

UNICEF ePD Step by step guide

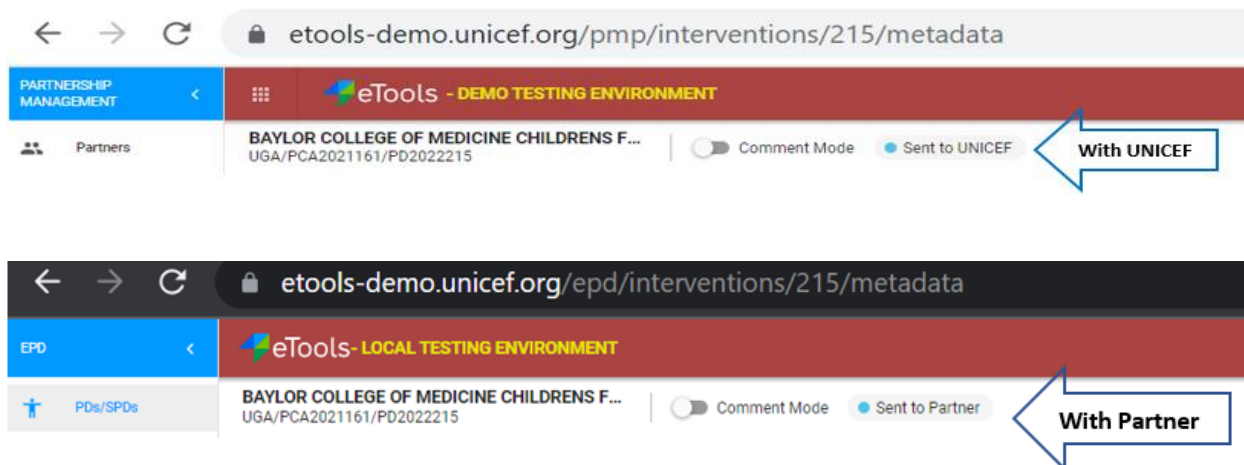
Purpose: To workflow programme document between UNICEF and Partner, adding and resolving comment.

Who: Partner and UNICEF Programme Document Focal Points

When: After the ePD has been initiated by UNICEF focal point and sent to partner.

Why: To jointly develop the Programme document with online feedback.

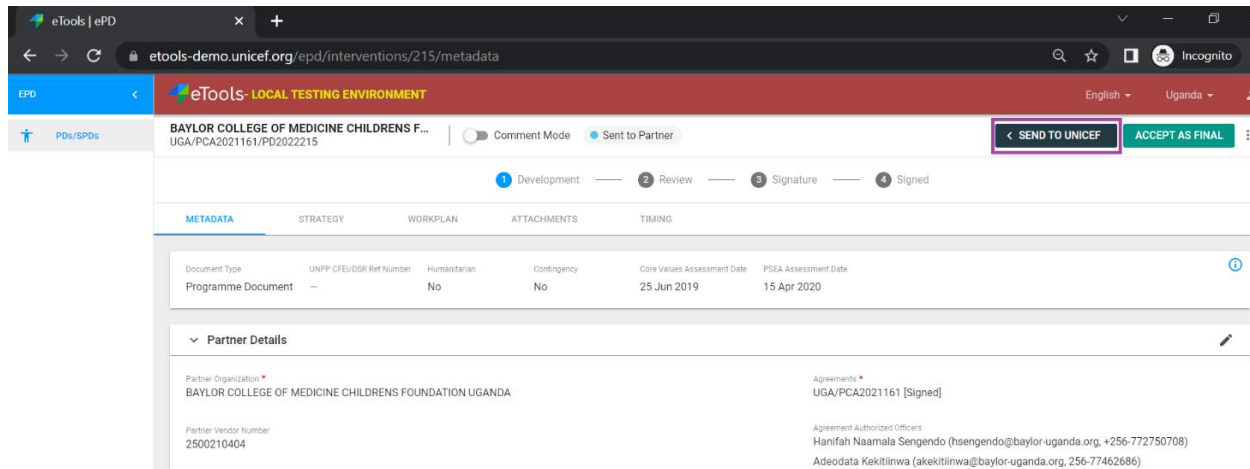
Only the focal points included in the metadata tab can edit and send the ePD to UNICEF or the Partner. Only one party, UNICEF or the Partner, can edit the ePD at a time. Check where the PD is currently work flowed to know who can edit it.



Step 1: Once the partner has completed all the relevant entries, click “**send to UNICEF**” icon

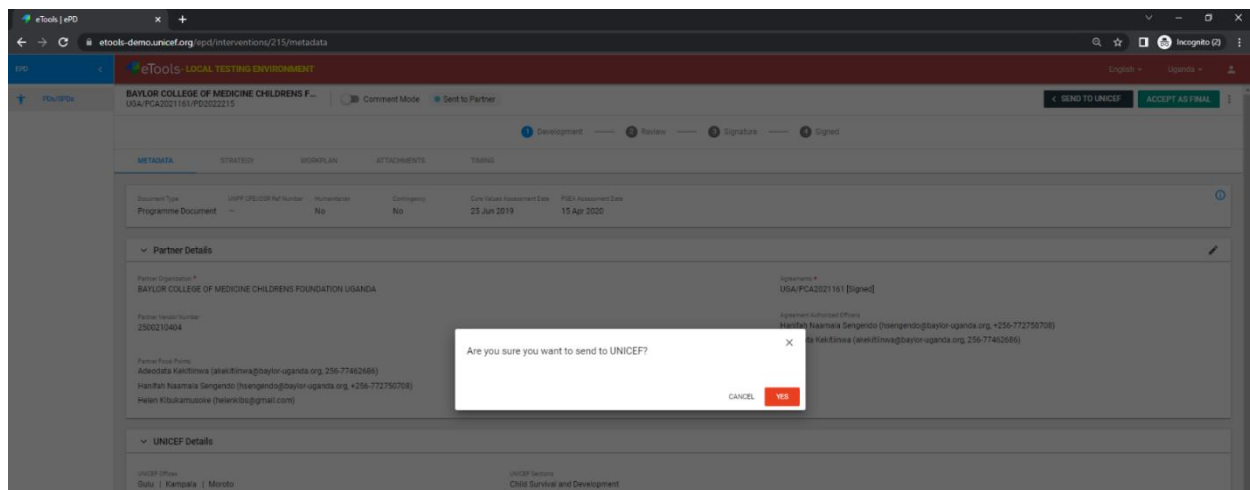
This action workflows the PD to the UNICEF focal points for further action.

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The screenshot shows the eTools interface for a Programme Document (PD) titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F... UGA/PCA2021161/PD2022215". The workflow status is "Sent to Partner". A red box highlights the "SEND TO UNICEF" button. The interface includes a progress bar with steps: 1. Development, 2. Review, 3. Signature, and 4. Signed. Below the progress bar, there are tabs for METADATA, STRATEGY, WORKPLAN, ATTACHMENTS, and TIMING. The METADATA tab is active, showing a table with columns: Document Type, UNFP CFEV/DSR Ref Number, Humanitarian, Contingency, Core Values Assessment Date, and PSEA Assessment Date. The table contains one row: Programme Document, --, No, No, 25 Jun 2019, 15 Apr 2020. Below the table, there is a "Partner Details" section with fields for Partner Organization (BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA), Partner Vendor Number (2500210404), Agreements (UGA/PCA2021161 [Signed]), and Agreement Authorized Officers (Hanifah Naamala Sengendo, Adeodata Kekitlinwa).

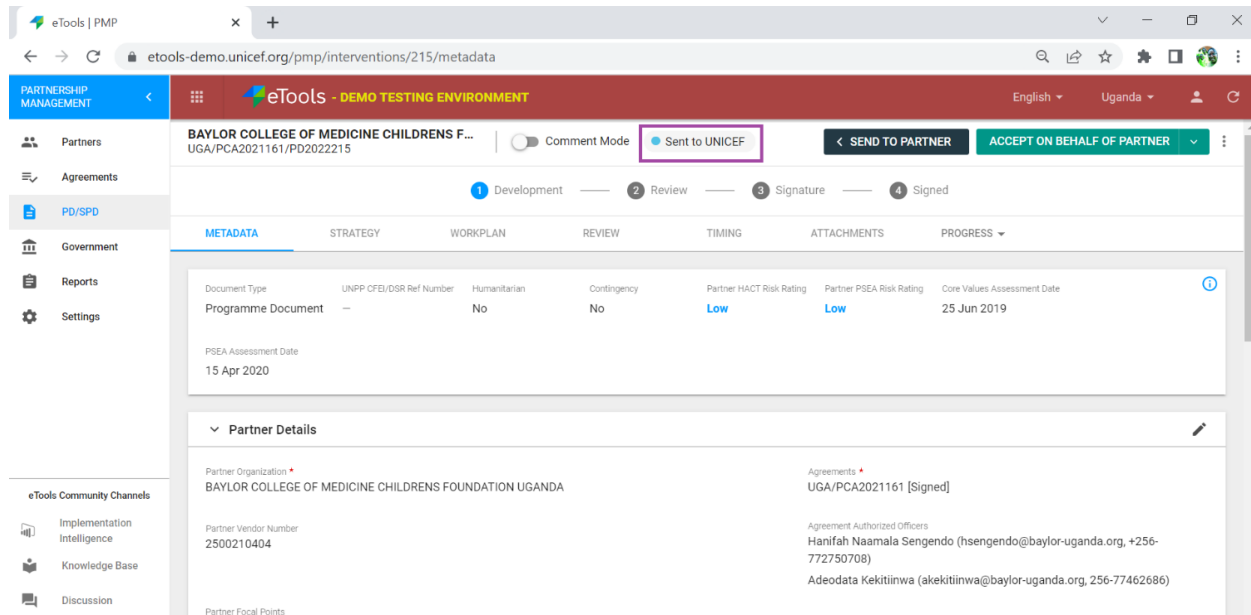
Step 2: In the pop screen, click yes to send the PD to UNICEF



The screenshot shows the same eTools interface as above, but with a confirmation dialog box overlaid. The dialog box contains the text "Are you sure you want to send to UNICEF?" and two buttons: "CANCEL" and "YES". The "SEND TO UNICEF" button in the background is now greyed out.

The workflow status of the document will move from **Sent to Partner** to **Sent to UNICEF**.


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The screenshot shows the eTools interface for a document titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F... UGA/PCA2021161/PD2022215". The document is in "Sent to UNICEF" mode, indicated by a blue dot and a box around the "Sent to UNICEF" button. The document is in the "Development" stage. The metadata table shows the following details:

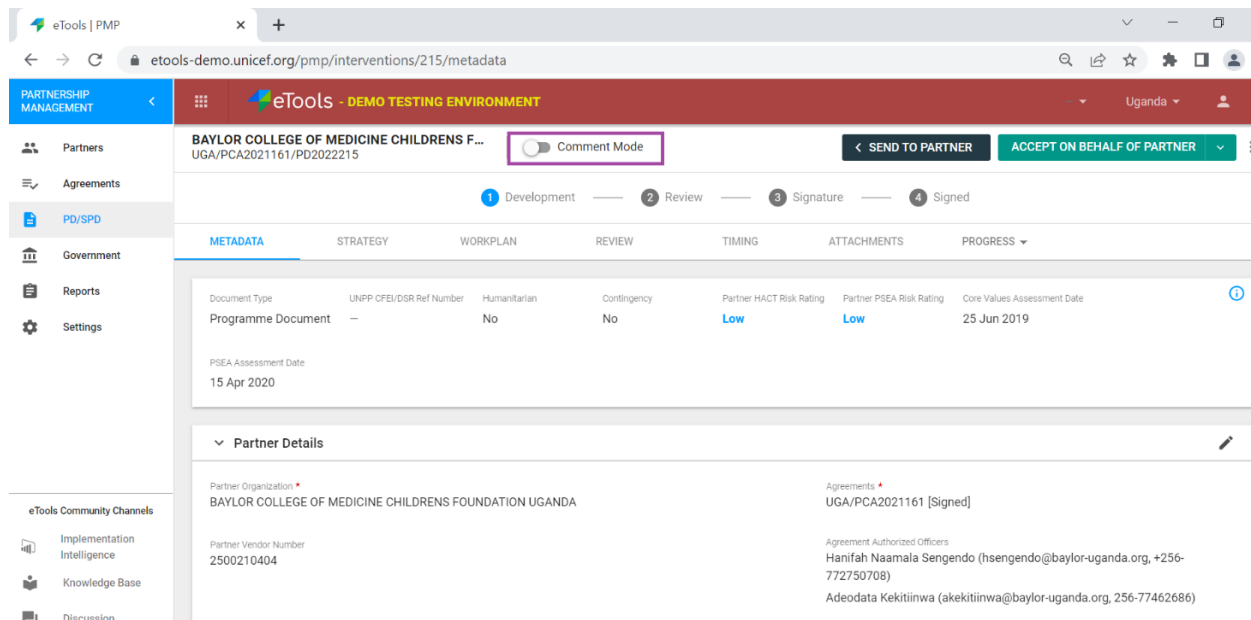
Document Type	UNPP CFEI/DSR Ref Number	Humanitarian	Contingency	Partner HACT Risk Rating	Partner PSEA Risk Rating	Core Values Assessment Date
Programme Document	-	No	No	Low	Low	25 Jun 2019

The PSEA Assessment Date is 15 Apr 2020. The Partner Details section shows the Partner Organization as BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA, with a Vendor Number of 2500210404. The Agreement is UGA/PCA2021161 [Signed], and the Agreement Authorized Officers are Hanifah Naamala Sengendo (hsengendo@baylor-uganda.org, +256-772750708) and Adeodata Kekitiinwa (akekitiinwa@baylor-uganda.org, 256-77462686).

 **Knowledge:** The document cannot be edited by the partner when it is sent to UNICEF. If edits need to be made, request the UNICEF focal point to send back the document to the partner.

Add comments, review, reply and resolve comments in the PD.

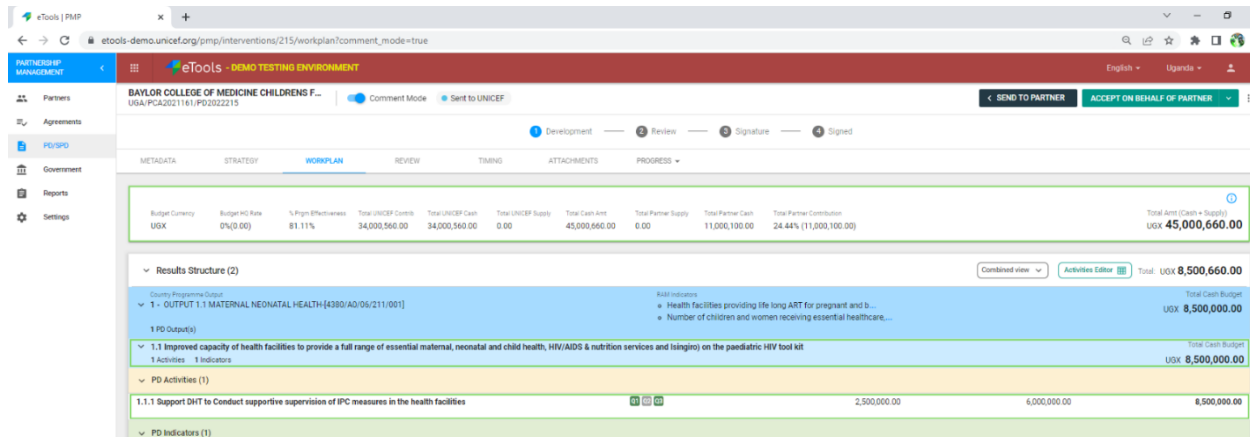
Step 3: Click the **Comment mode** icon to open the PD in comment mode.



The screenshot shows the eTools interface with the document in "Comment Mode", indicated by a grey dot and a box around the "Comment Mode" button. The document is in the "Review" stage. The metadata table is the same as in the previous screenshot. The Partner Details section is also the same.

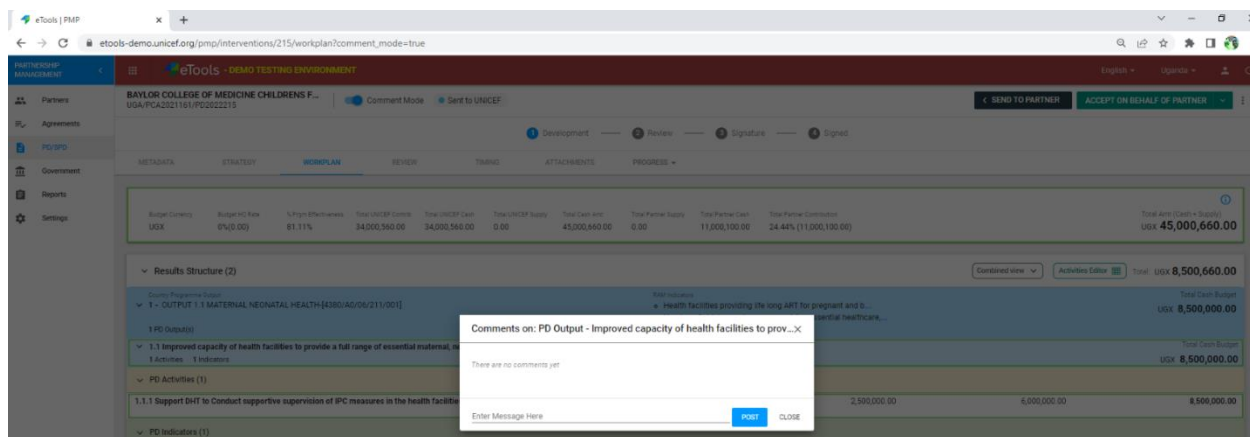
Step 4: All relevant PD sections will be highlighted in green. Navigate to the relevant section to add a comment. Click the section to add a comment

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Budget Currency	Budget FC Rate	% from Effectiveness	Total UNICEF Commit	Total UNICEF Cash	Total UNICEF Supply	Total Cash Amt	Total Partner Supply	Total Partner Cash	Total Partner Commitment	Total Am. (Cash + Supply)
USD	0%	81.11%	34,000,560.00	34,000,560.00	0.00	45,000,660.00	0.00	11,000,100.00	24.44% (11,000,100.00)	USD 45,000,660.00

Step 5: Add a comment to the section and click post.



Step 6: The comments mode highlights all the sections in green or red. The red highlights show that comments have been added to the section and include a number to show the number of comments made. To reply to /resolve the comment, navigate to section, and click the red highlighted text to view the comment.

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The screenshot shows the eTools interface for a project titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F...". The interface displays a list of indicators with their respective values and targets. The indicator "% Number and proportion of districts with evidence of data use in decision making and planning for the adolescent HIV program" is highlighted with a red border, indicating it is the focus of the current step.

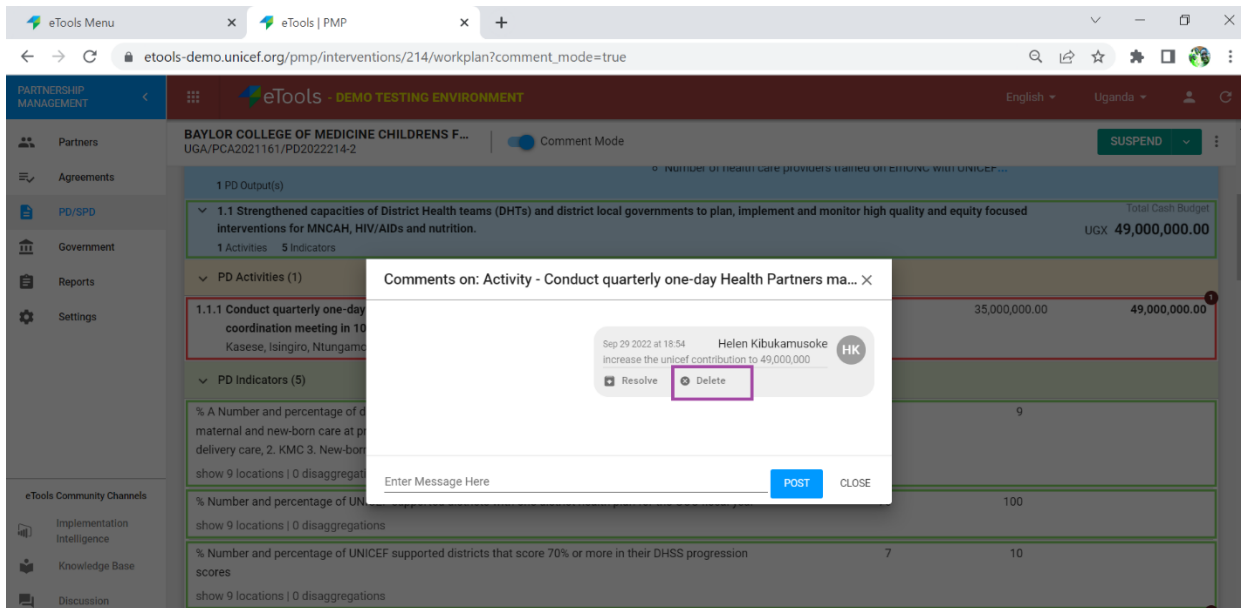
Indicator	Value	Target
% A Number and percentage of districts implementing at least 3 interventions to improve the quality of maternal and new-born care at primary healthcare level in UNICEF supported districts (1. Labour and delivery care, 2. KMC 3. New-born Resuscitation)	9	9
% Number and percentage of UNICEF supported districts with one district health plan for the GOU fiscal year	70	100
% Number and percentage of UNICEF supported districts that score 70% or more in their DHSS progression scores	7	10
% Number and proportion of districts with evidence of data use in decision making and planning for the adolescent HIV program	0	10
% Proportion of districts with functional multisectoral Nutrition Coordination committees.	0	4

Step 7: In the popup window, add a response in the section “enter message here” and click **post**.

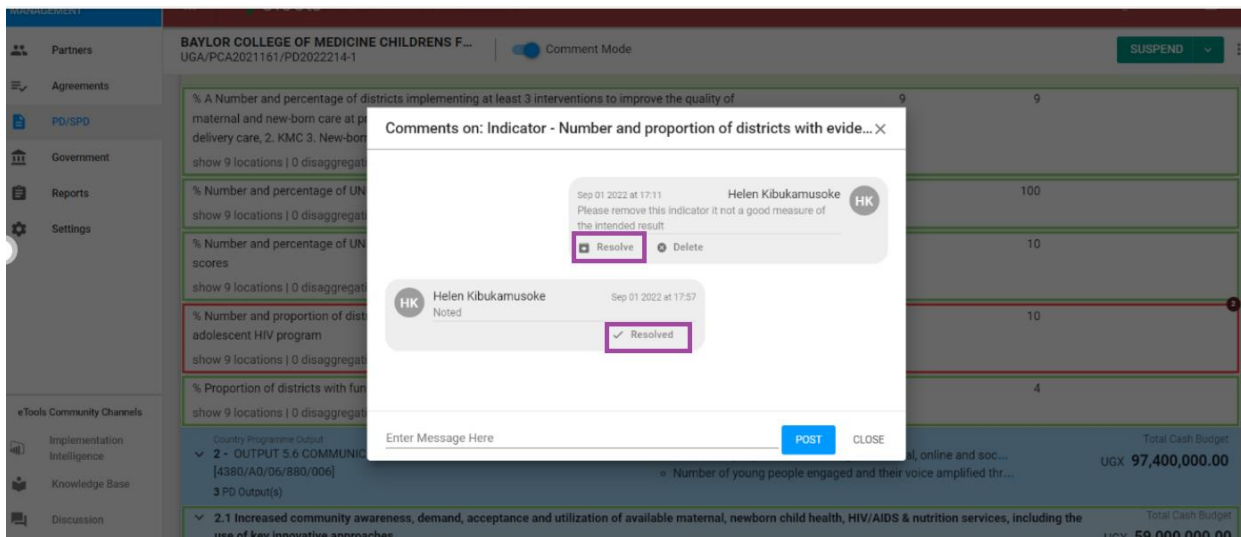
The screenshot shows the eTools interface with a comment popup window open. The comment text is "Please remove this indicator it not a good measure of the intended result". The user "Helen Kibukamusoke" has added a response: "Noted". The "POST" button is highlighted, indicating the next step in the process.

Step 8: To delete a comment, go to the comment and click delete. Note that only the creator of the comment can delete it.

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Step 9: To resolve a comment, go to the comment and click resolve. The comment status will change to resolved



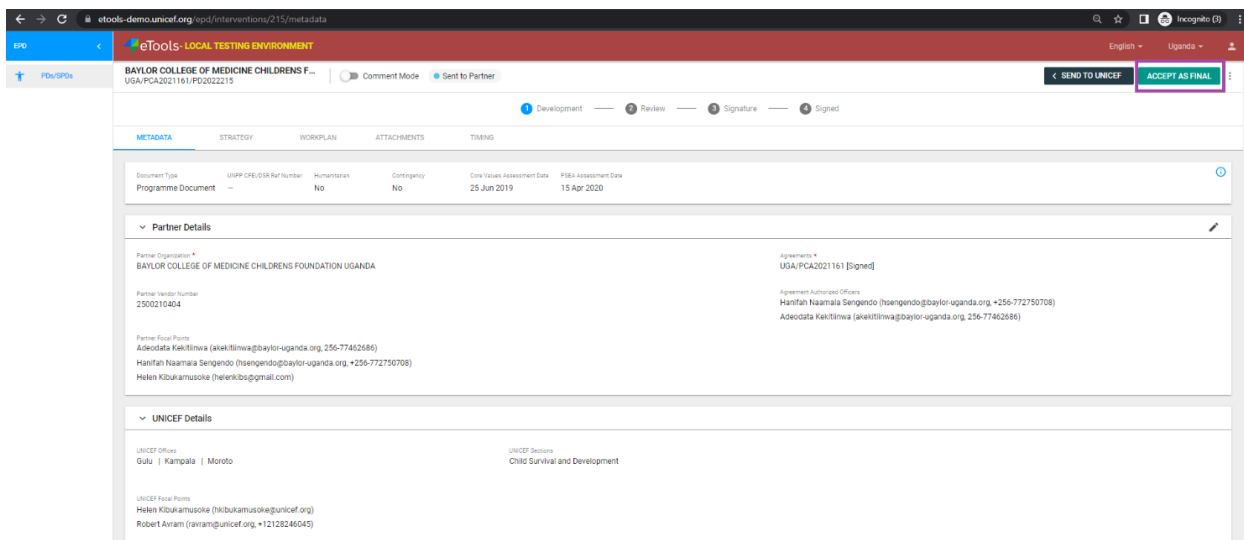
Knowledge: Note that the PD cannot be edited in comment mode. To edit the PD, toggle off the comment mode to make the necessary changes.

Step 10: When the programme document is completed, click **“Accept as final”** to confirm that you are satisfied with all entered information including the PD duration, planned budget, results

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and other requirements. This action locks the PD for any further changes and sends it to UNICEF to accept as final for internal review.

Check and adjust the PD start and end dates, activities timeframe, reporting duration and Programmatic visit timing before **accepting as final**. Refer to the guide on adjusting the PD (Programme Document) duration, adding the partner reporting and programmatic visit requirements.



The screenshot shows the eTools interface for a document titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F..." with ID UGA/PCA2021161/PD2022215. The document is currently in the "Sent to Partner" status. The progress bar shows four steps: 1. Development (active), 2. Review, 3. Signature, and 4. Signed. The "ACCEPT AS FINAL" button is highlighted in red. The metadata table below shows the following details:

Document Type	UNPP CFE/DSR Ref Number	Humanitarian	Contingency	Core Values Assessment Date	PSEA Assessment Date
Programme Document		No	No	25 Jun 2019	15 Apr 2020

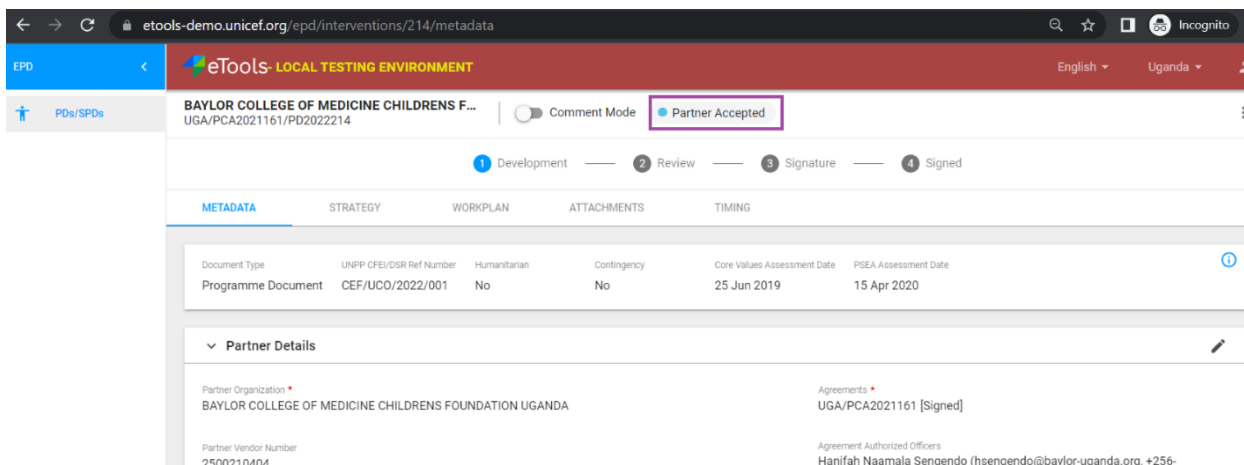
The Partner Details section includes:

- Partner Organization: BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA
- Partner Vendor Number: 2500210404
- Partner Focal Point: Ajeodata Keriitilwa (akeritilwa@baylor-uganda.org, +256-77462686)
- Agreement Authorized Officers: Hanifah Naamala Sengendo (hsengendo@baylor-uganda.org, +256-772750708) and Ajeodata Keriitilwa (akeritilwa@baylor-uganda.org, +256-77462686)

The UNICEF Details section includes:

- UNICEF Office: Gulu | Kampala | Moroto
- UNICEF Section: Child Survival and Development
- UNICEF Focal Point: Helen Kibukamusoke (hkibukamusoke@unicef.org) and Robert Anam (ranam@unicef.org, +12129246045)

The status will change from **Sent to Partner** to **Partner Accepted**



The screenshot shows the eTools interface for a document titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F..." with ID UGA/PCA2021161/PD2022214. The document is now in the "Partner Accepted" status. The progress bar shows four steps: 1. Development, 2. Review (active), 3. Signature, and 4. Signed. The "Partner Accepted" button is highlighted in red. The metadata table below shows the following details:

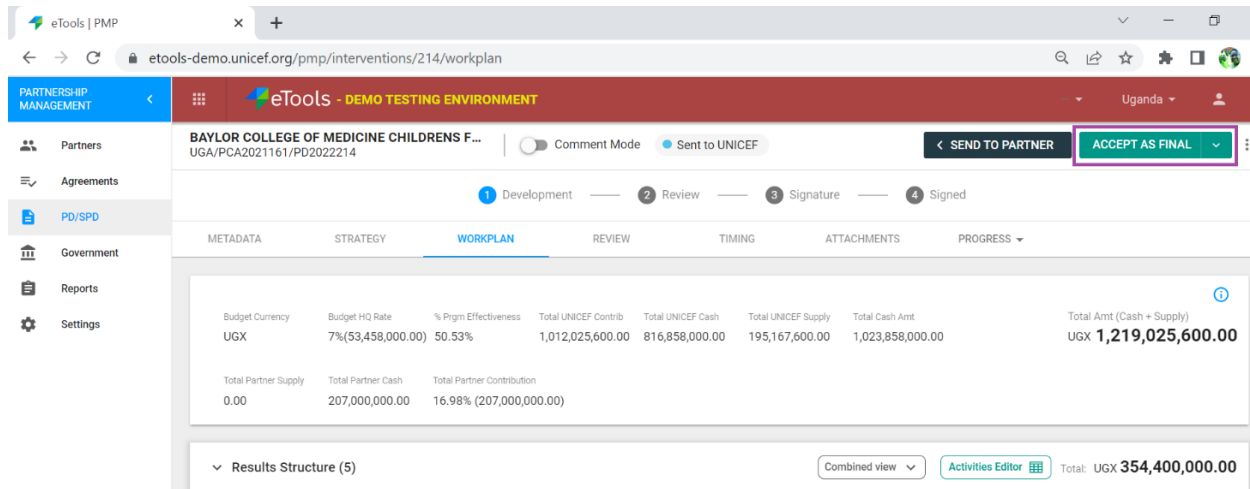
Document Type	UNPP CFE/DSR Ref Number	Humanitarian	Contingency	Core Values Assessment Date	PSEA Assessment Date
Programme Document	CEF/UCO/2022/001	No	No	25 Jun 2019	15 Apr 2020

The Partner Details section includes:

- Partner Organization: BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA
- Partner Vendor Number: 2500210404
- Agreement Authorized Officers: Hanifah Naamala Sengendo (hsengendo@baylor-uganda.org, +256-772750708)

Step 11: For UNICEF, click “**accept as final**” to confirm that you are satisfied with all entered information, planned budget, results and other requirements.

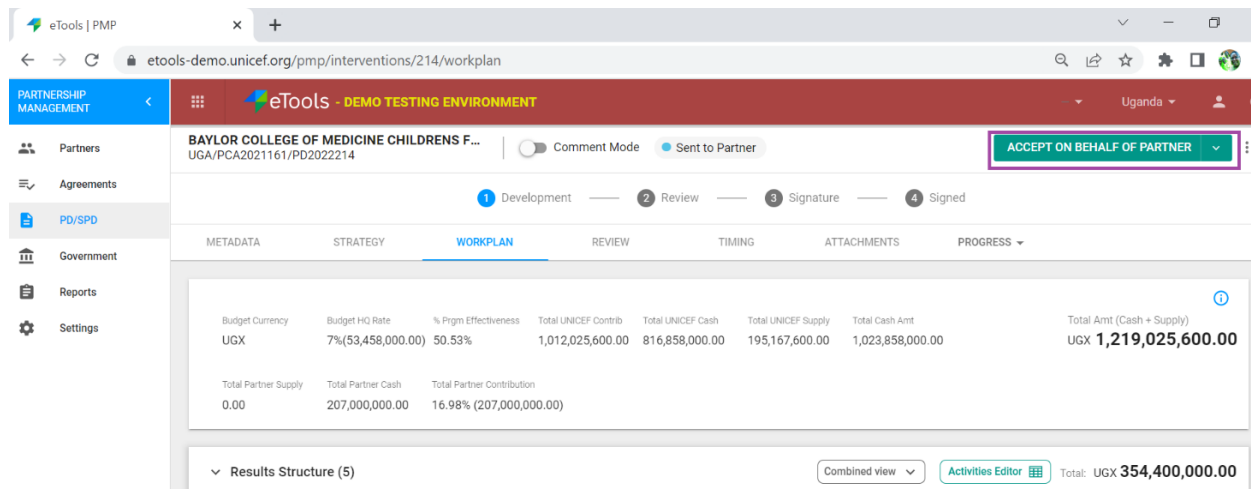
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The screenshot shows the eTools interface for a partner management system. The main header displays the partner name "BAYLOR COLLEGE OF MEDICINE CHILDRENS F..." and the ID "UGA/PCA2021161/PD2022214". The interface includes a navigation menu on the left with options like Partners, Agreements, PD/SPD, Government, Reports, and Settings. The main content area shows a progress bar with four steps: Development, Review, Signature, and Signed. Below the progress bar, there are tabs for METADATA, STRATEGY, WORKPLAN, REVIEW, TIMING, ATTACHMENTS, and PROGRESS. A table displays financial data for the partner, including Budget Currency (UGX), Budget HQ Rate (7%), % Prgm Effectiveness (50.53%), Total UNICEF Contrib (1,012,025,600.00), Total UNICEF Cash (816,858,000.00), Total UNICEF Supply (195,167,600.00), Total Cash Amt (1,023,858,000.00), and Total Amt (Cash + Supply) (UGX 1,219,025,600.00). At the bottom, there is a "Results Structure (5)" section with a "Combined view" dropdown and an "Activities Editor" button. The total amount is displayed as "Total: UGX 354,400,000.00". A purple box highlights the "ACCEPT AS FINAL" button in the top right corner.

UNICEF can also accept the PD on behalf of the partner in specific scenarios as clarified in the FAQs (Frequently Asked Questions).

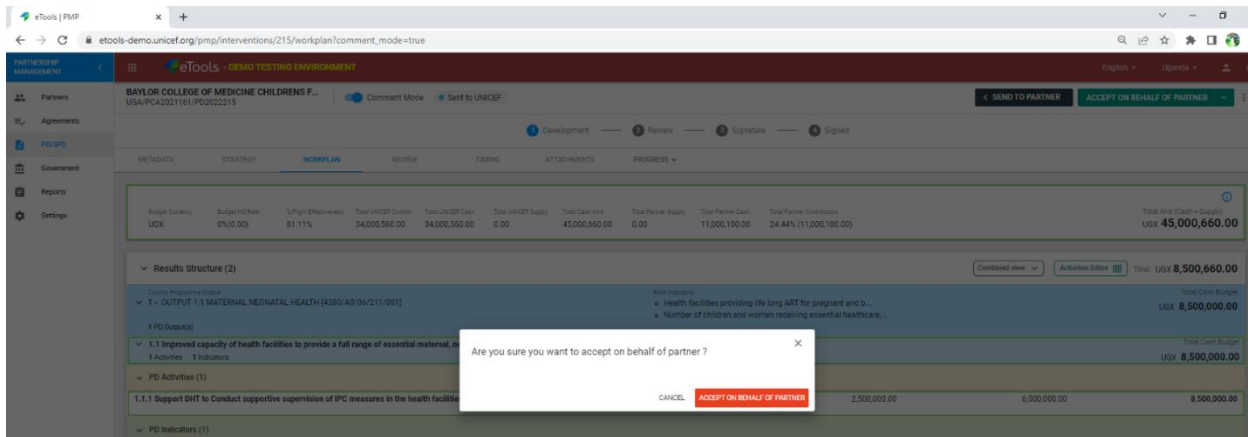
Step 12: Click **Accept on behalf of partner**



The screenshot shows the eTools interface for a partner management system, similar to the previous one. The main header displays the partner name "BAYLOR COLLEGE OF MEDICINE CHILDRENS F..." and the ID "UGA/PCA2021161/PD2022214". The interface includes a navigation menu on the left with options like Partners, Agreements, PD/SPD, Government, Reports, and Settings. The main content area shows a progress bar with four steps: Development, Review, Signature, and Signed. Below the progress bar, there are tabs for METADATA, STRATEGY, WORKPLAN, REVIEW, TIMING, ATTACHMENTS, and PROGRESS. A table displays financial data for the partner, including Budget Currency (UGX), Budget HQ Rate (7%), % Prgm Effectiveness (50.53%), Total UNICEF Contrib (1,012,025,600.00), Total UNICEF Cash (816,858,000.00), Total UNICEF Supply (195,167,600.00), Total Cash Amt (1,023,858,000.00), and Total Amt (Cash + Supply) (UGX 1,219,025,600.00). At the bottom, there is a "Results Structure (5)" section with a "Combined view" dropdown and an "Activities Editor" button. The total amount is displayed as "Total: UGX 354,400,000.00". A purple box highlights the "ACCEPT ON BEHALF OF PARTNER" button in the top right corner.

Step 13: In the pop-up screen click **Accept on behalf of partner**

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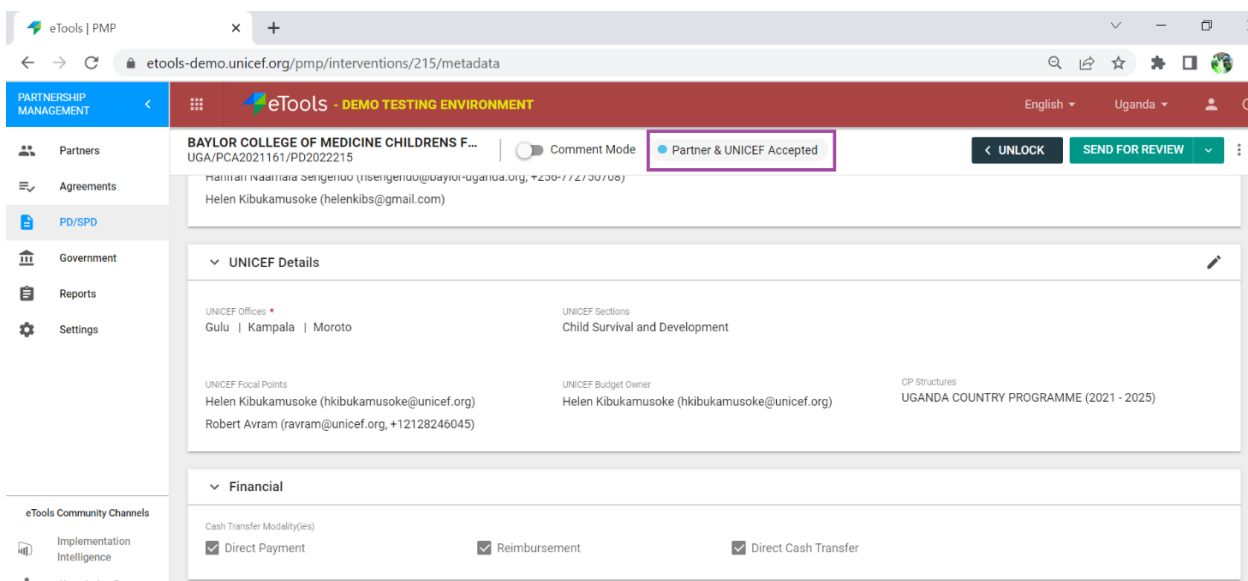


The screenshot shows the eTools interface with a budget table and a confirmation dialog box. The budget table has the following data:

Budget Category	Budget FY Rate	% Plan (2020/2021)	Total UNICEF Grants	Total UNICEF Cash	Total UNICEF Supply	Total Cash Inv.	Total Partner Share	Total Partner Cash	Total Partner Contribution	Total and Cash (Budget)
UDX	0%	81.11%	34,000,560.00	34,000,560.00	0.00	45,000,800.00	0.00	11,000,100.00	24.44%	(11,000,100.00)
										Total and Cash (Budget) UGX 45,000,660.00

The confirmation dialog box asks: "Are you sure you want to accept on behalf of partner?" with "CANCEL" and "ACCEPT ON BEHALF OF PARTNER" buttons.

Step 14: When both UNICEF and the partner have accepted the PD as final, the status changes to **Partner and UNICEF accepted**. The ePD can no longer be edited by the partner and UNICEF.



The screenshot shows the eTools interface with the status "Partner & UNICEF Accepted" highlighted in a purple box. The "UNICEF Details" section is expanded, showing the following information:

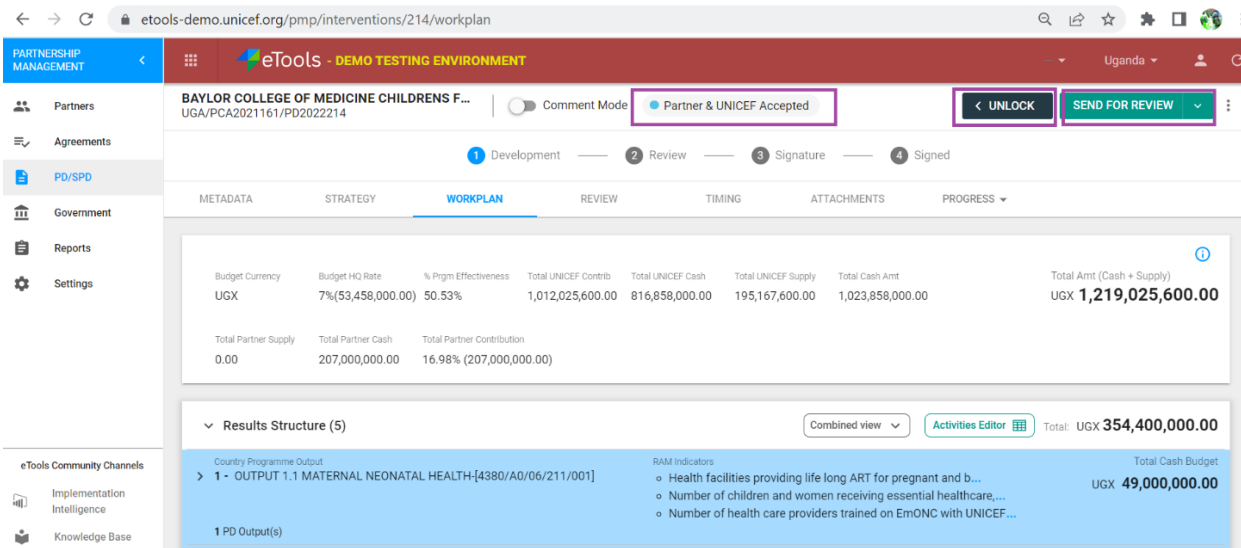
- UNICEF Offices:** Gulu | Kampala | Moroto
- UNICEF Sections:** Child Survival and Development
- UNICEF Focal Points:** Helen Kibukamusoke (hkibukamusoke@unicef.org), Robert Avram (ravram@unicef.org, +12128246045)
- UNICEF Budget Owner:** Helen Kibukamusoke (hkibukamusoke@unicef.org)
- CP Structures:** UGANDA COUNTRY PROGRAMME (2021 - 2025)

The "Financial" section is also expanded, showing the following options:

- Direct Payment
- Reimbursement
- Direct Cash Transfer

Step 15: If changes must still be made, the PD can be unlocked using the **UNLOCK** icon. Request the UNICEF focal point to unlock the PD. Unlock removes all approvals by UNICEF and partner and enables editing. Click the **unlock** icon.

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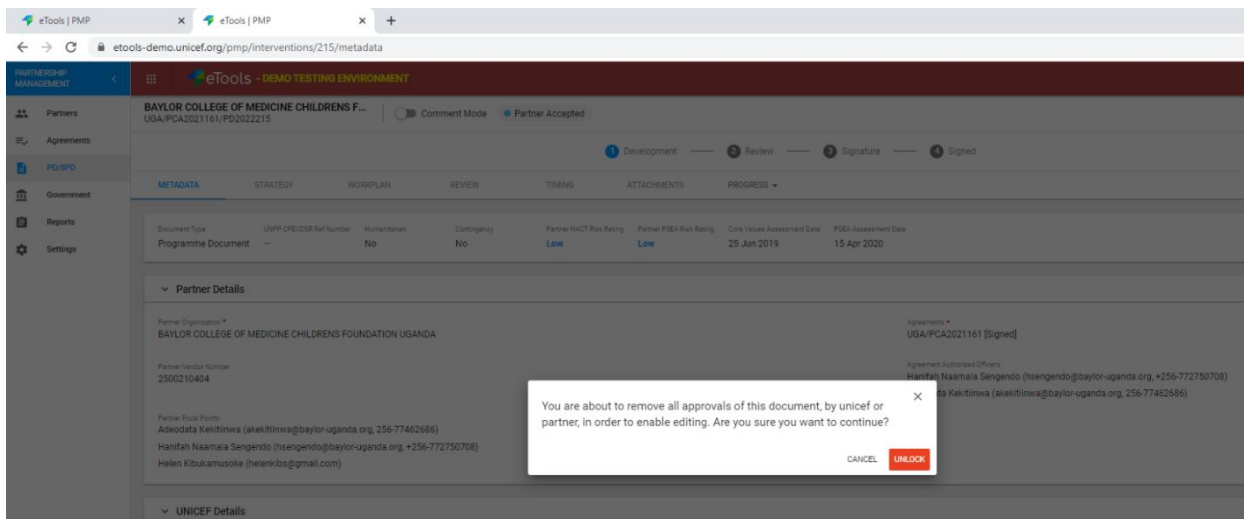


The screenshot shows the eTools interface for a programme document. The status is 'Partner & UNICEF Accepted'. A red box highlights the 'UNLOCK' button. The interface displays various metrics and a results structure table.

METADATA	STRATEGY	WORKPLAN	REVIEW	TIMING	ATTACHMENTS	PROGRESS
Budget Currency	Budget HQ Rate	% Prgm Effectiveness	Total UNICEF Contrib	Total UNICEF Cash	Total UNICEF Supply	Total Cash Amt
UGX	7%(53,458,000.00)	50.53%	1,012,025,600.00	816,858,000.00	195,167,600.00	1,023,858,000.00
Total Partner Supply	Total Partner Cash	Total Partner Contribution				
0.00	207,000,000.00	16.98% (207,000,000.00)				

Results Structure (5)		Total
Country Programme Output		
1 - OUTPUT 1.1 MATERNAL NEONATAL HEALTH-[4380/A0/06/211/001]	RAM Indicators	Total Cash Budget
	<ul style="list-style-type: none"> Health facilities providing life long ART for pregnant and b... Number of children and women receiving essential healthcare... Number of health care providers trained on EmONC with UNICEF... 	UGX 49,000,000.00
1 PD Output(s)		

Step 16: In the pop-up window, click **unlock** to confirm the action.



The screenshot shows the eTools interface with a pop-up window. The pop-up window contains the following text:

You are about to remove all approvals of this document, by unicef or partner, in order to enable editing. Are you sure you want to continue?

CANCEL UNLOCK

When the programme document is completed, both the partner and UNICEF accept it as final to confirm that they are satisfied with all entered information, planned budget, results and other requirements.

The ePD is now ready for UNICEF internal review. Refer to the guides on “How to undertake internal review”