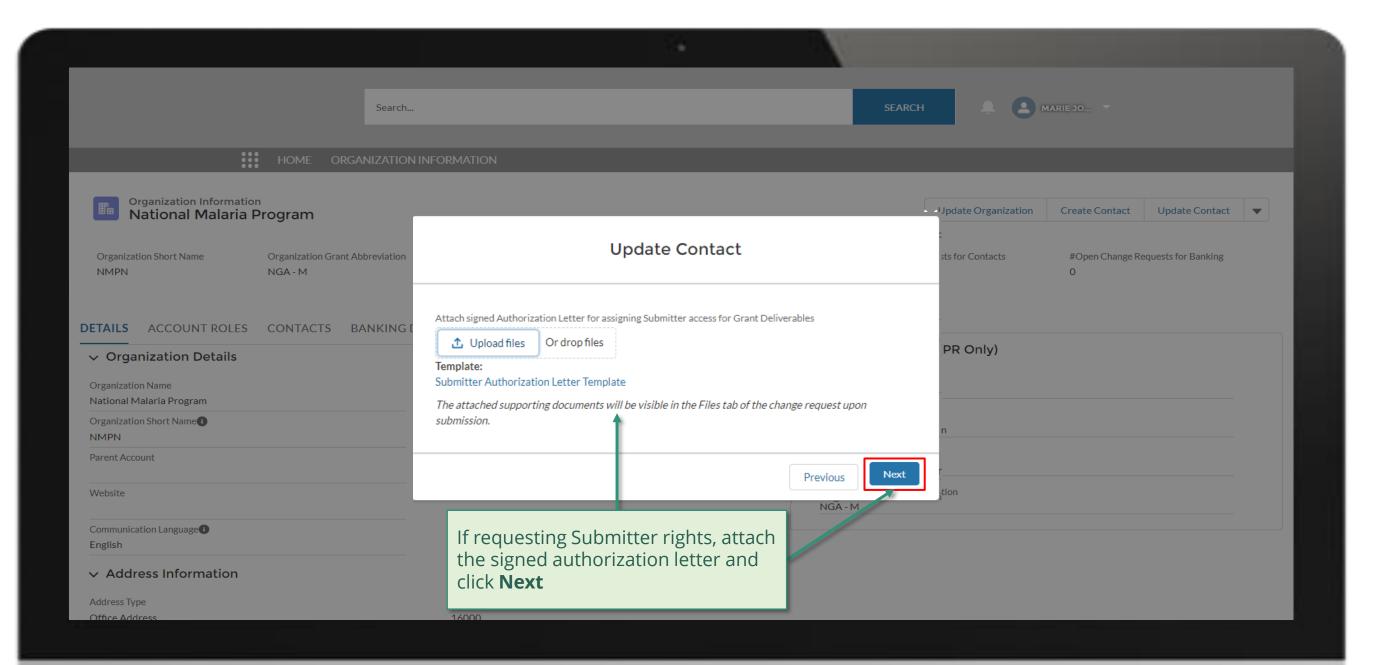




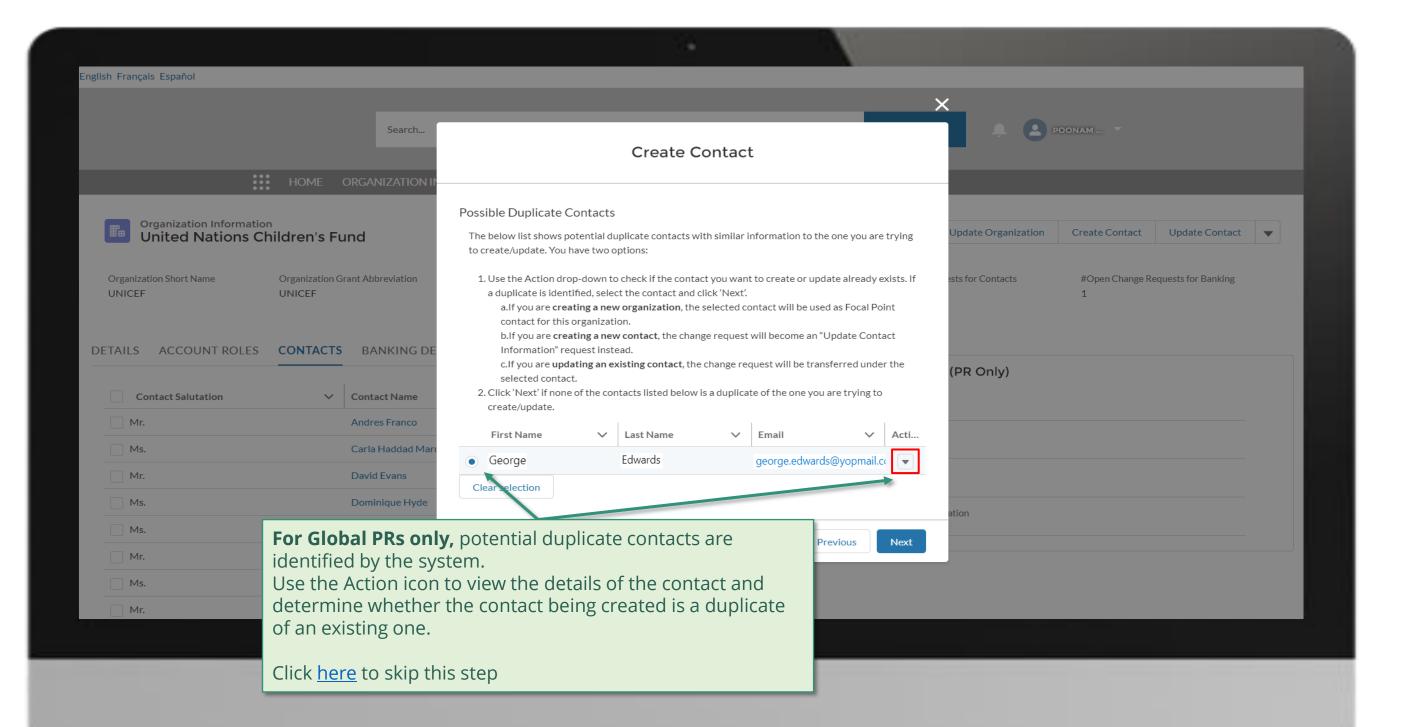




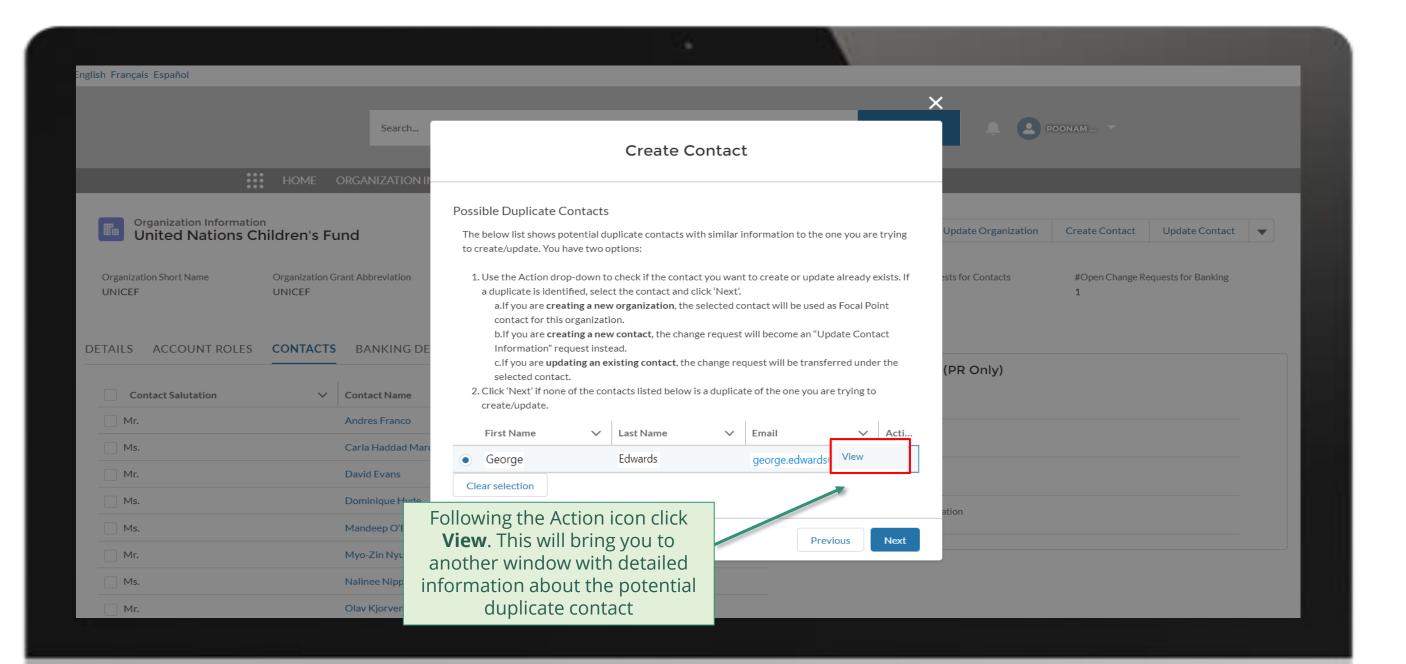




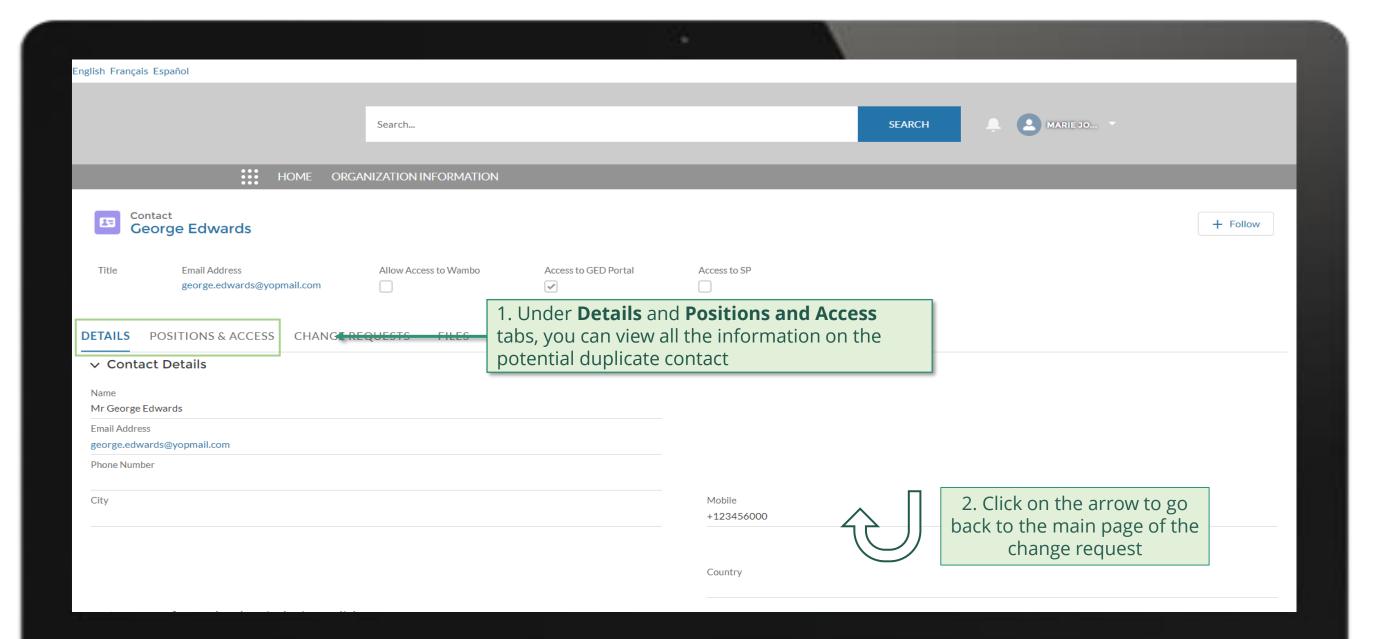




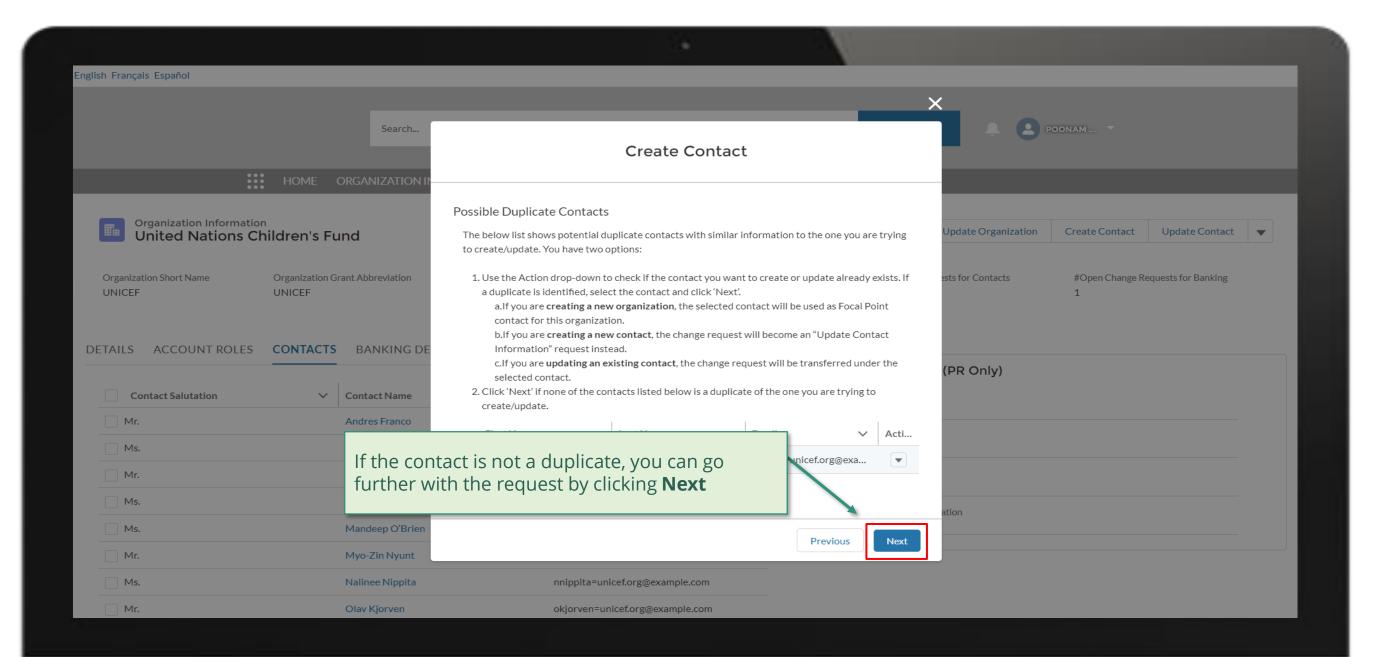




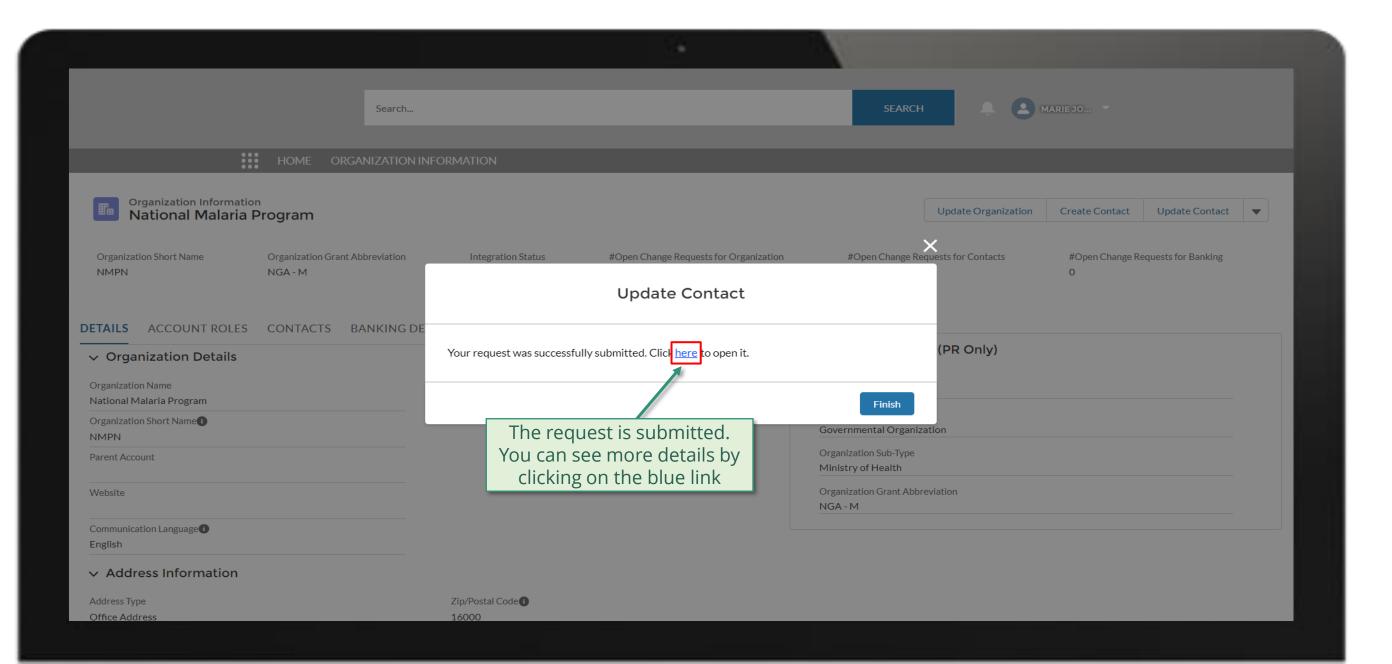




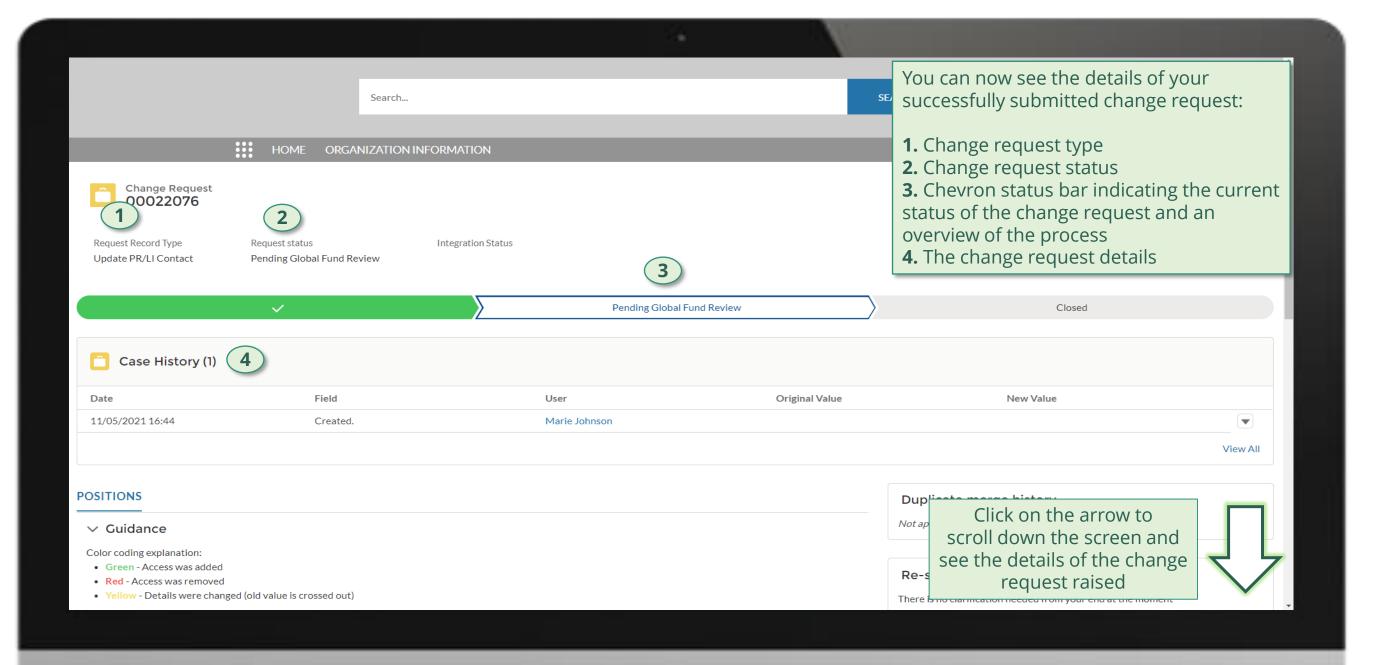








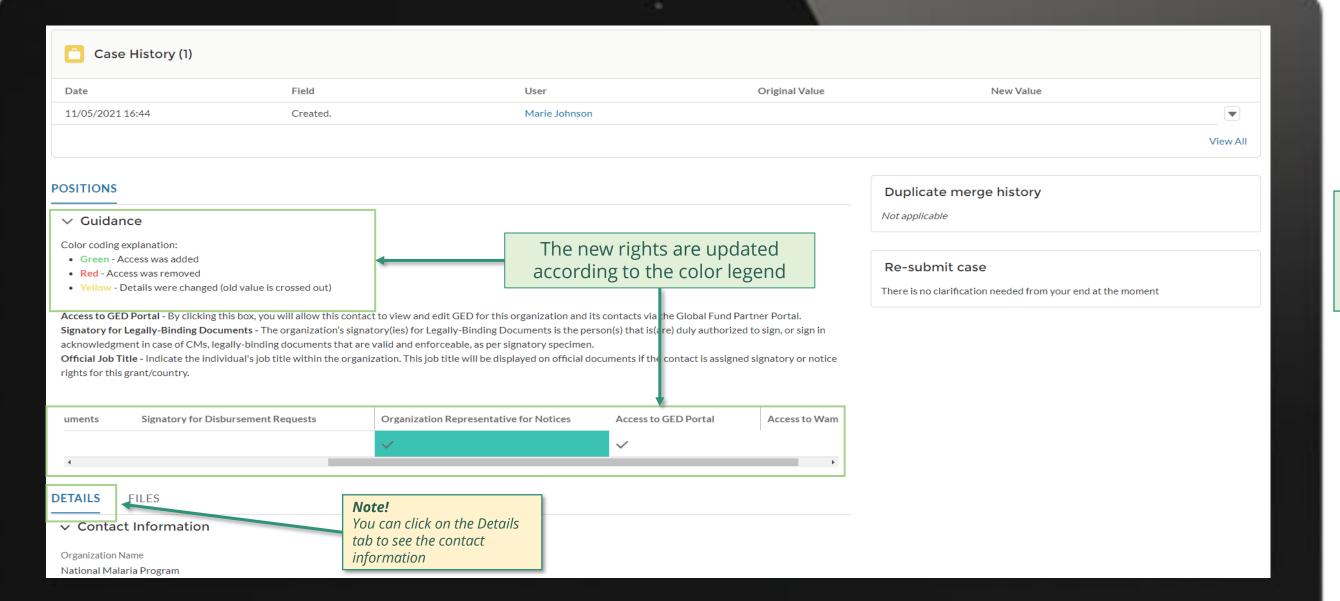






for this

request





Click here to go back to the overview page



## **Grant Entity Data (GED) Interactive Manual**

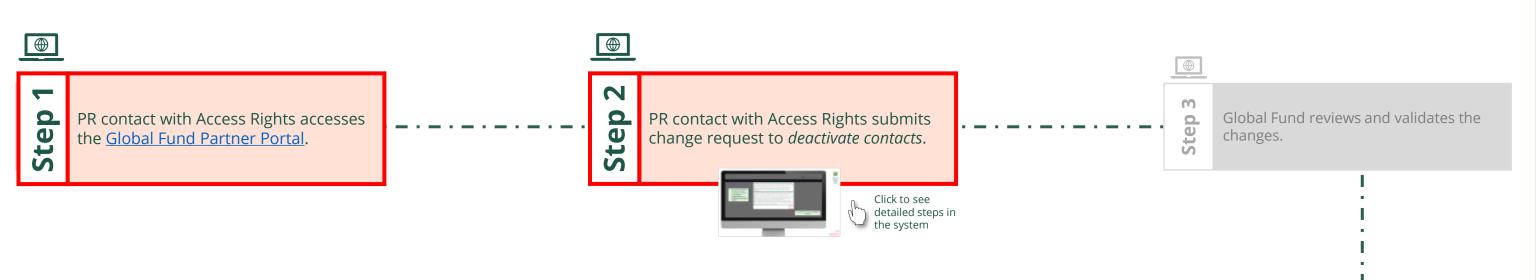
The steps assigned to you are highlighted in the red boxes

### **PR | Deactivate Contacts**





Follow the steps below



Updated GED reflected in Global Fund Partner Portal



In the system







overview of the steps for this request

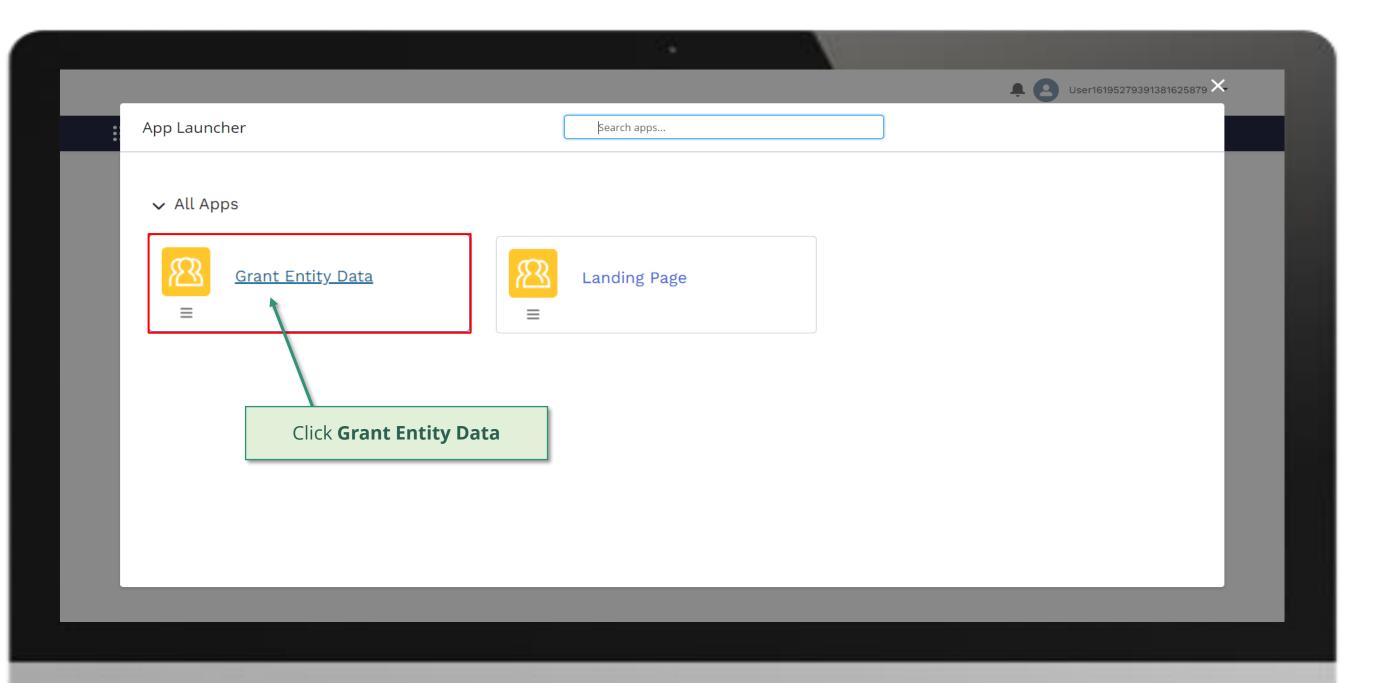
#### Welcome!

Use App Launcher to choose what portal you want to open

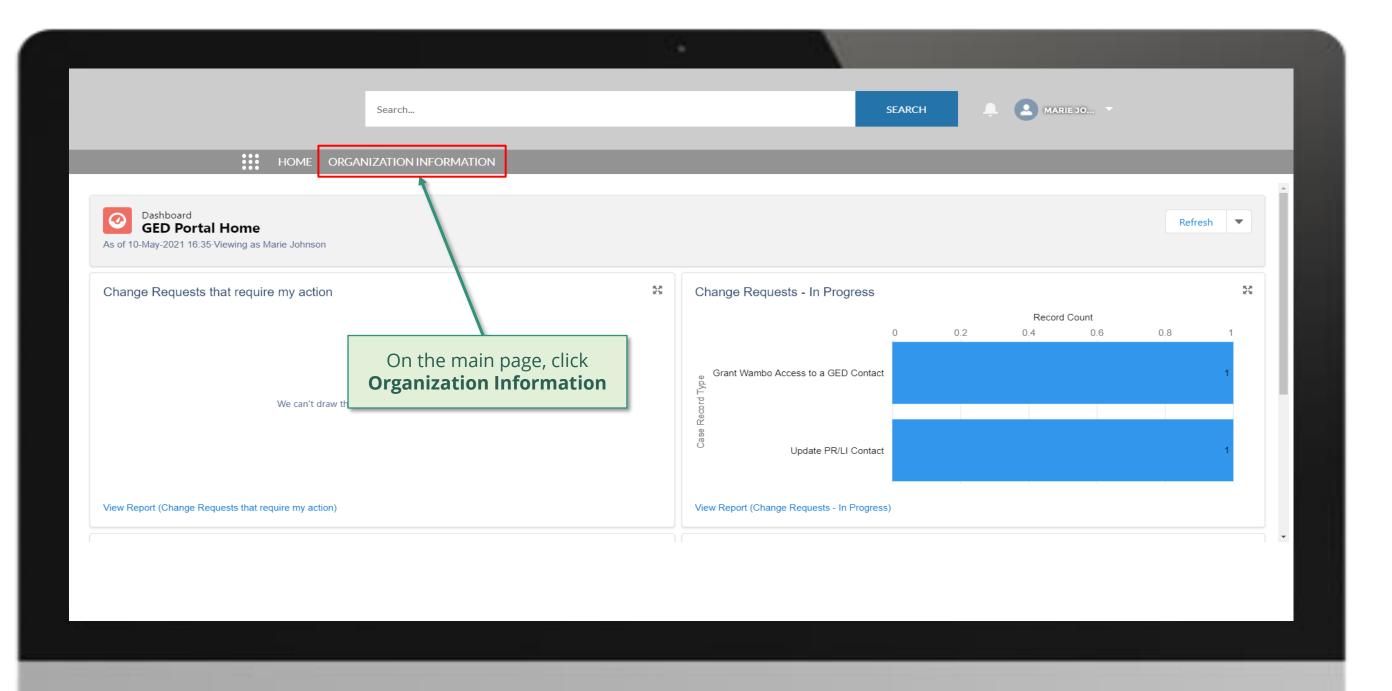
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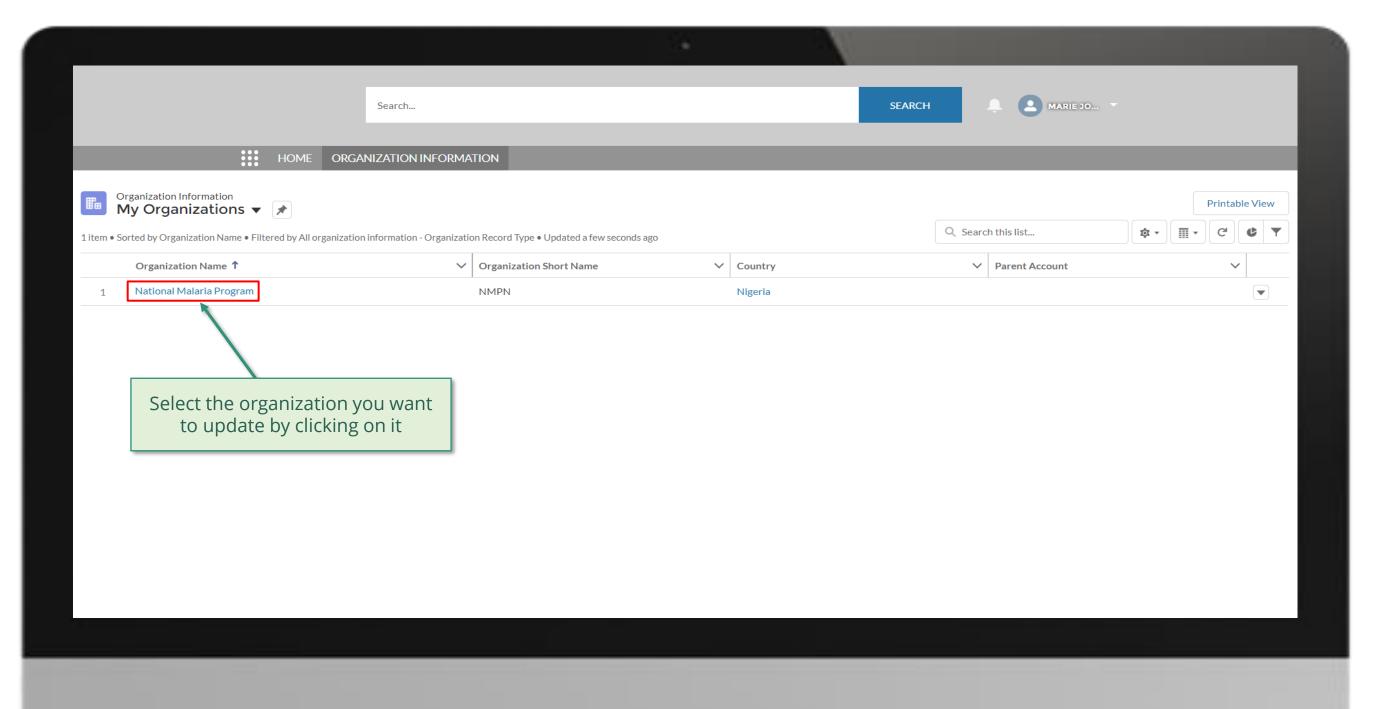
Home



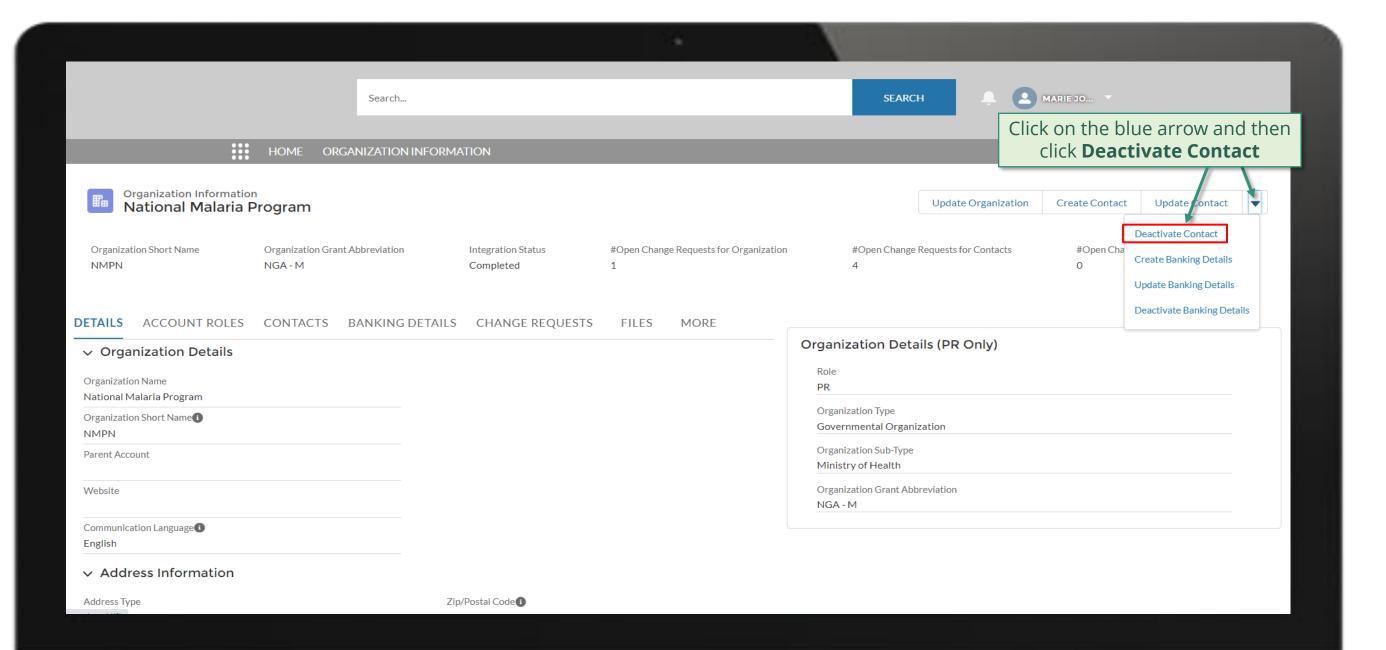




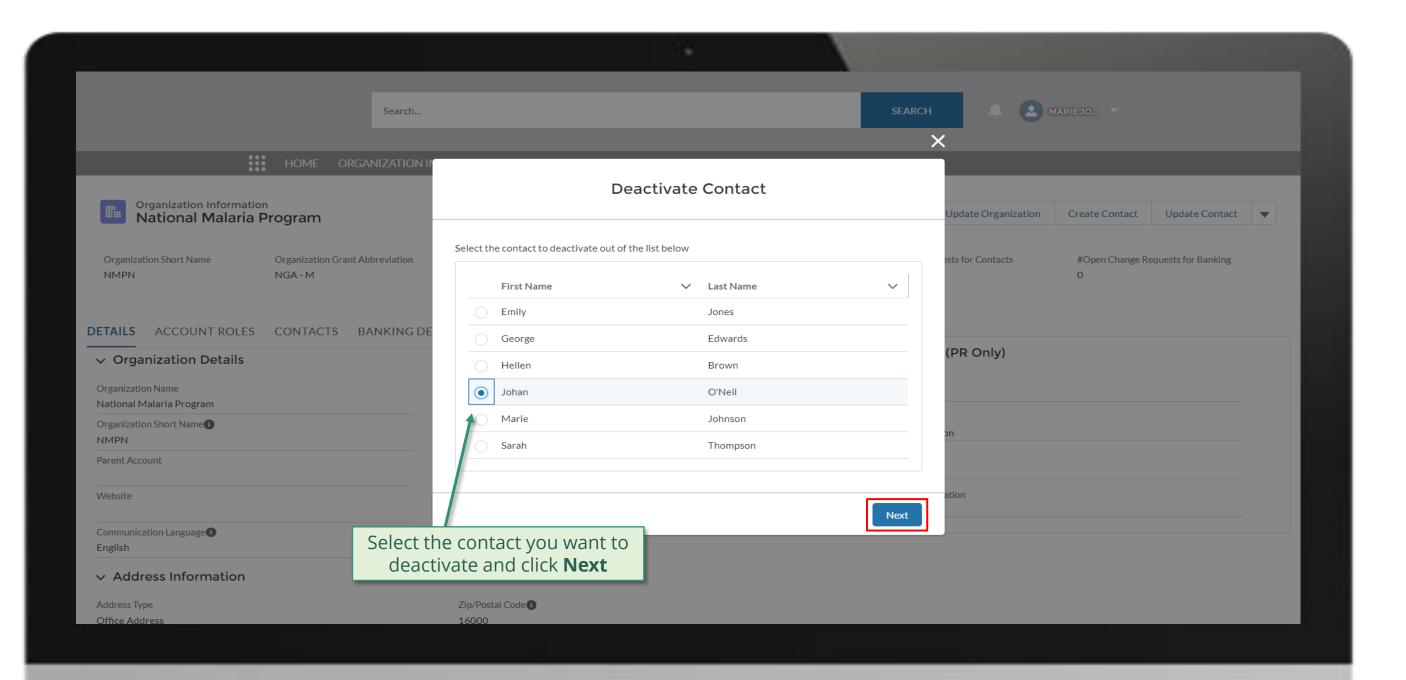








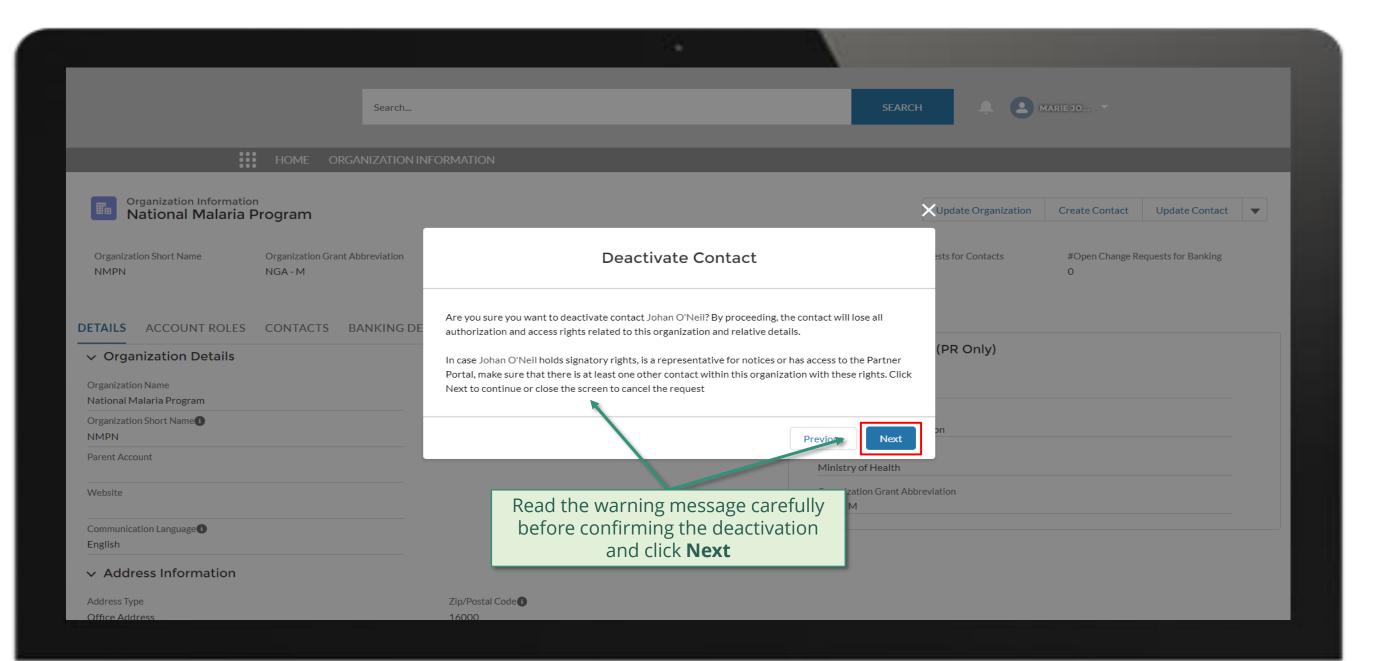




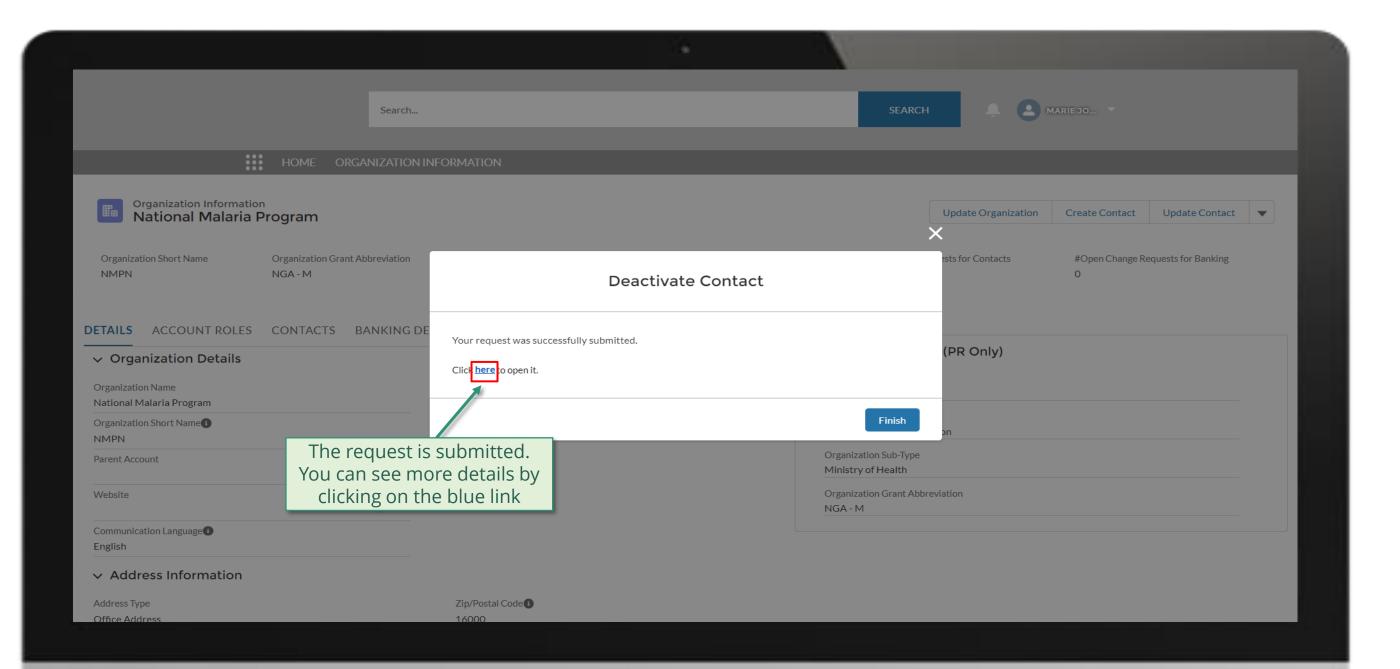


for this

<u>request</u>

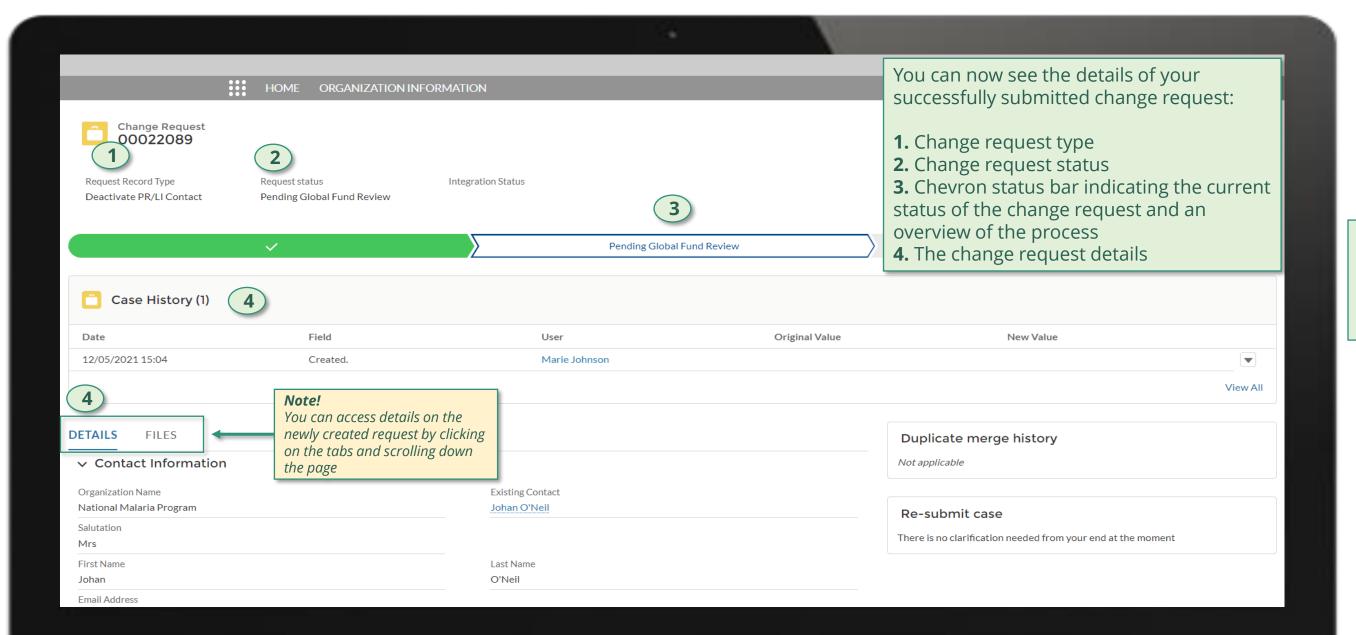








for this request





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### **Grant Entity Data (GED) Interactive Manual**

### Select the type of change request

Select Another
External Stakeholder

Select from the below

# Organization information Change Requests

Create New Organization

... page 109

Update Organization Information

... page 110

# **Contact Information Change Requests**



**Create Contacts** 

... page 118



**Update Contacts** 

... page 131



Deactivate Contacts ... ,

page 14



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

### **CCM | Create New Organization**

External Stakeholder



Follow the steps below

CCM emails Organization Information Designated CCM focal point with Access Global Fund creates new organization in Form\*\* & supporting documents1 to Rights receives login details to the Partner Portal. Access to Funding. Global Fund Partner Portal via email.

> Click here to get started CCM Focal Point contact with Access Step The Global Fund Partner Portal Rights is able to submit change requests.

Via e-mail In the system

<sup>&</sup>lt;sup>1</sup> See Operational Policy Manual (OPM) Annex 3 on required supporting documents.

<sup>\*\*</sup> Organization Information Form (EN | ES | FR). Please note! Spanish and French versions are courtesy translations only. Please complete and submit the English version of this template.



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

#### **CCM | Update Organization Information**



External Stakeholder

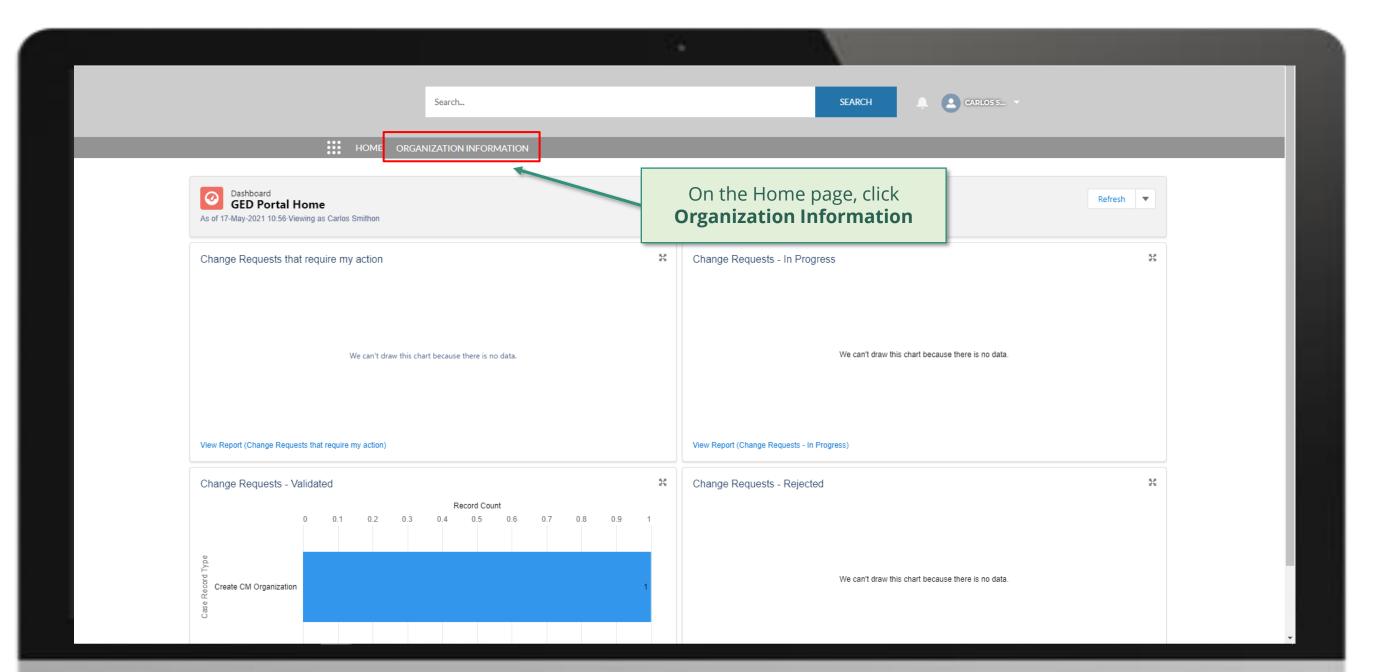


Follow the steps below



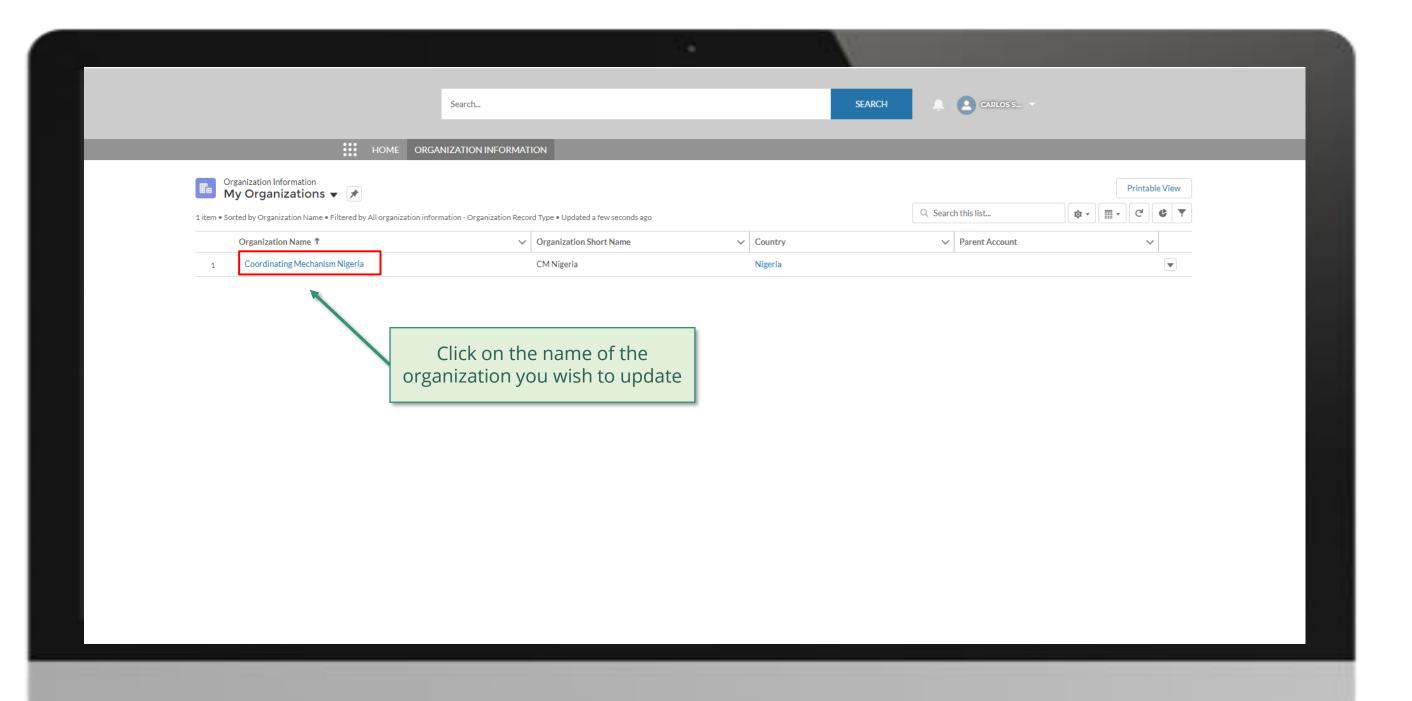
Updated GED reflected in Global Fund Partner Portal







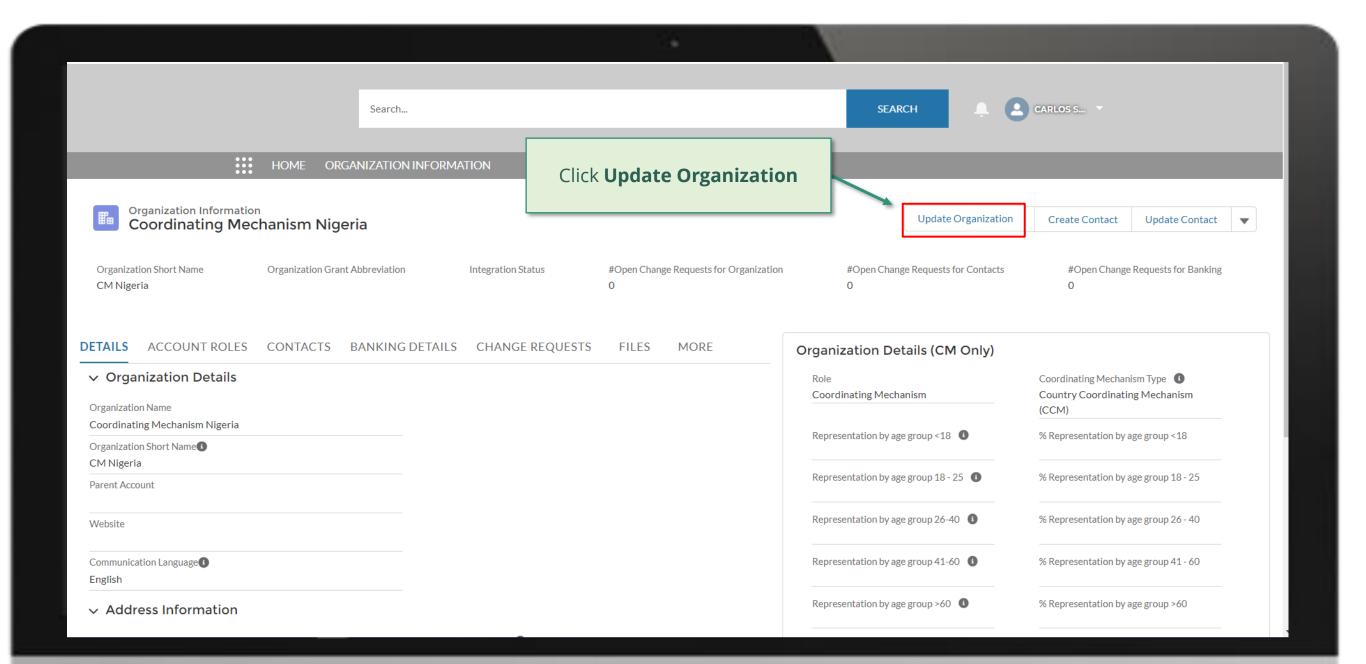
for this request





for this

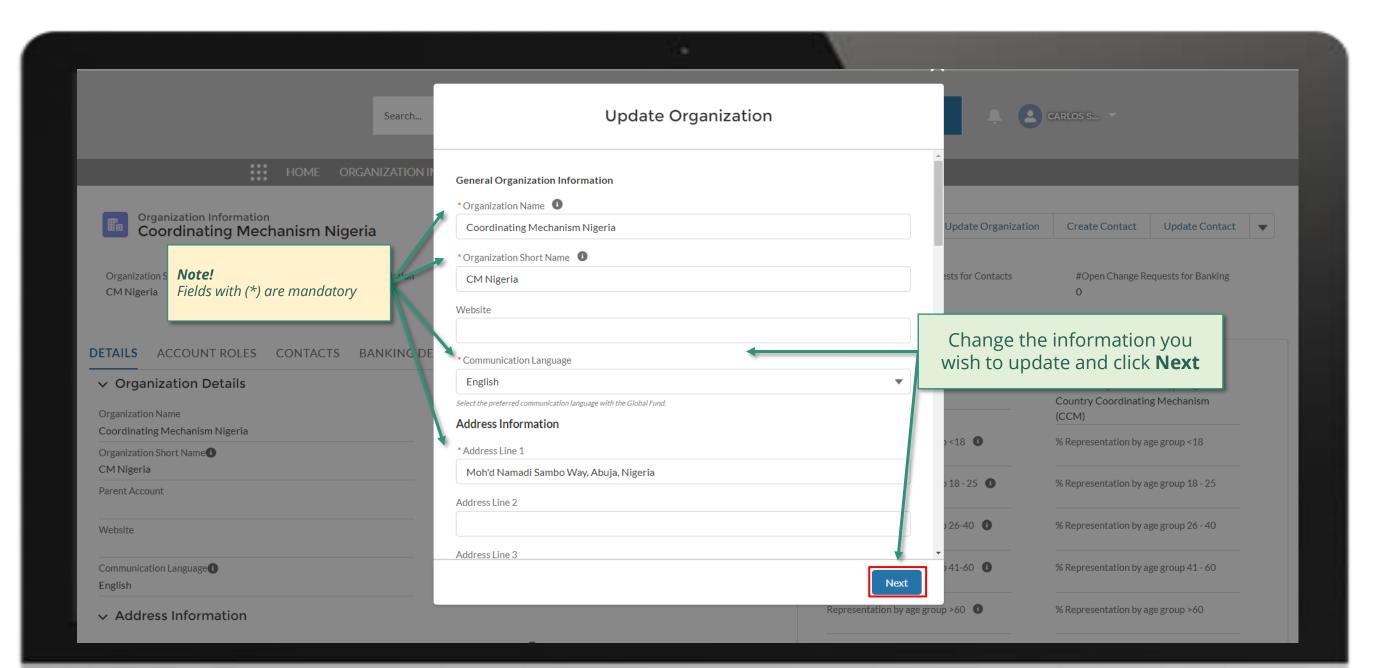
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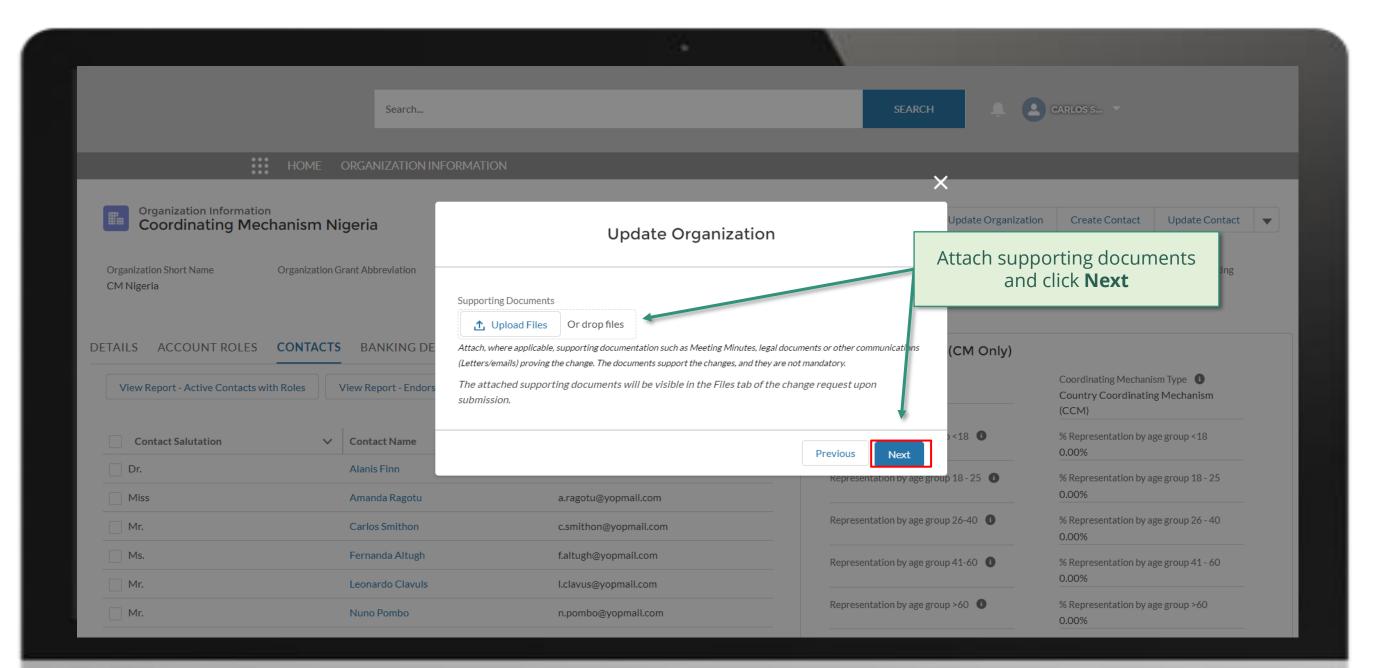


for this

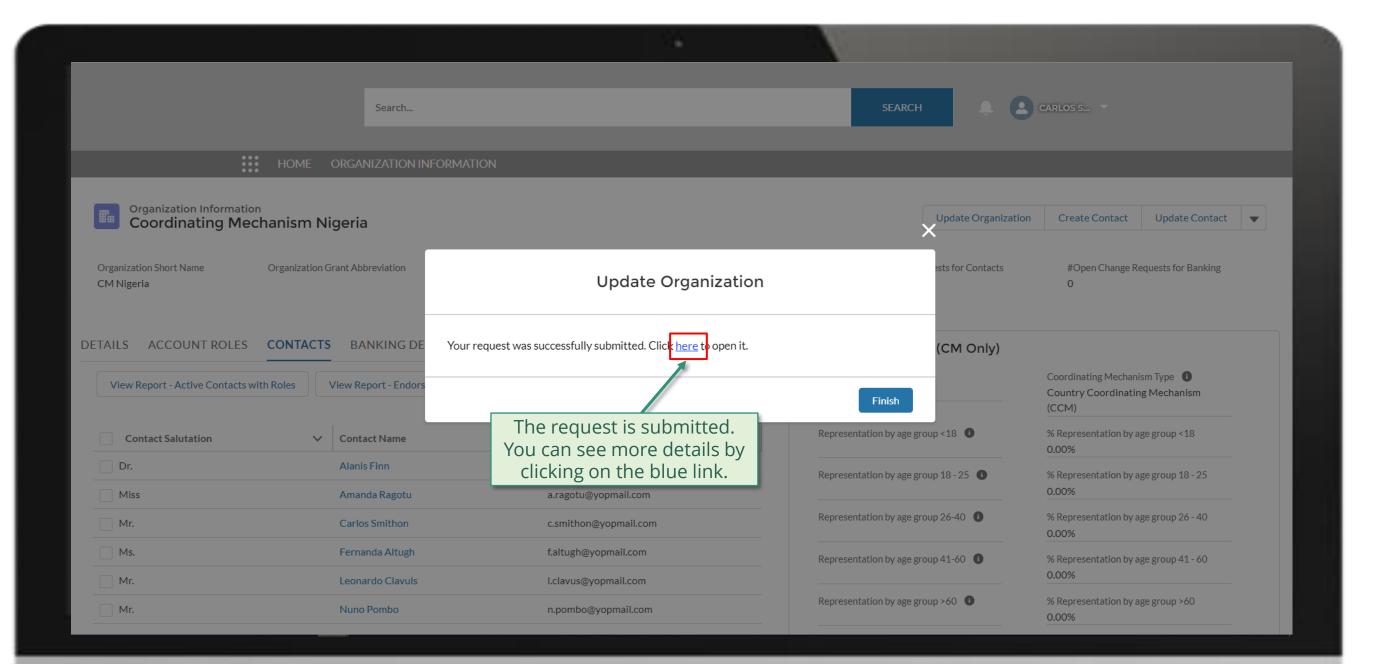
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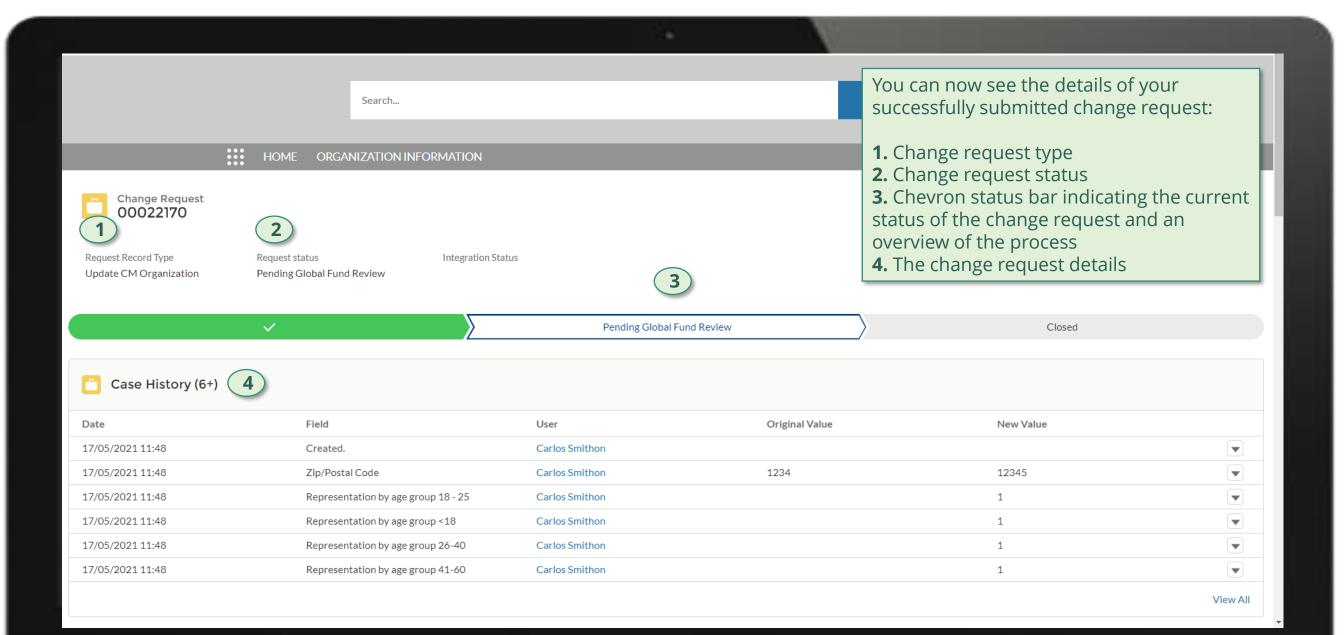














the steps

for this

request

Click here to go back to the overview page



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

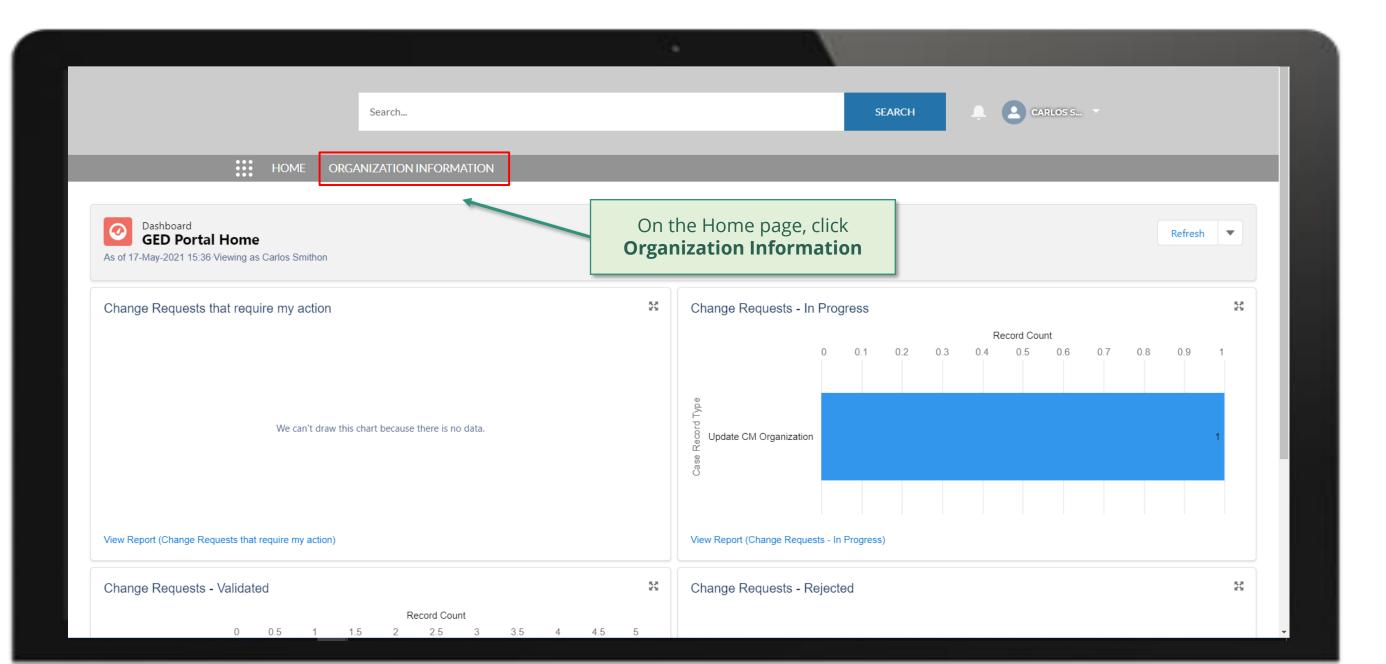
#### **CCM | Create Contacts**



Follow the steps below

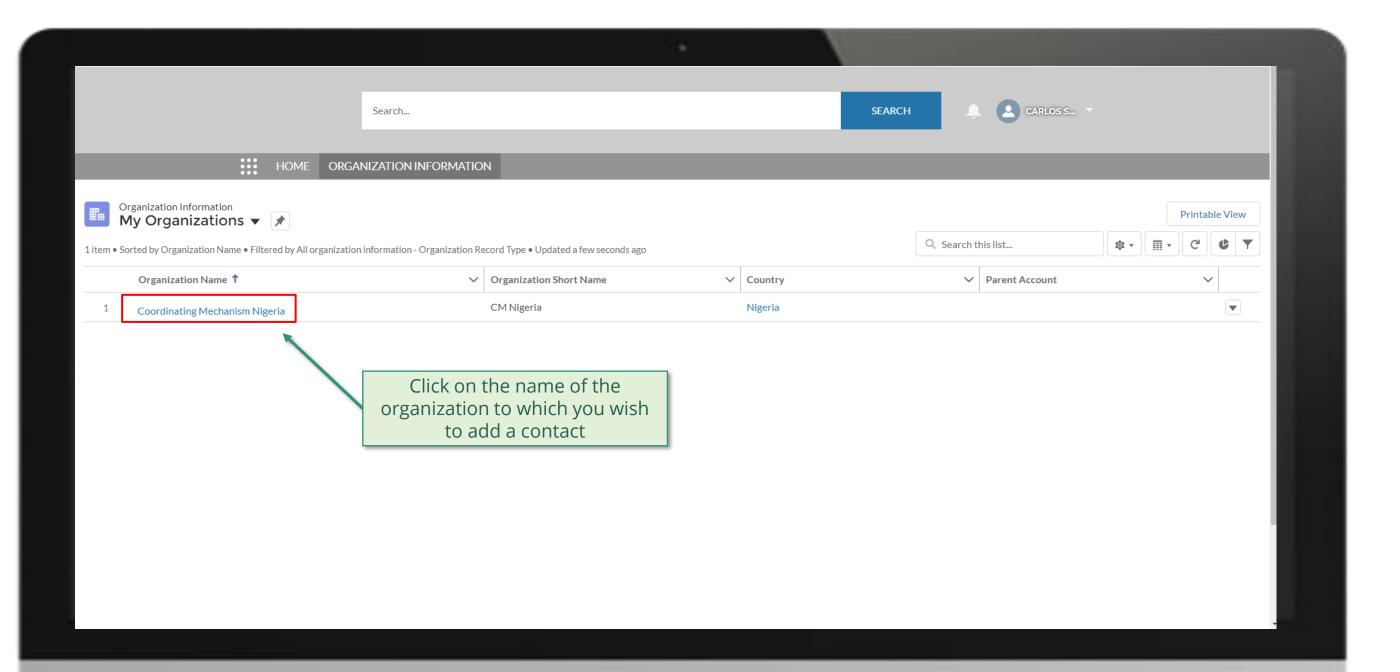
External Stakeholder Change Request



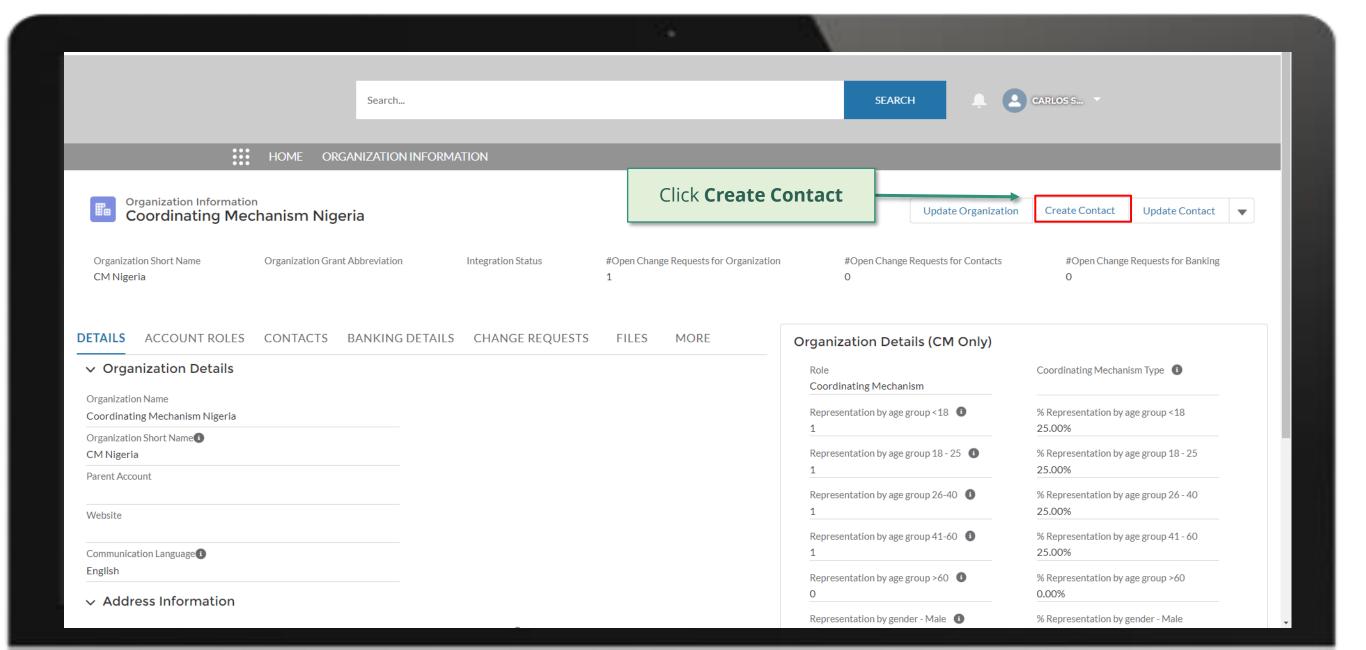




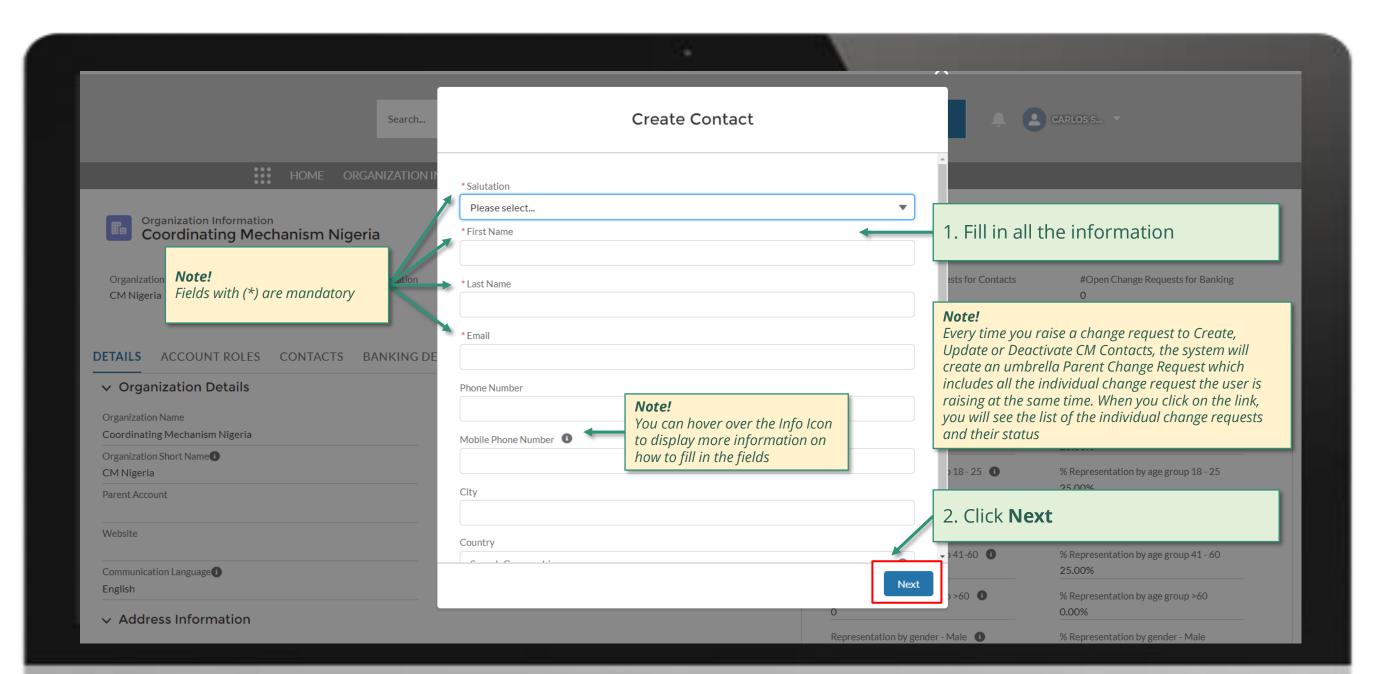
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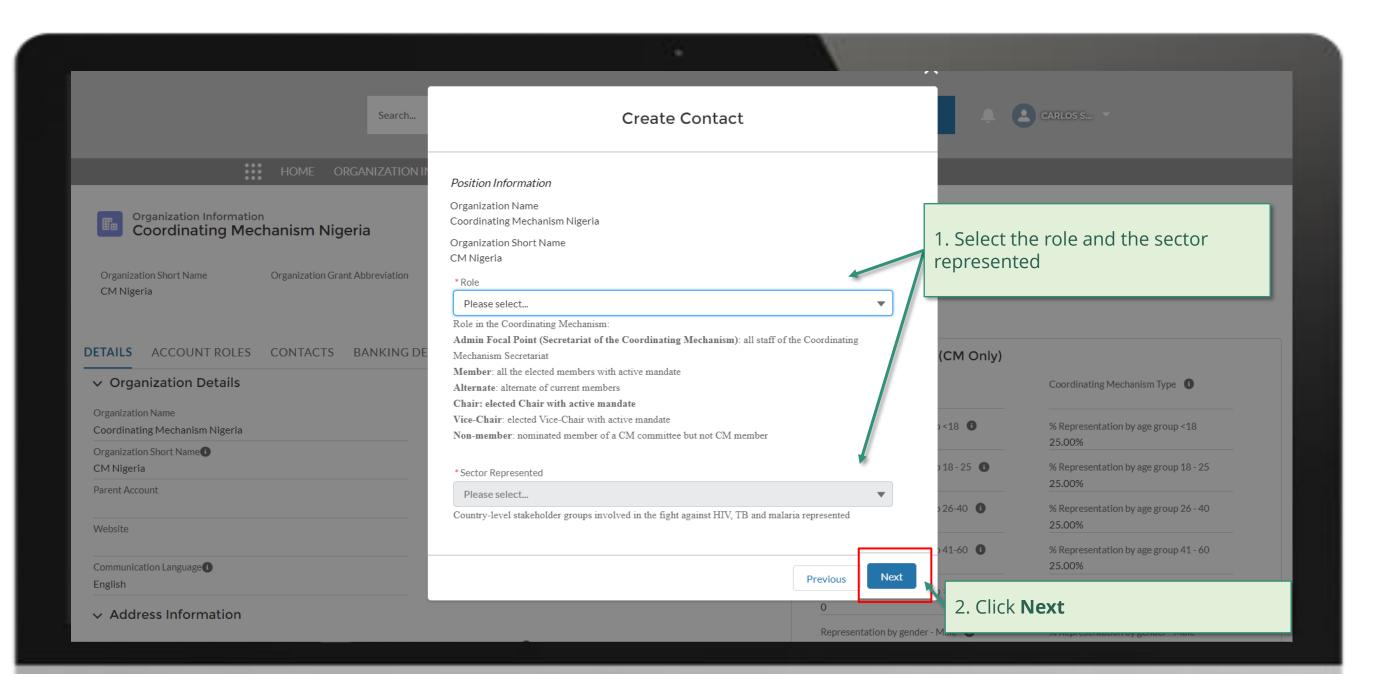






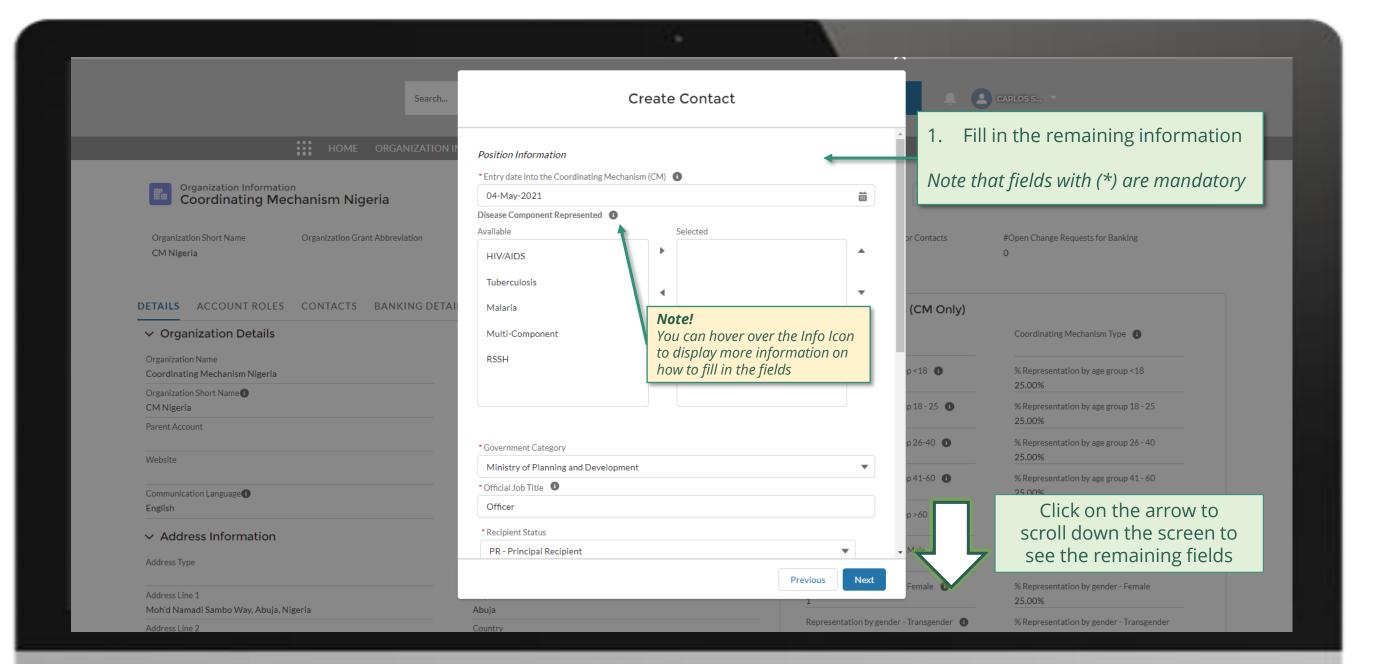




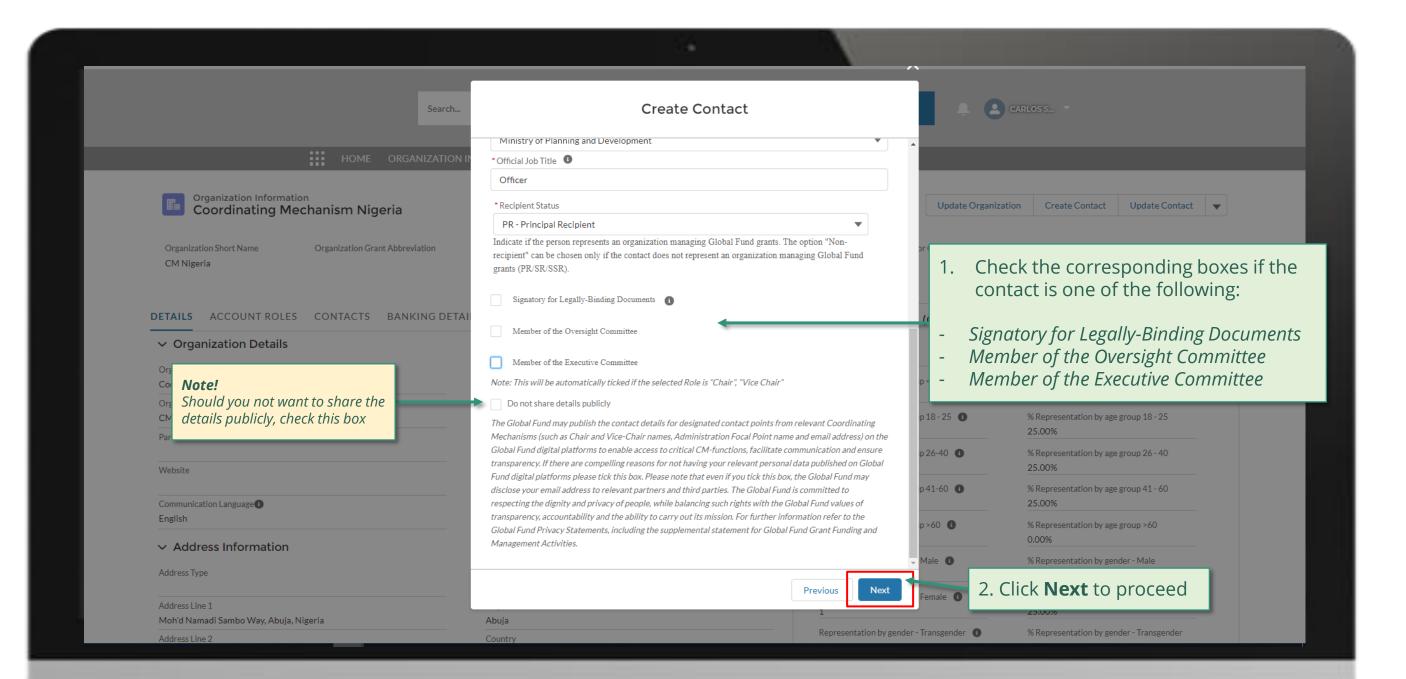




for this



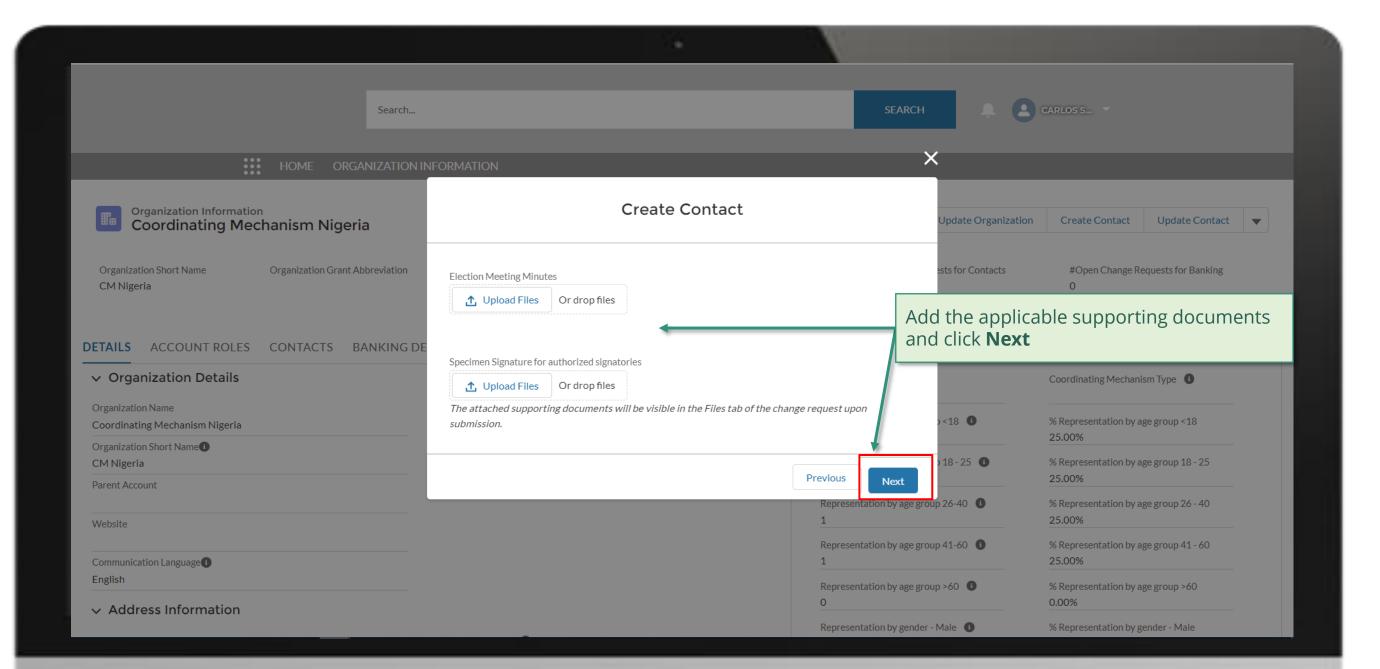




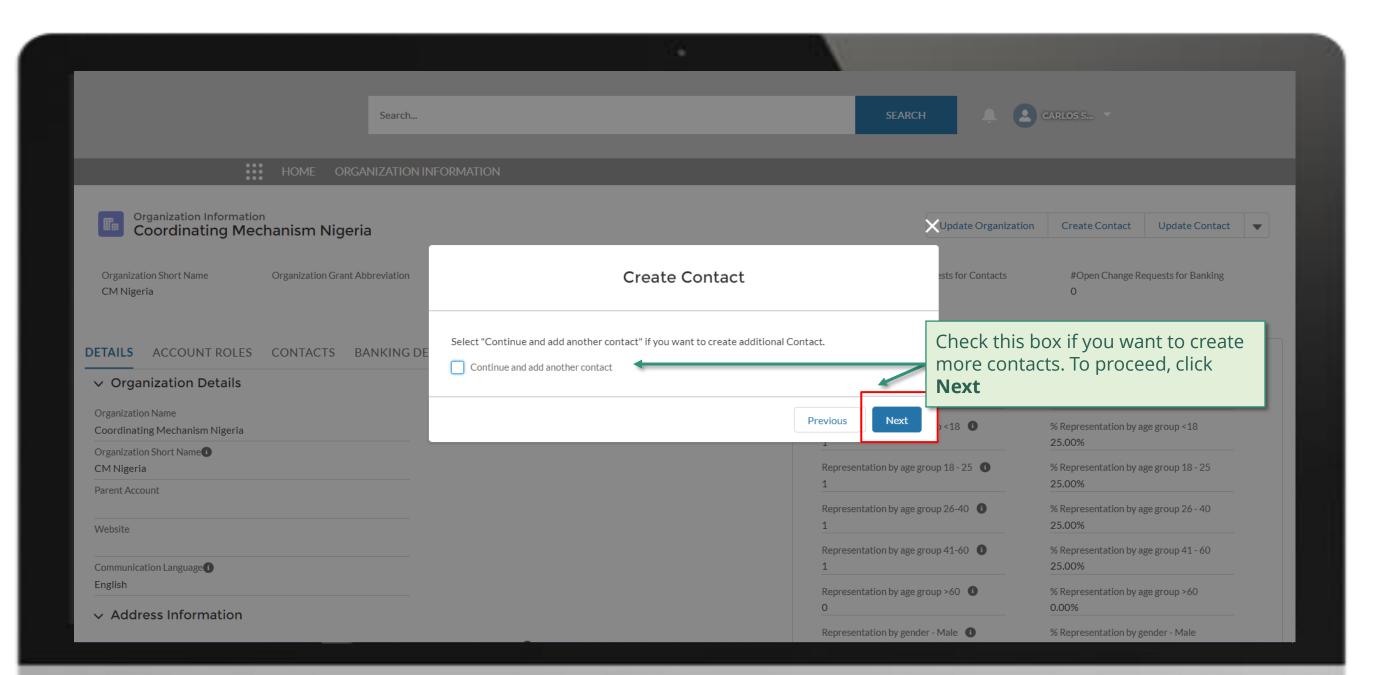


the steps

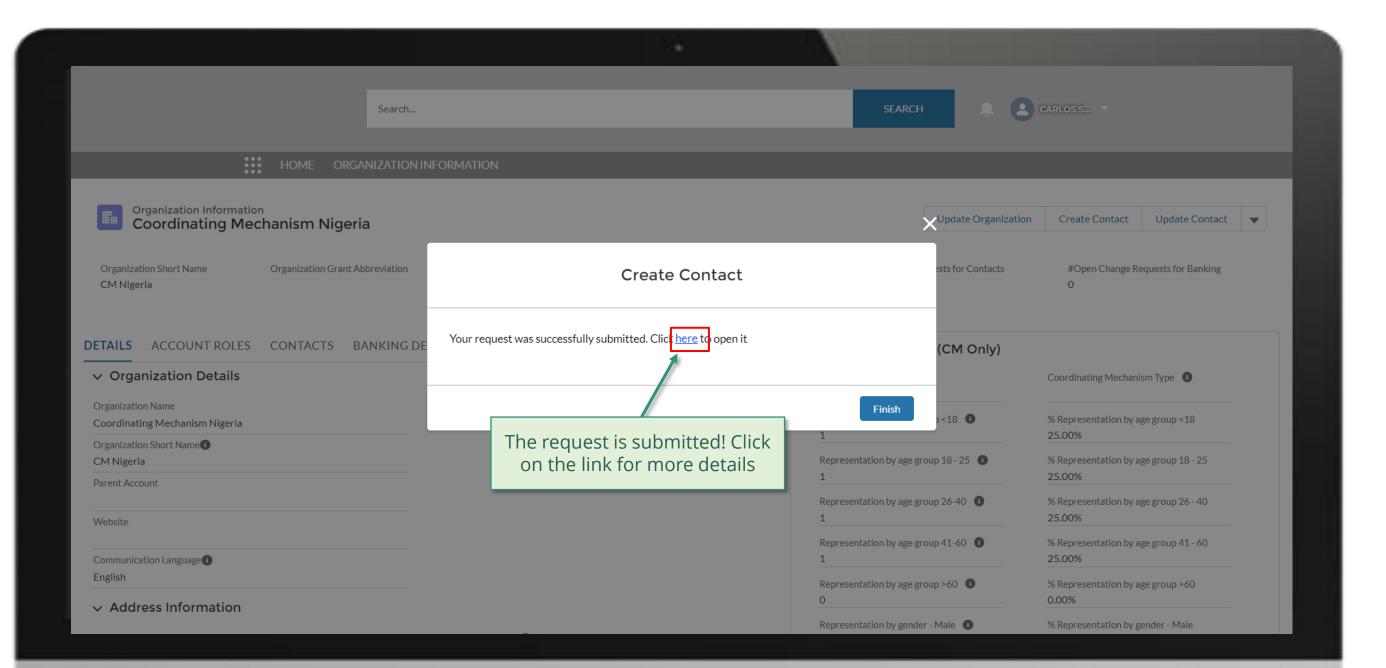
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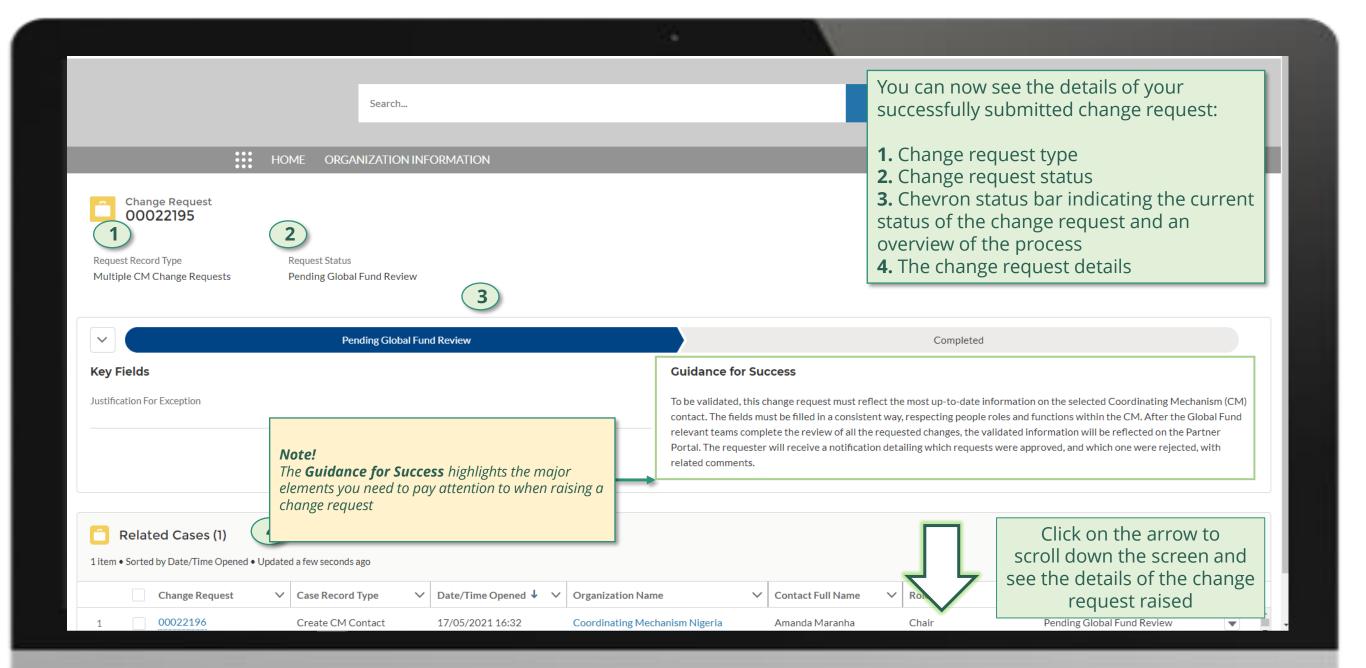




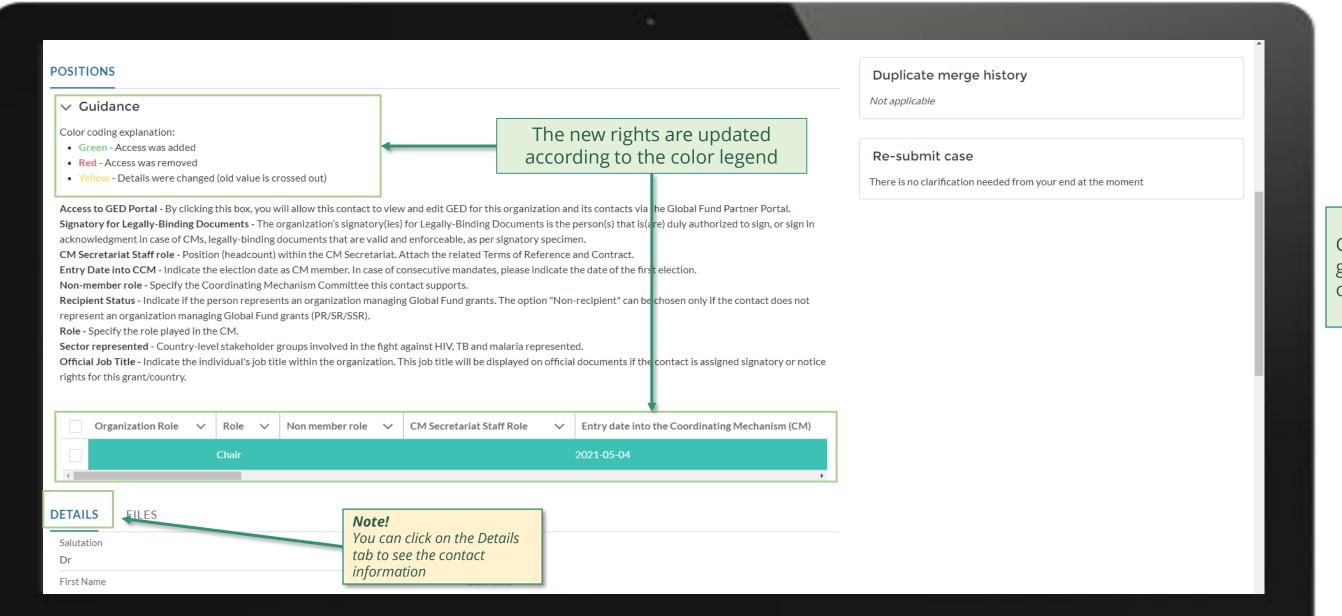




<u>request</u>









Click here to go back to the overview page



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

#### **CCM | Update Contacts**

External Stakeholder

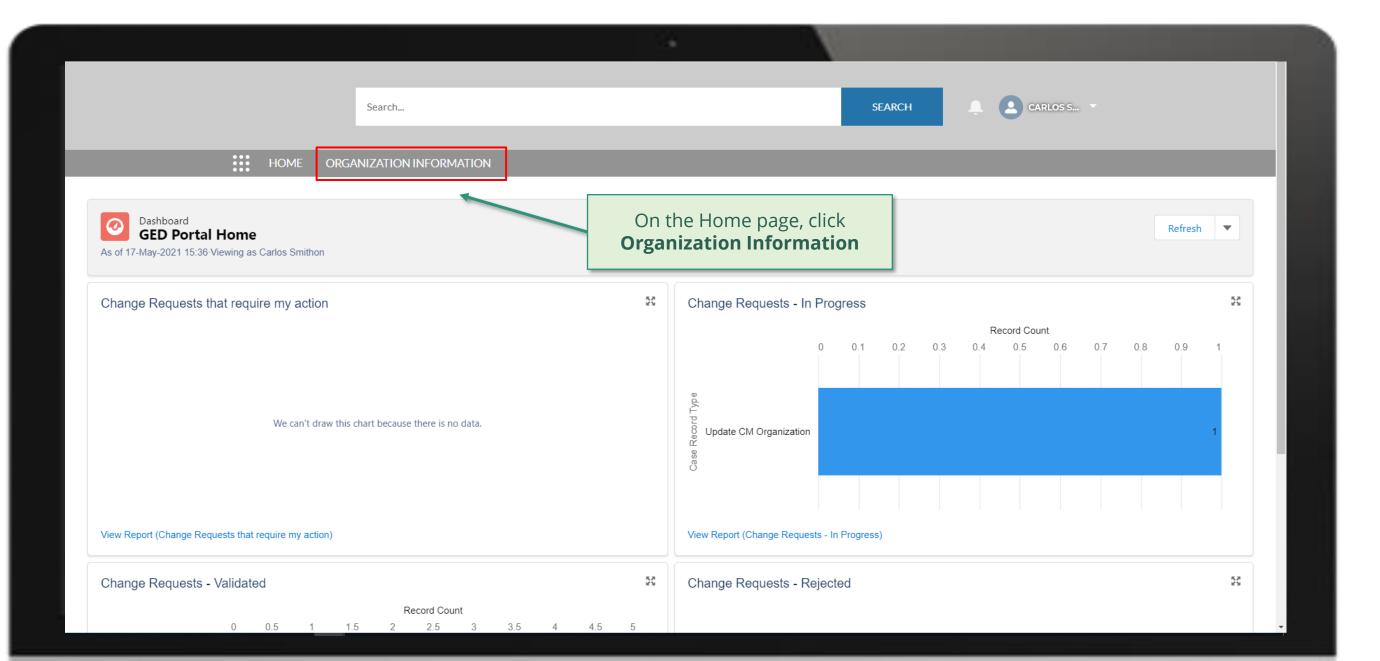


Follow the steps below

CCM focal point with Access Rights CCM focal point with Access Rights submits change request to update Global Fund reviews and validates the accesses the Global Fund Partner changes. contacts, including supporting Portal. documents<sup>1</sup>. Click to see detailed steps in

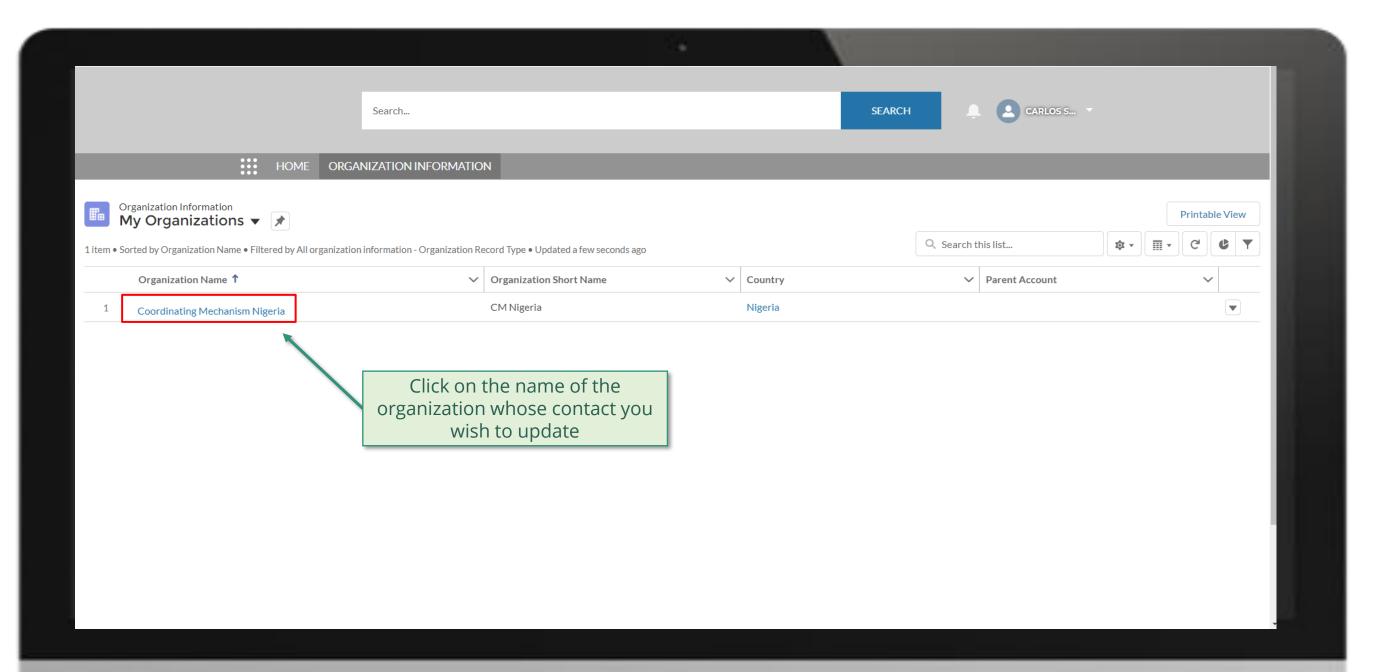
> Updated GED reflected in Global Fund Partner Portal



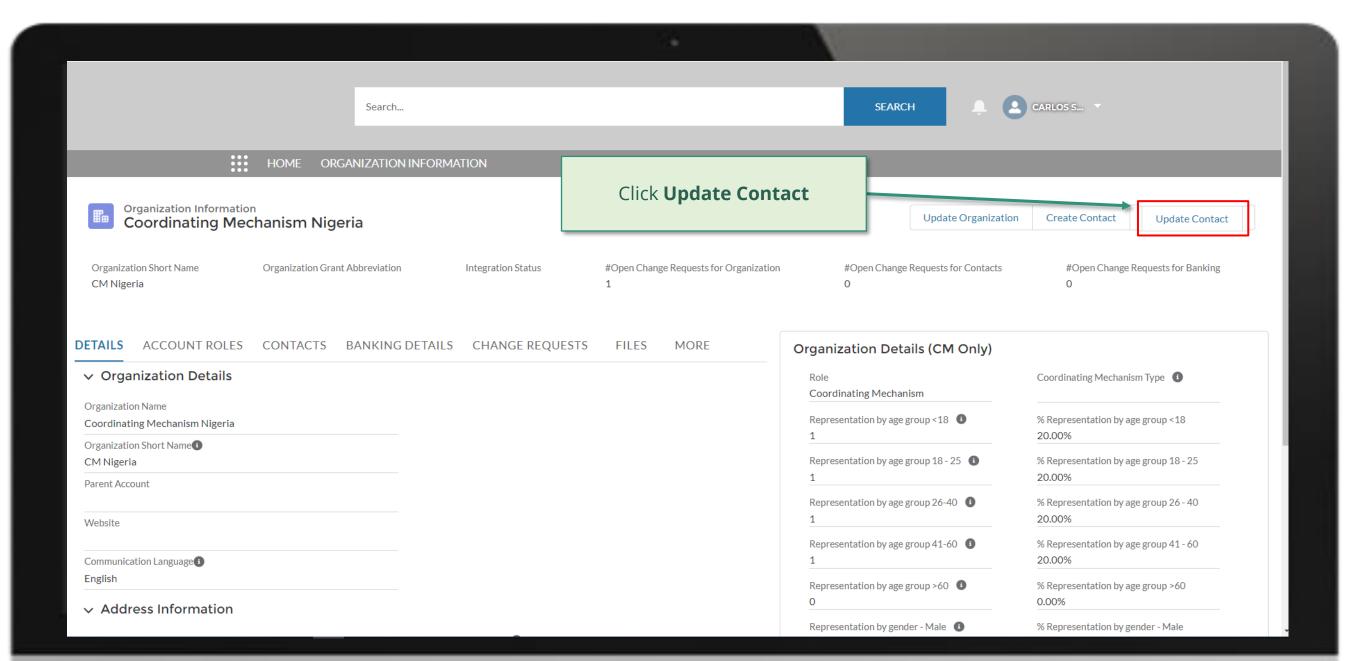




for this request

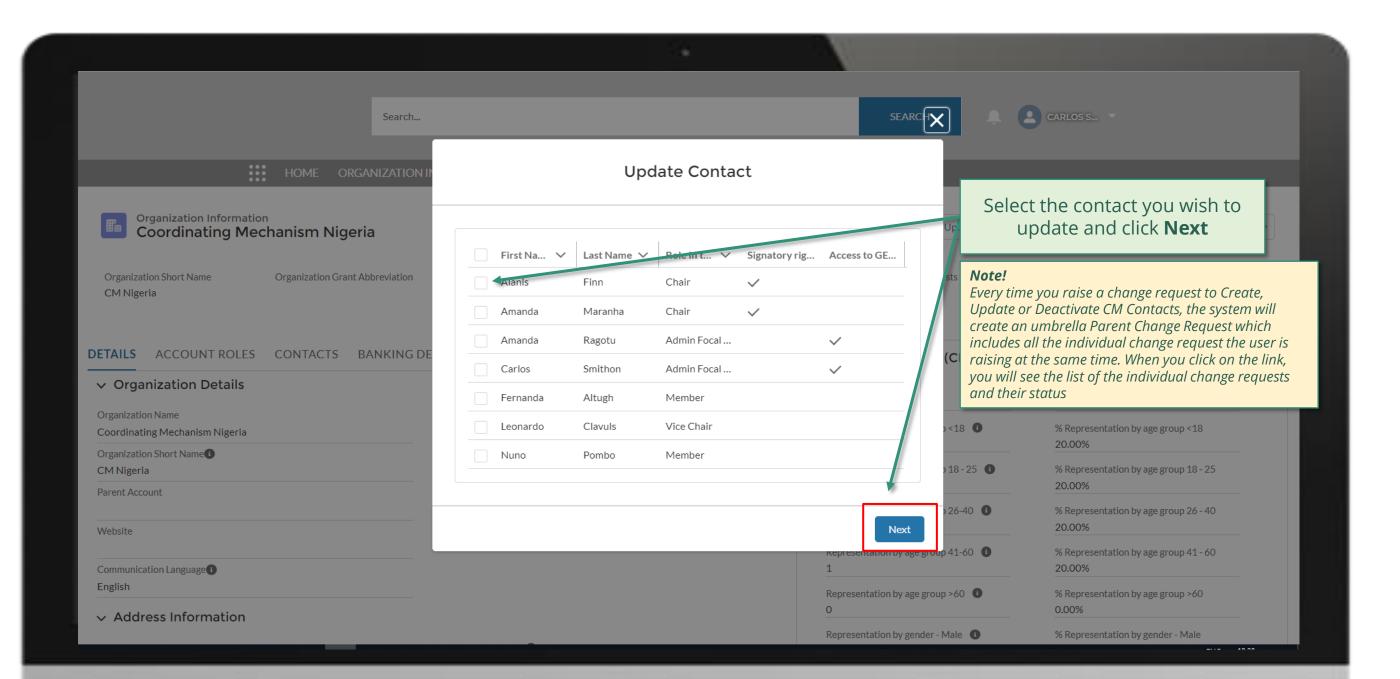






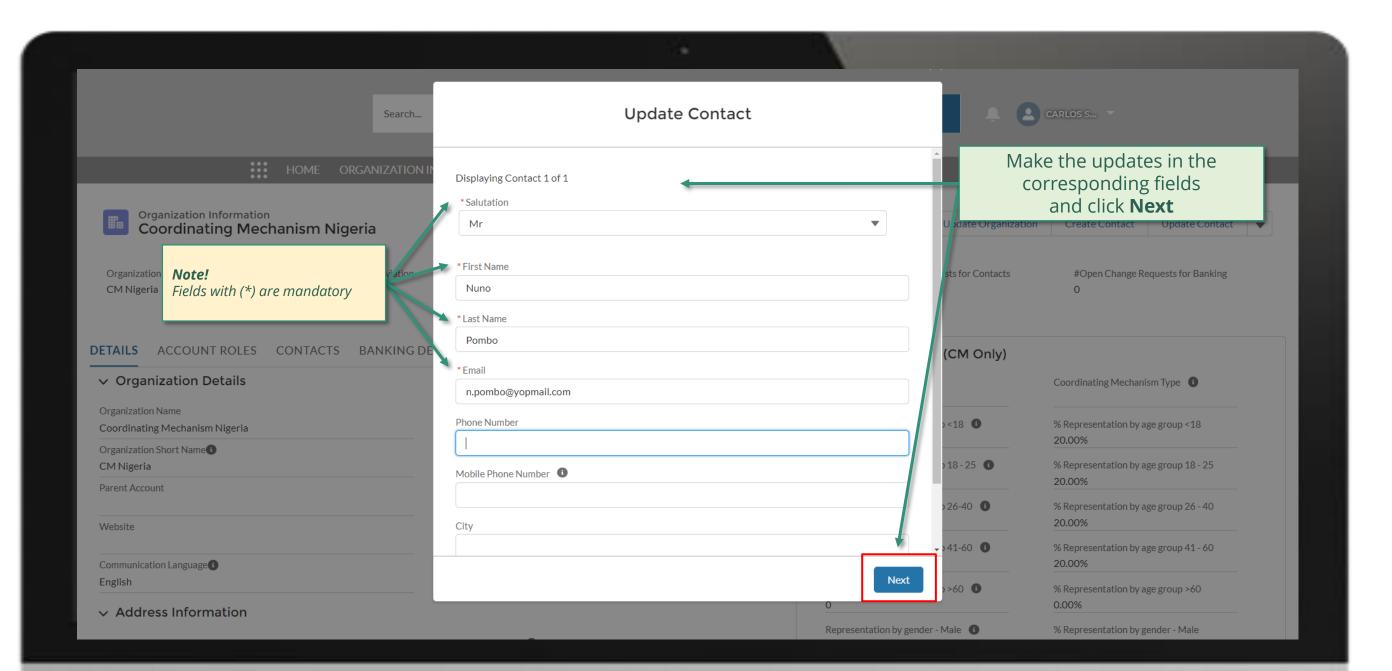


for this

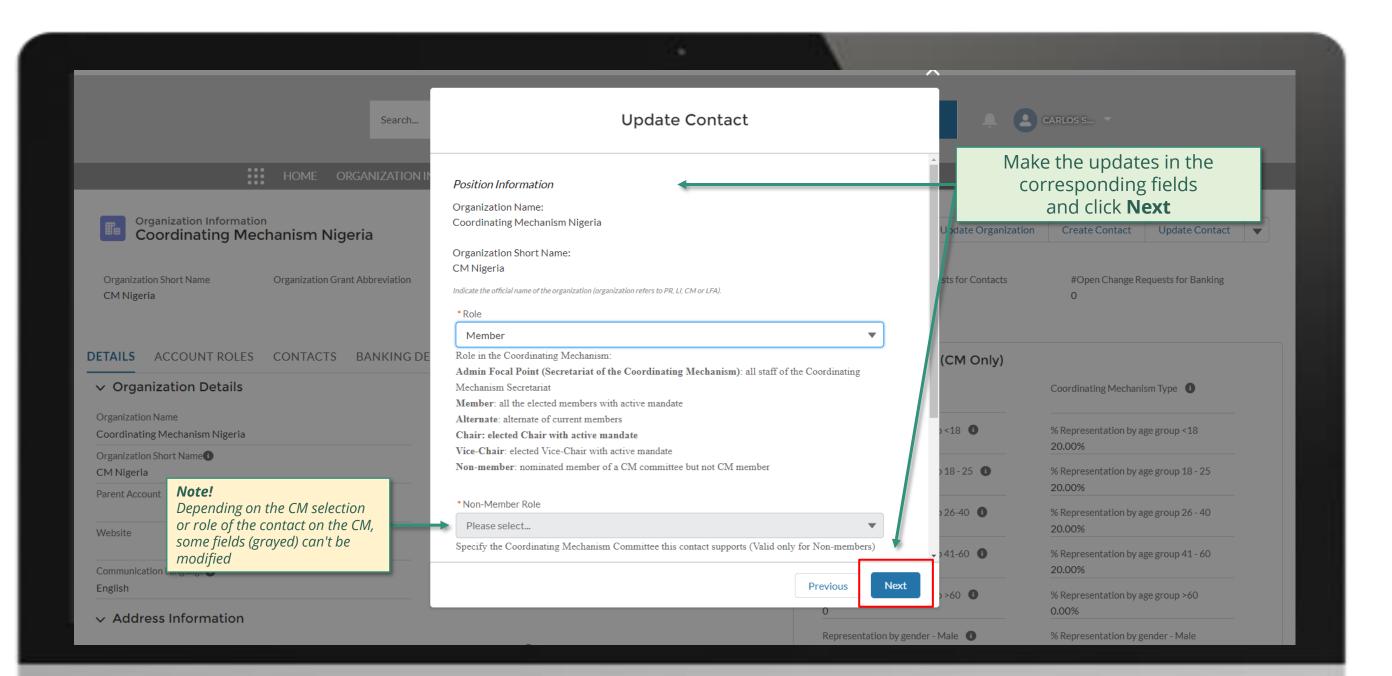




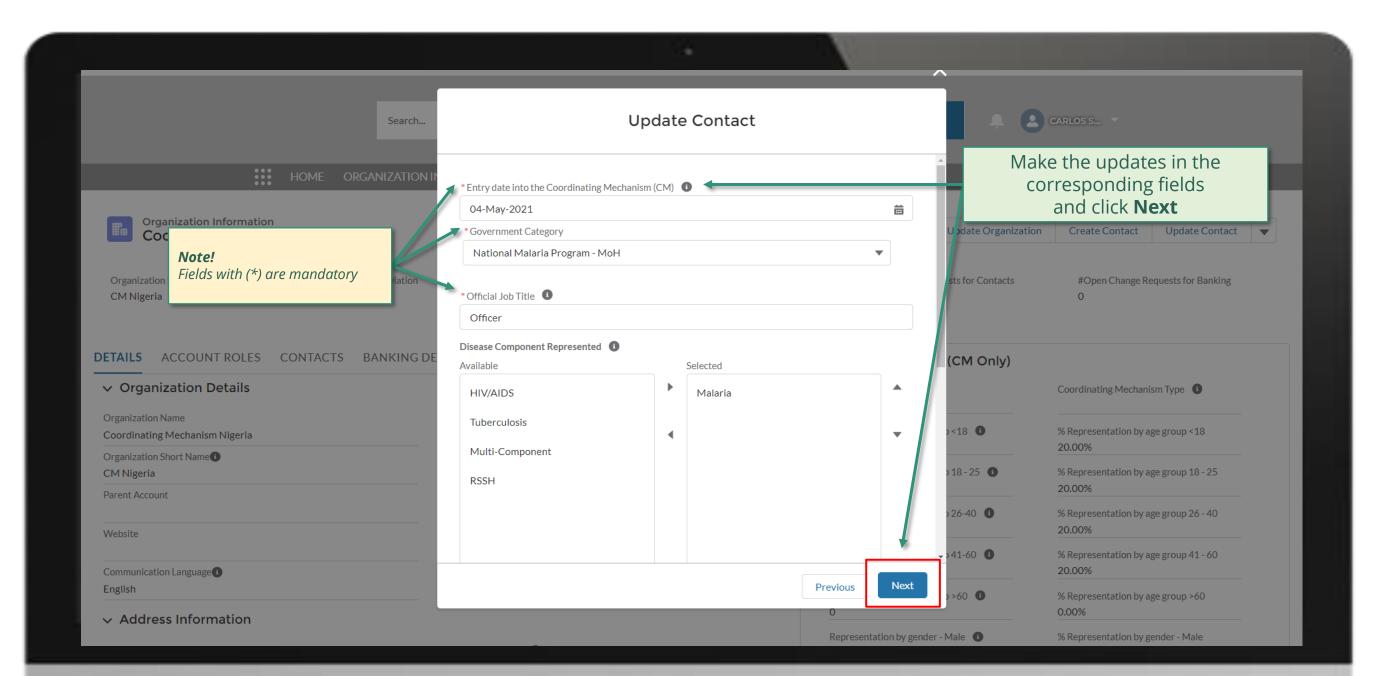
for this request



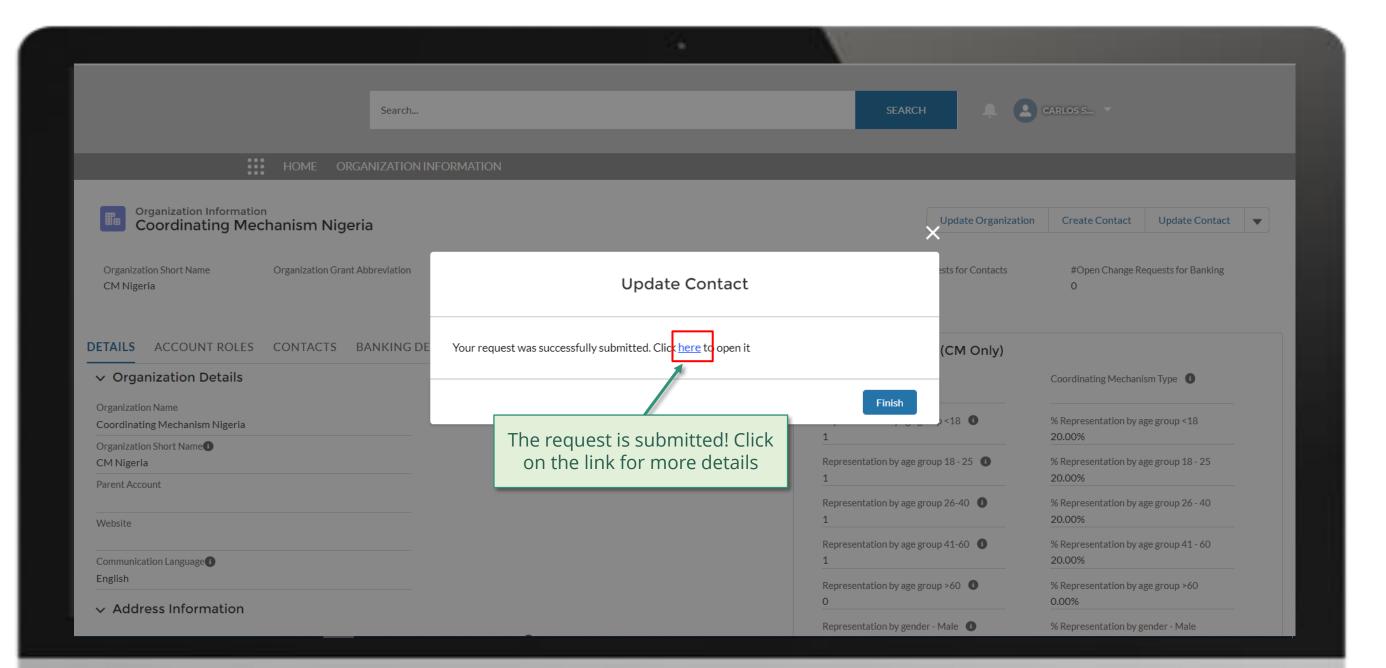




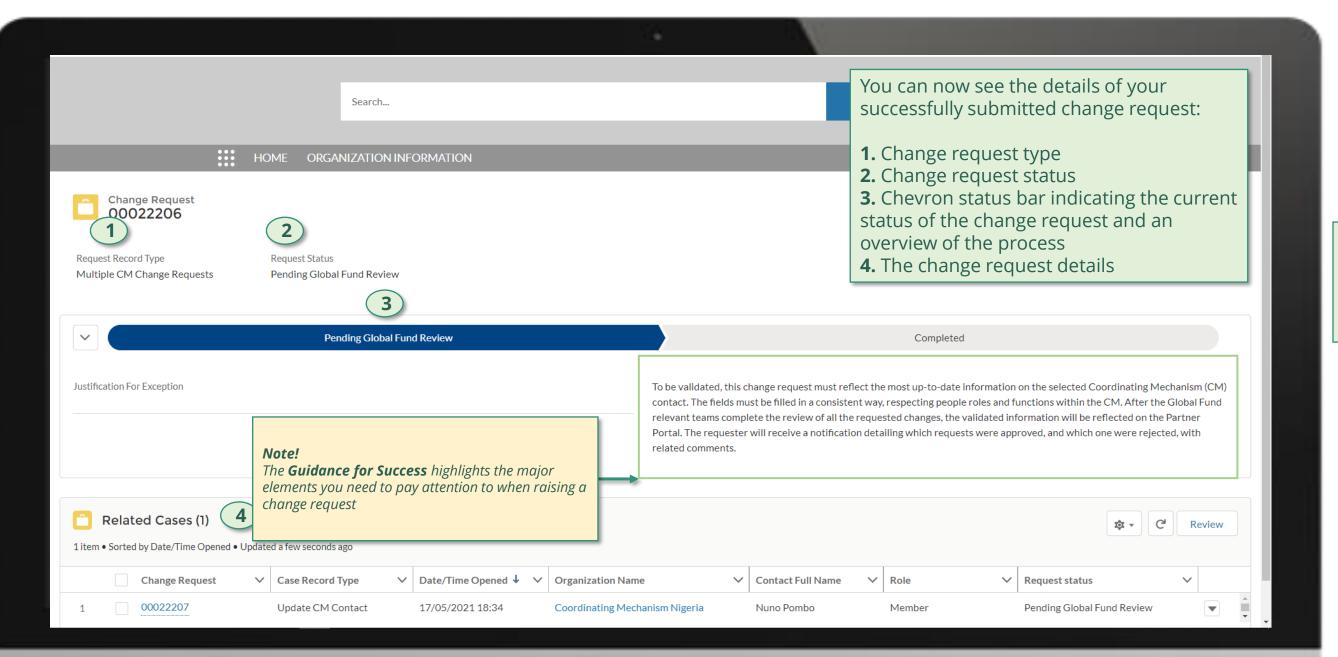














Click here to go back to the overview page



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

#### **CCM | Deactivate Contacts**

External Stakeholder

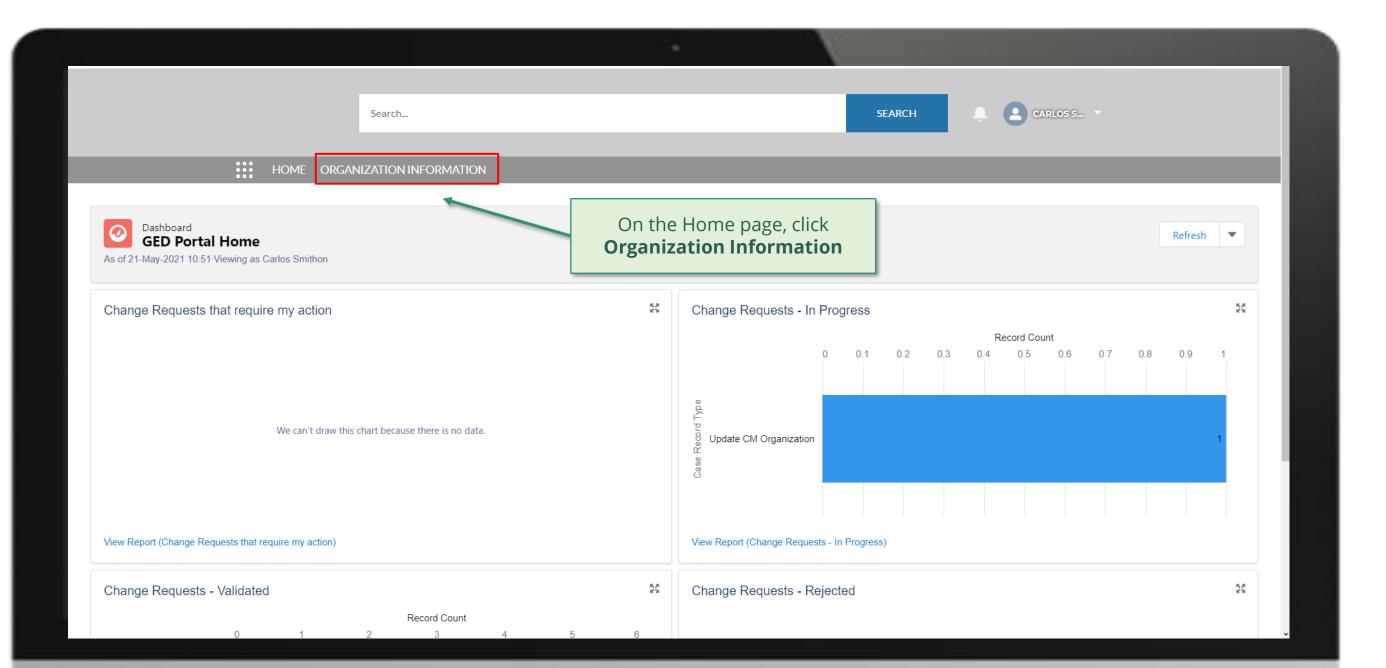


Follow the steps below



Updated GED reflected in Global Fund Partner Portal

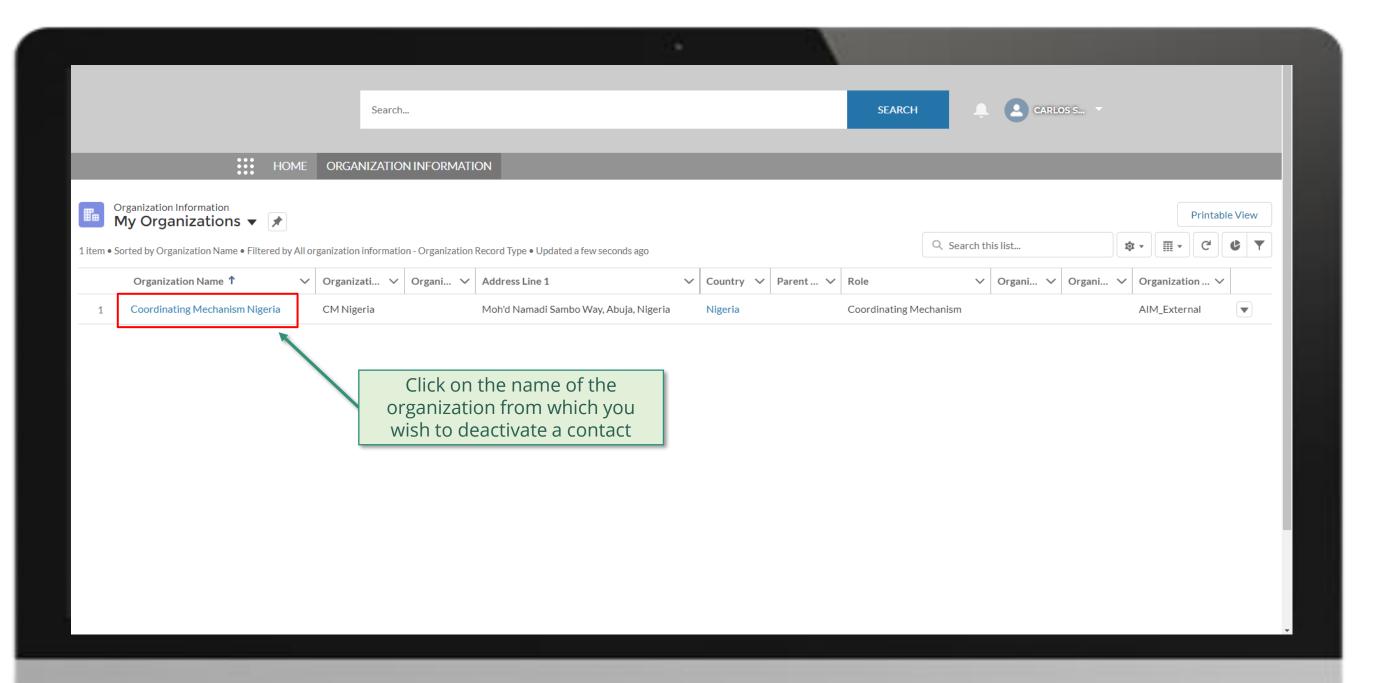




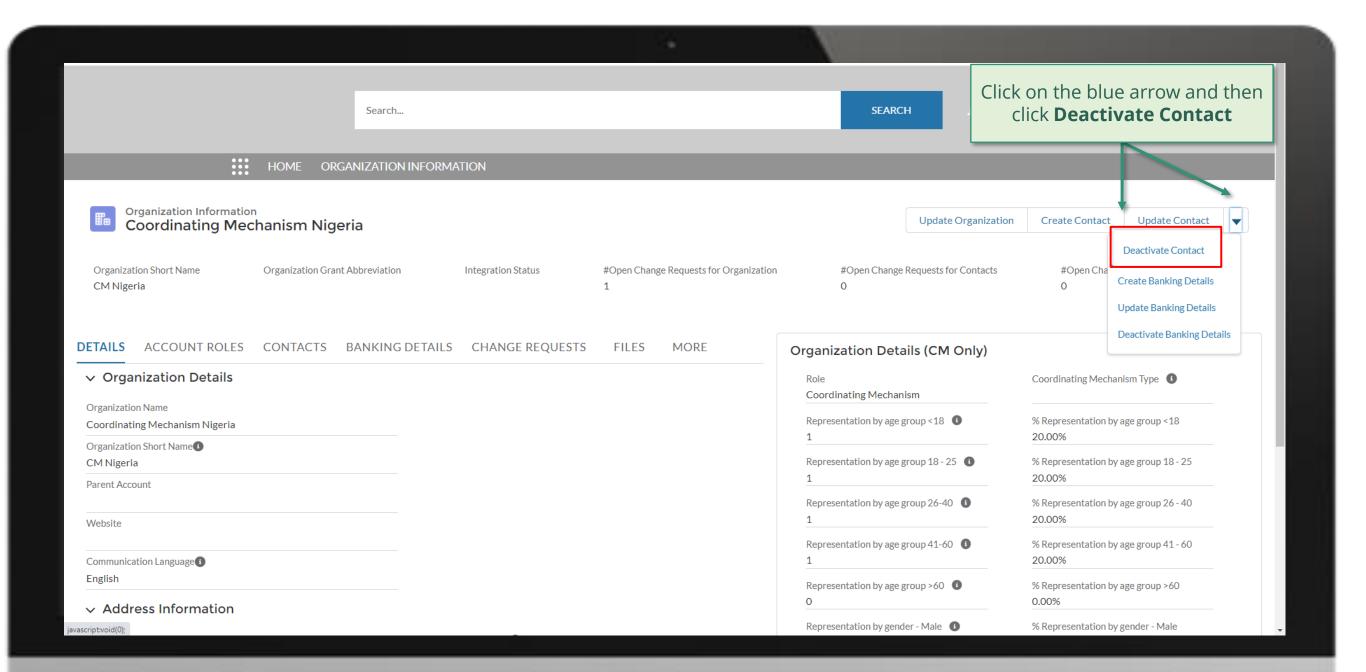


for this

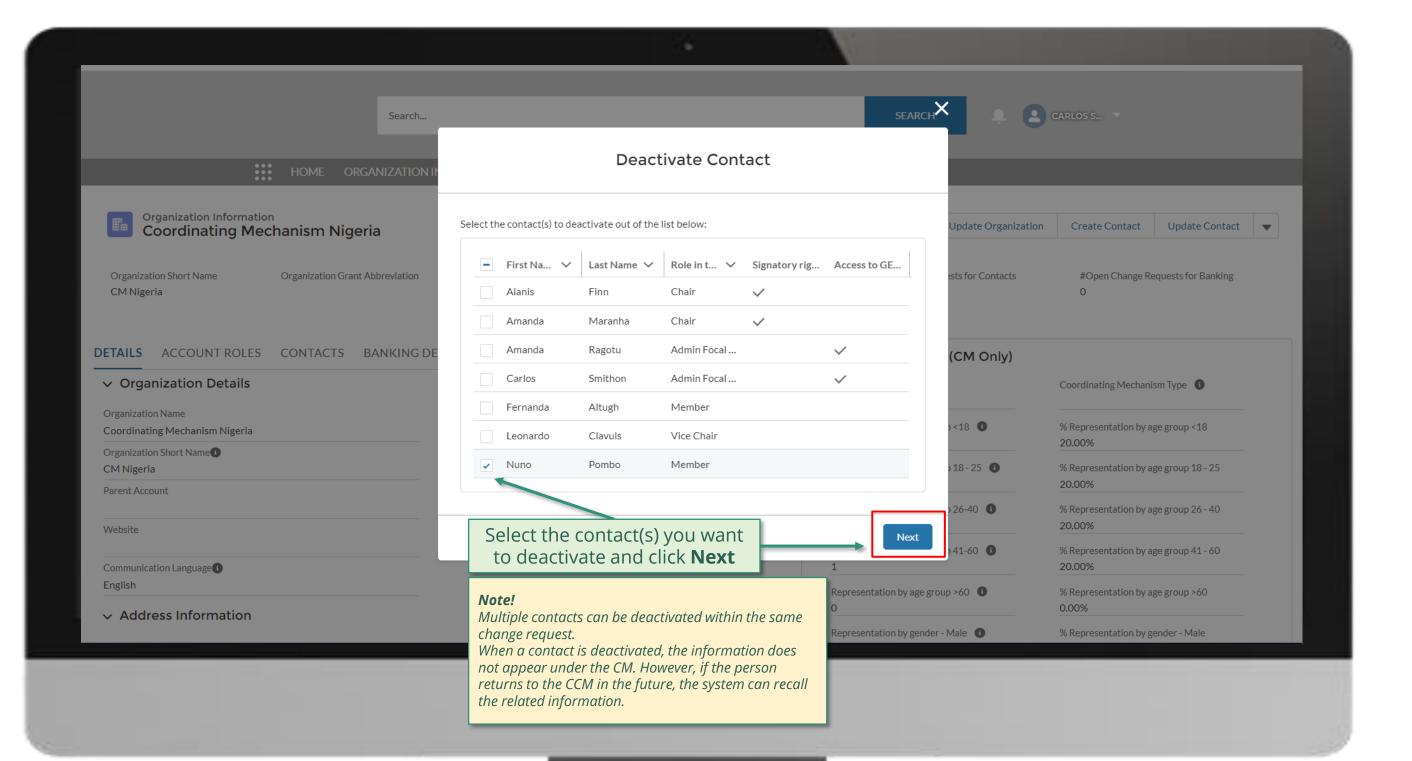
<u>request</u>





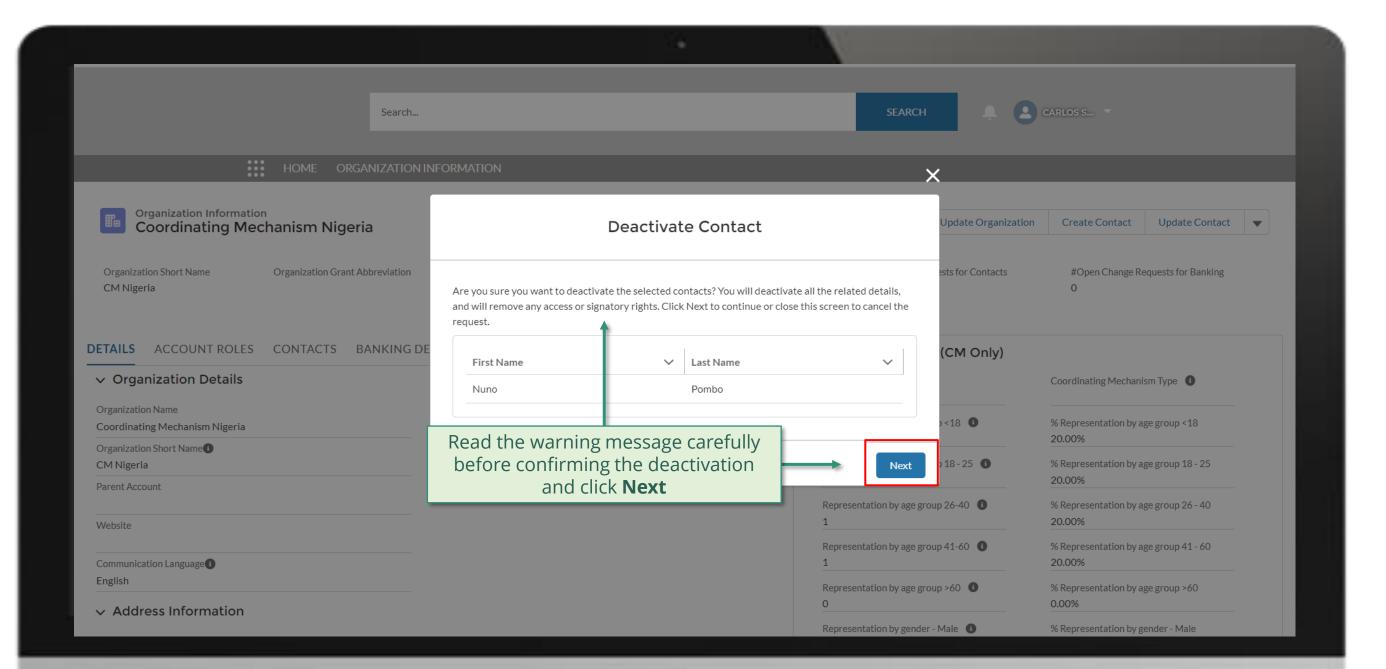






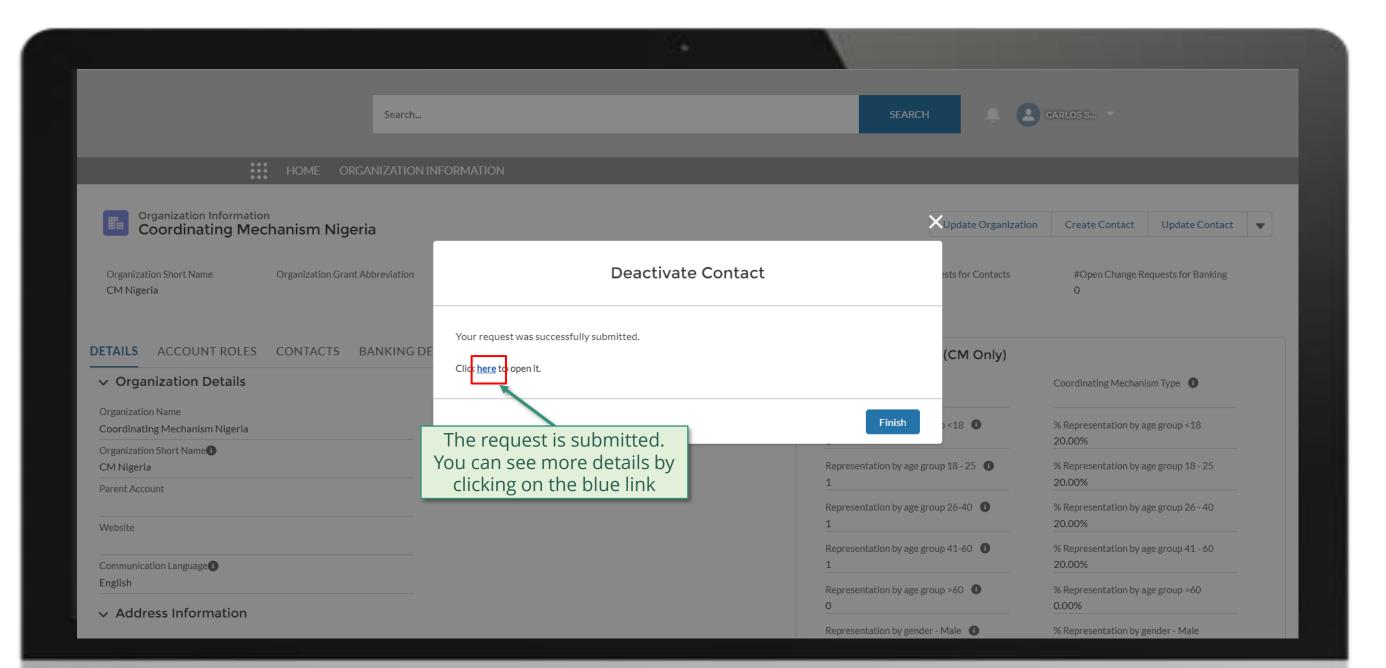


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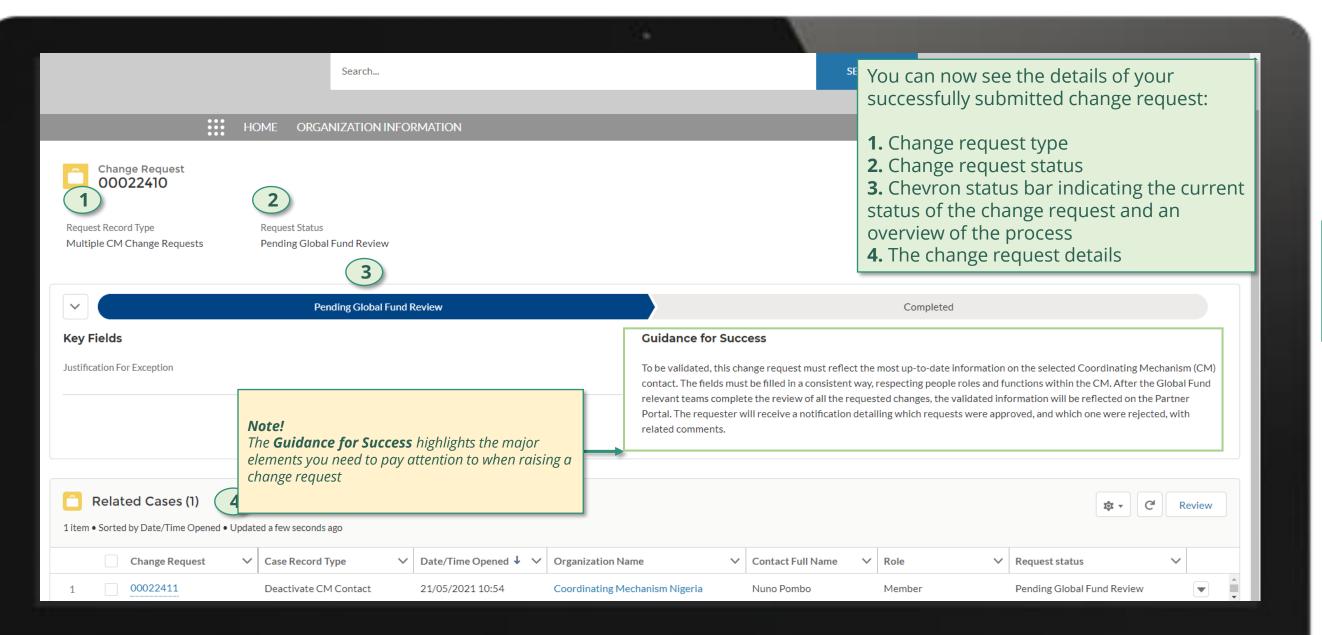




request









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### Select the type of change request

Select Another External Stakeholder

Select from the below

# Organization information Change Requests



Create New

Organization

... page 150



Update Organization

Information ... page 151

# **Contact Information Change Requests**



Create Contacts

... page 164



**Update Contacts** 

... page 184

... page 203



Deactivate

- Deactivate Contact

'-- Deactivate Position ... page 215



The steps assigned to you are highlighted in the red boxes

#### **LFA | Create New Organization**

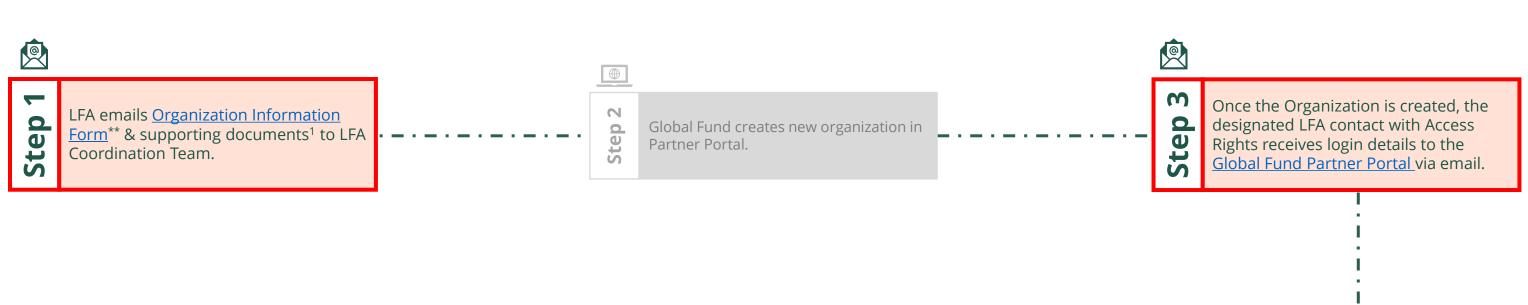
Select Another

External Stakeholder



Follow the steps below

Tollow the steps below





(5) The Global Fund Partner Portal

LFA Fo Rights reques

LFA Focal Point contact with Access Rights is able to submit change requests.

O Via e-mail
In the system

<sup>&</sup>lt;sup>1</sup> See Operational Policy Manual (OPM) Annex 3 on required supporting documents

<sup>\*\*</sup> Organization Information Form (EN | ES | FR). Please note! Spanish and French versions are courtesy translations only. Please complete and submit the English version of this template.



The steps assigned to you are highlighted in the red boxes

#### **LFA** | **Update Organization Information**



<u>Select Another</u> <u>External Stakeholder</u>



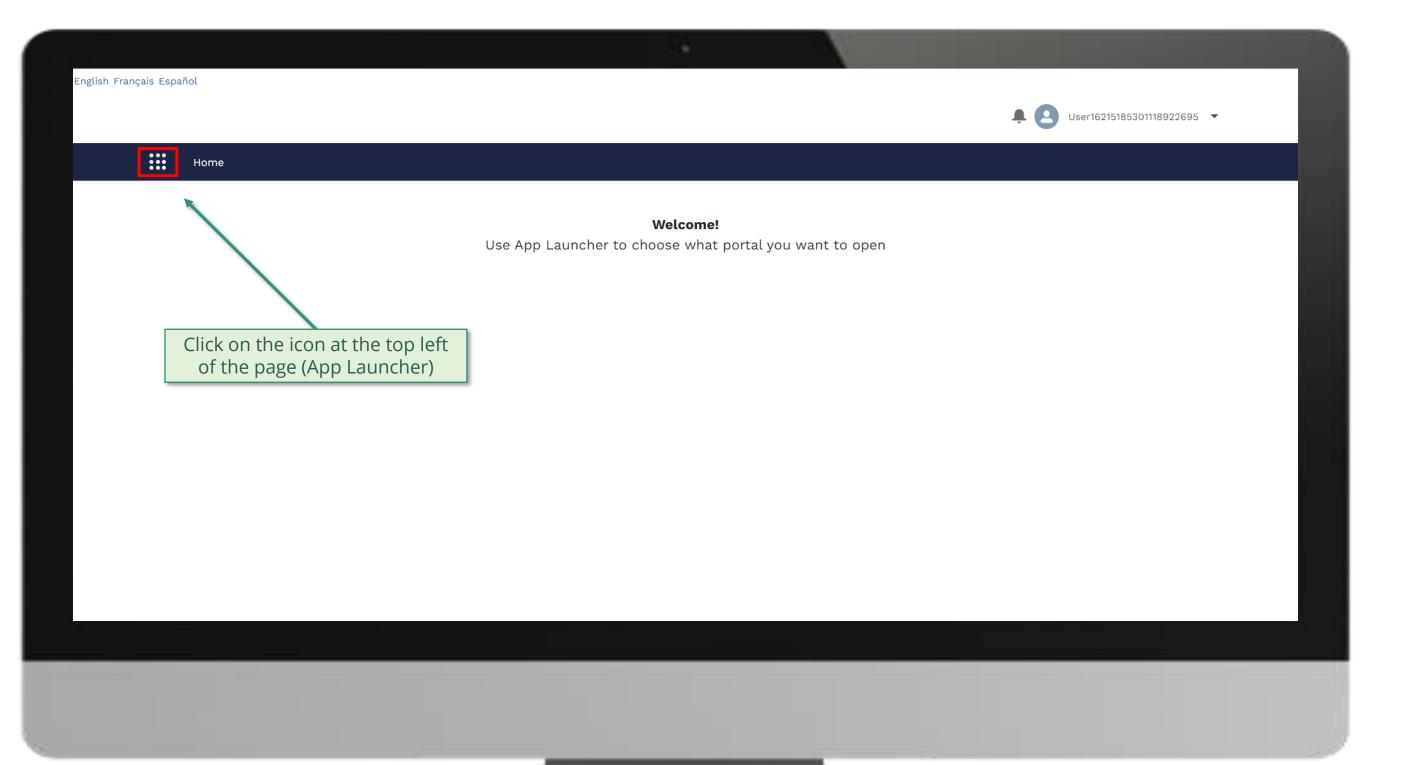
Follow the steps below



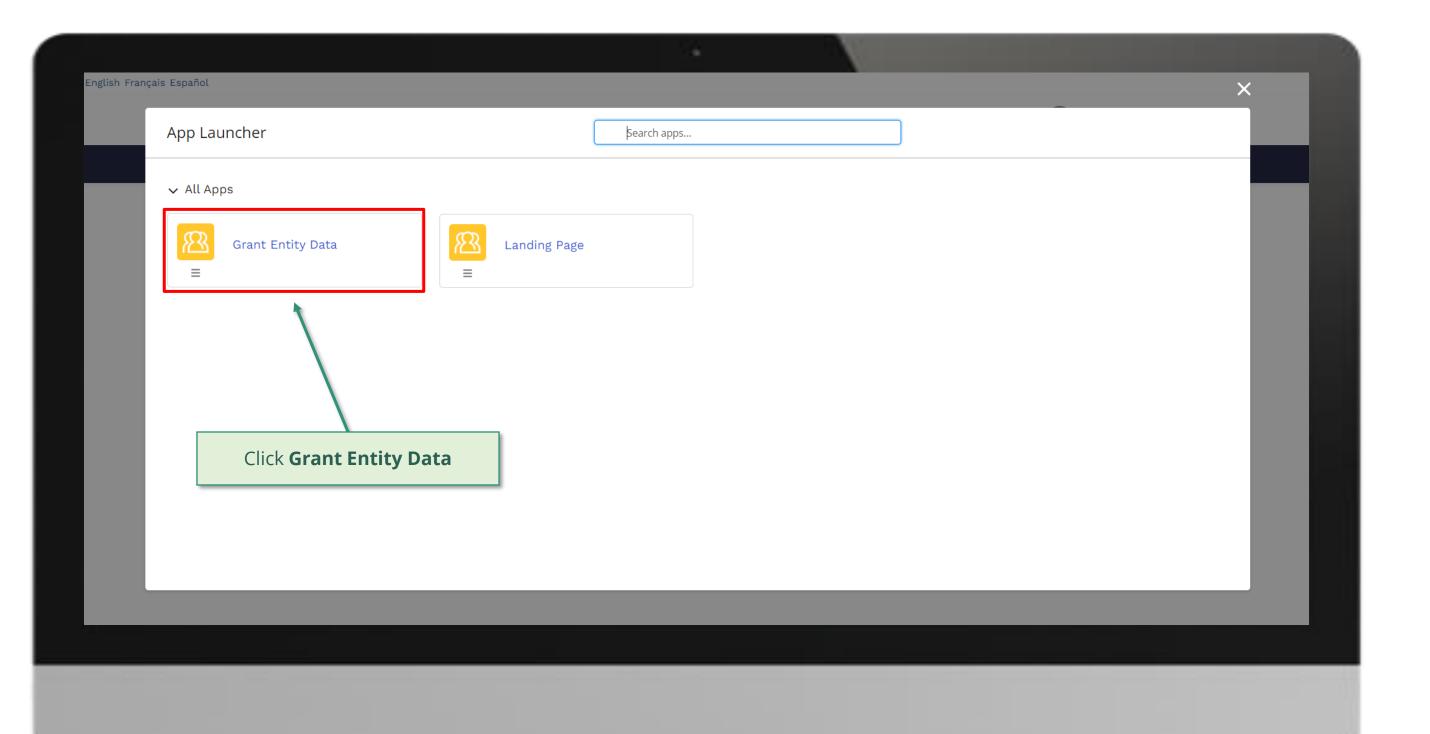




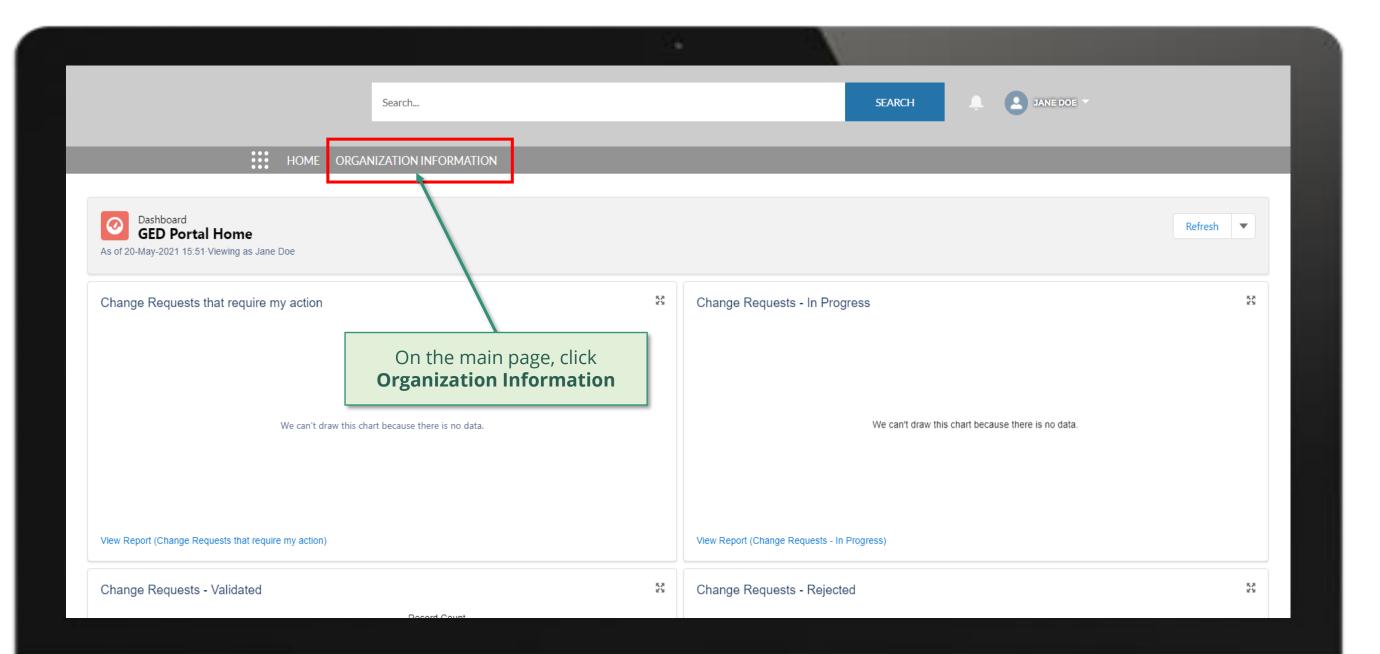




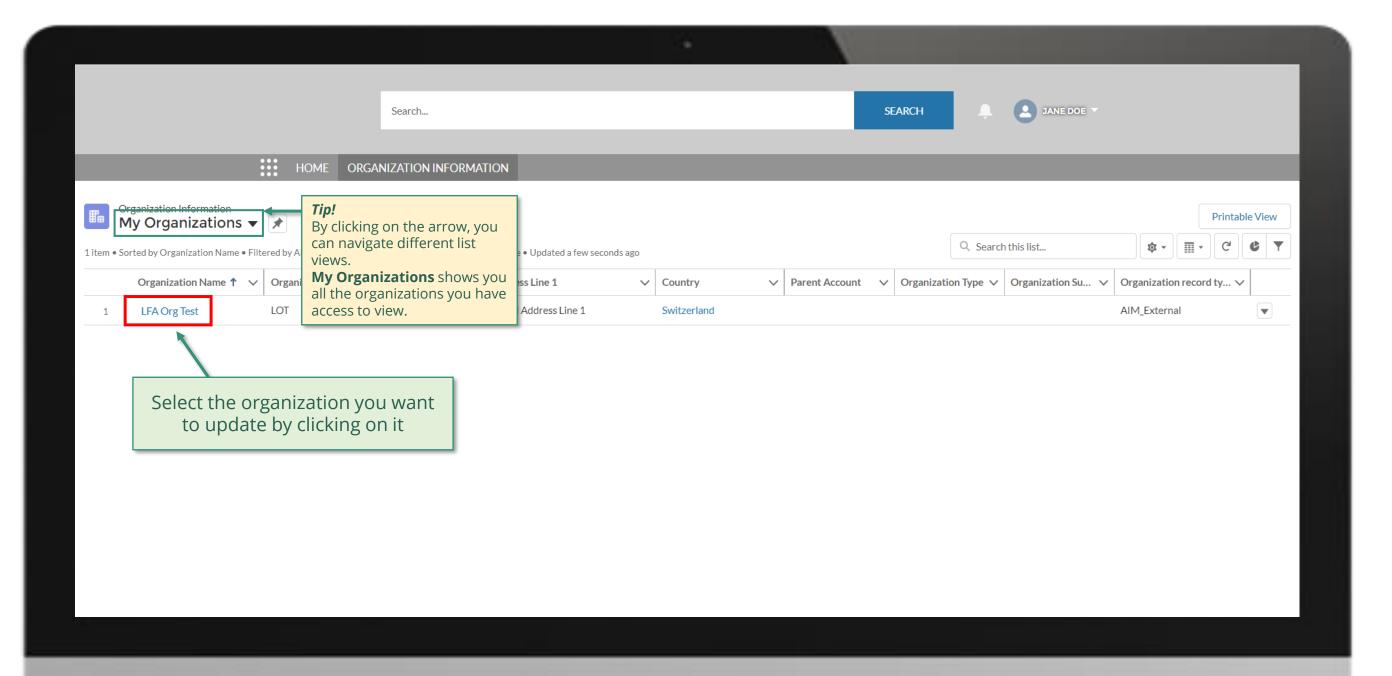




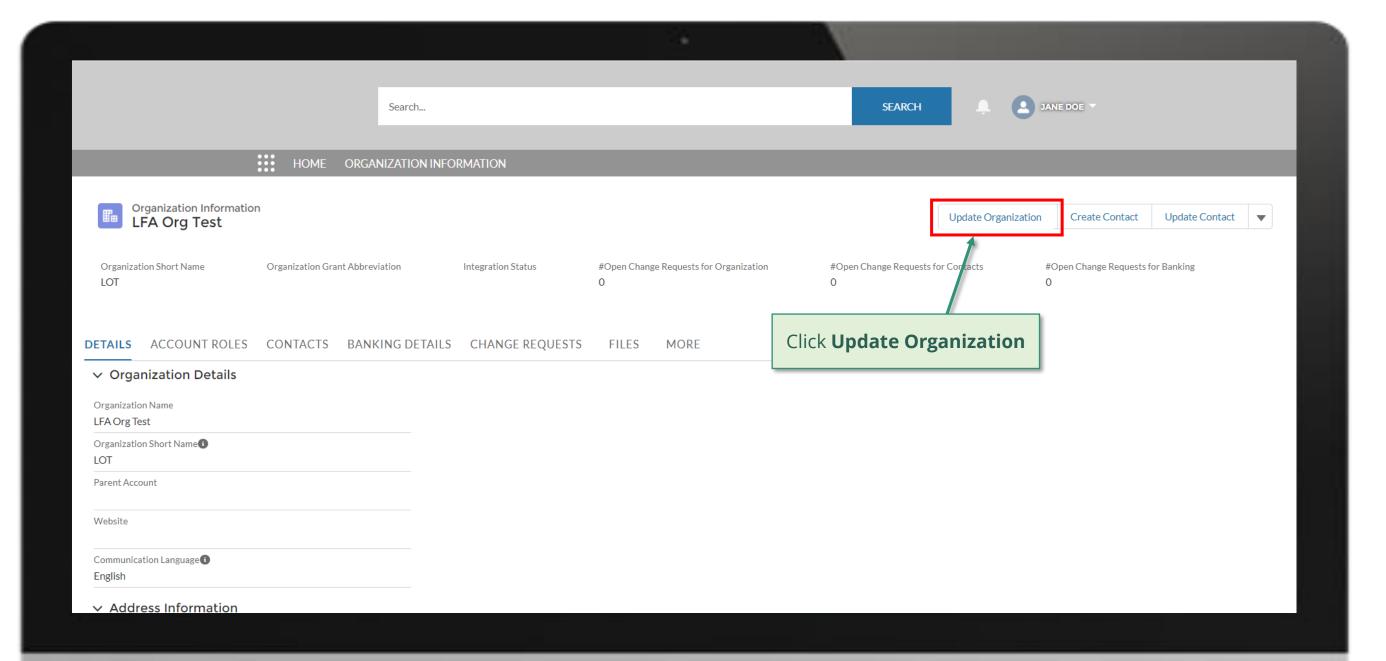






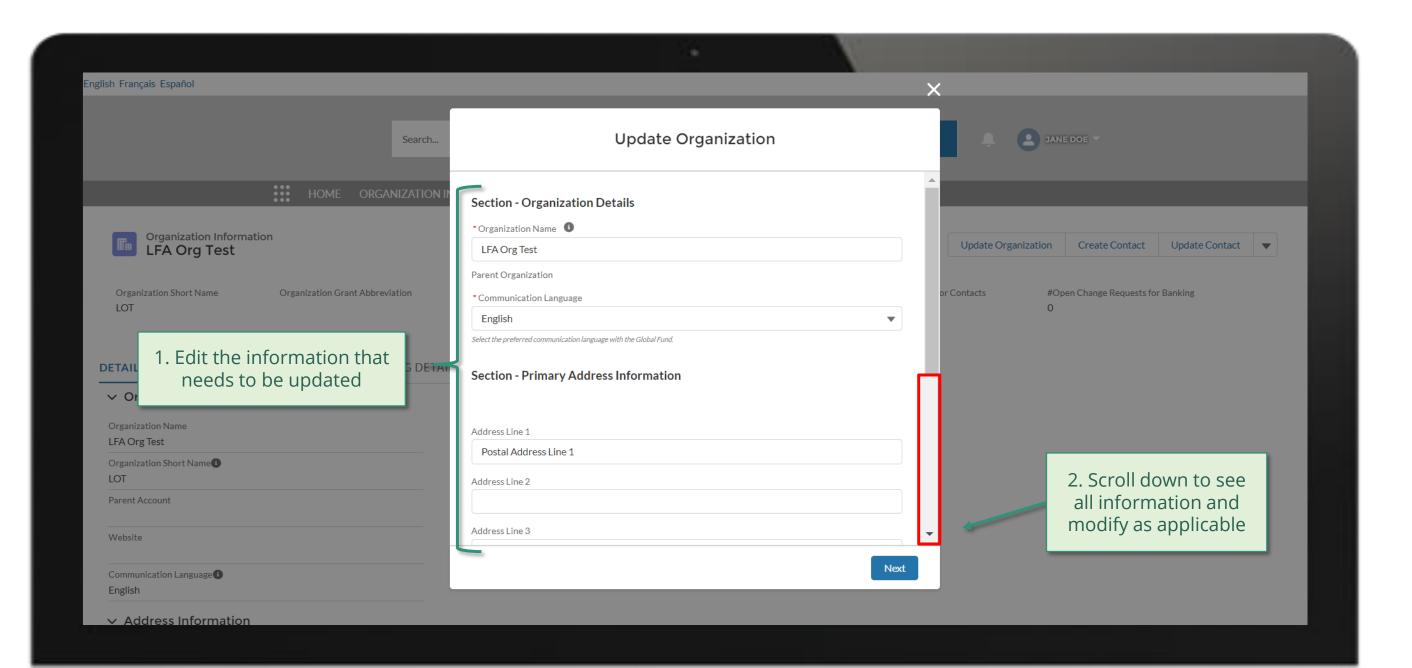






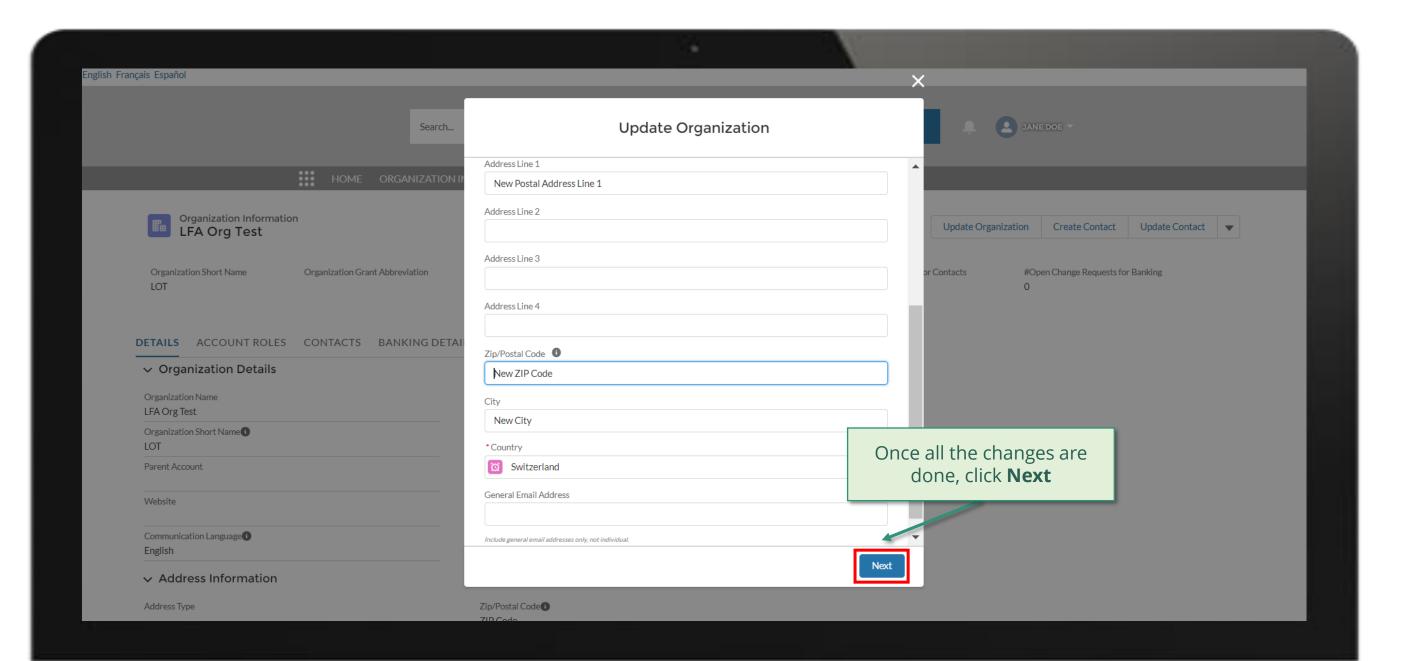


for this request





for this request

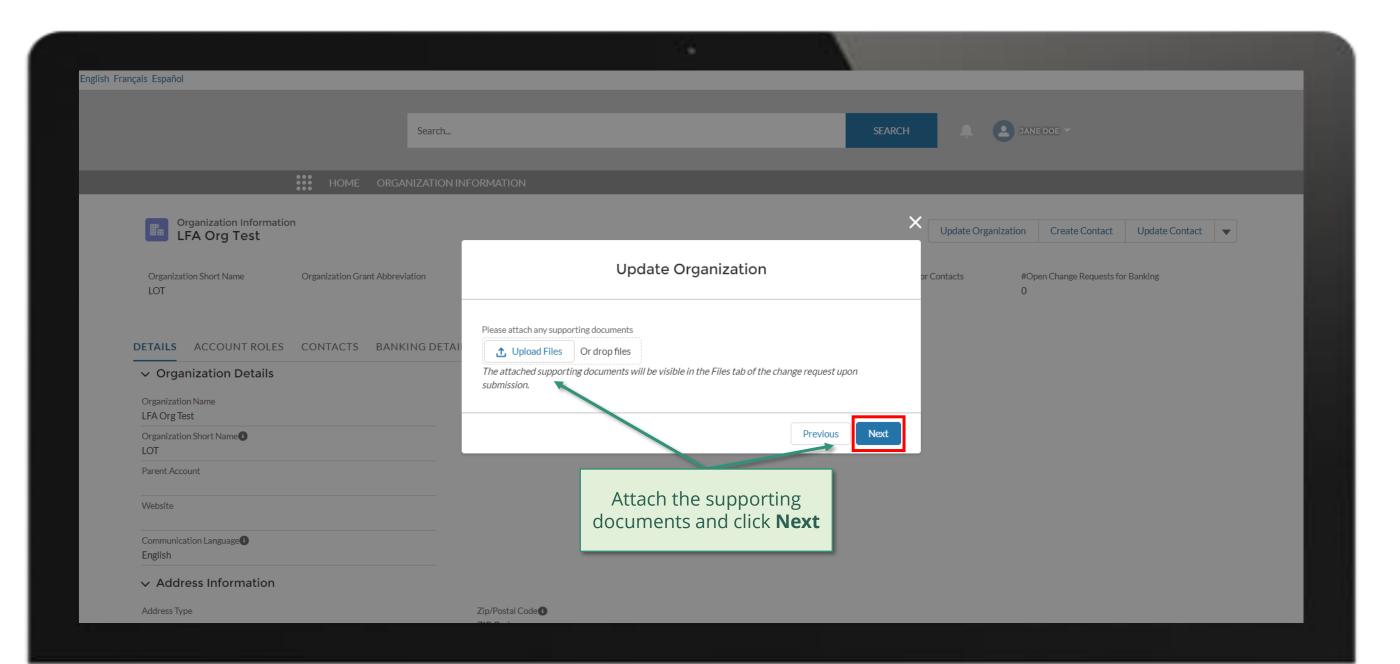




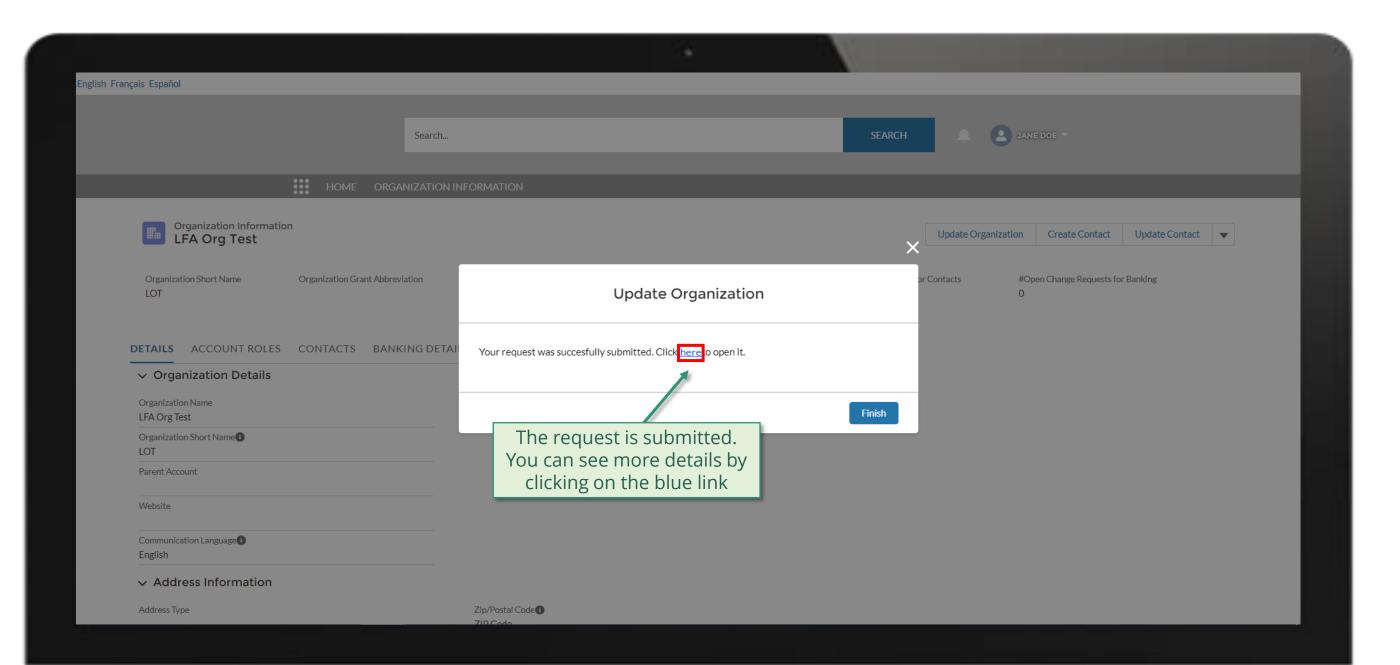
the steps

for this

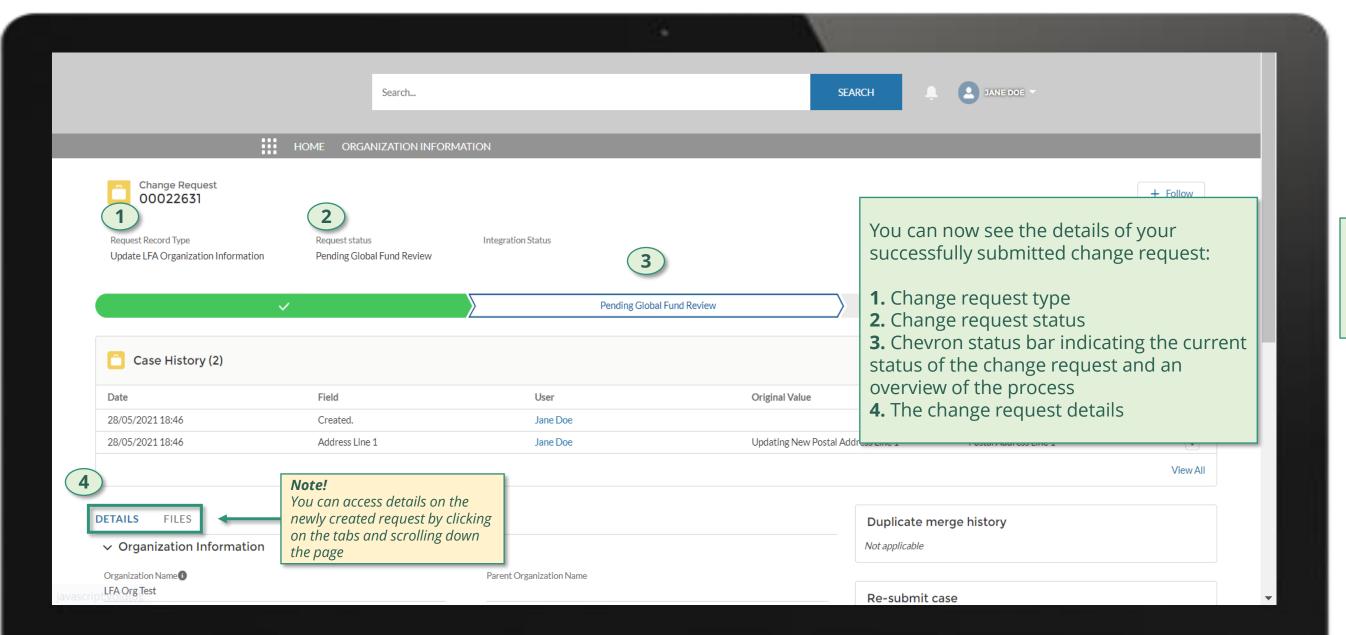
<u>request</u>













Click here to go back to the overview page



The steps assigned to you are highlighted in the red boxes

#### **LFA** | Create Contacts

Select Anothe

External Stakeholder



Follow the steps below

LFA contact with Access Rights accesses the Global Fund Partner Portal.

LFA contact with Access Rights submits change request to create contacts, including supporting documents¹.

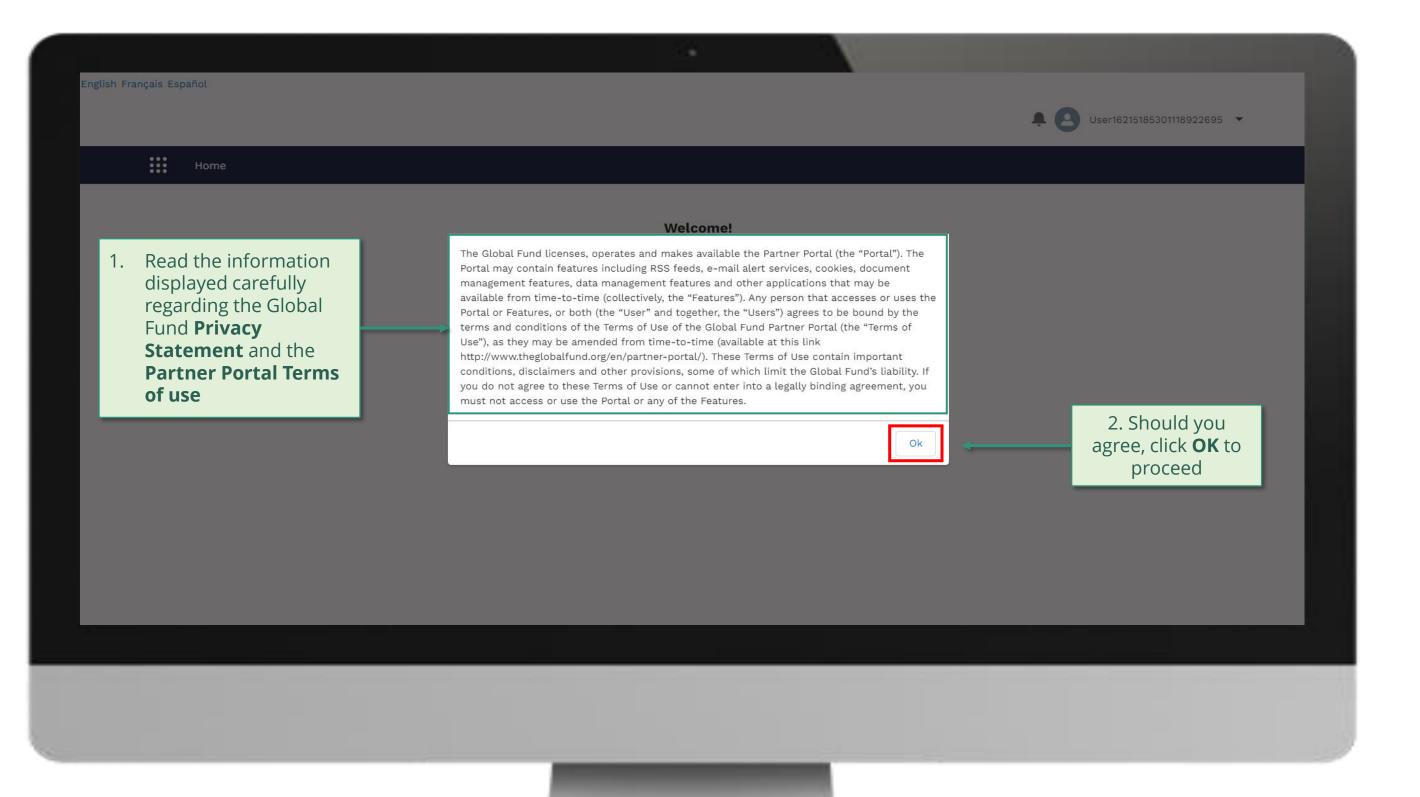
Click to see detailed steps in the system

Click to see detailed steps in the system

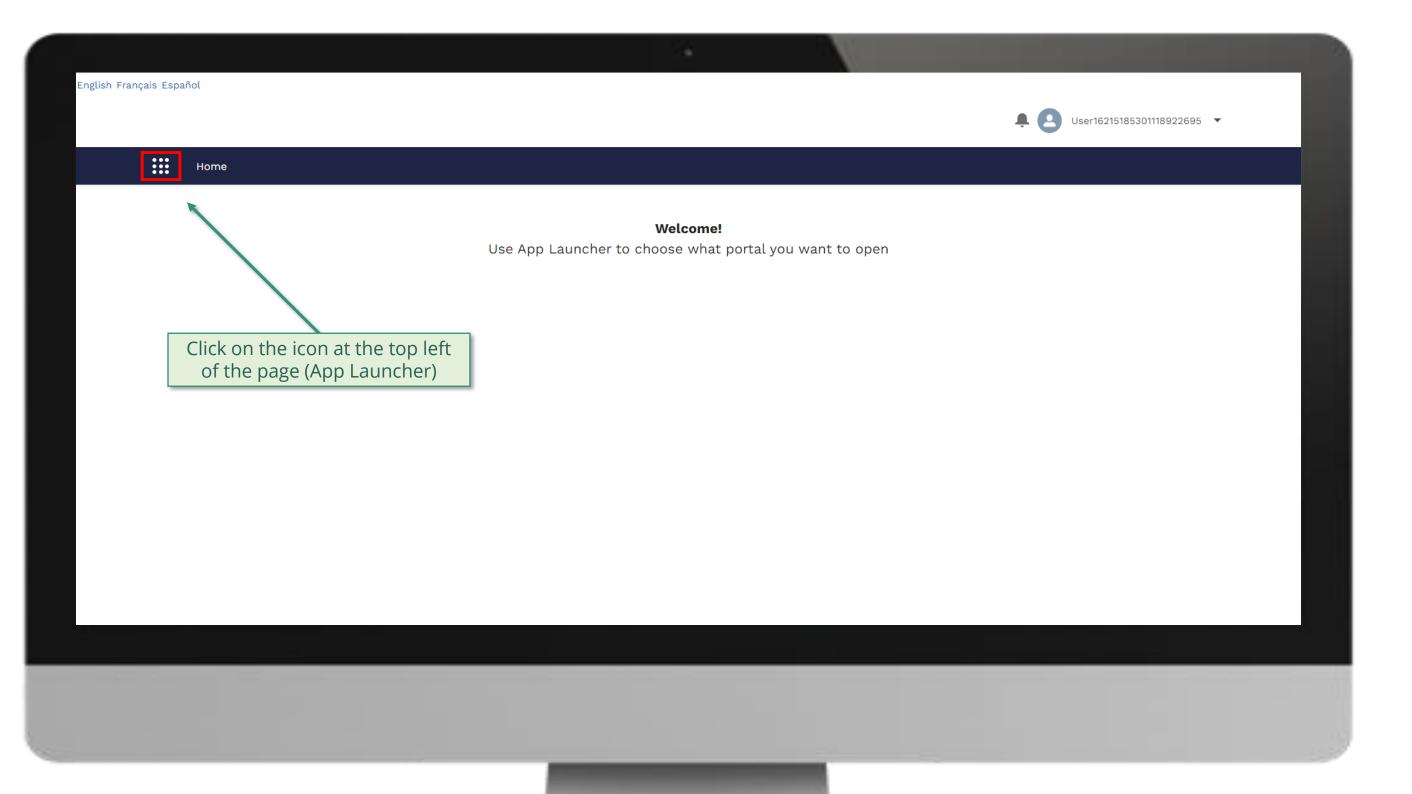
Updated GED reflected in Global Fund Partner Portal



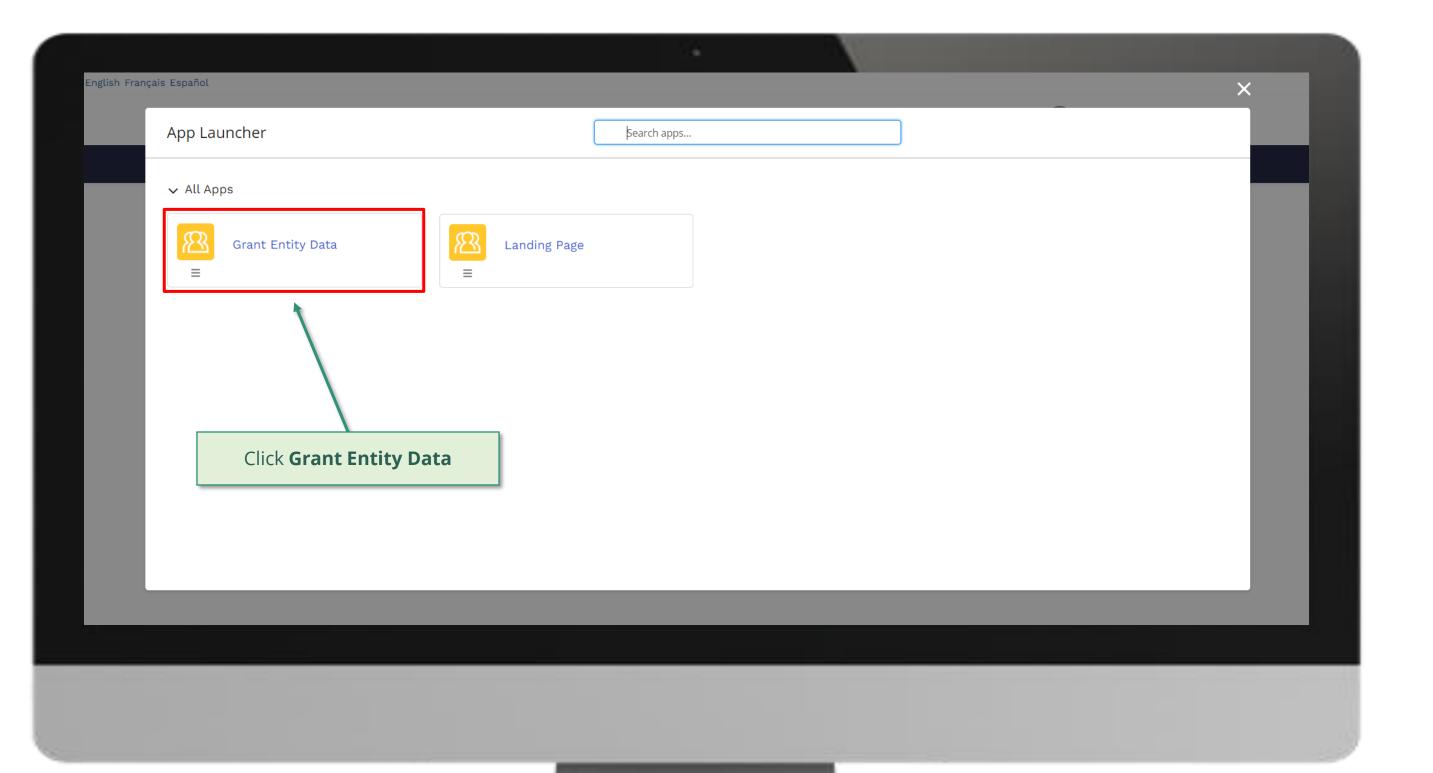




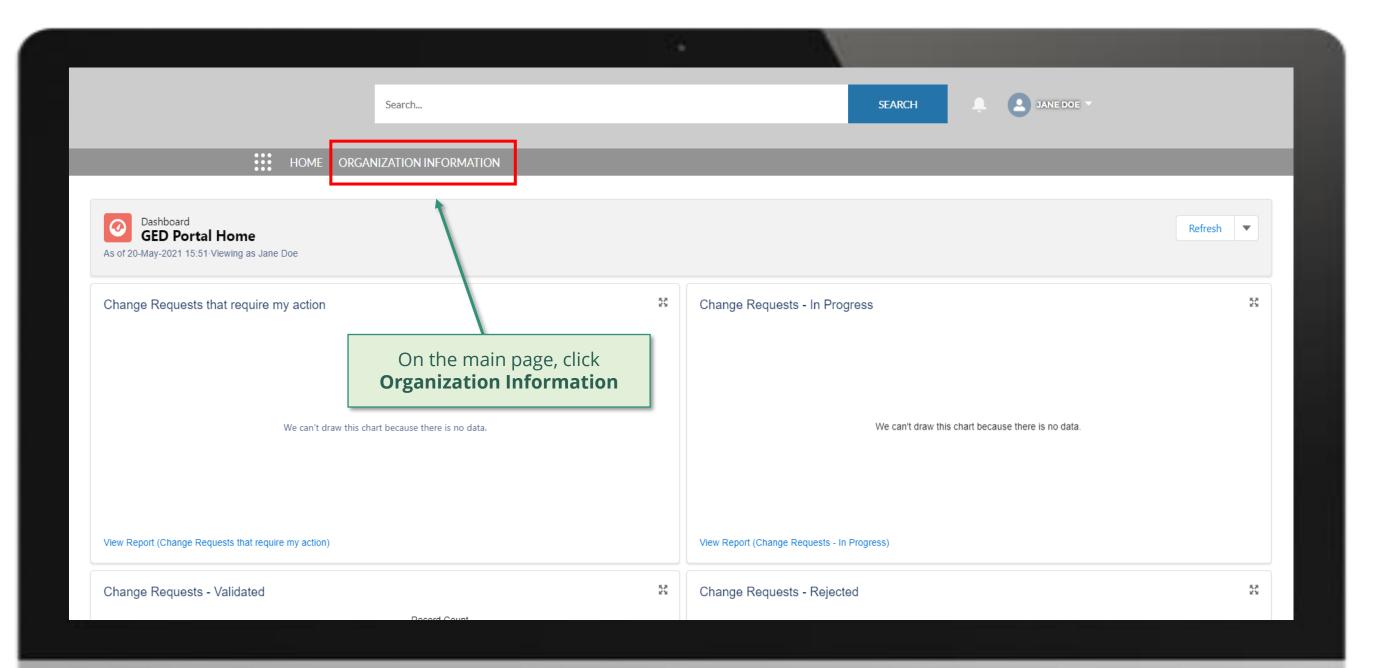




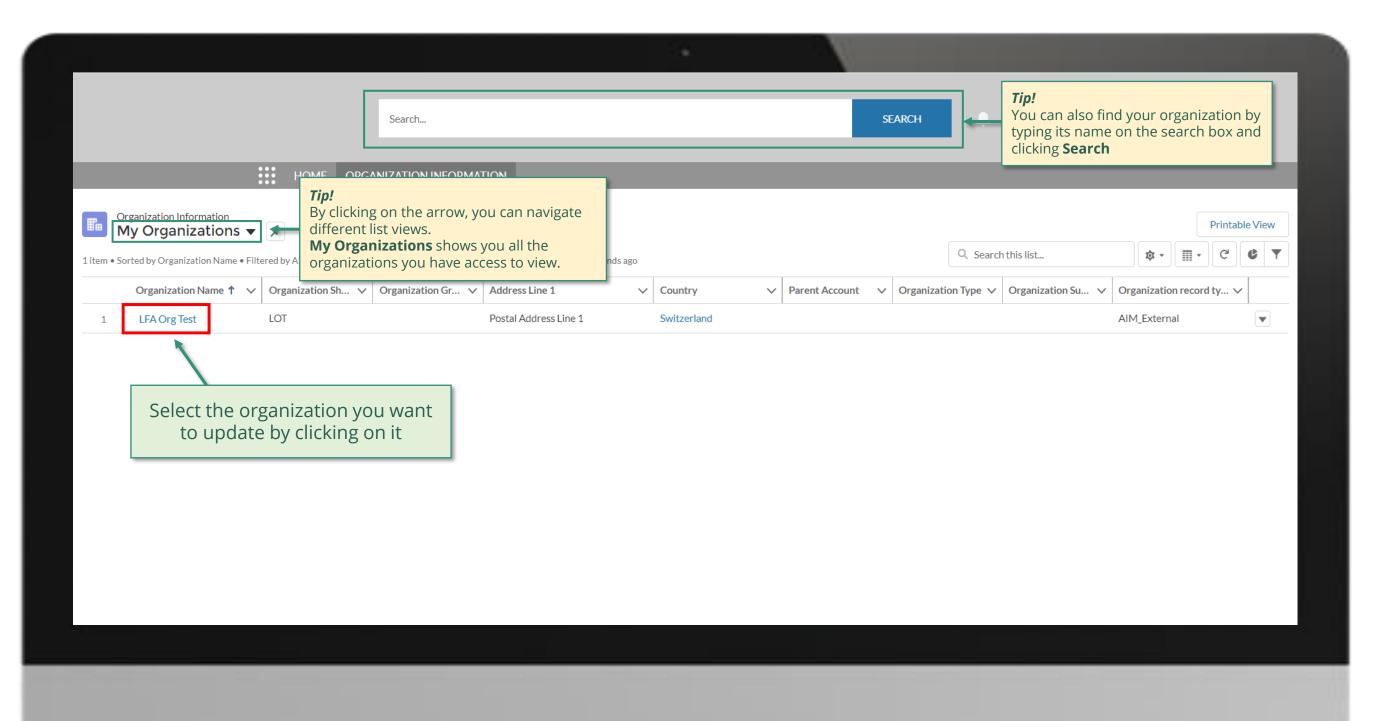




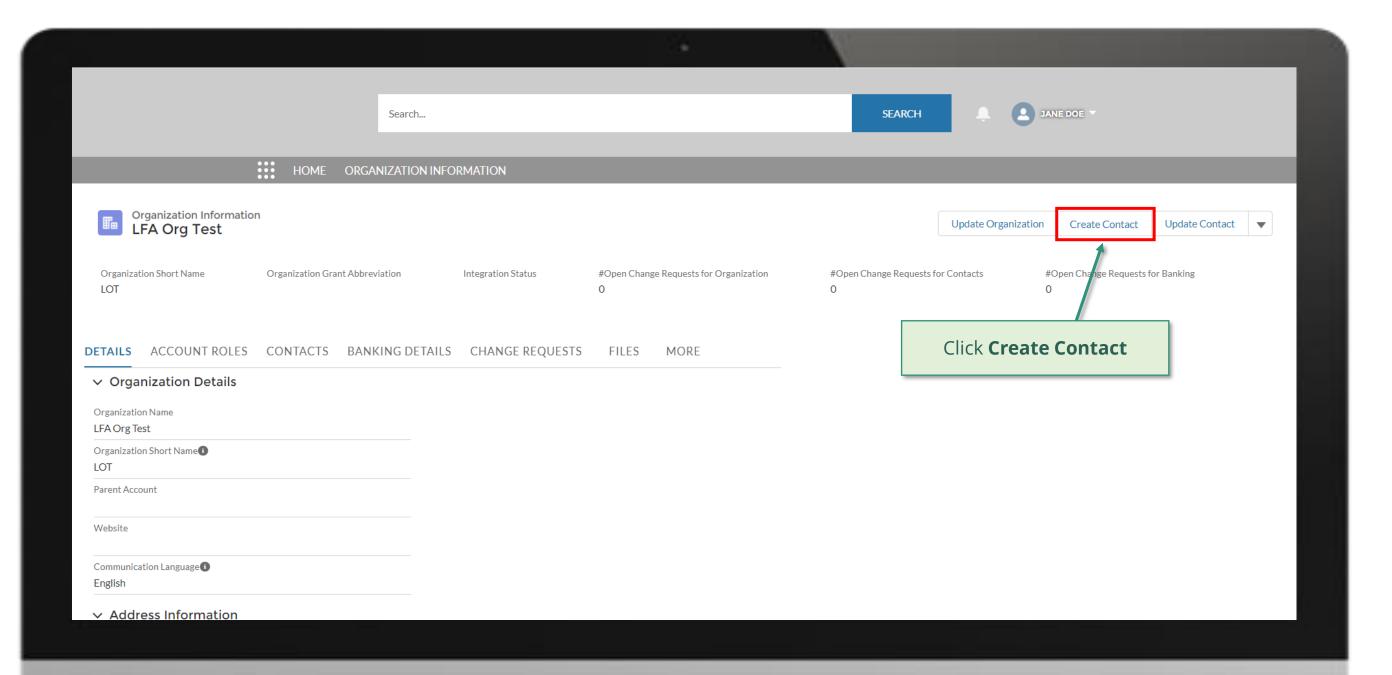




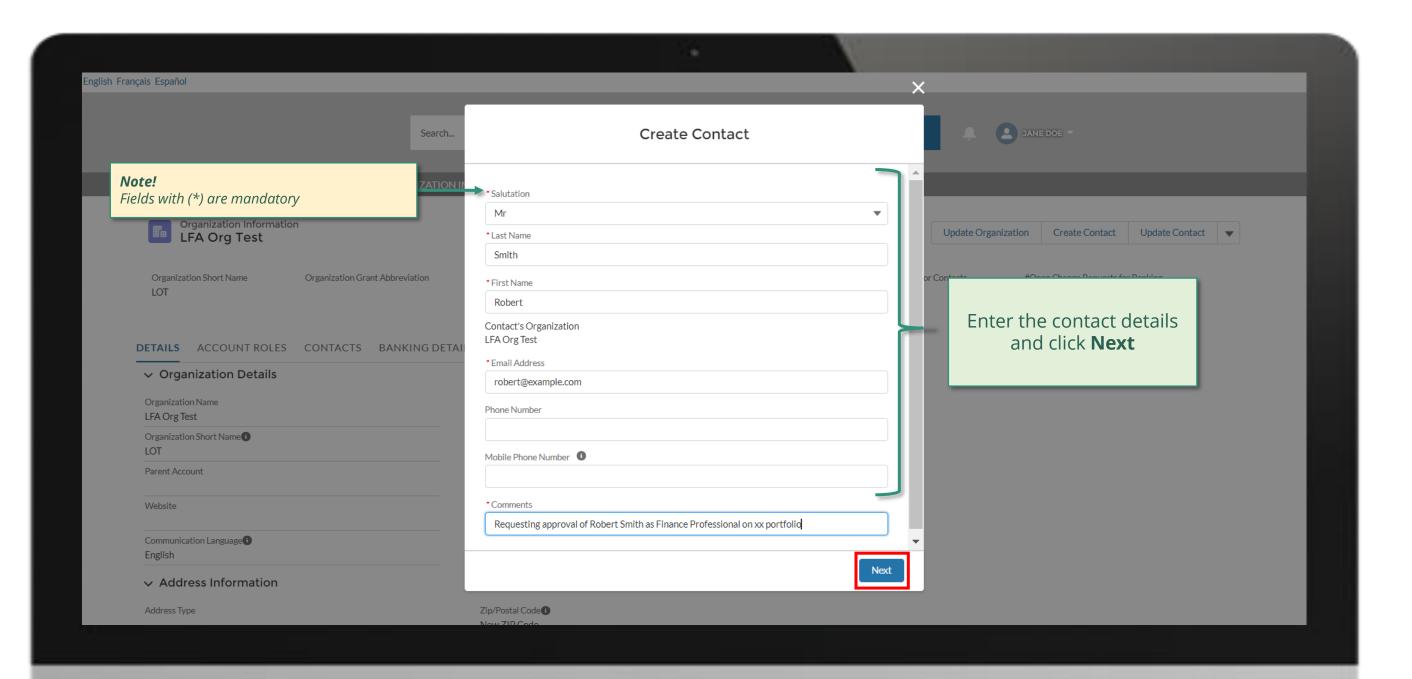








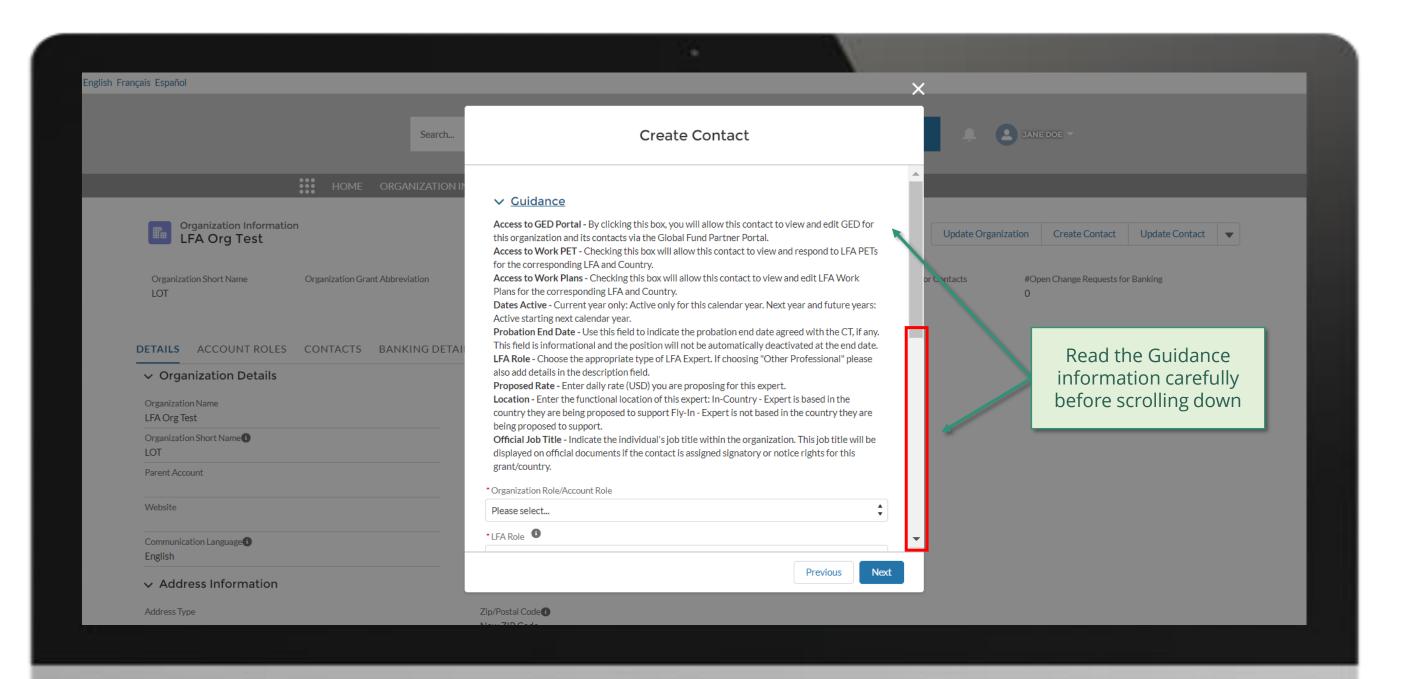




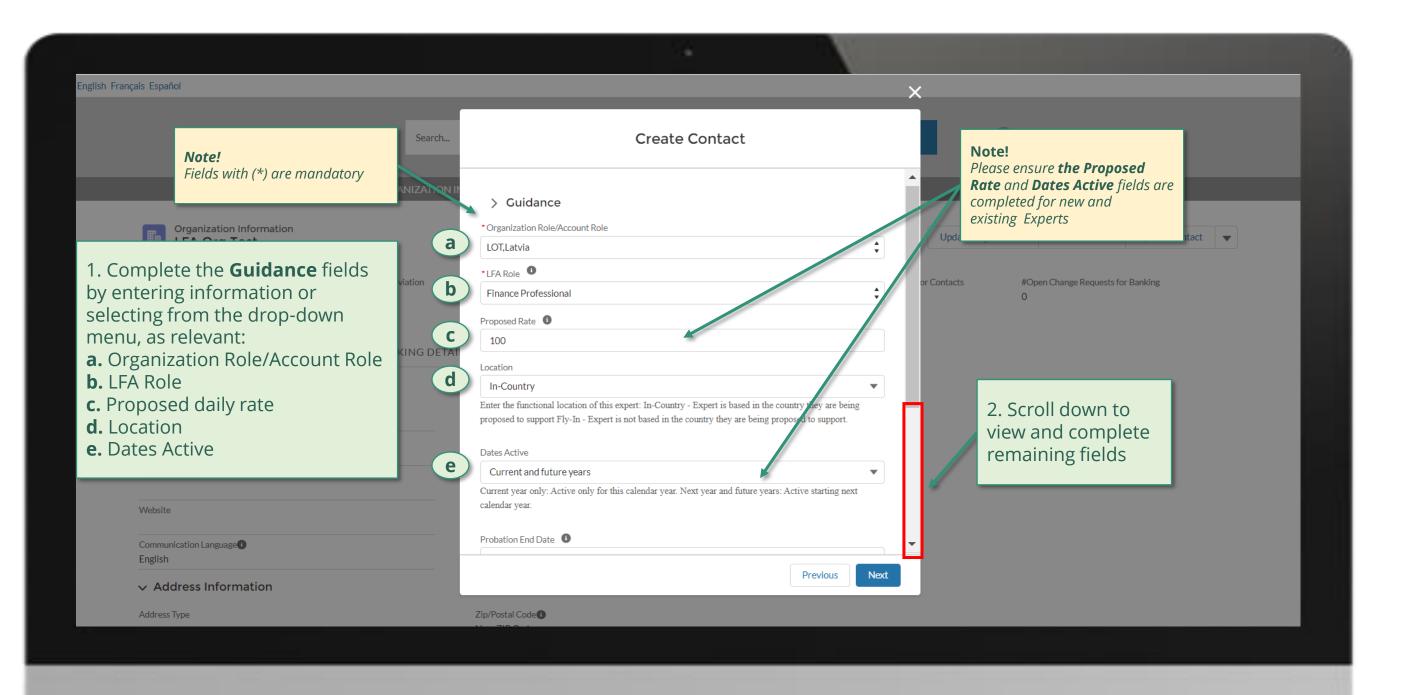


for this

<u>request</u>





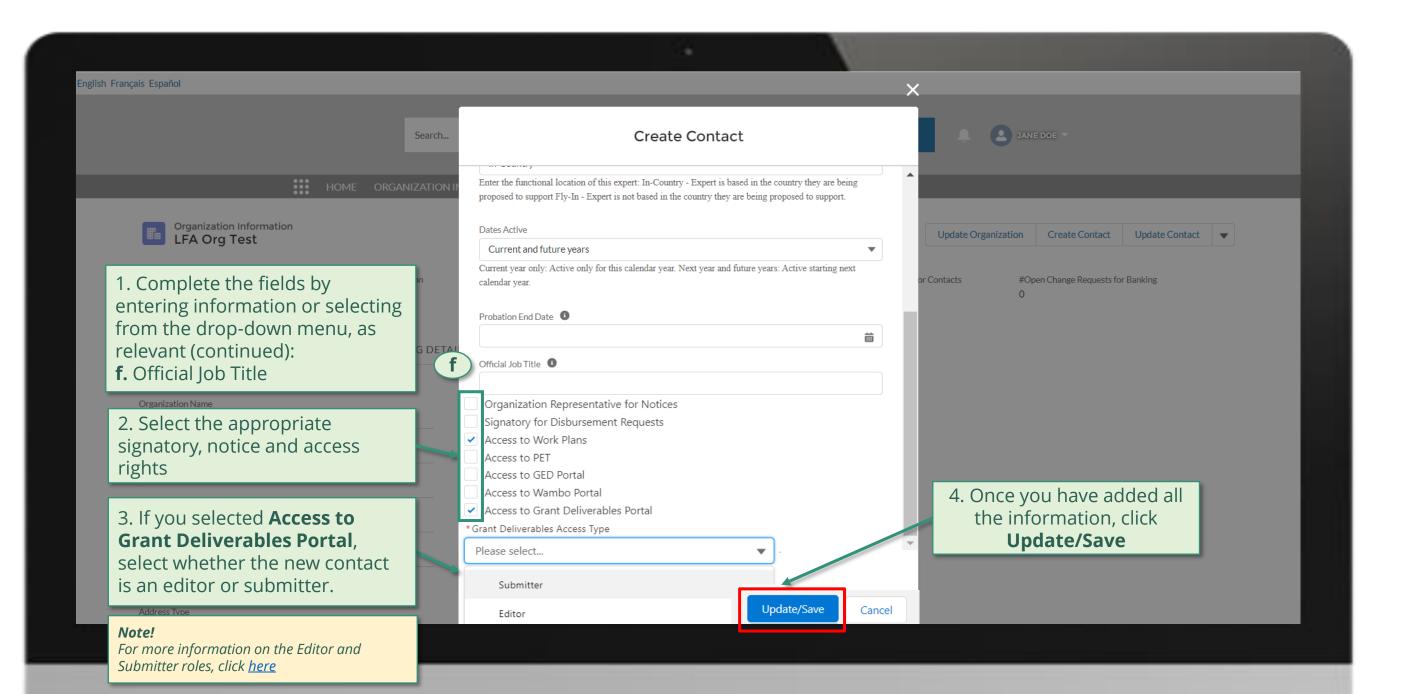




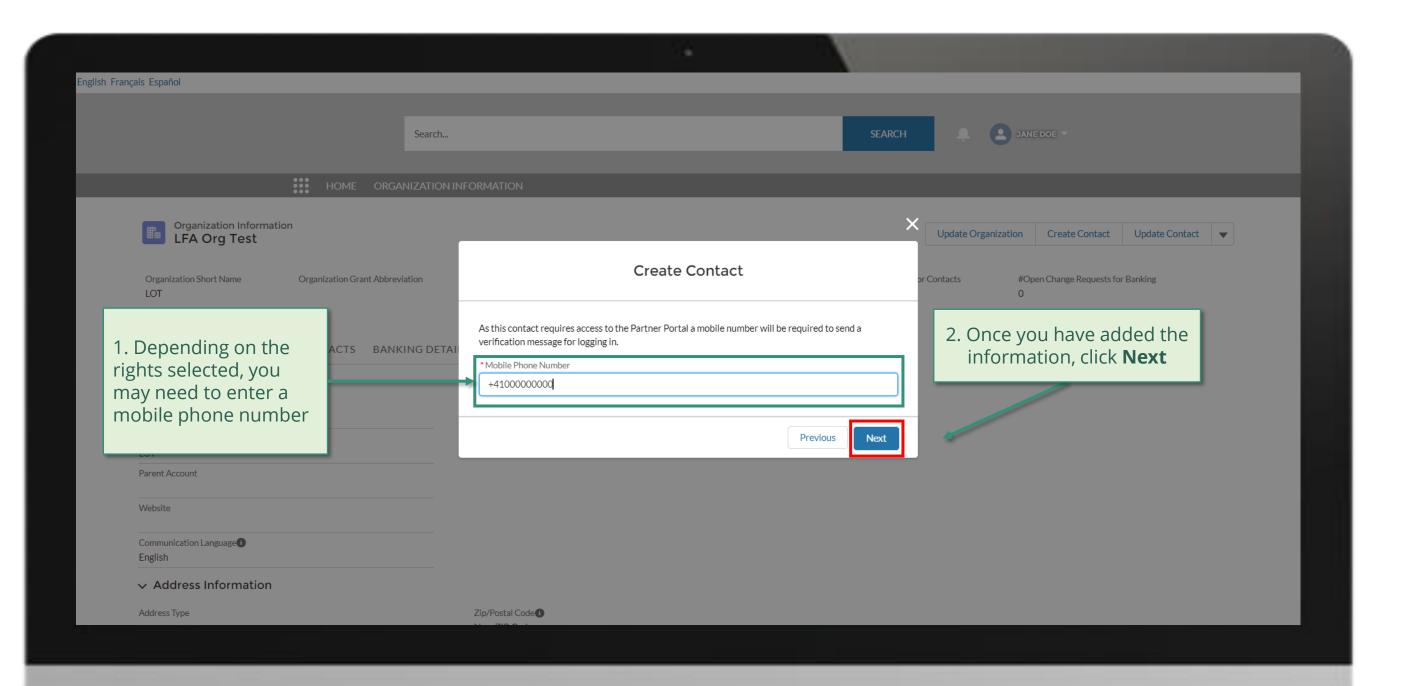
the steps

for this

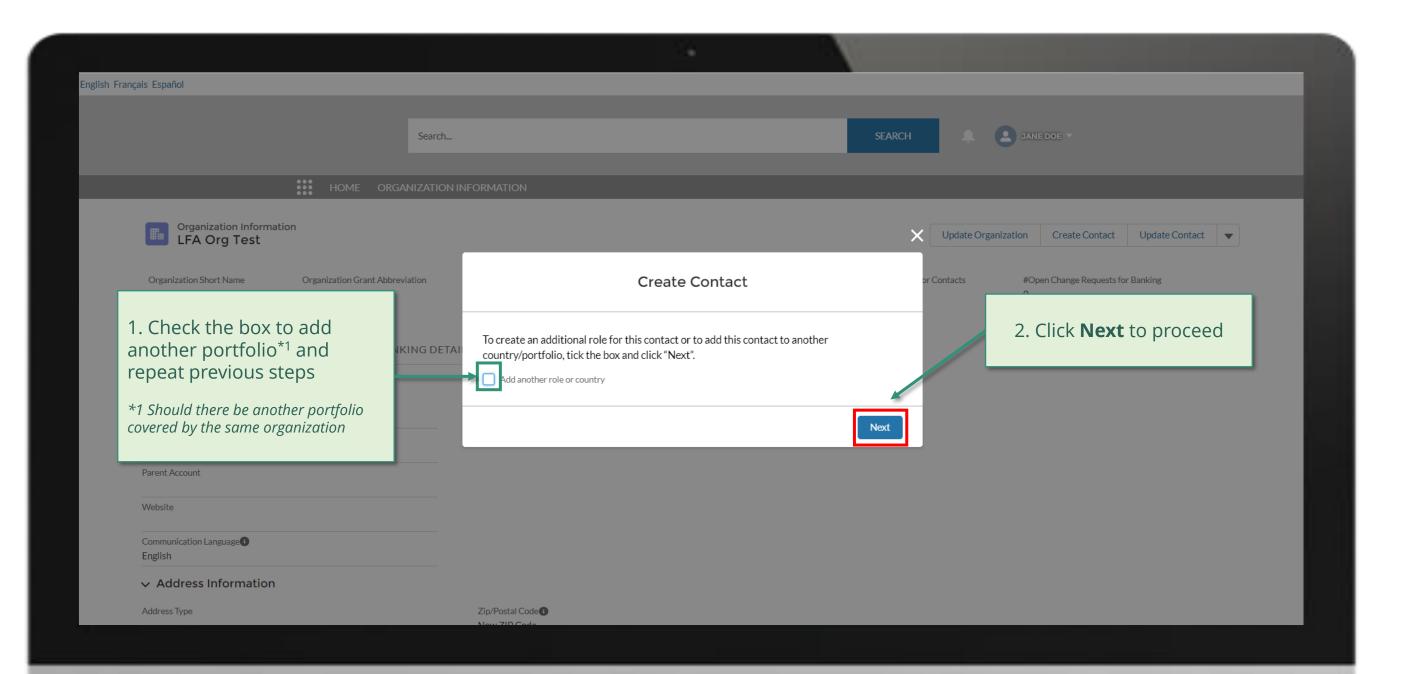
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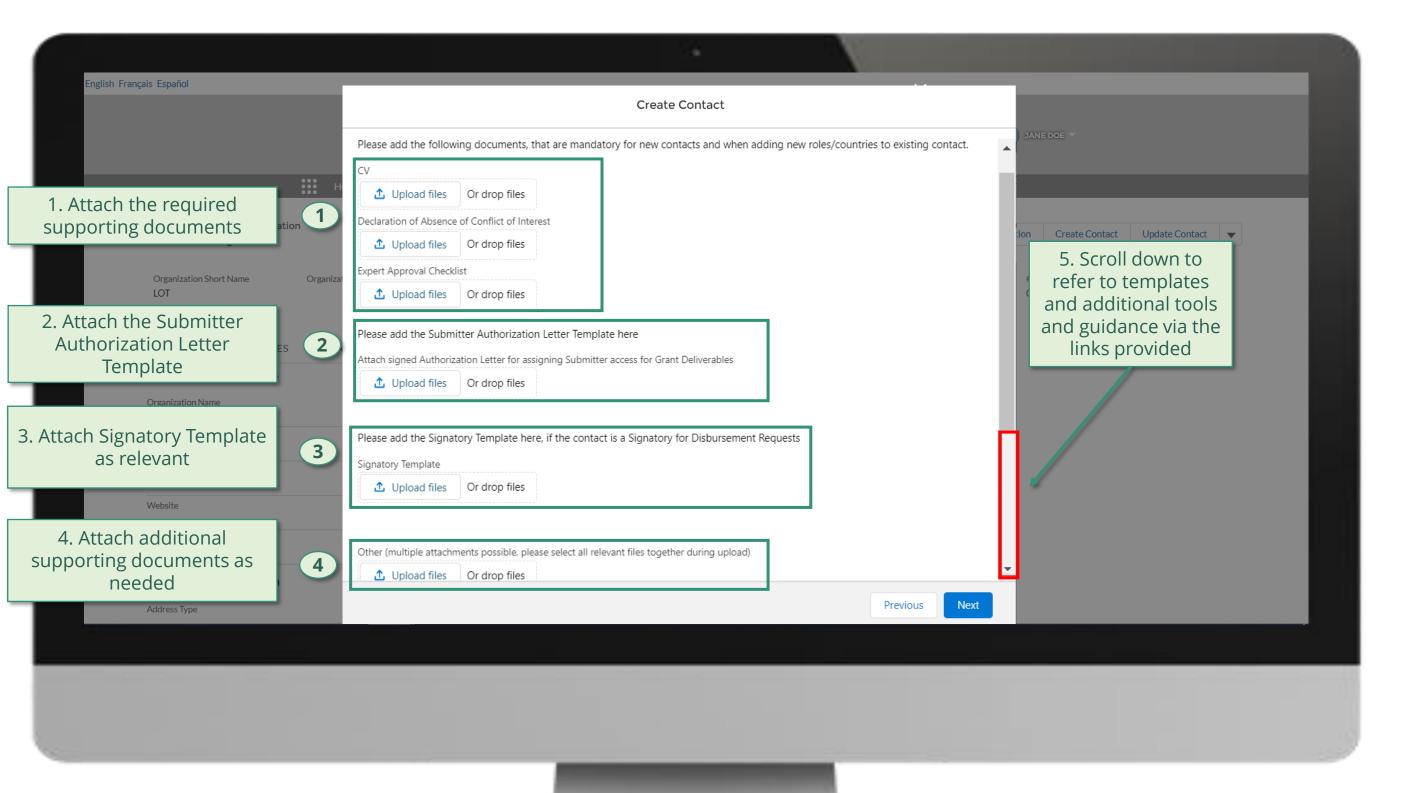




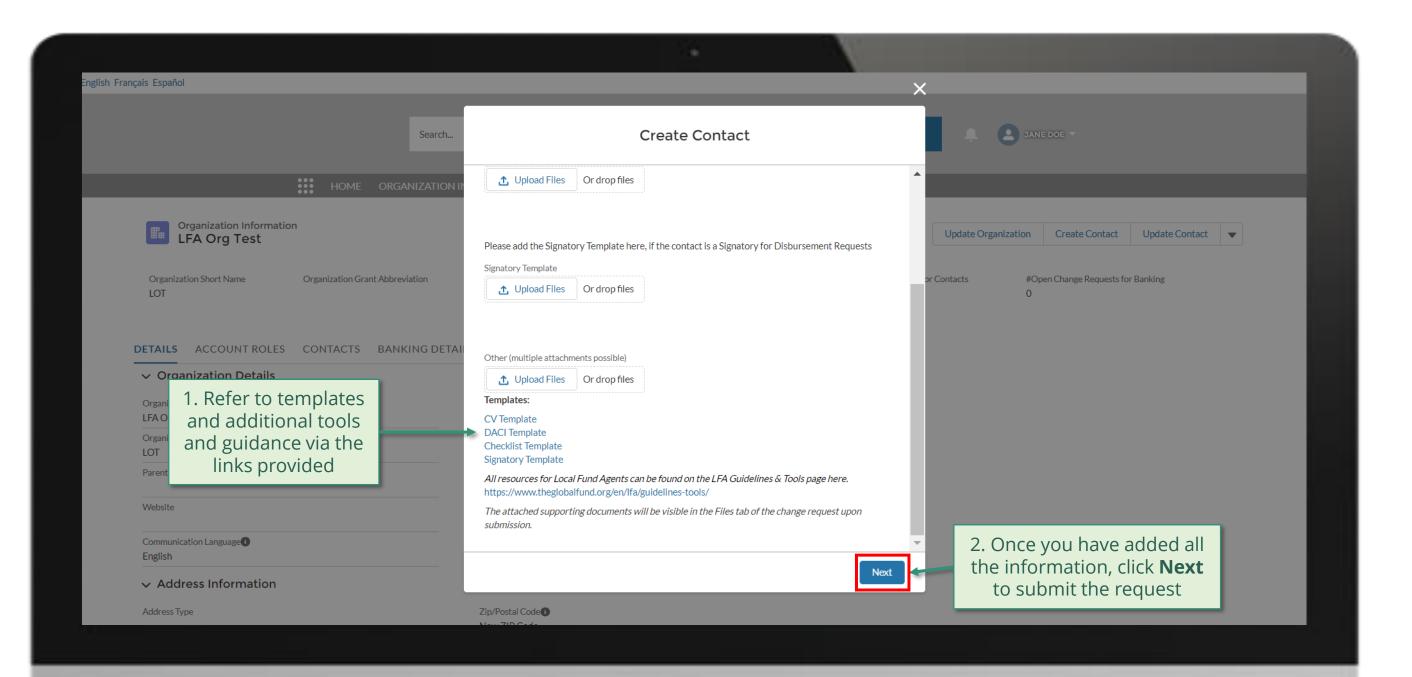








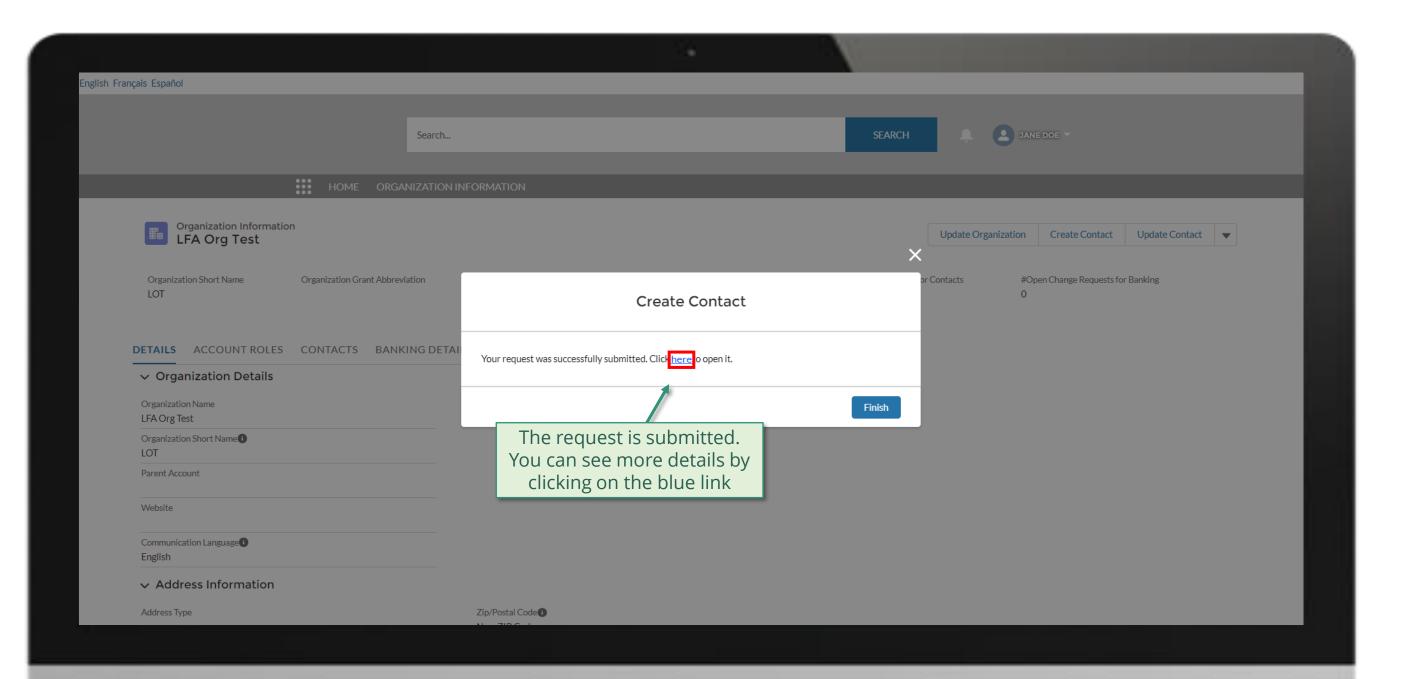




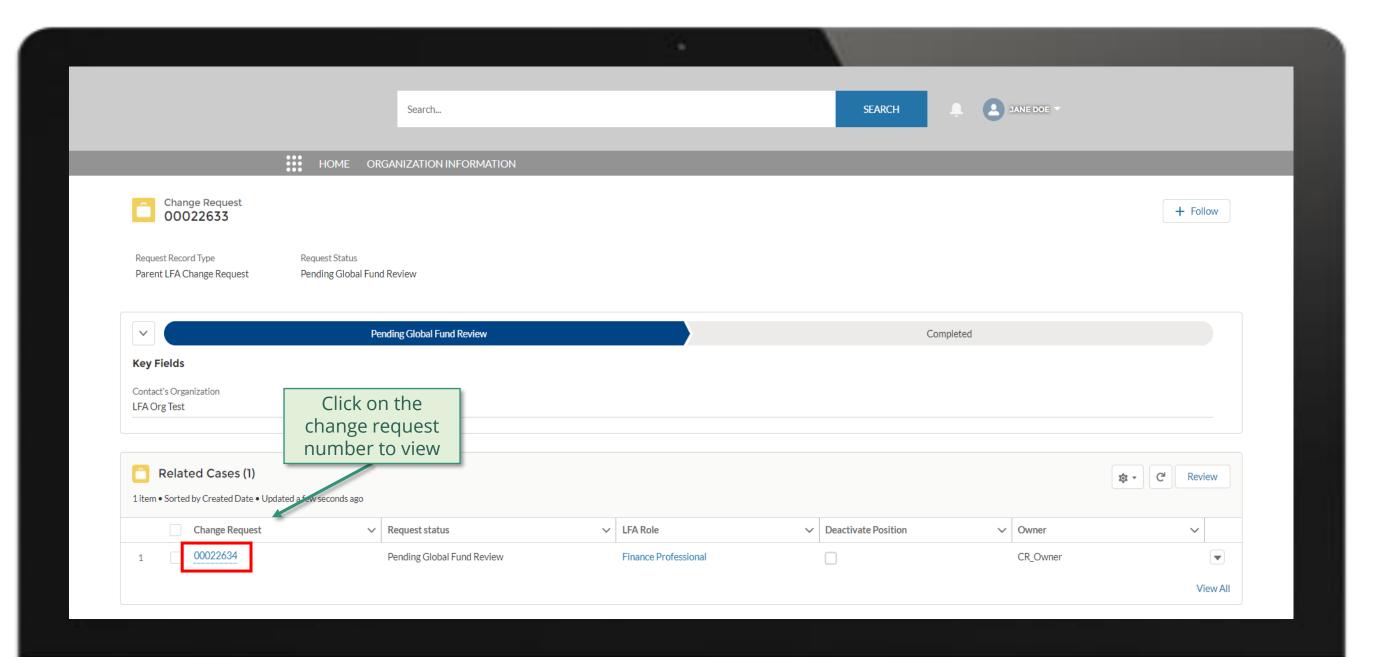


the steps for this

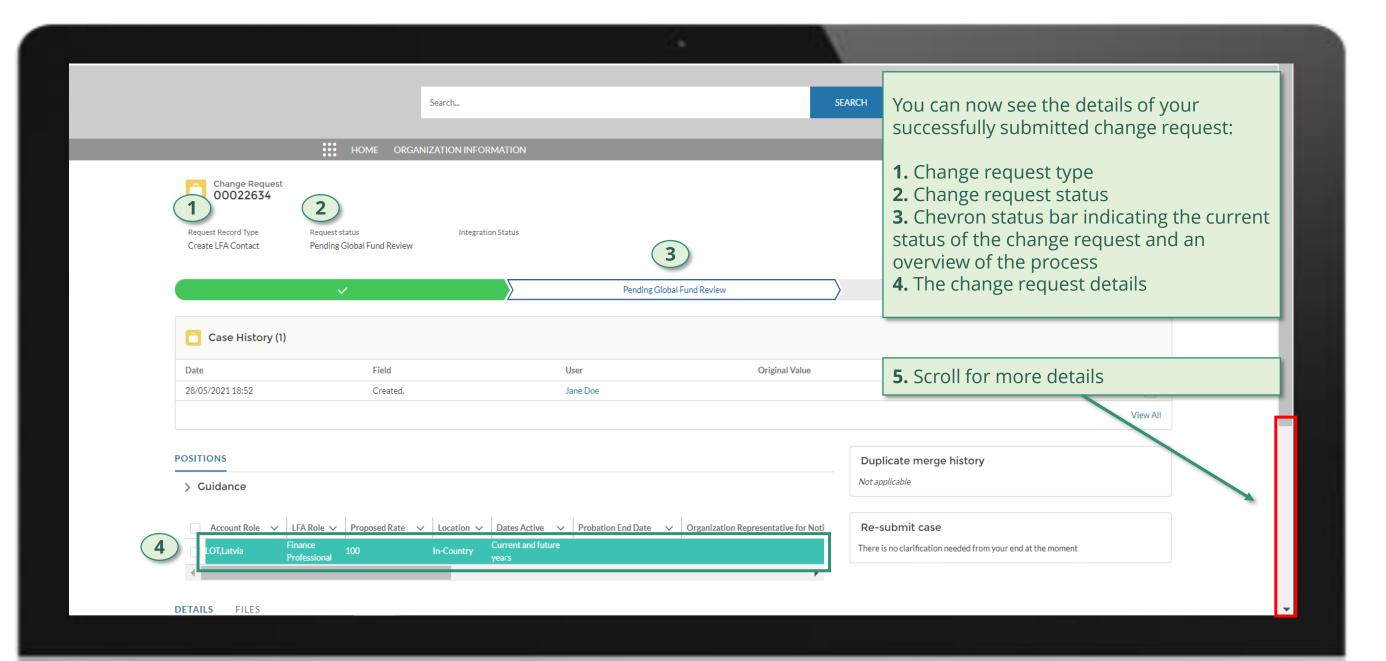
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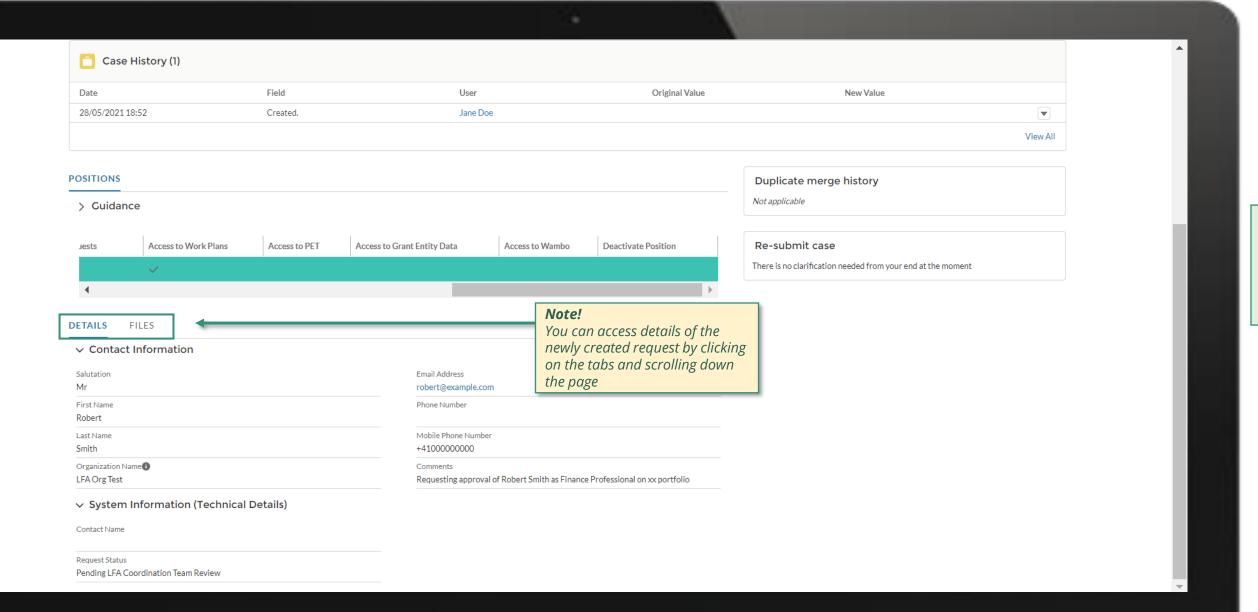














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# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

## **LFA | Update Contacts**

Select Anothe

External Stakeholder



Follow the steps below

LFA contact with Access Rights accesses the Global Fund Partner Portal.

LFA contact with Access Rights submits change request to update contacts, including supporting documents¹.

Click to see detailed steps in the system

Updated GED reflected in Global Fund Partner Portal

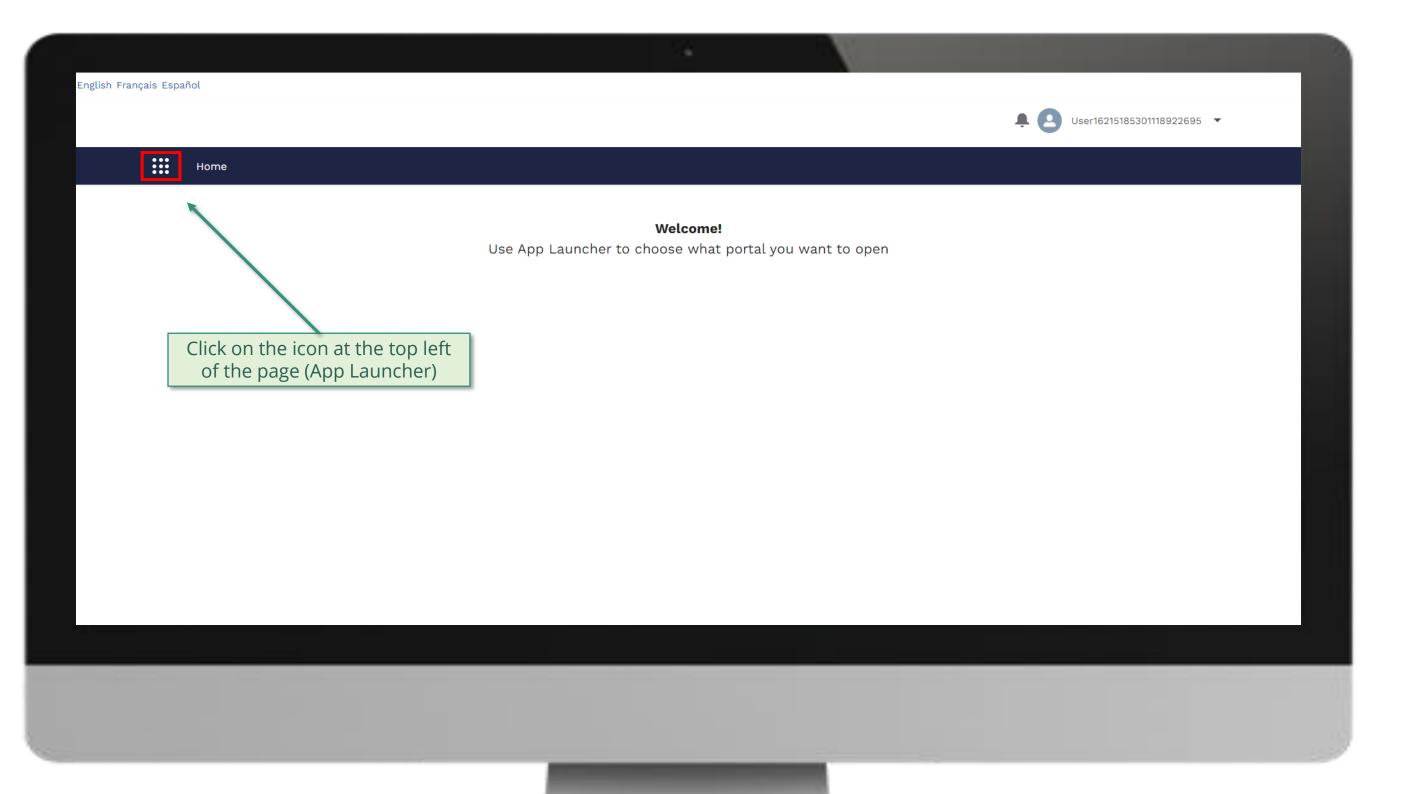




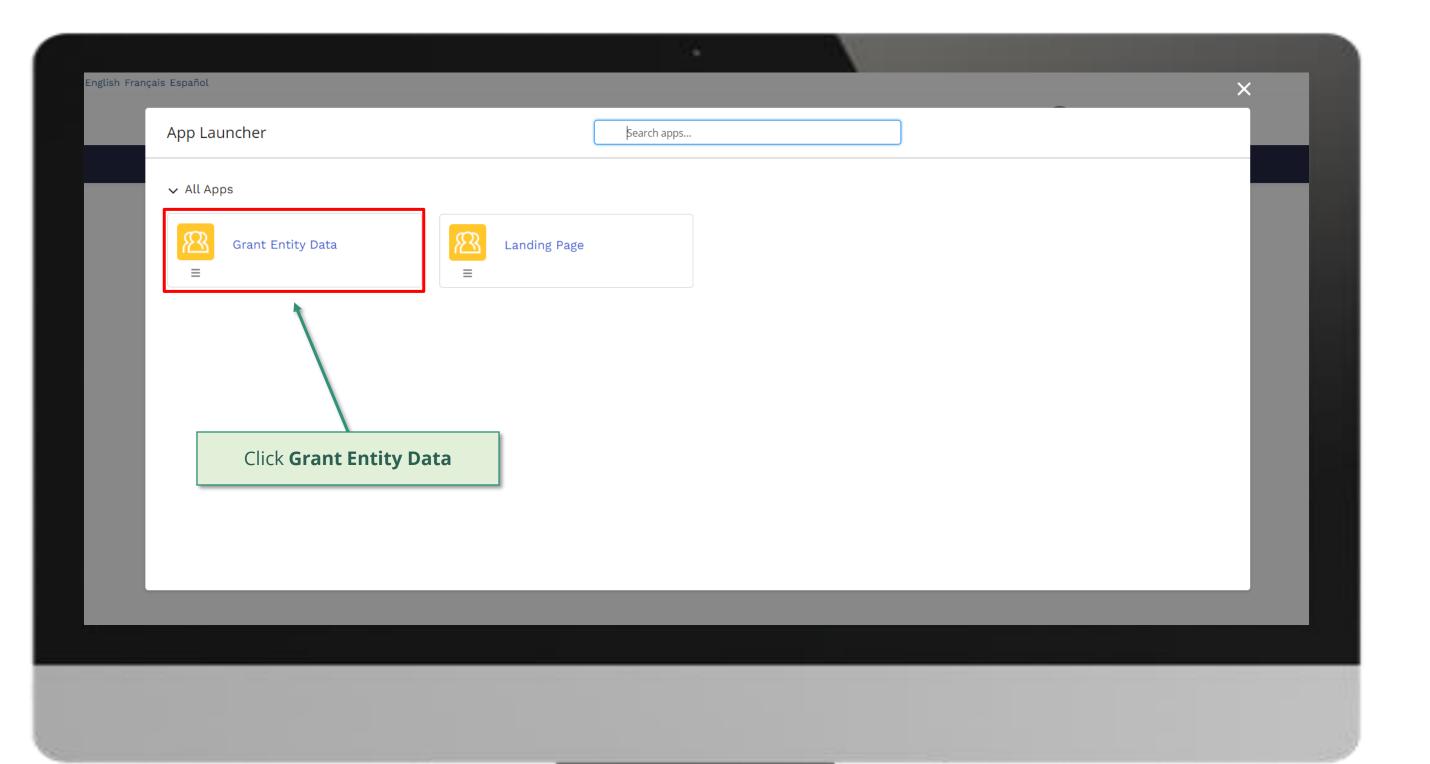
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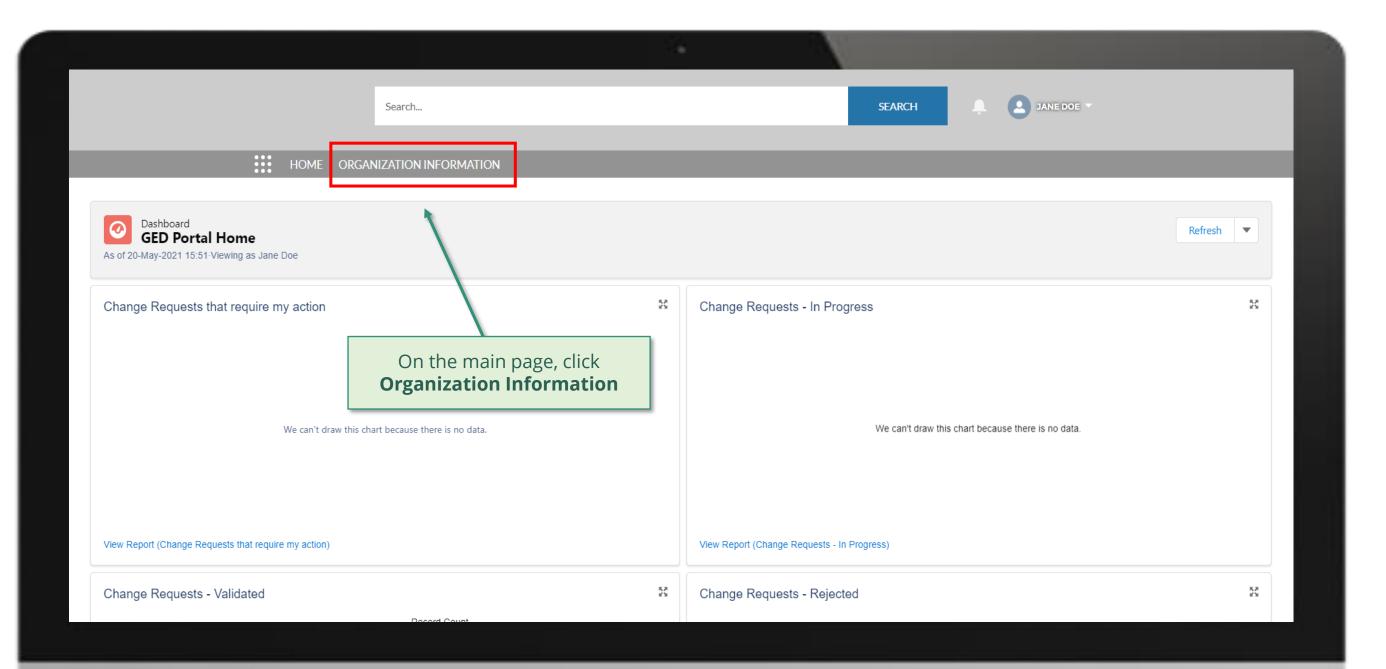




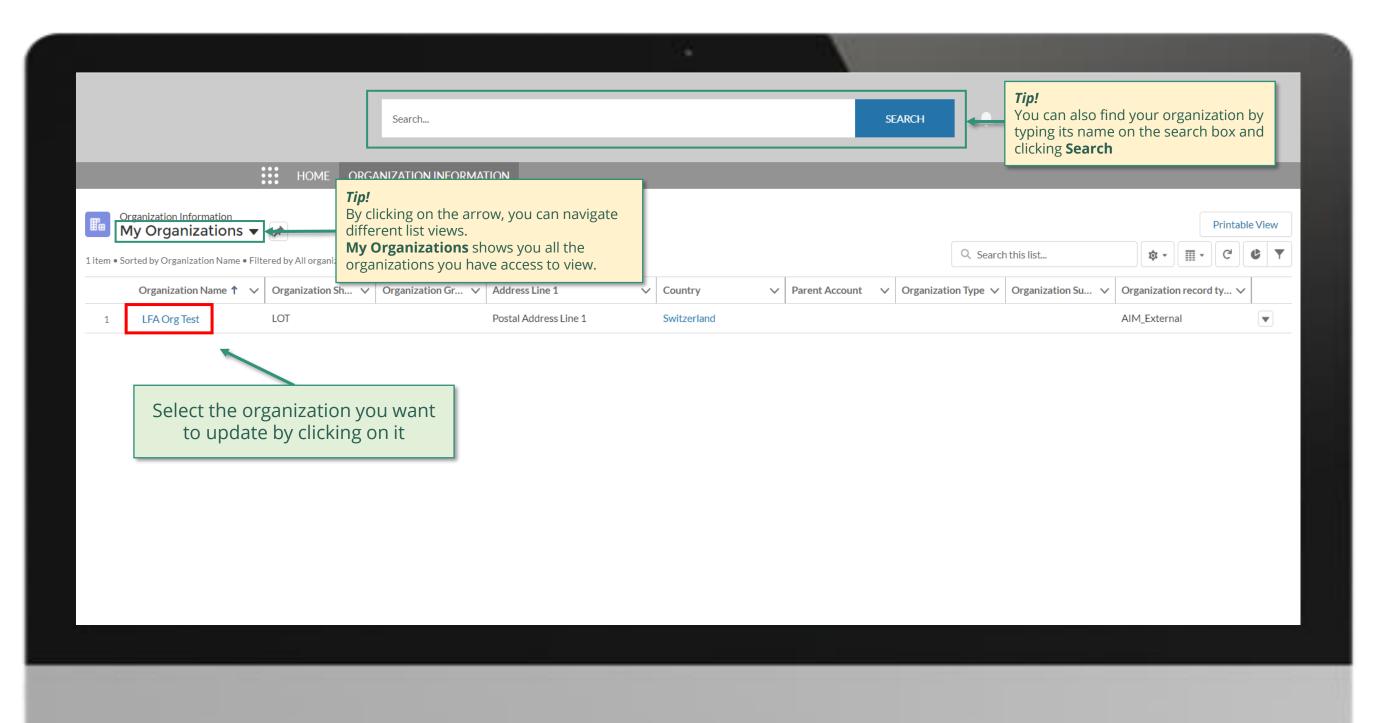




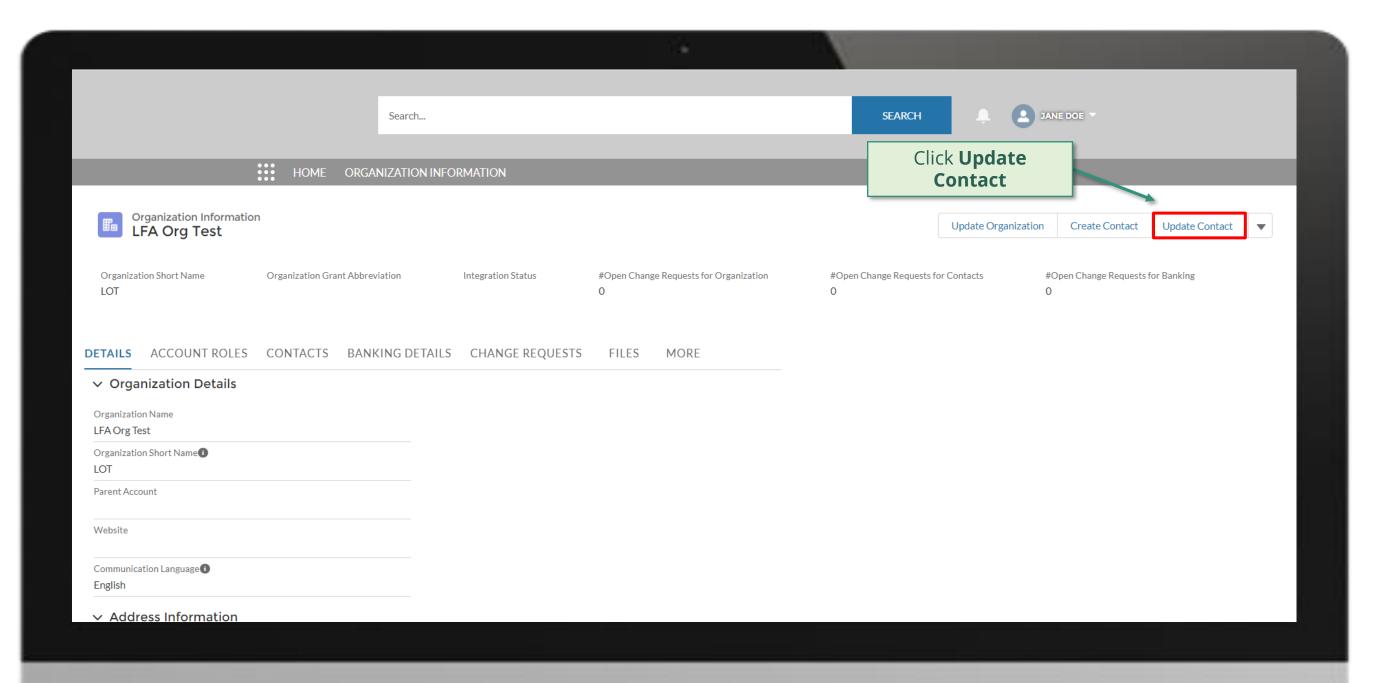




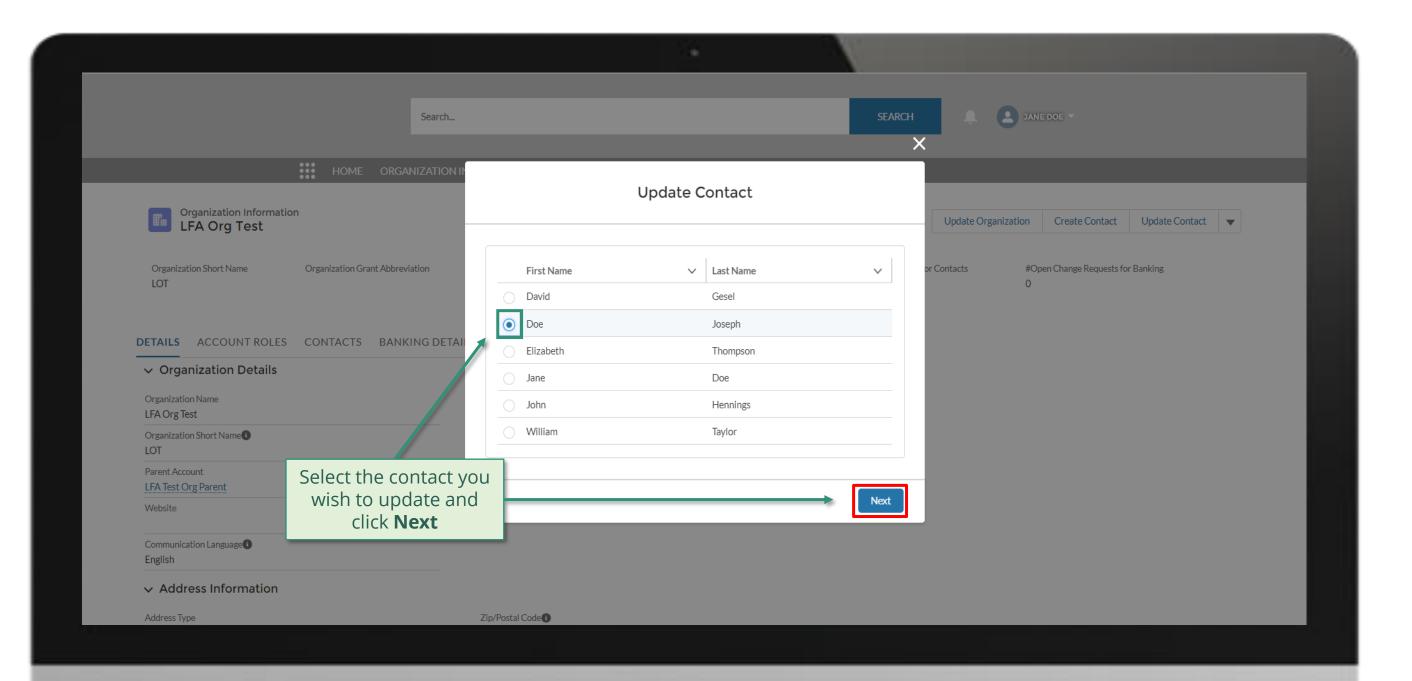




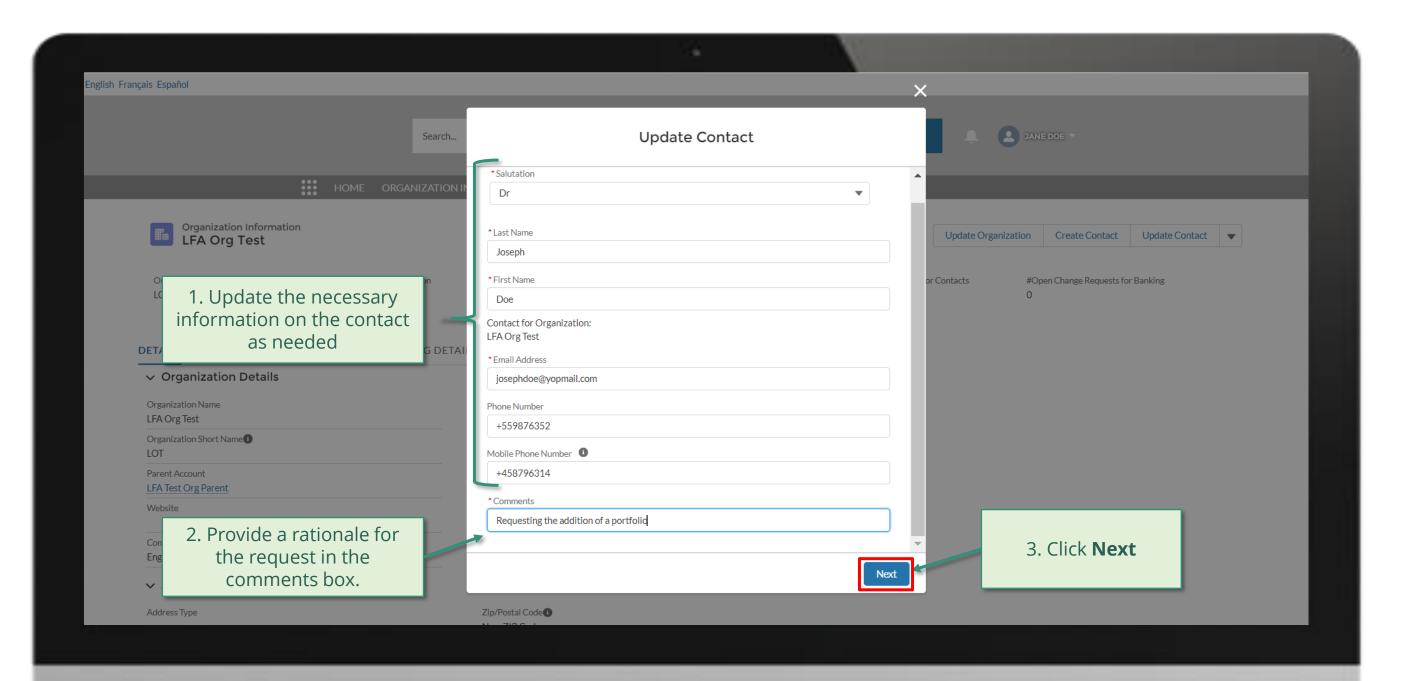




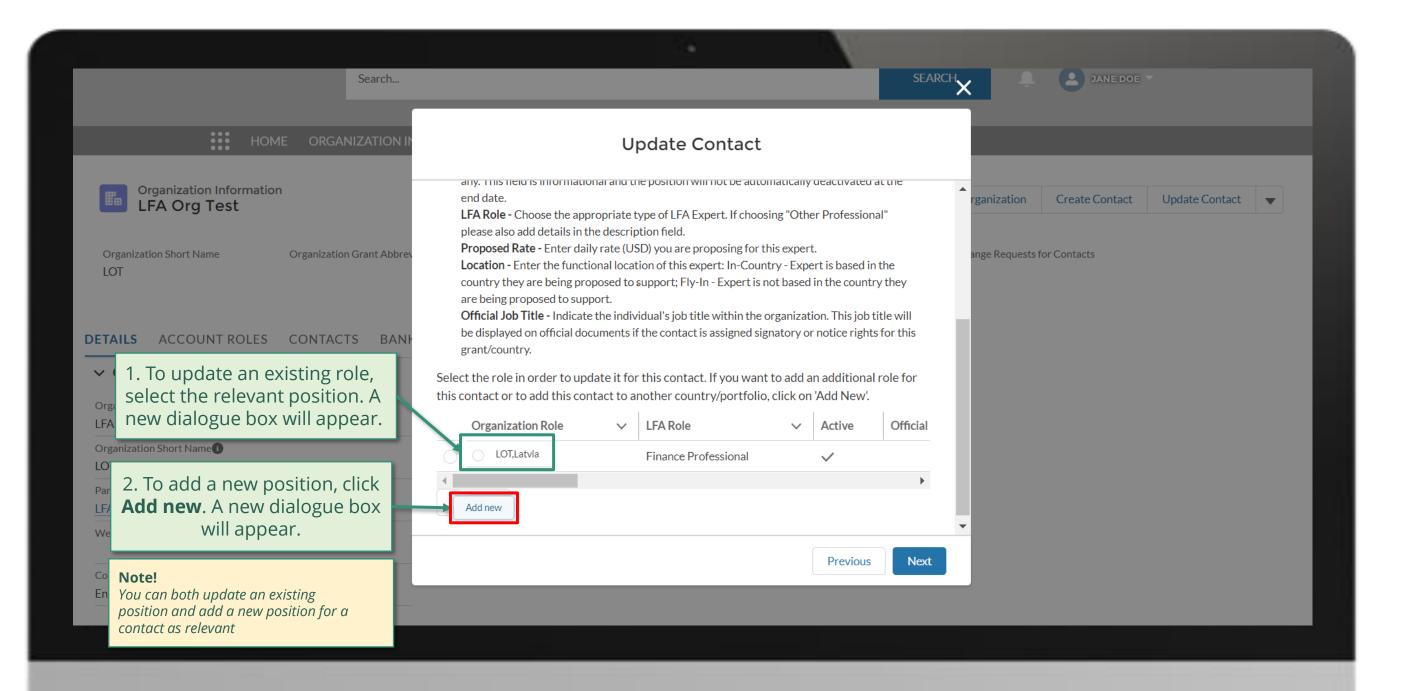




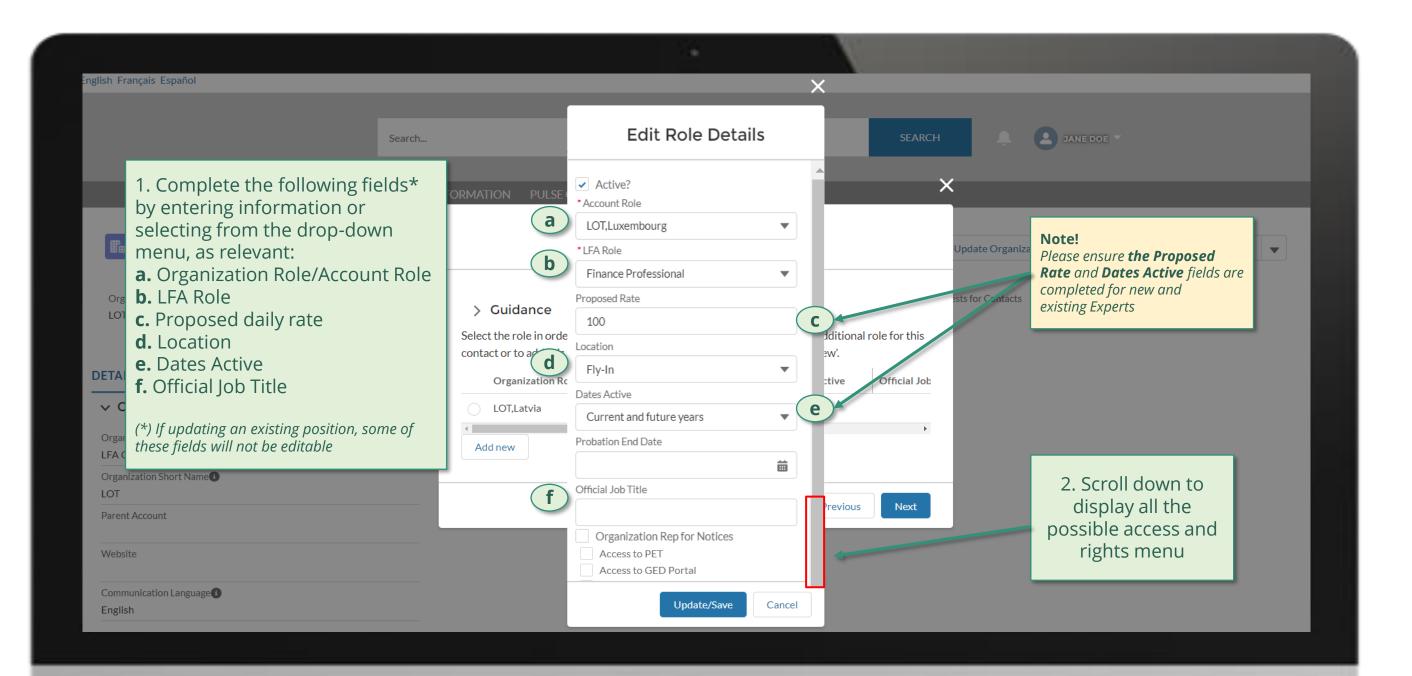








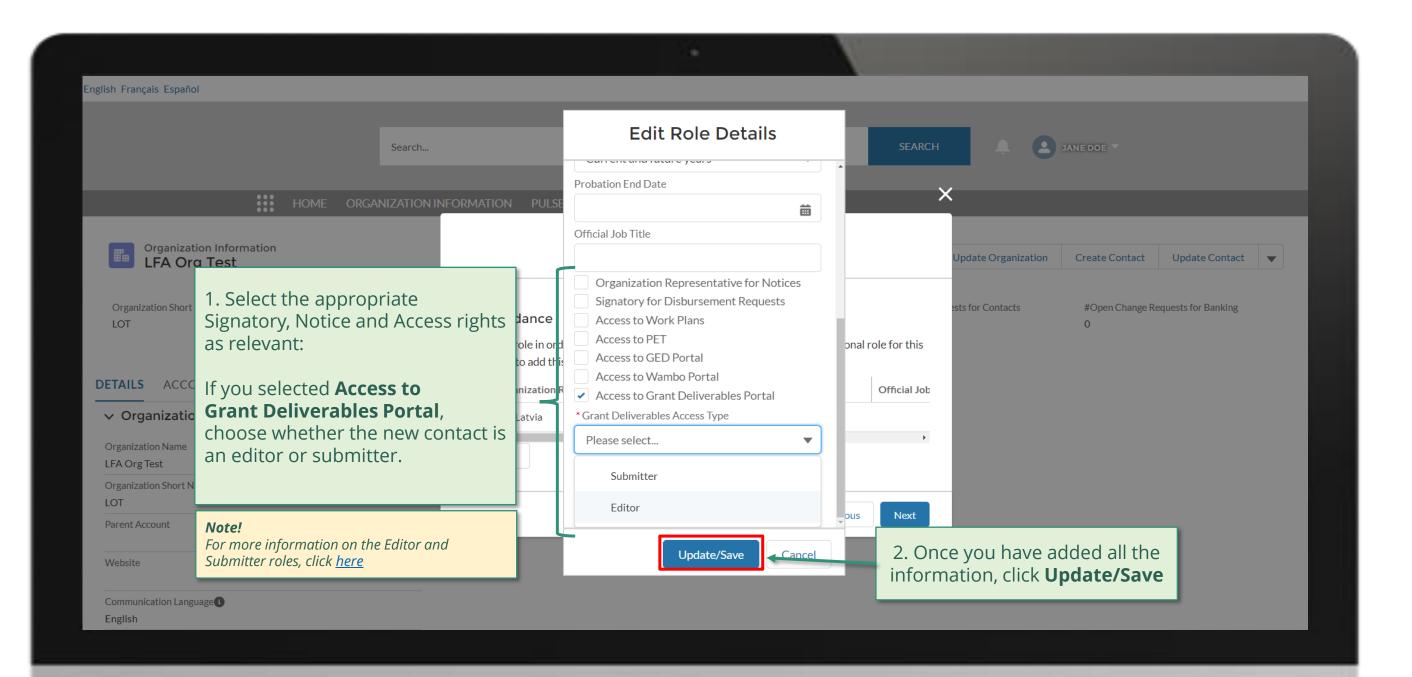






the steps for this

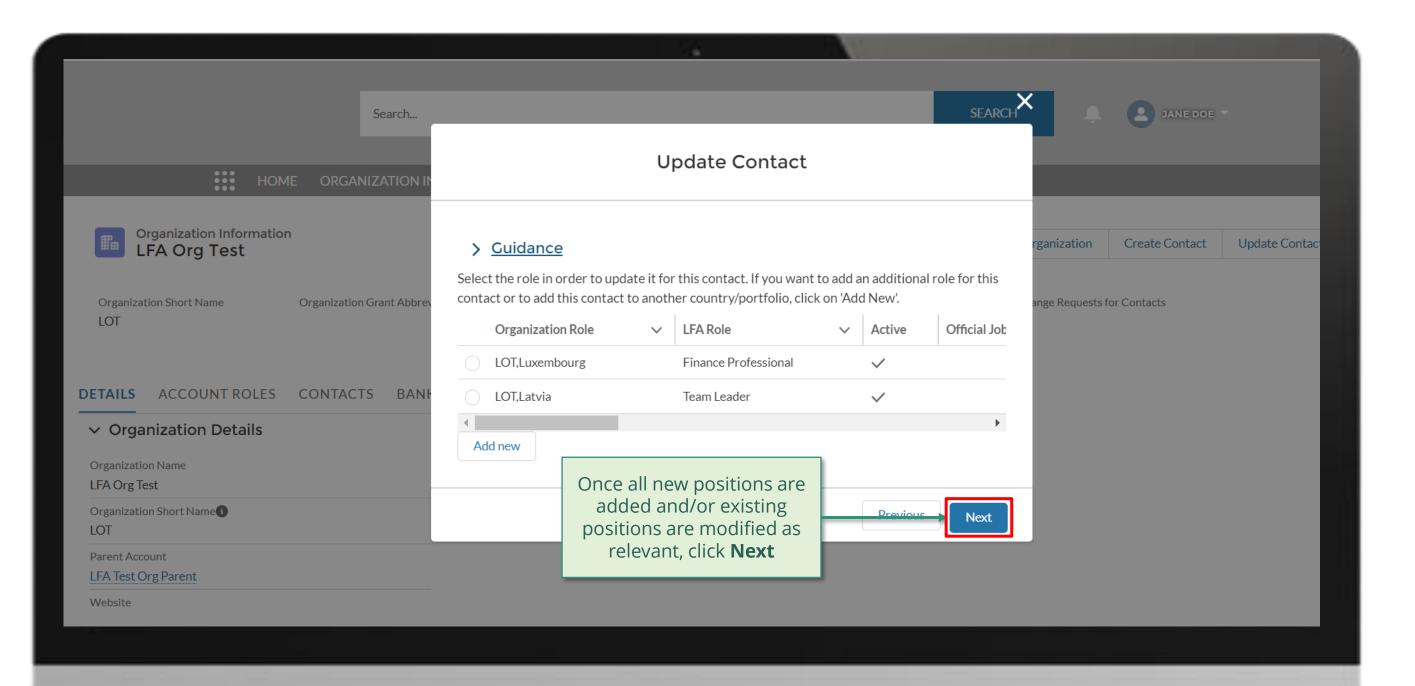
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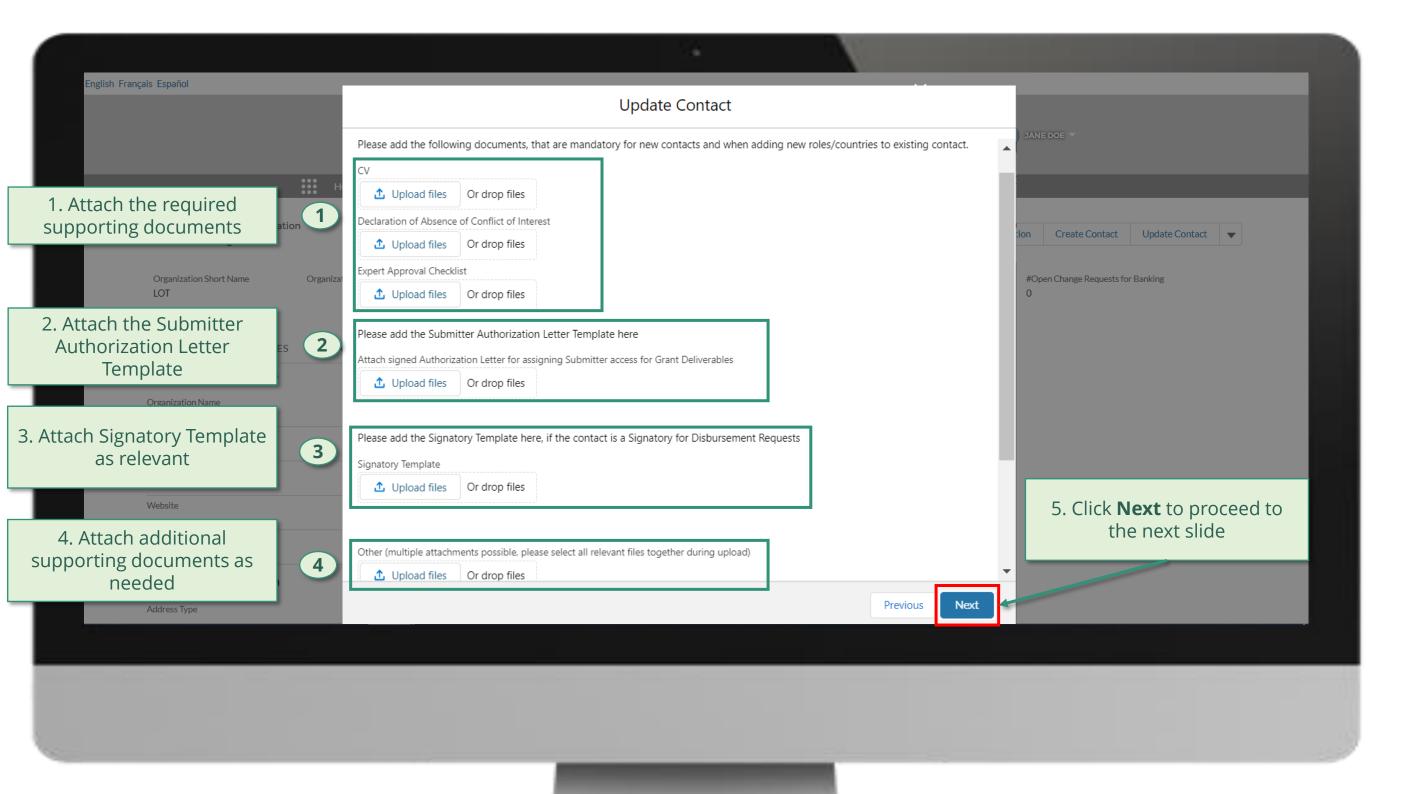
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request





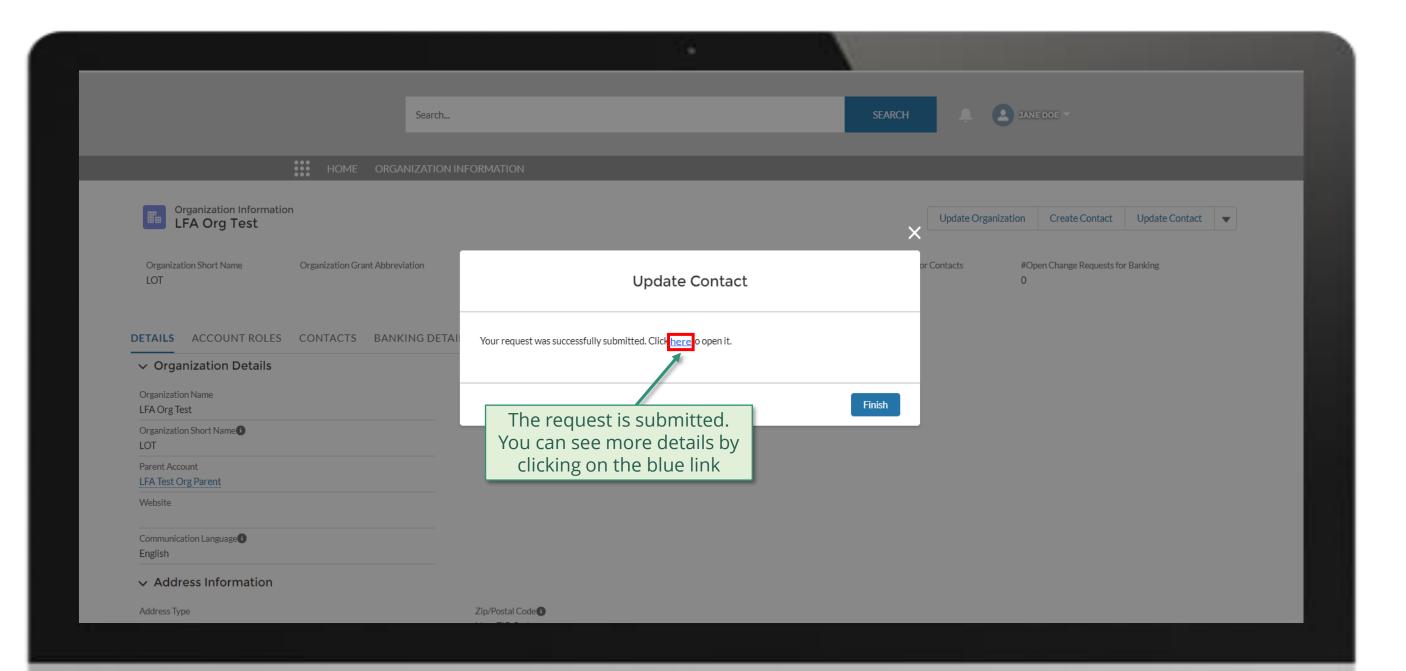
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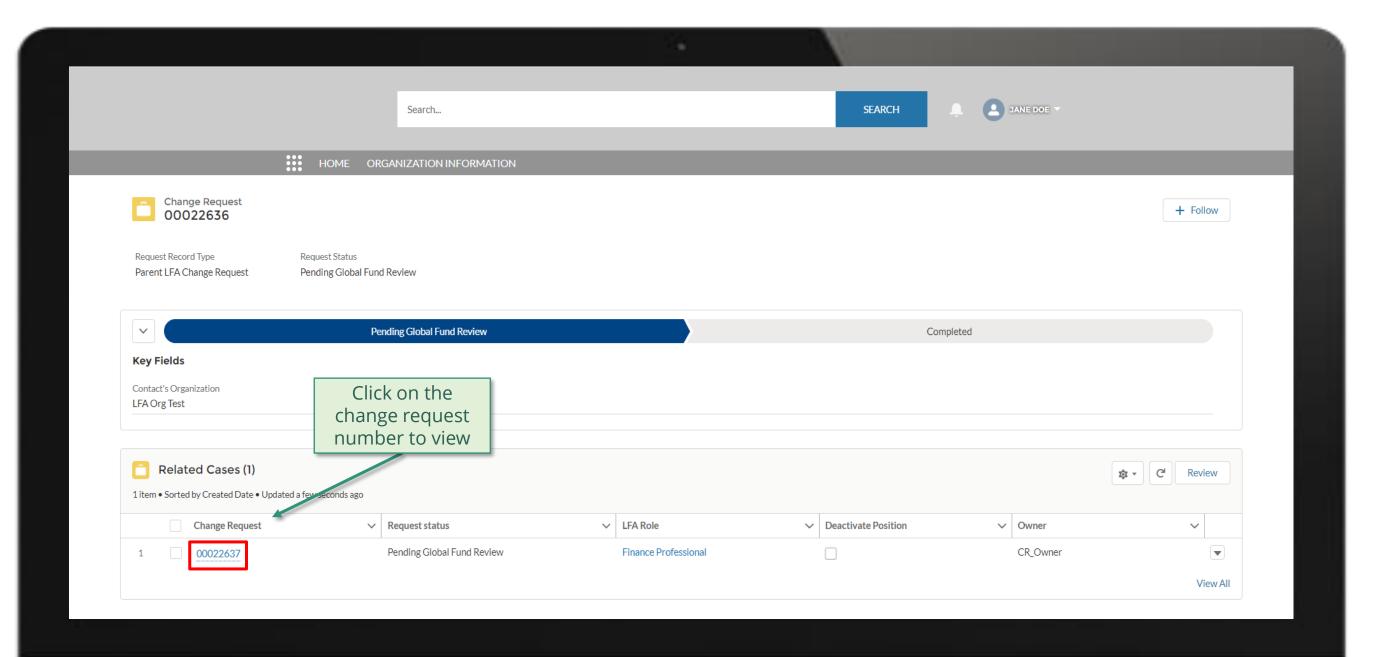


the steps

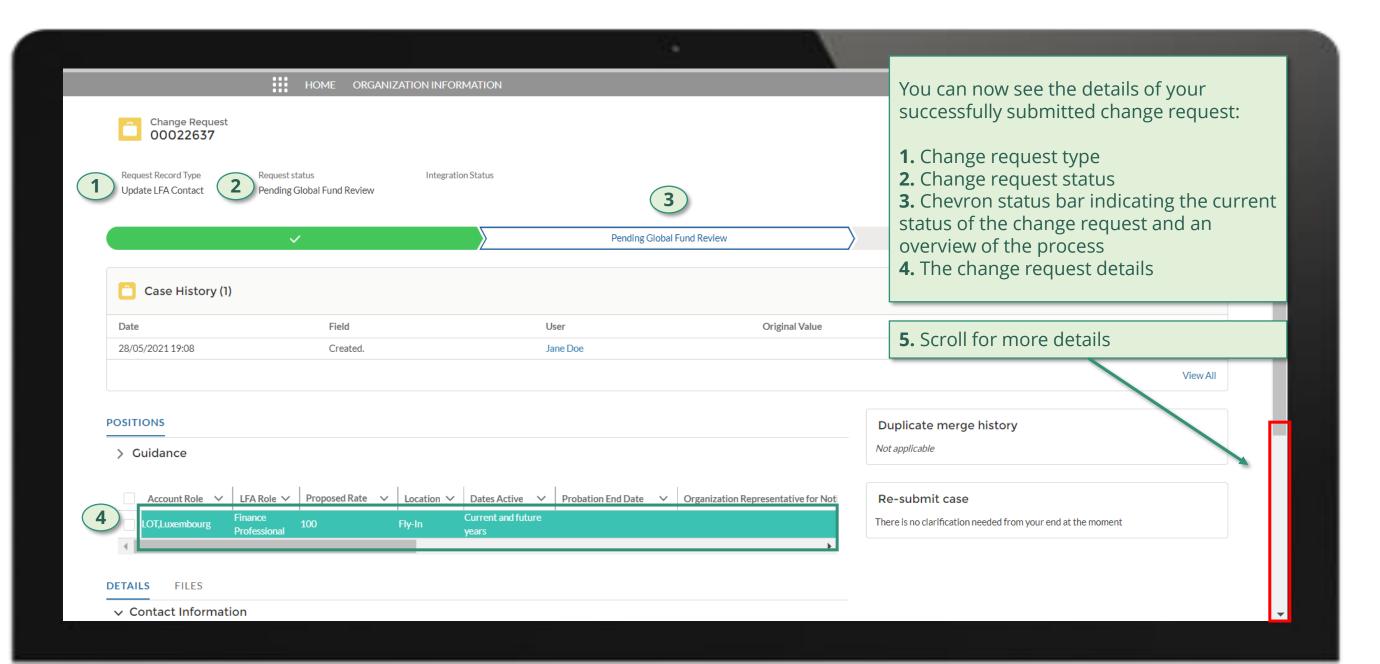
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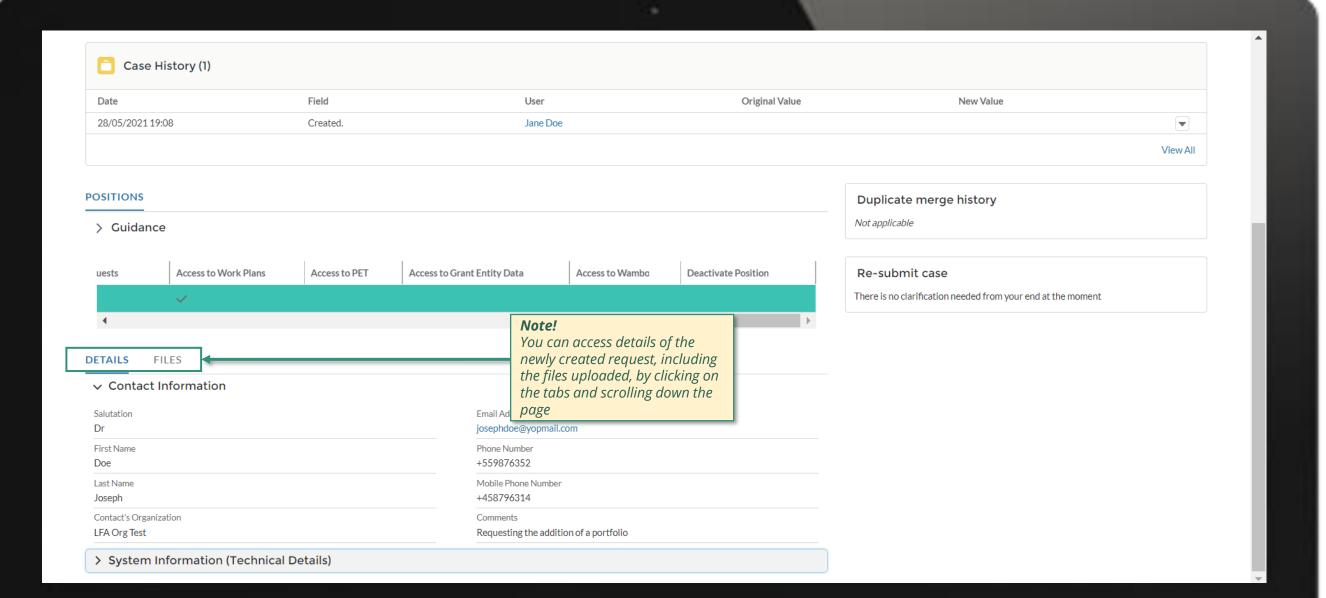






for this

request





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# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

## **LFA** | Deactivate Contacts



External Stakeholder



Follow the steps below

### Note!

Deactivating a contact will permanently deactivate a contact and all associated positions. To deactivate a single position, please follow the <u>Deactivate Position</u> process.

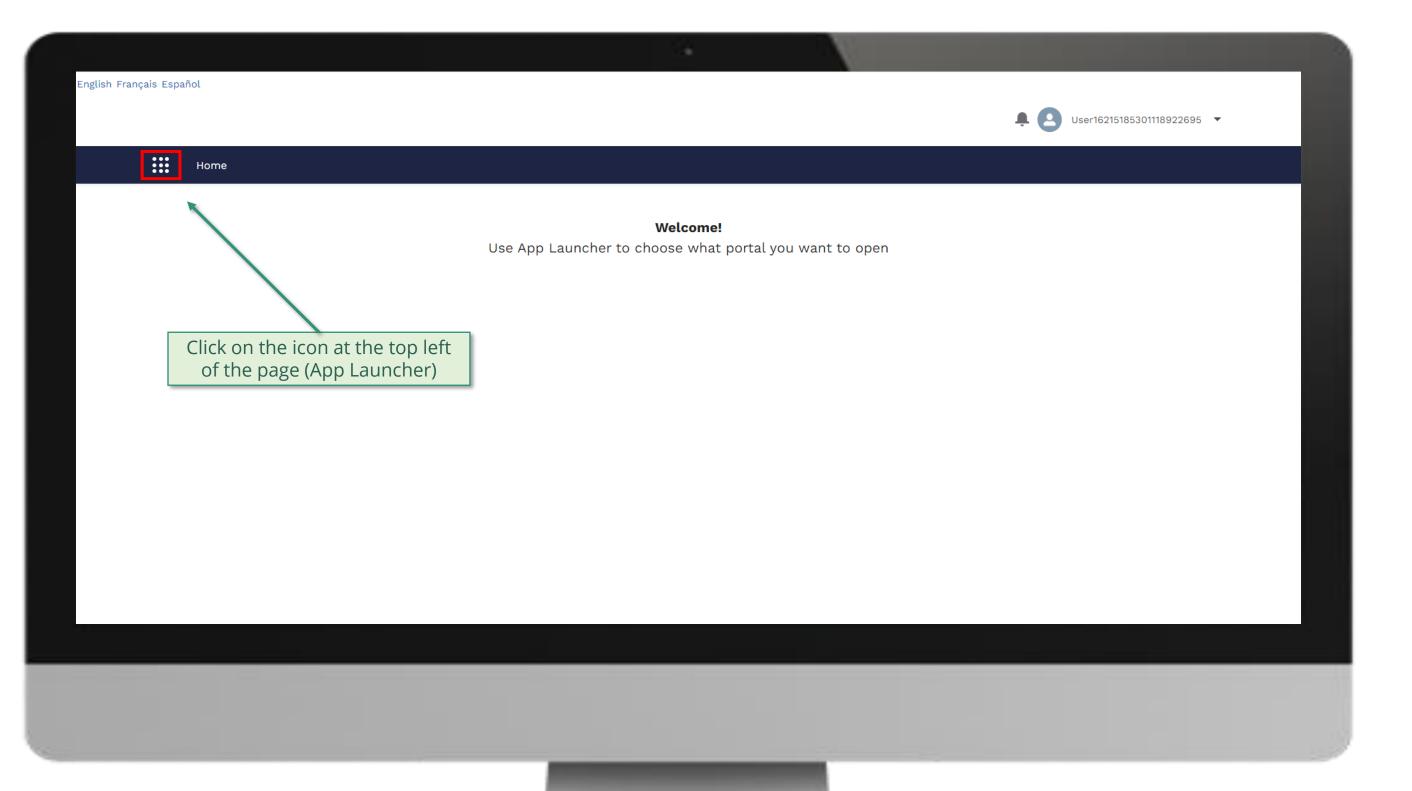




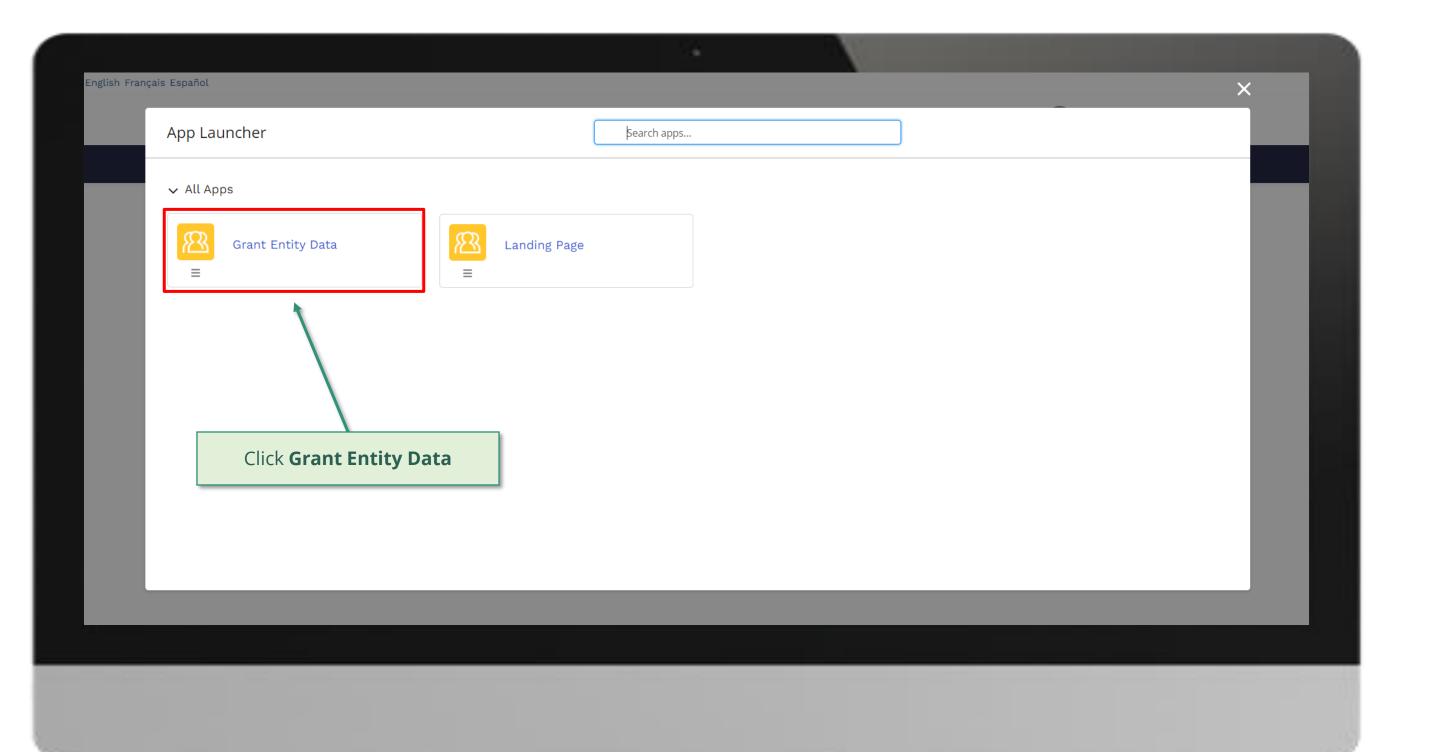
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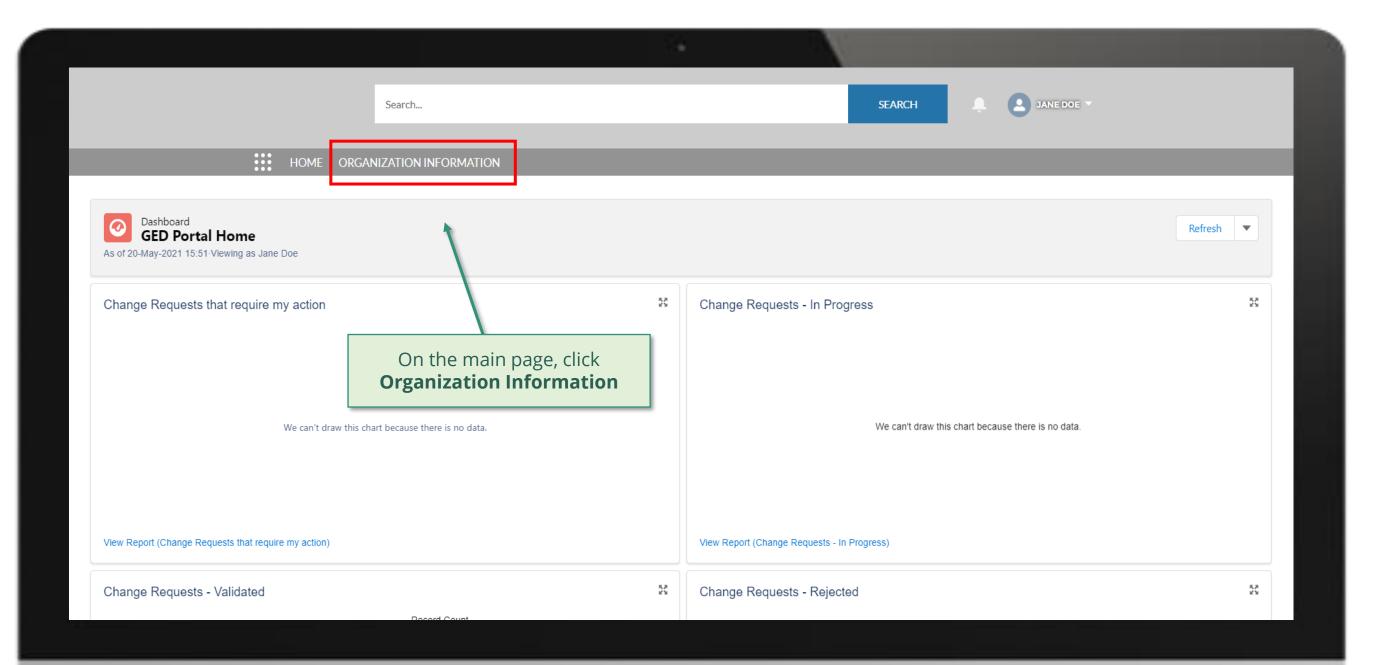




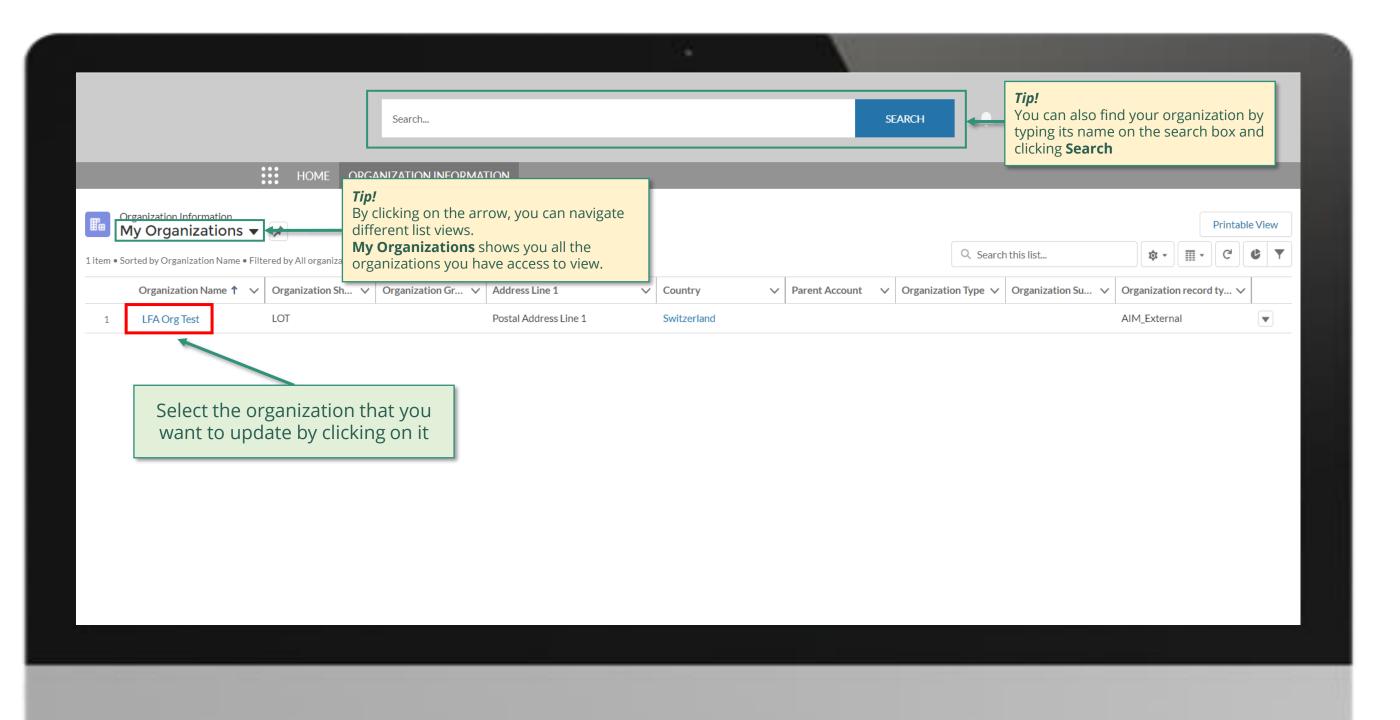




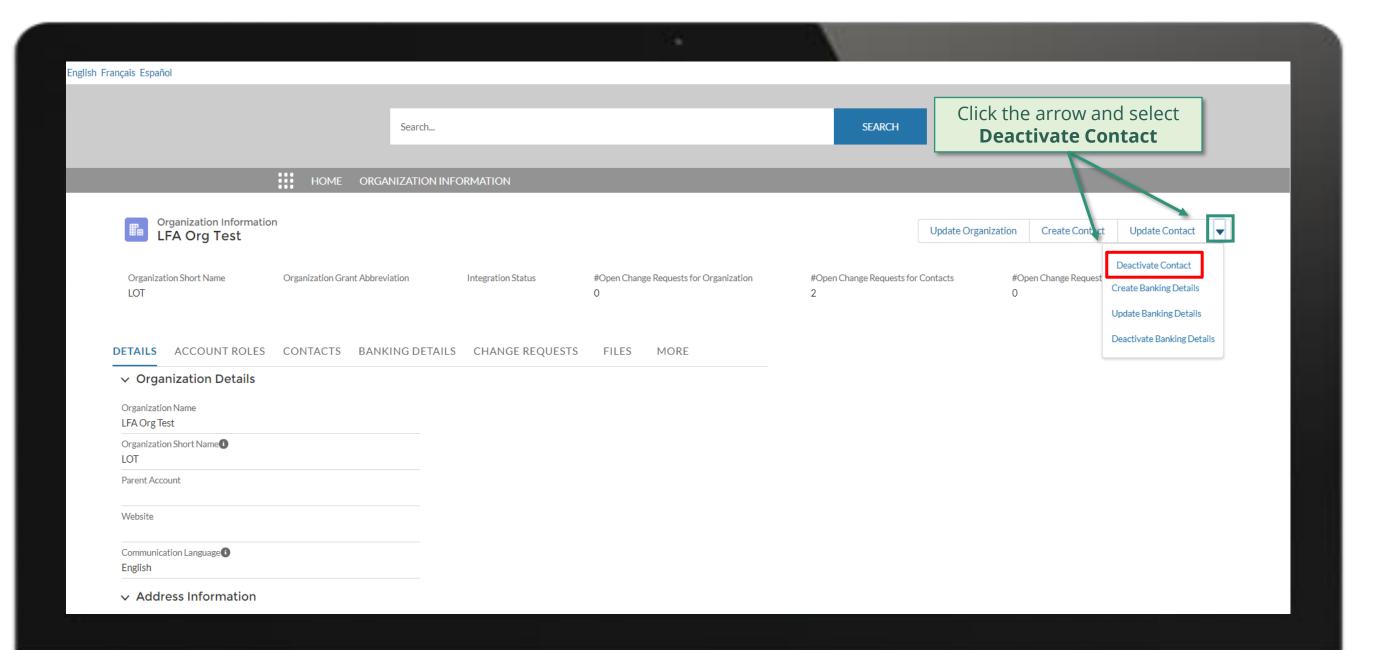




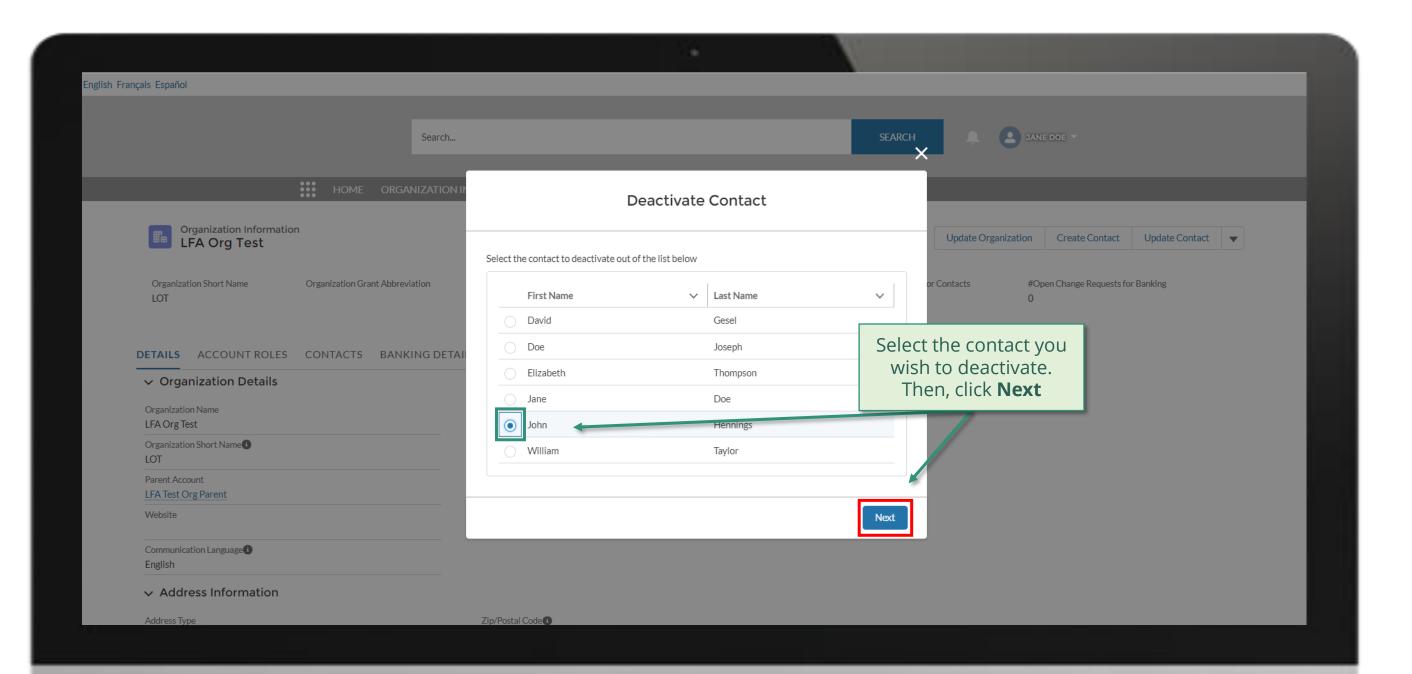




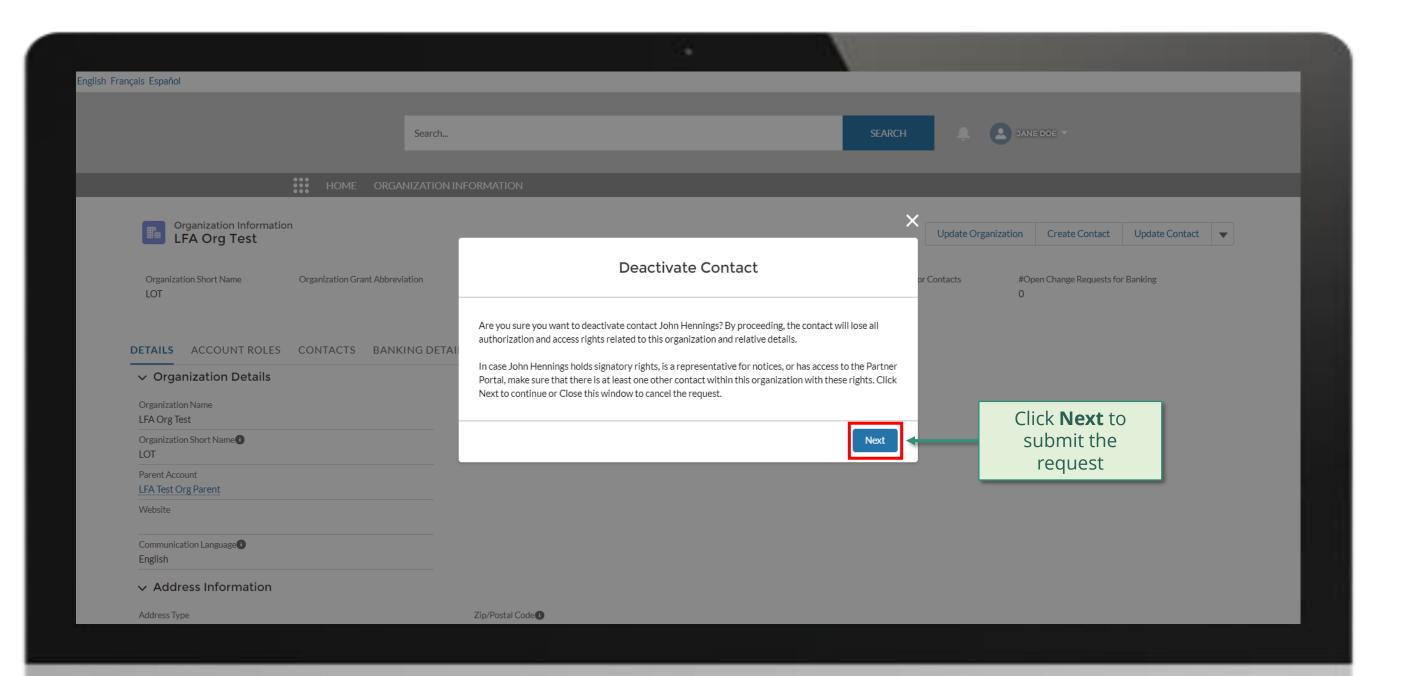




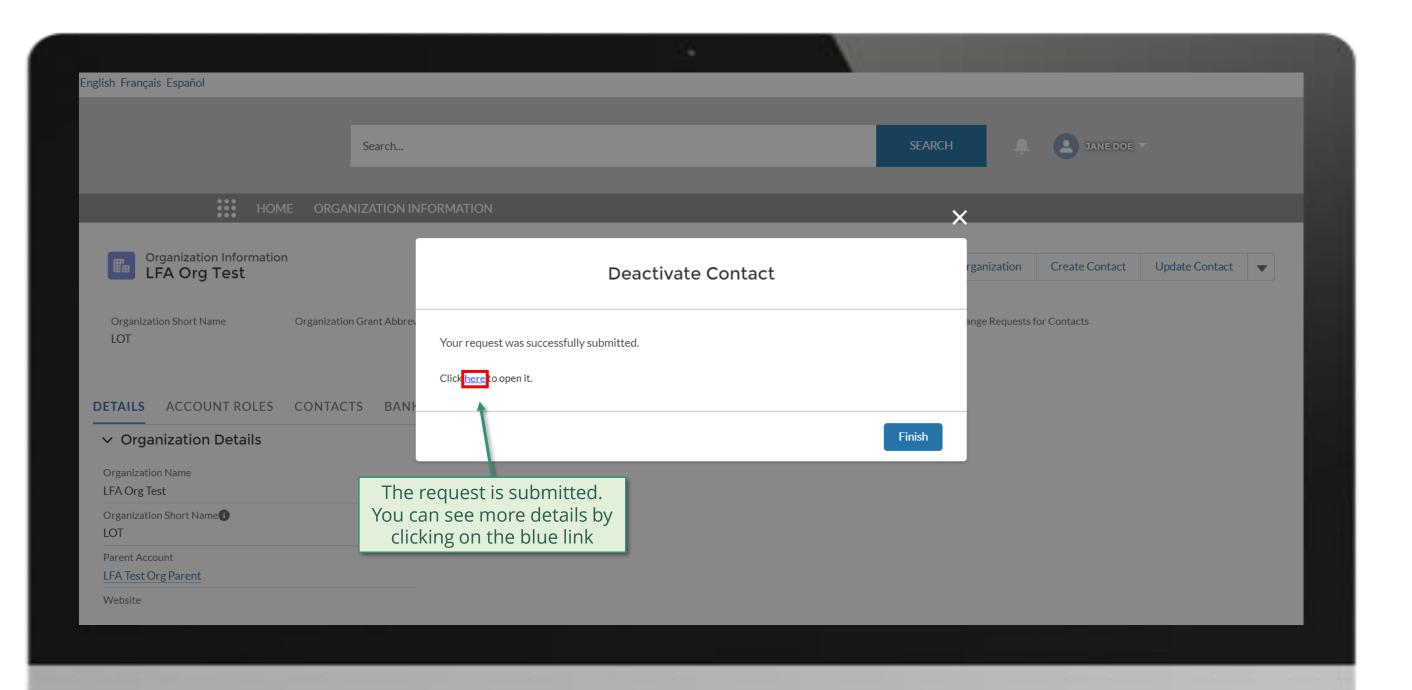








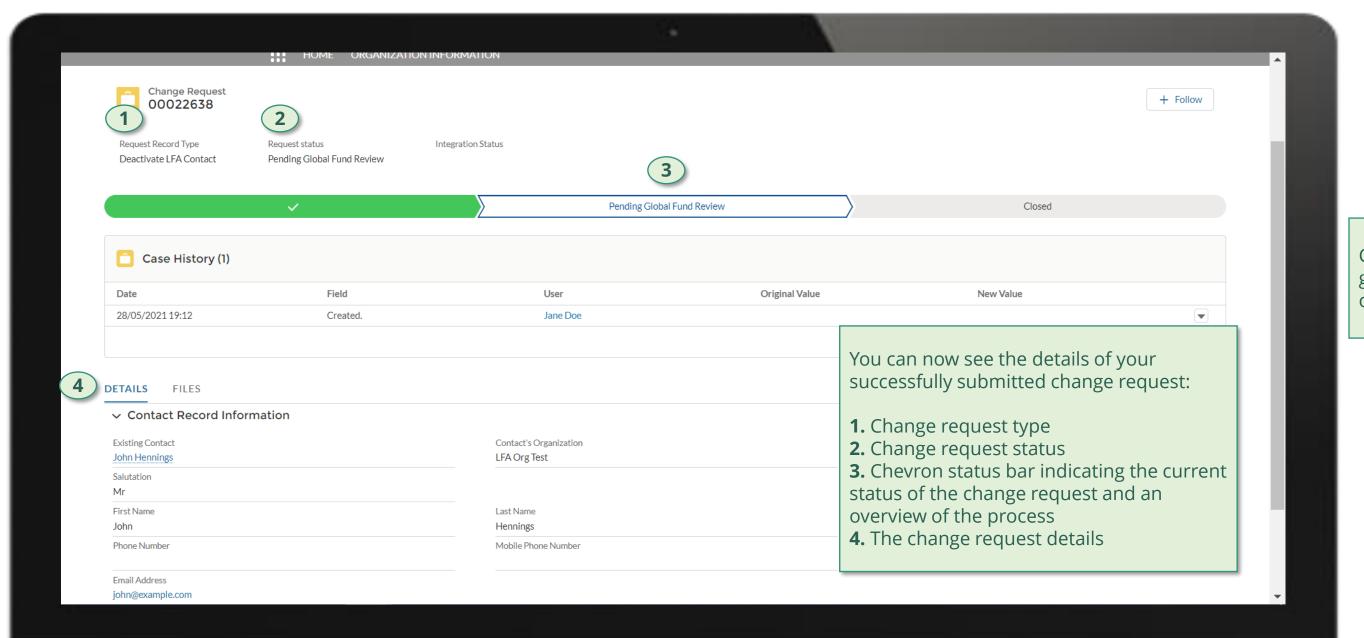






for this request

Step 2j





Click here to go back to the overview page



# **Grant Entity Data (GED) Interactive Manual**

The steps assigned to you are highlighted in the red boxes

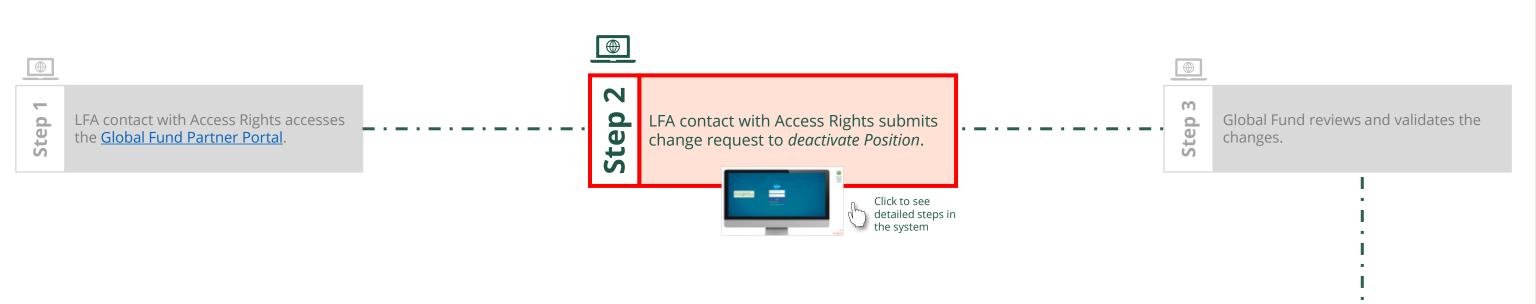
## **LFA** | Deactivate Position



External Stakeholder



Follow the steps below



Updated GED reflected in Global Fund Partner Portal

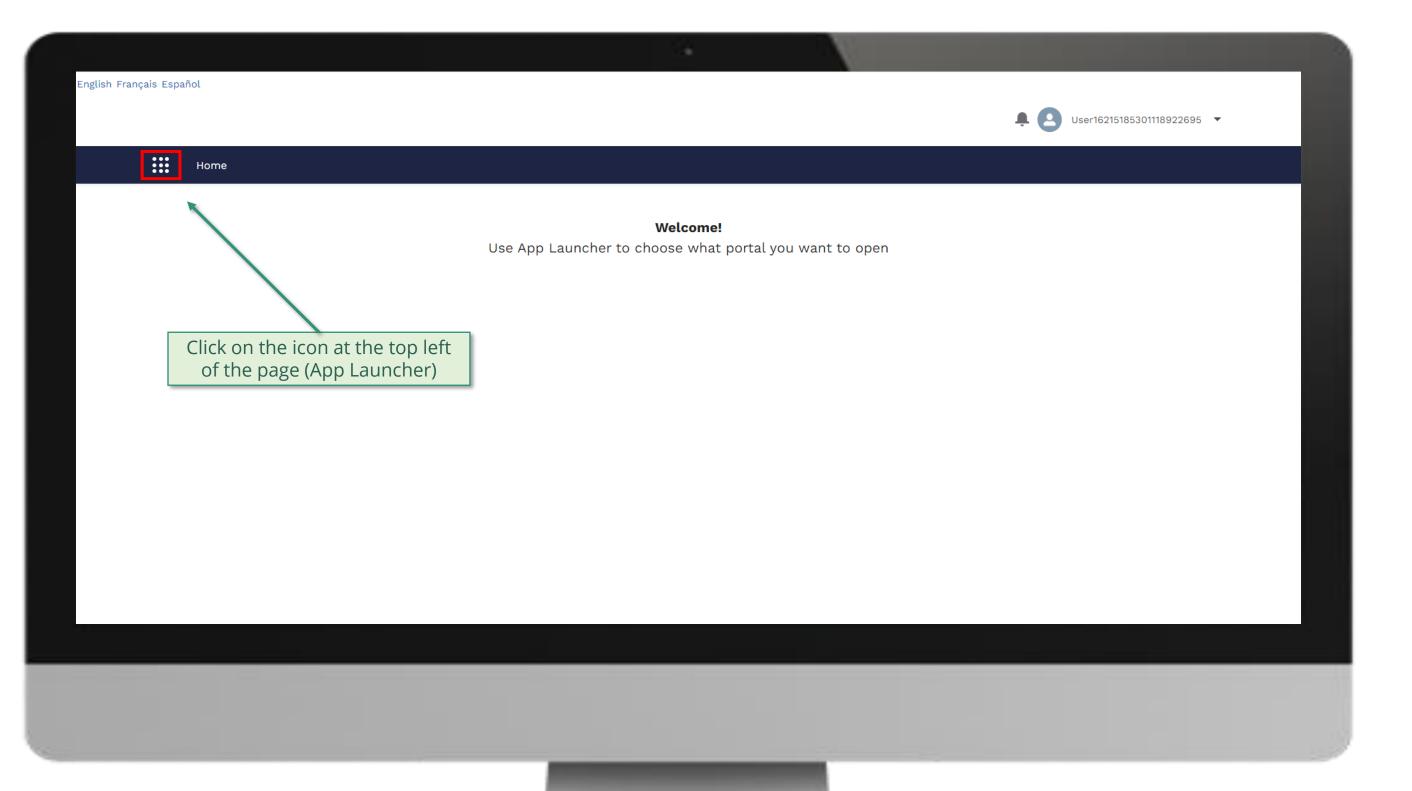




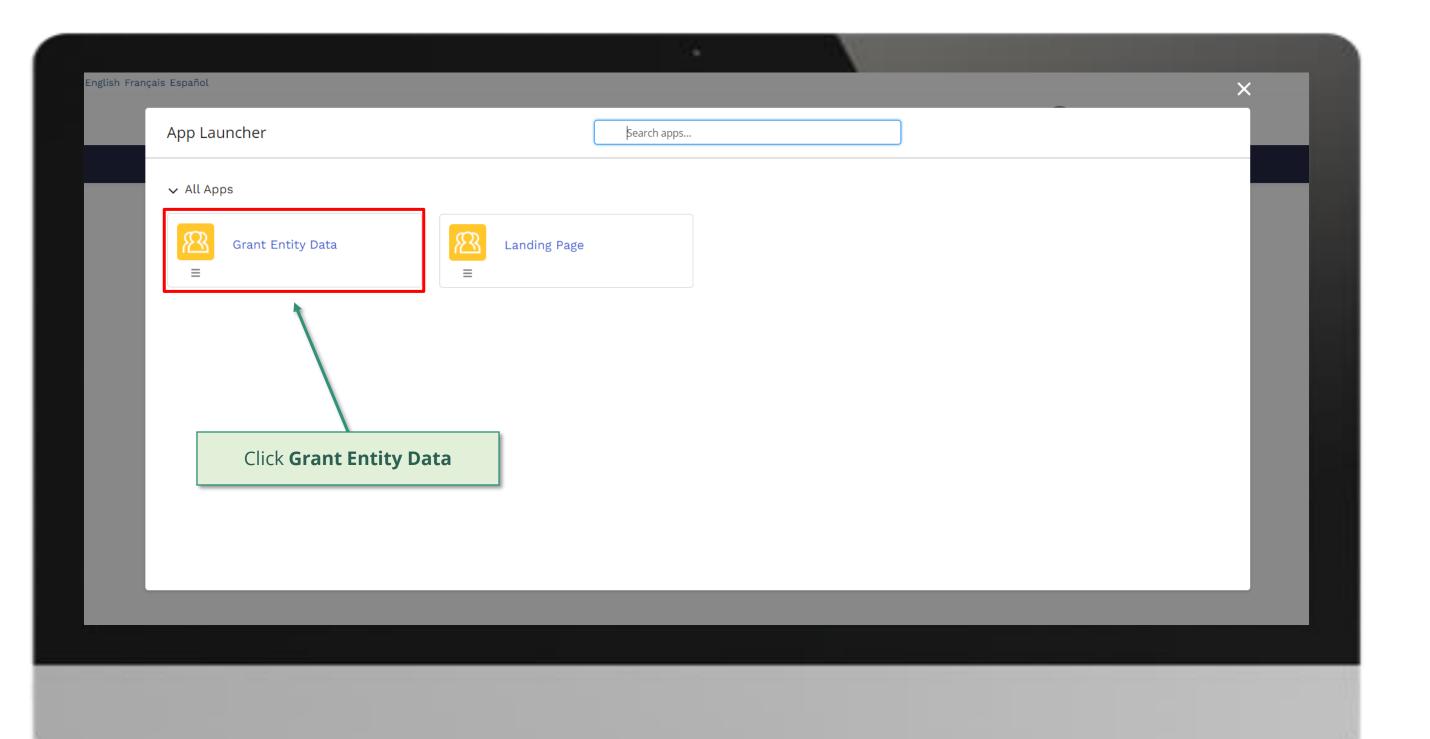
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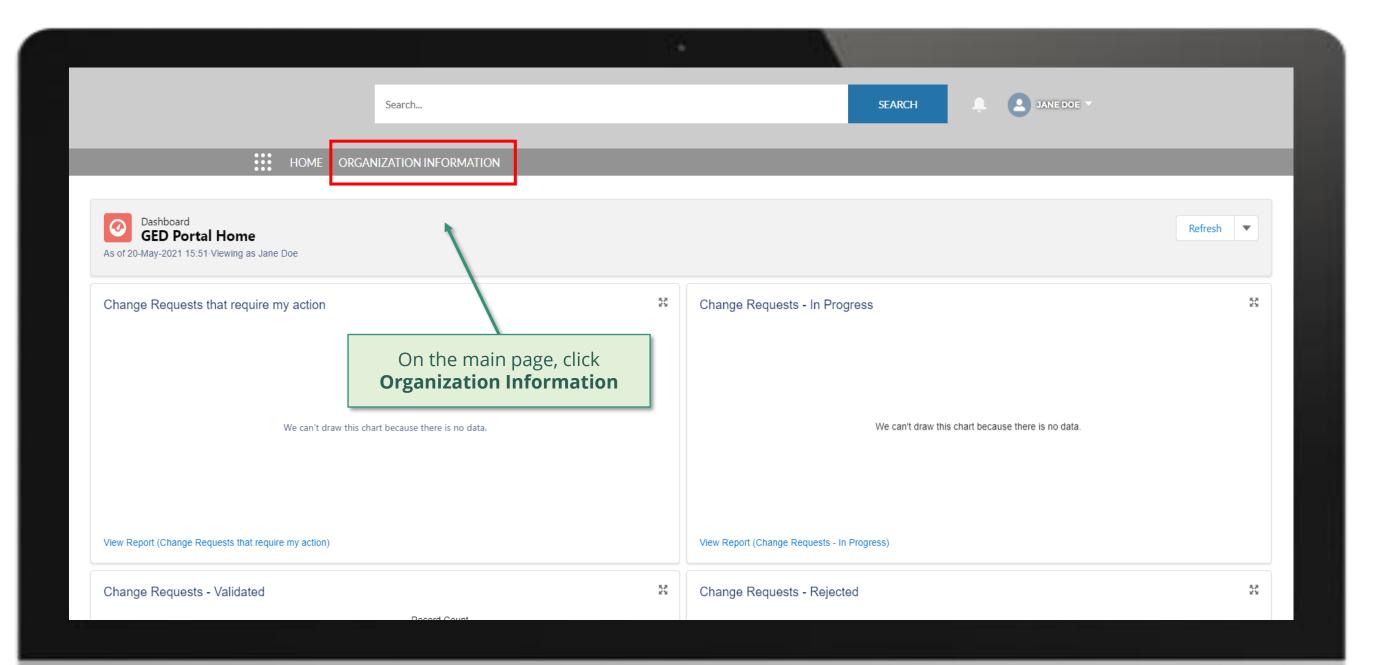




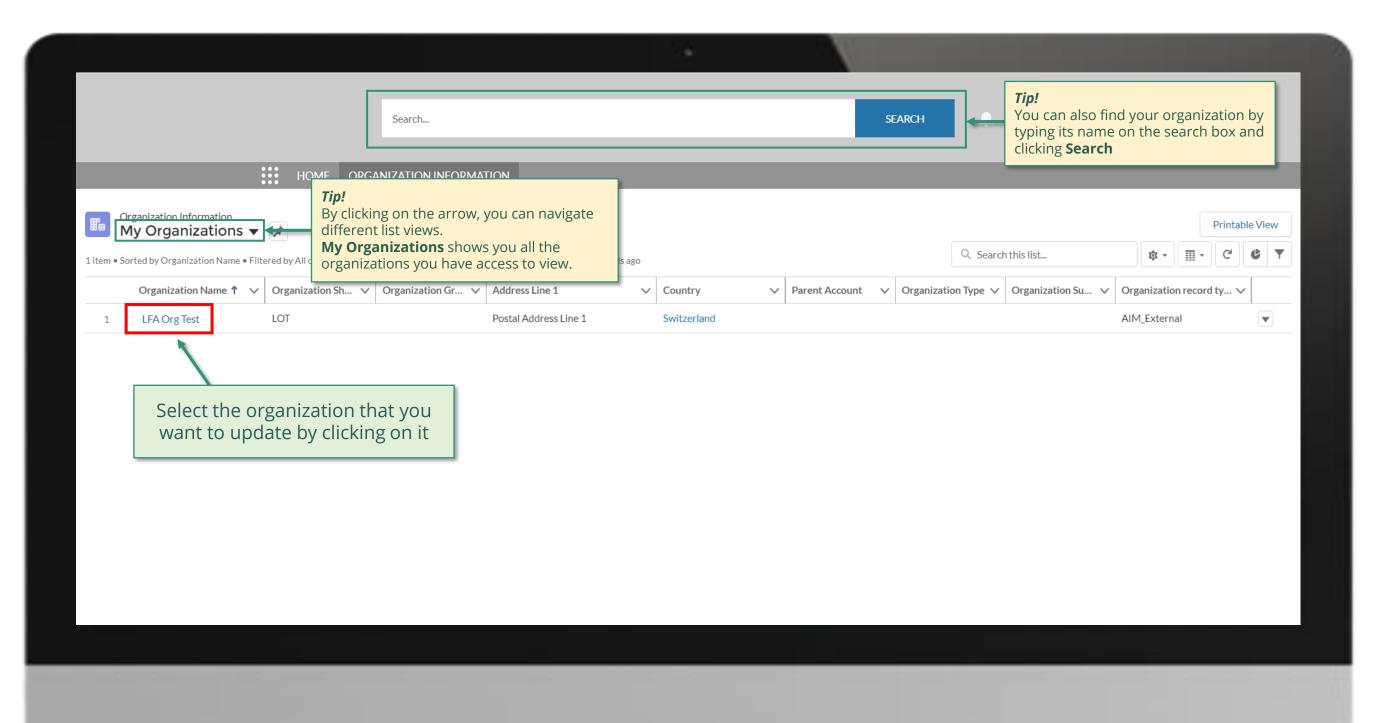




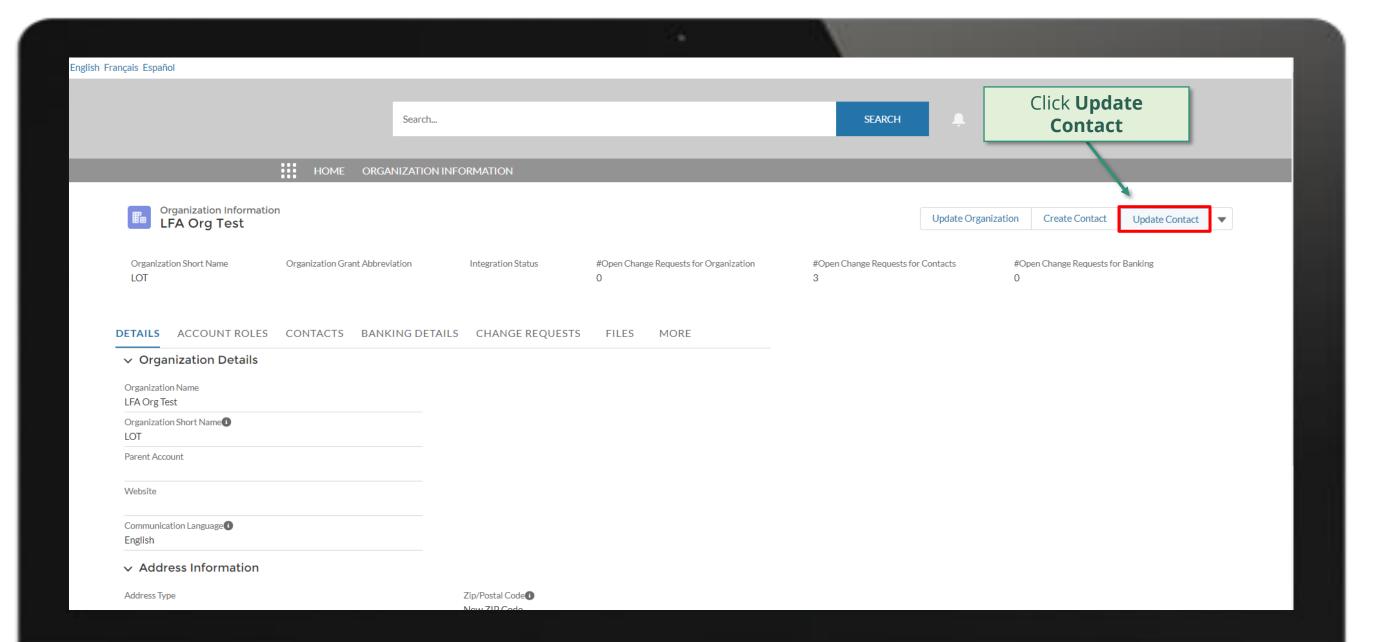




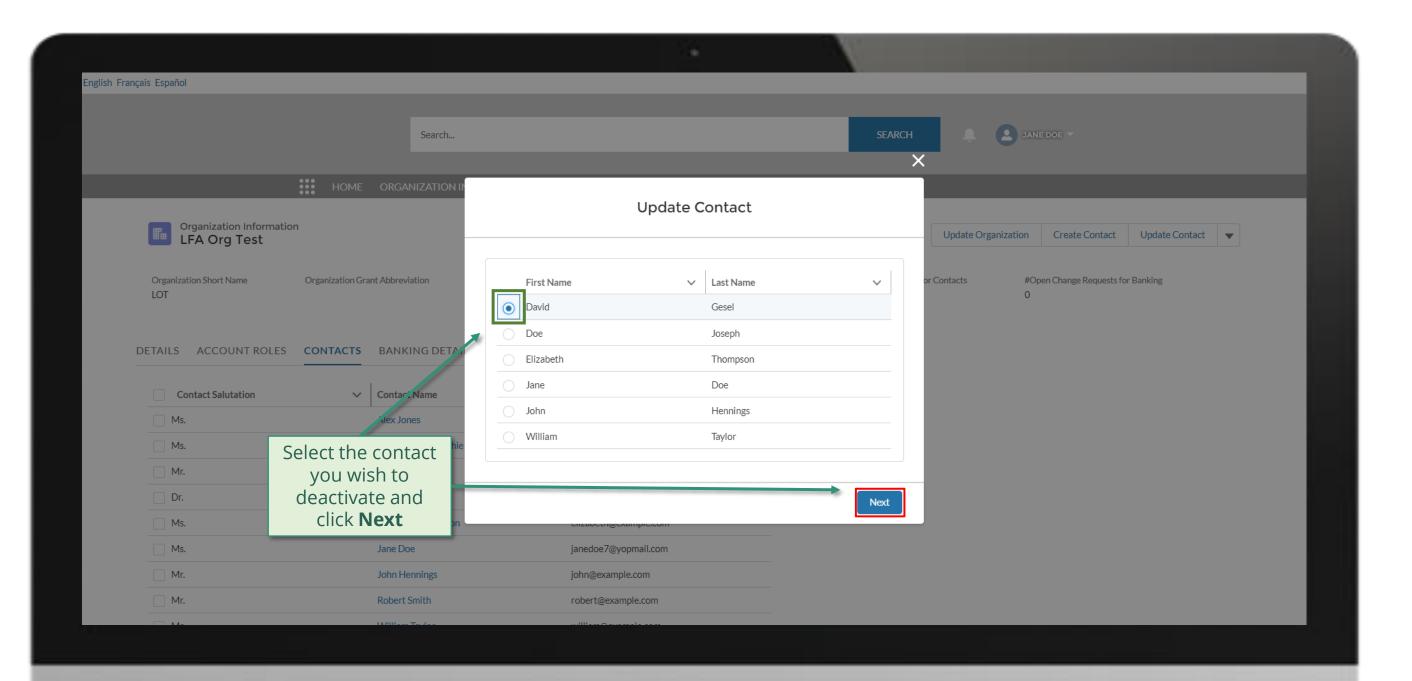




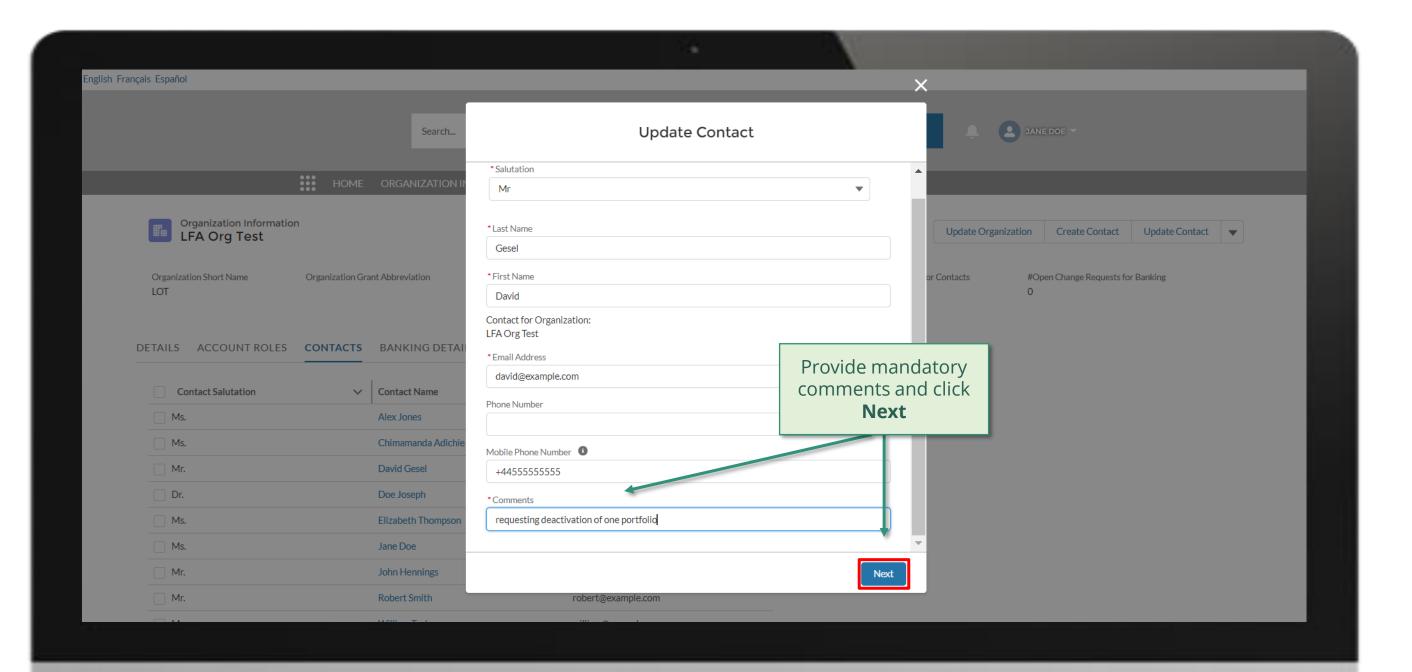




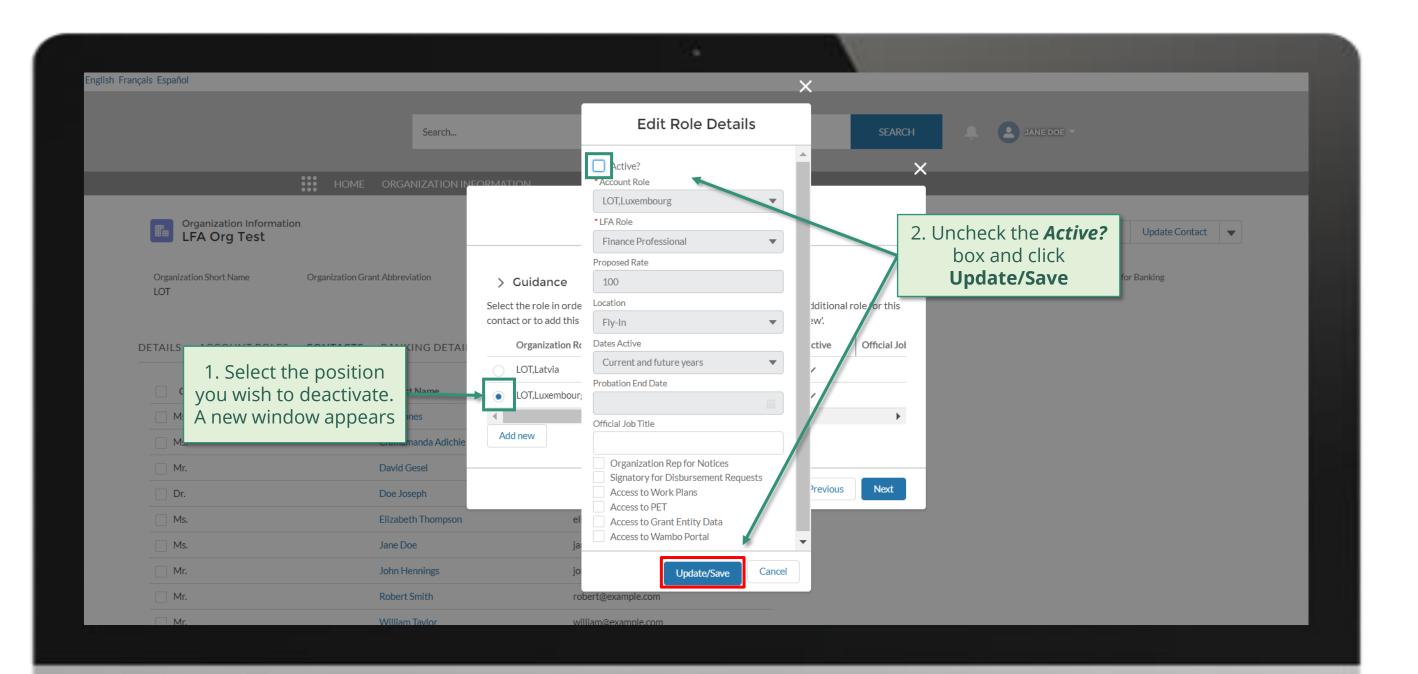




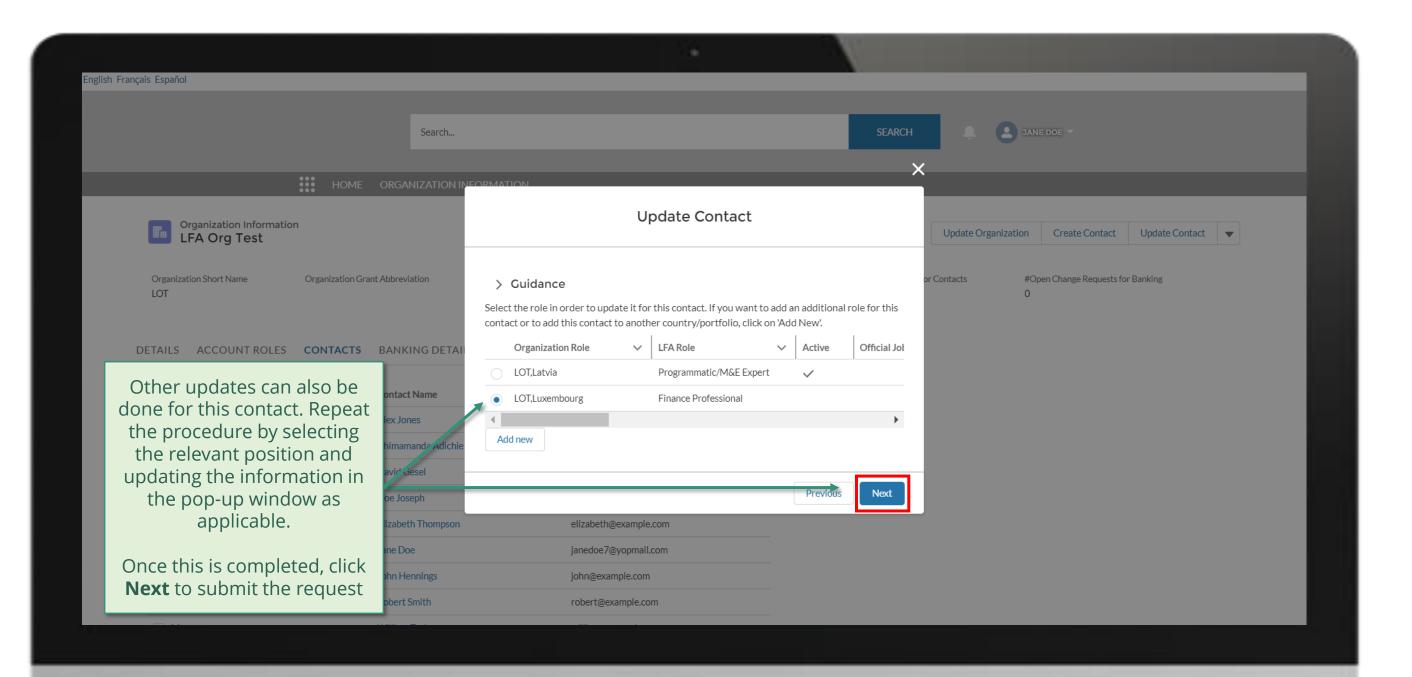




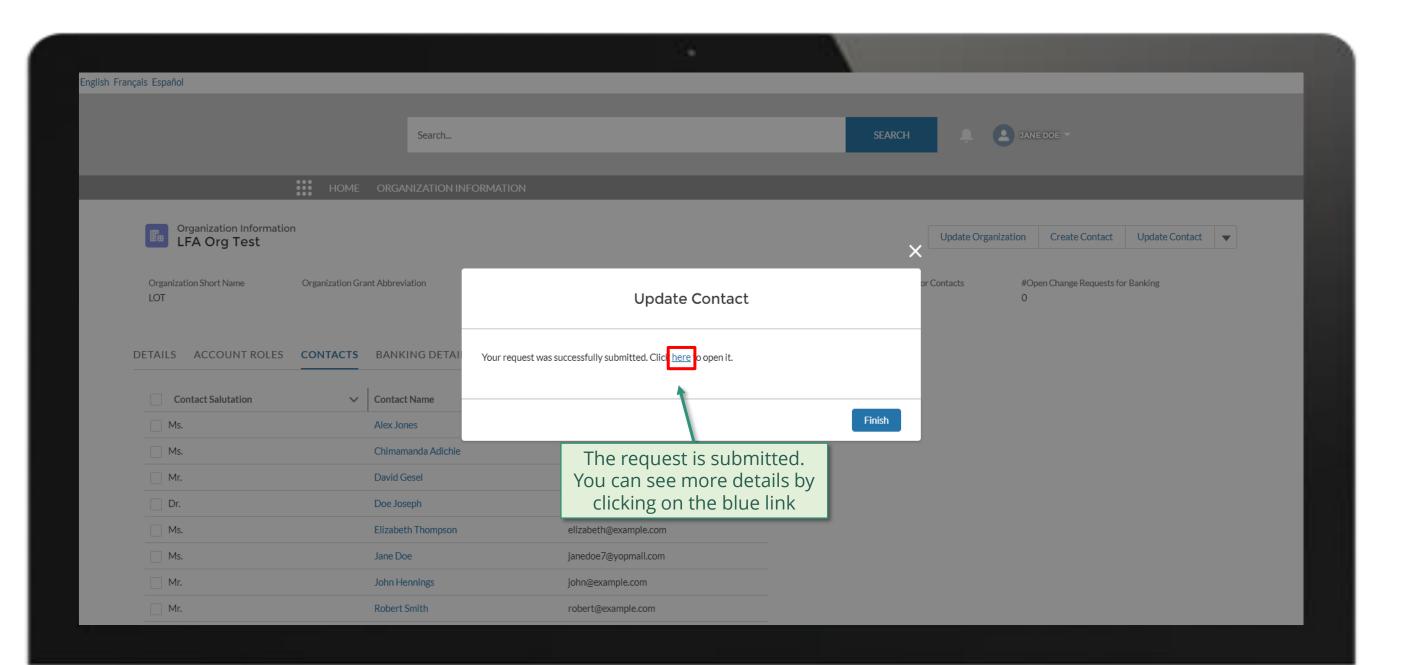




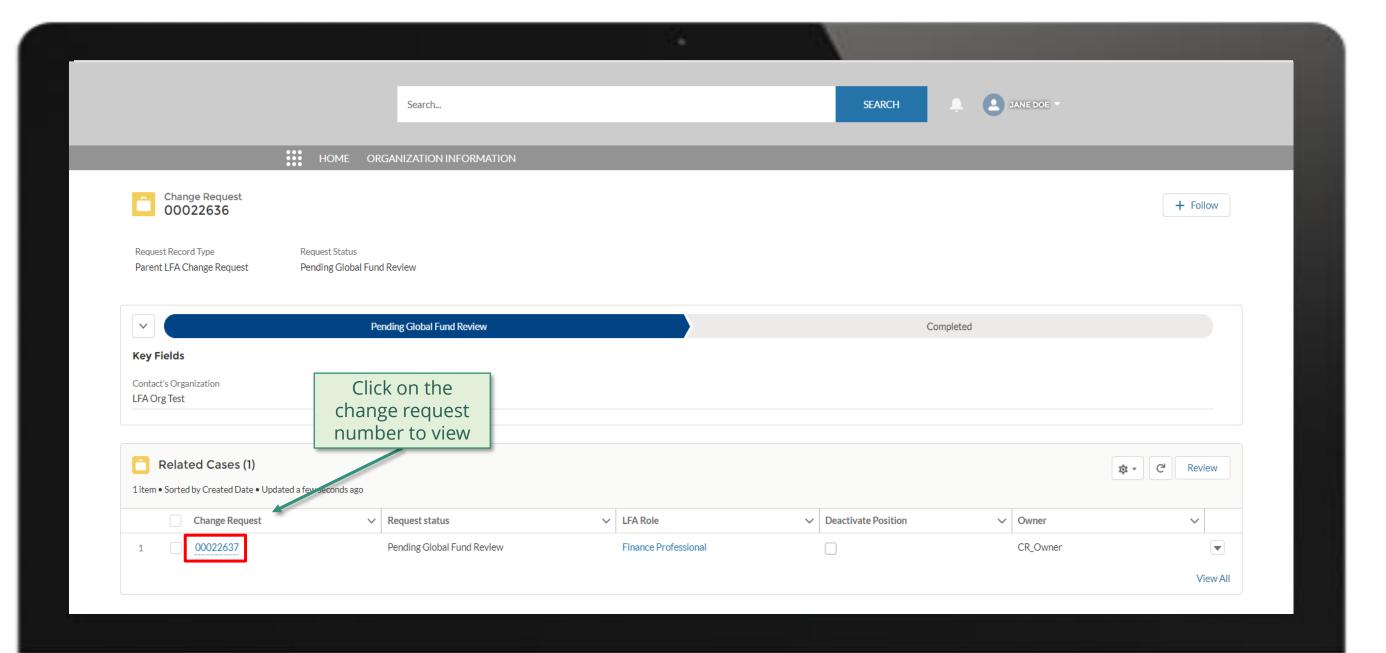




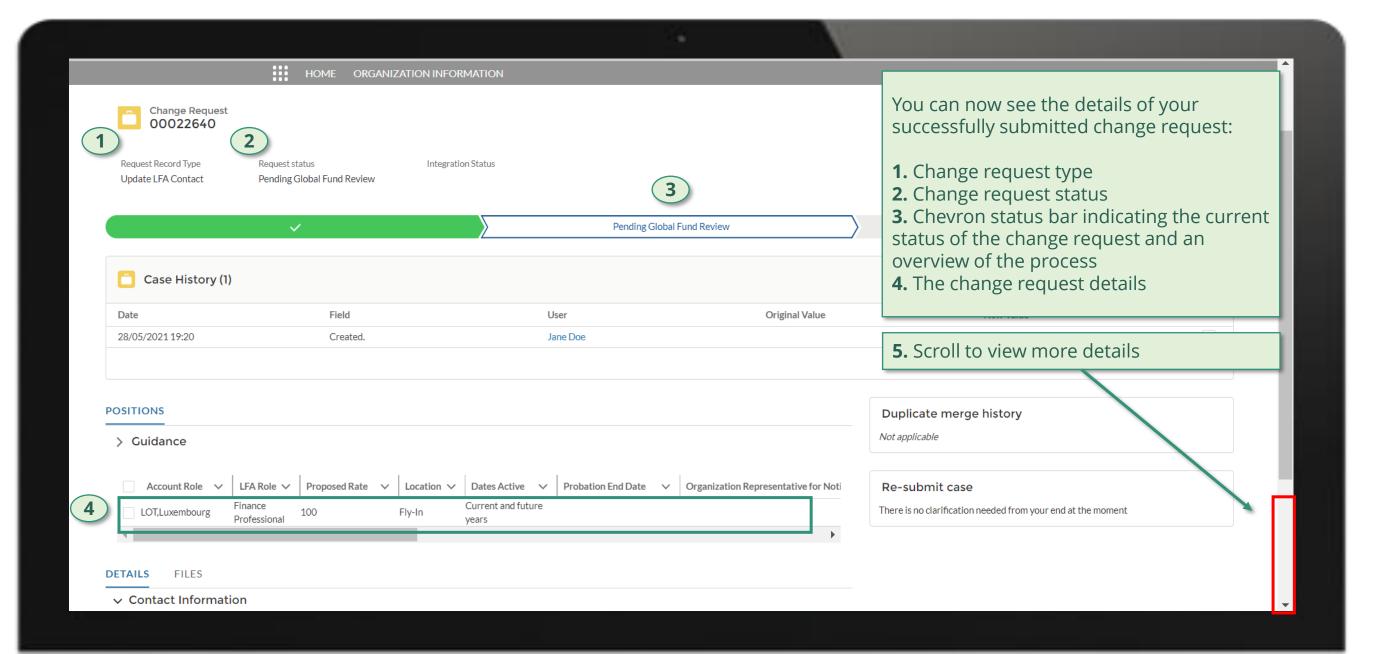




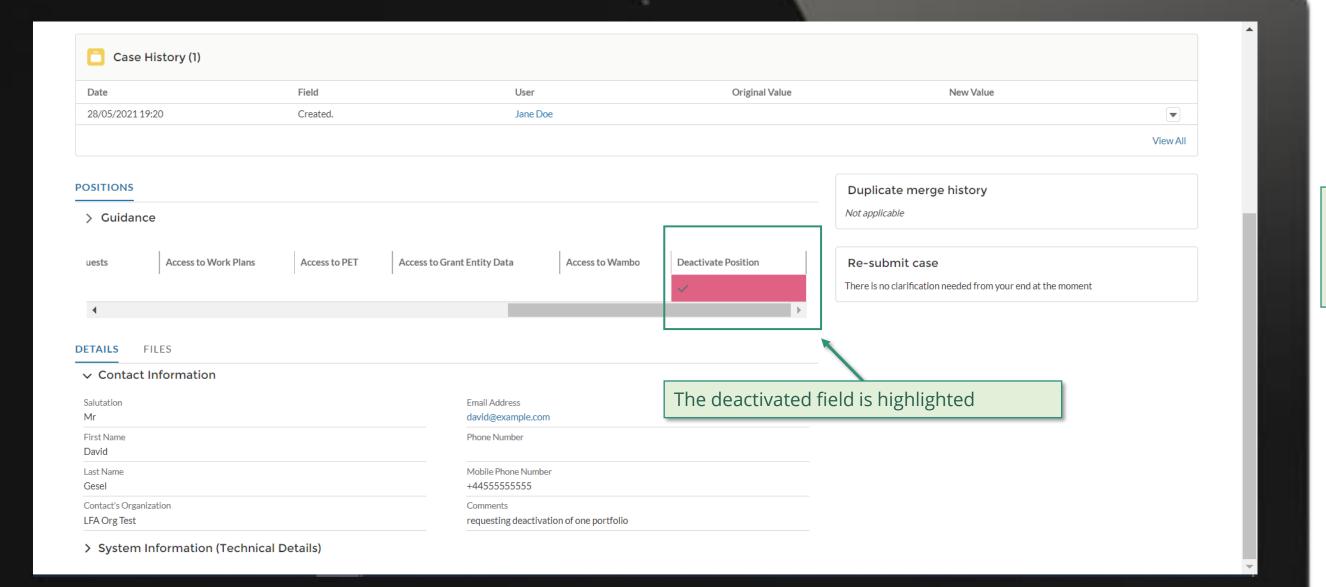














Click here to go back to the overview page



#### Select the type of change request

Select from the below



## Organization information Change Requests



Create New

Organization

... page 232



**Update Organization** 

Information

... page 233



Link Existing Third

Party with PR

... page 234

# **Banking Information Change Requests**



Create/Update
Banking
Information

... page 235



The steps assigned to you are highlighted in the red boxes

#### **Third Party | Create New Organization**



External Stakeholder



Follow the steps below



Third Party emails required information to Country Team, including supporting documents<sup>1</sup>.

2

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

Updated GED reflected in Global Fund Partner Portal





The steps assigned to you are highlighted in the red boxes

#### **Third Party | Update Organization Information**



External Stakeholder



Follow the steps below



Third Party emails required information to Country Team, including supporting documents<sup>1</sup>.

Global Fund reviews and validates the changes.

Updated GED reflected in Global Fund Partner Portal





The steps assigned to you are highlighted in the red boxes

#### **Third Party | Link Existing Third Party With PR**



External Stakeholder



Follow the steps below

·



Step 1

Third Party emails required information to Country Team, including supporting documents<sup>1</sup>.

Step 2

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

Updated GED reflected in Global Fund Partner Portal





The steps assigned to you are highlighted in the red boxes

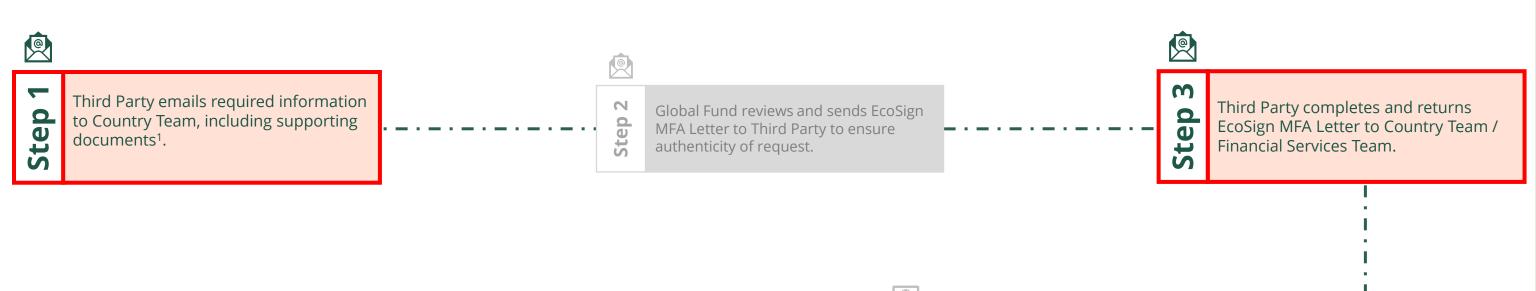
**Third Party | Banking Information: Create / Update** 



Select Another Third Party Change Request

Follow the steps below

Select Another External Stakeholder



Updated GED reflected in Global Fund Partner Portal



Global Fund reviews and creates Third Party banking information in Global Fund systems.