

## UNICEF ePD Step by step guide

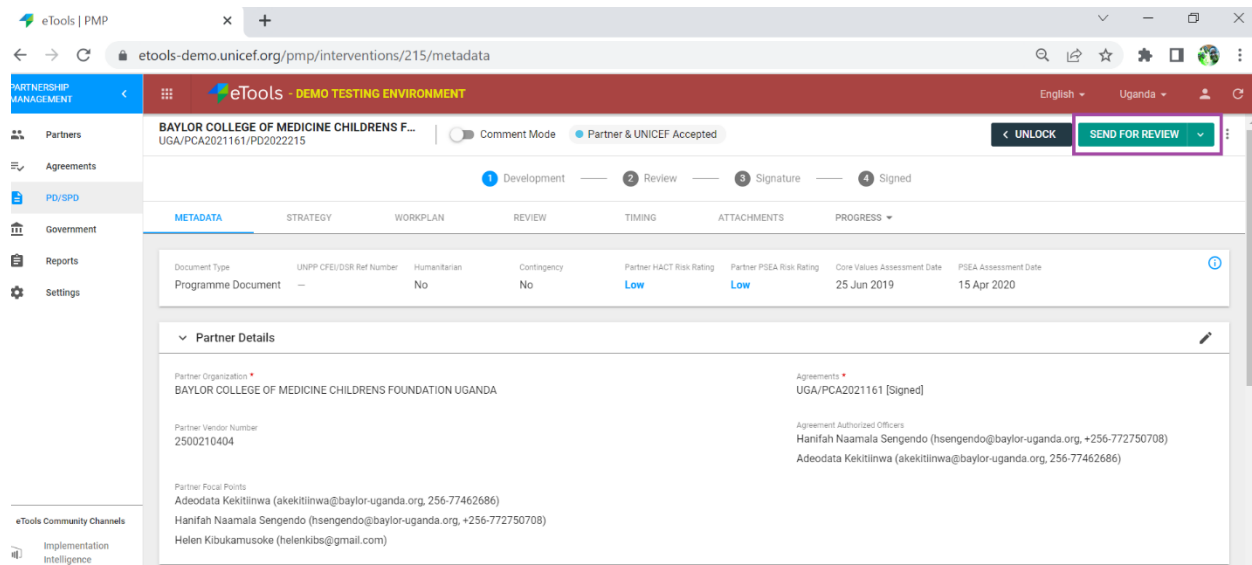
**Purpose:** How to undertake ePD internal review.

**When:** When both UNICEF and the partner have accepted the Programme Document as final.

**Why:** To review, reject or approve and send the ePD for final approval.

**Who:** UNICEF staff (Budget owner, PRC Secretary, members, and PRC chair) as refer in the roles and responsibilities guide.

**Step 1:** Once the document is accepted as final by both parties (**Partner and UNICEF accepted**), the Budget owner will click **SEND FOR REVIEW** to send the document for internal review.



The screenshot shows the eTools interface for a Programme Document (PD) titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F...". The document is in the "Review" stage, and the "SEND FOR REVIEW" button is highlighted in a red box. The interface includes a navigation menu on the left, a top navigation bar, and a main content area with tabs for METADATA, STRATEGY, WORKPLAN, REVIEW, TIMING, ATTACHMENTS, and PROGRESS. The METADATA tab is active, showing a table with columns for Document Type, UNPP CFEI/DSR Ref Number, Humanitarian, Contingency, Partner HACT Risk Rating, Partner PSEA Risk Rating, Core Values Assessment Date, and PSEA Assessment Date. Below the table, there is a section for Partner Details, including Partner Organization, Partner Vendor Number, Partner Focal Points, and Agreement Authorized Officers.

Document Type	UNPP CFEI/DSR Ref Number	Humanitarian	Contingency	Partner HACT Risk Rating	Partner PSEA Risk Rating	Core Values Assessment Date	PSEA Assessment Date
Programme Document	—	No	No	Low	Low	25 Jun 2019	15 Apr 2020

**Partner Details**

Partner Organization: BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA

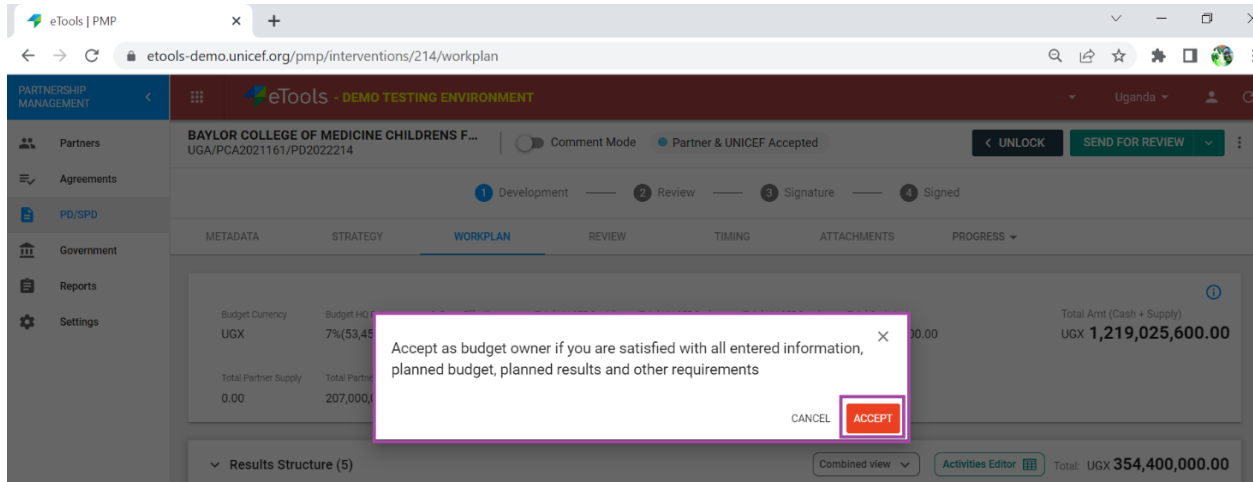
Partner Vendor Number: 2500210404

Partner Focal Points: Adeodata Kekitlinwa (akekitlinwa@baylor-uganda.org, +256-77462686), Hanifah Naamala Sengendo (hsengendo@baylor-uganda.org, +256-772750708), Helen Kibukamusoke (helenkibs@gmail.com)

Agreement Authorized Officers: Hanifah Naamala Sengendo (hsengendo@baylor-uganda.org, +256-772750708), Adeodata Kekitlinwa (akekitlinwa@baylor-uganda.org, +256-77462686)

**Step 2:** Click **accept** in the pop-up window 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 Partnership Management (PMP) document. The document is titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F..." and is in the "Review" stage. A confirmation dialog box is displayed, asking the user to accept as budget owner if satisfied with the entered information. The dialog box contains the text: "Accept as budget owner if you are satisfied with all entered information, planned budget, planned results and other requirements". Below the text are "CANCEL" and "ACCEPT" buttons. The background interface shows a table with budget details and a total amount of UGX 1,219,025,600.00.

METADATA	STRATEGY	WORKPLAN	REVIEW	TIMING	ATTACHMENTS	PROGRESS
Budget Currency	Budget HGT					Total Amt (Cash + Supply)
UGX	7%(53,45					UGX 1,219,025,600.00
Total Partner Supply	Total Partner					
0.00	207,000					

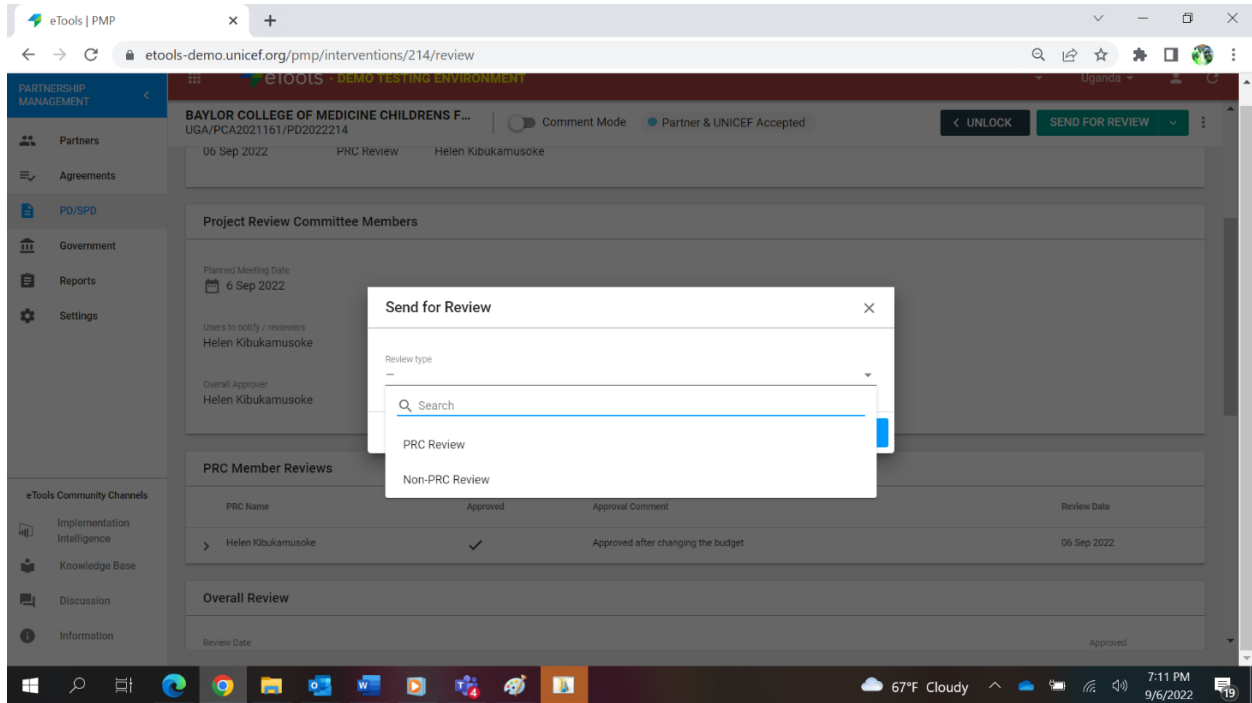
**Knowledge:** All regular programme documents, with UNICEF contribution more than \$100,000 (cash and supply) or higher thresholds set by office, are reviewed by the Partnership Review Committee (PRC). The PRC recommends either approval or non-approval of the partnership to the Head of Office. Simplified programme documents (PDs for humanitarian response or less than ≤\$100,000) are not subject from PRC review.

**Step 3:** Select the review type from the dropdown list

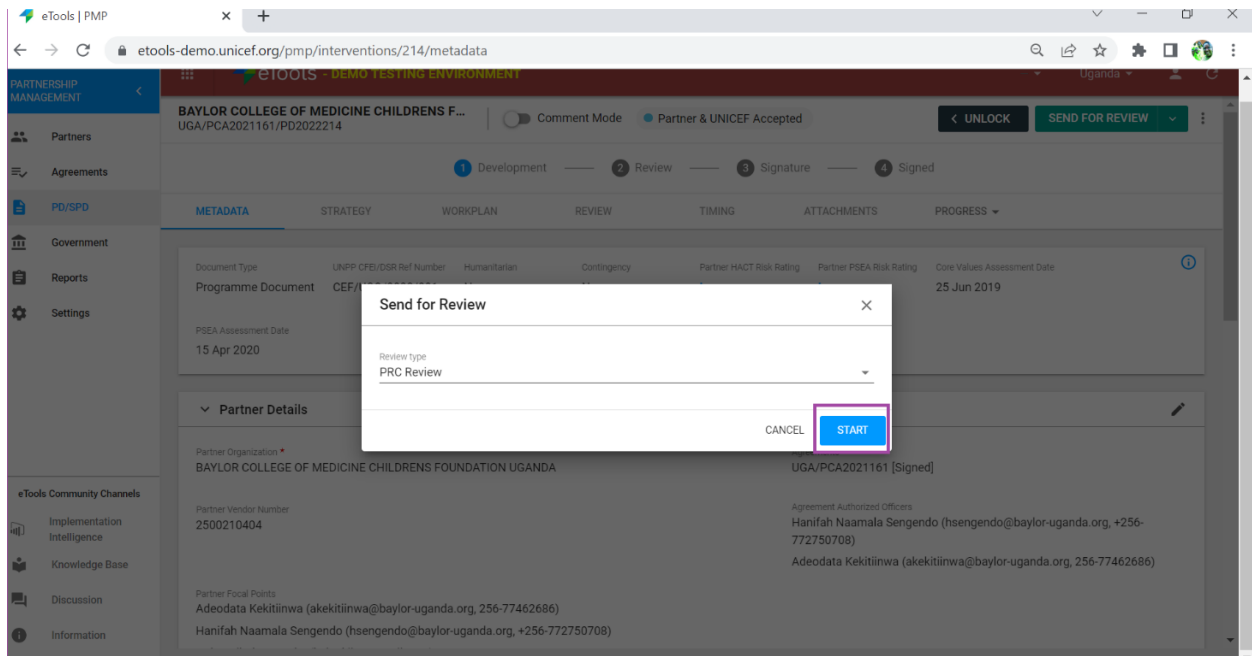
- PRC review
- Non-PRC review – Continue to step 14

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## PRC review

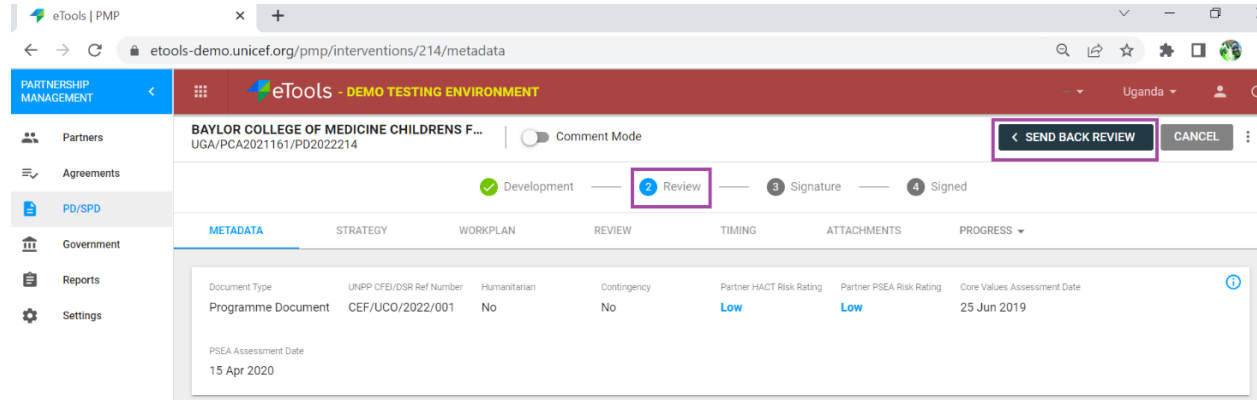


### Step 4: Click start



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 **Knowledge:** The Development status changes to a green tick as this status has been completed and the review status turns to blue.




The screenshot shows the eTools interface for a Programme Document (PD) titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F...". The document is currently in the "Review" phase, indicated by a blue circle with the number 2. The "SEND BACK REVIEW" button is highlighted with a red box. The interface also shows a progress bar with four stages: Development (green tick), Review (blue circle with 2), Signature (grey circle with 3), and Signed (grey circle with 4). The document metadata table is as follows:

Document Type	UNPP CFE/DSR Ref Number	Humanitarian	Contingency	Partner HACT Risk Rating	Partner PSEA Risk Rating	Core Values Assessment Date
Programme Document	CEF/UCO/2022/001	No	No	Low	Low	25 Jun 2019

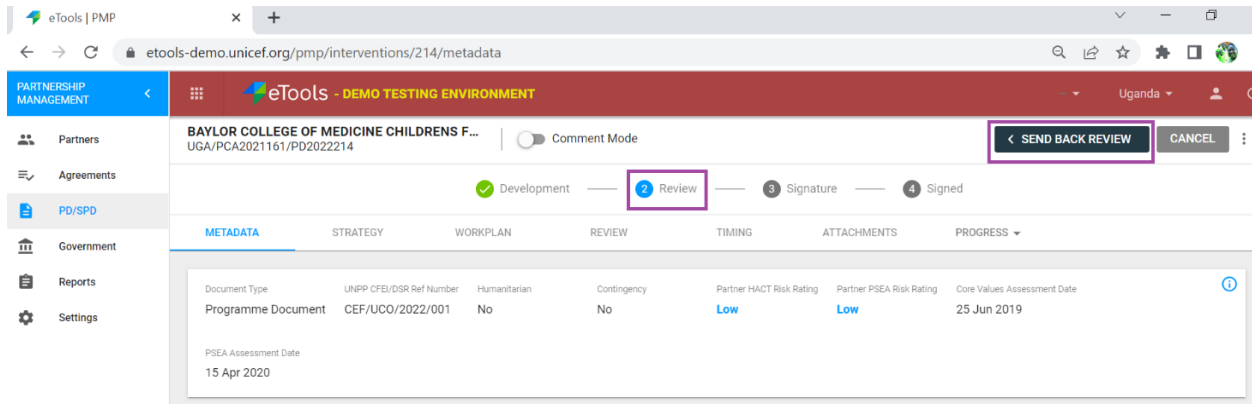
Additional metadata shown below the table:

- PSEA Assessment Date: 15 Apr 2020

 **Knowledge:** The PRC secretary will receive a notification of the submission, review the PD (Programme Document) completion, and determine if a remote or in person review will be done.

**Step 5 (optional):** If the reviewers/PRC secretariat, PRC Chair identify issues or gaps that need to be addressed by the partner or UNICEF programme team. The Secretary can click **send back review** for any changes to be implemented. This action removes the previous approvals and sends the PD back to the development phase. The PD will need to be “accepted as final” by UNICEF and partner to return it to the review phase. To **send back review**, click send back review will appear at the top of the screen.

## UNICEF ePD Step by step guide



eTools | PMP

etools-demo.unicef.org/pmp/interventions/214/metadata

**eTools - DEMO TESTING ENVIRONMENT** Uganda

**BAYLOR COLLEGE OF MEDICINE CHILDRENS F...**  
UGA/PCA2021161/PD2022214

Comment Mode

**SEND BACK REVIEW** CANCEL

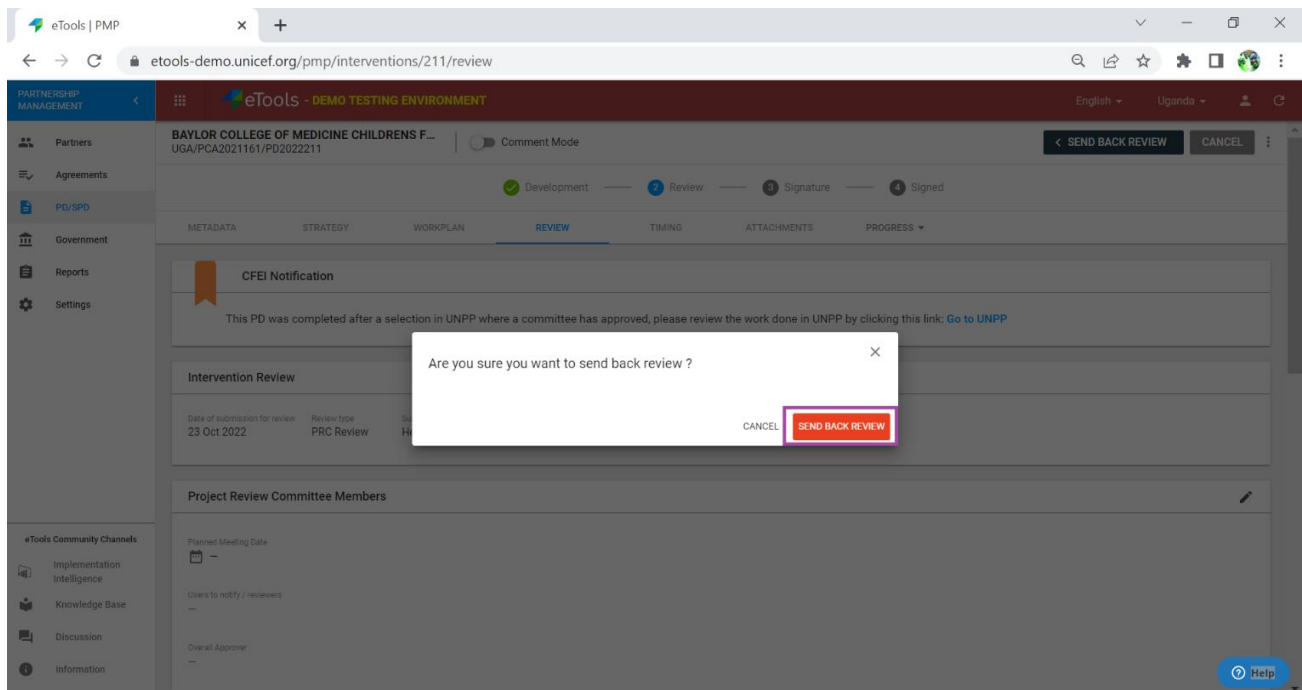
Development — **2 Review** — 3 Signature — 4 Signed

METADATA STRATEGY WORKPLAN REVIEW TIMING ATTACHMENTS PROGRESS

Document Type	UNPP CFEI/DSR Ref Number	Humanitarian	Contingency	Partner HACT Risk Rating	Partner PSEA Risk Rating	Core Values Assessment Date
Programme Document	CEF/UCO/2022/001	No	No	Low	Low	25 Jun 2019

PSEA Assessment Date  
15 Apr 2020

### Step 6 (Optional): Click send back review



eTools | PMP

etools-demo.unicef.org/pmp/interventions/211/review

**eTools - DEMO TESTING ENVIRONMENT** English Uganda

**BAYLOR COLLEGE OF MEDICINE CHILDRENS F...**  
UGA/PCA2021161/PD2022211

Comment Mode

**SEND BACK REVIEW** CANCEL

Development — **2 Review** — 3 Signature — 4 Signed

METADATA STRATEGY WORKPLAN **REVIEW** TIMING ATTACHMENTS PROGRESS

**CFEI Notification**

This PD was completed after a selection in UNPP where a committee has approved, please review the work done in UNPP by clicking this link. [Go to UNPP](#)

**Intervention Review**

Date of submission for review	Review type	Status	Actions
23 Oct 2022	PRC Review	H	CANCEL <b>SEND BACK REVIEW</b>

**Project Review Committee Members**

Planned Meeting Date  
—

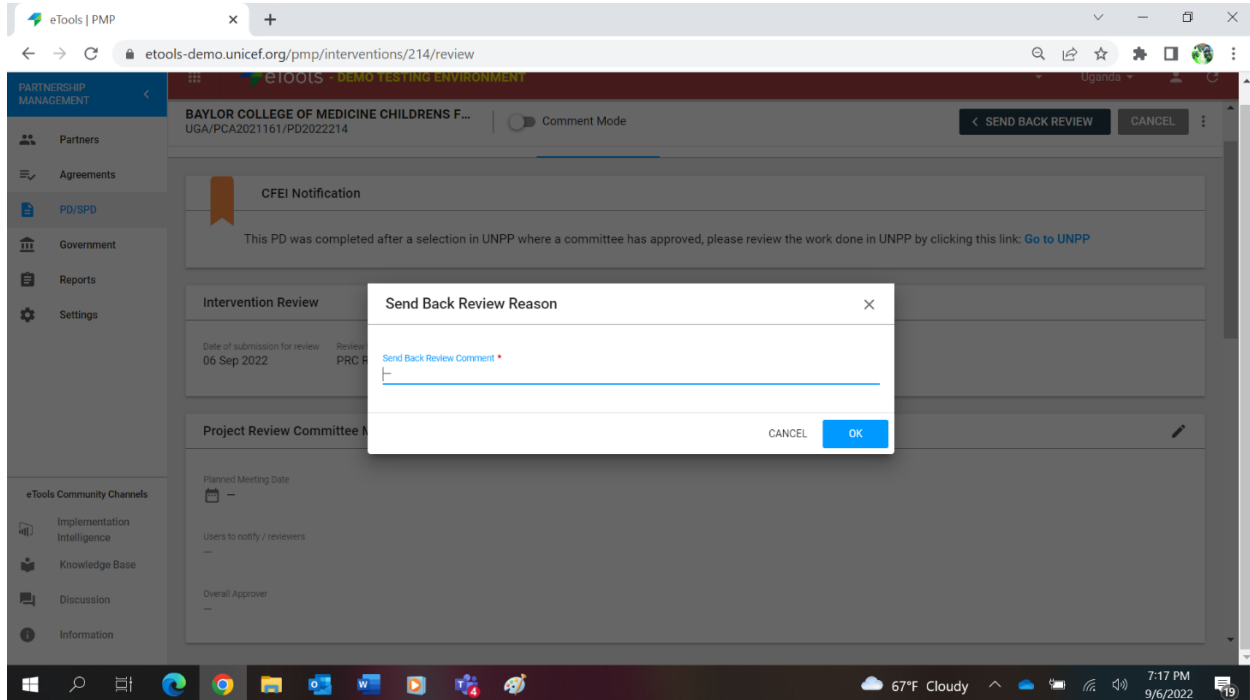
Implementation Intelligence  
Users to notify / reviewers  
—

Knowledge Base  
Discussion  
Information

Help

## UNICEF ePD Step by step guide

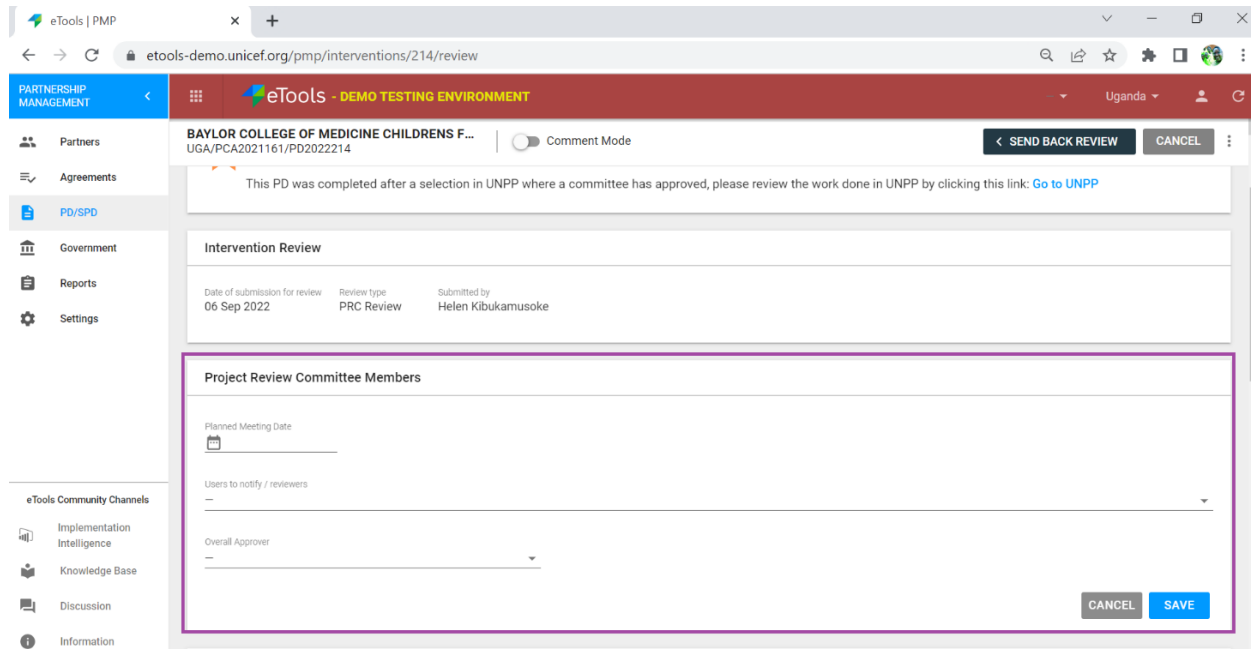
**Step 7 (optional):** Add send back review comment and click ok.



### To progress with the PRC review

**Step 8:** In the review tab, the PRC secretary adds the PRC members who will review the documents. Navigate to the **Partnership Review Committee Members** section and fill in the **planned meeting date**, PRC members/ **users to notify** and the **overall approver** (PRC Chair) and click **save**.

## UNICEF ePD Step by step guide



eTools | PMP

etools-demo.unicef.org/pmp/interventions/214/review

**eTools - DEMO TESTING ENVIRONMENT** Uganda

**BAYLOR COLLEGE OF MEDICINE CHILDRENS F...**  
UGA/PCA2021161/PD2022214

Comment Mode

SEND BACK REVIEW CANCEL

This PD was completed after a selection in UNPP where a committee has approved, please review the work done in UNPP by clicking this link: [Go to UNPP](#)

**Intervention Review**

Date of submission for review	Review type	Submitted by
06 Sep 2022	PRC Review	Helen Kibukamusoke

**Project Review Committee Members**

Planned Meeting Date

Users to notify / reviewers

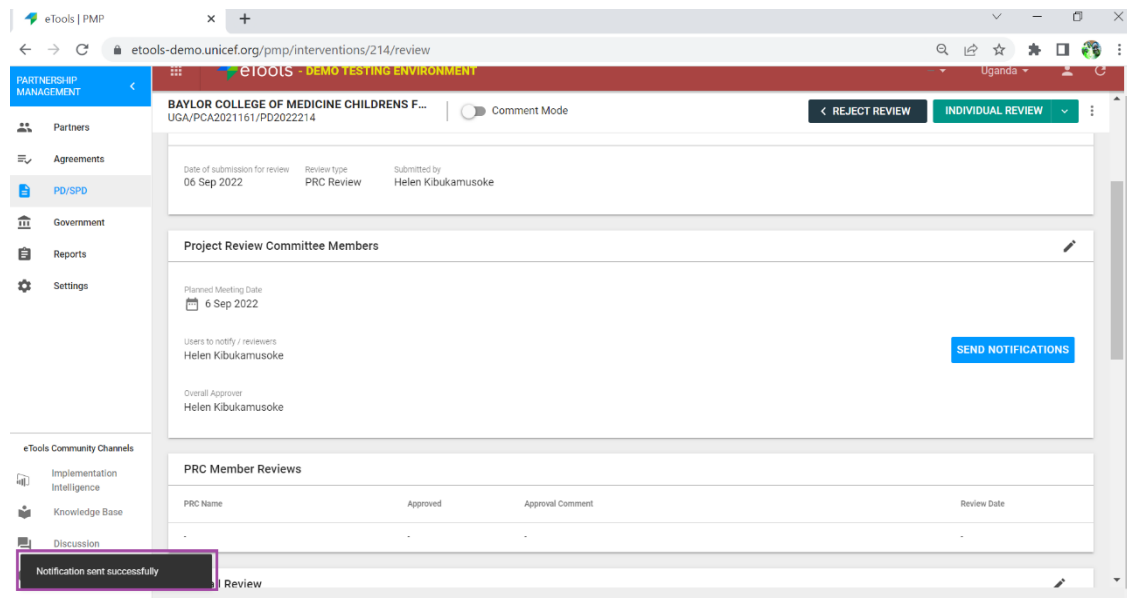
Overall Approver

CANCEL SAVE

**eTools Community Channels**

- Implementation Intelligence
- Knowledge Base
- Discussion
- Information

**Step 9: Click send notifications** to notify the reviewers/ PRC members, a **Notification sent successfully** will appear and email notification be sent to the reviewers.



eTools | PMP

etools-demo.unicef.org/pmp/interventions/214/review

**eTOOLS - DEMO TESTING ENVIRONMENT** Uganda

**BAYLOR COLLEGE OF MEDICINE CHILDRENS F...**  
UGA/PCA2021161/PD2022214

Comment Mode

REJECT REVIEW INDIVIDUAL REVIEW

Date of submission for review	Review type	Submitted by
06 Sep 2022	PRC Review	Helen Kibukamusoke

**Project Review Committee Members**

Planned Meeting Date

6 Sep 2022

Users to notify / reviewers

Helen Kibukamusoke

Overall Approver

Helen Kibukamusoke

SEND NOTIFICATIONS

**PRC Member Reviews**

PRC Name	Approved	Approval Comment	Review Date
-	-	-	-


Notification sent successfully

Review

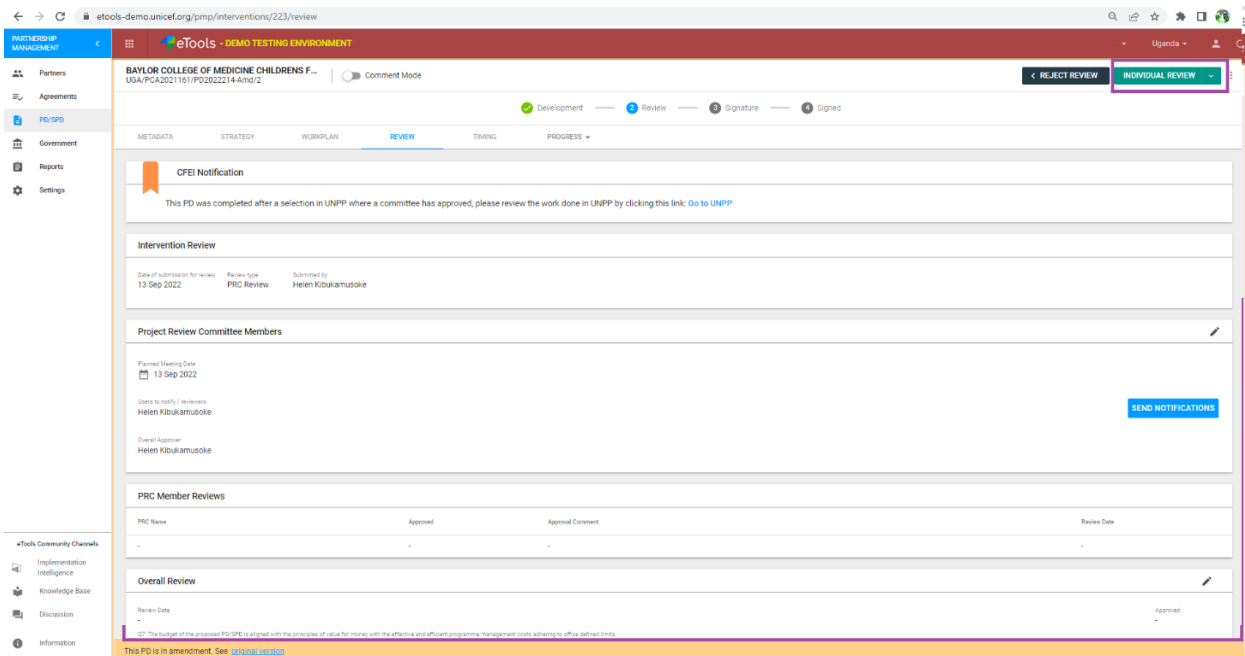
**eTools Community Channels**

- Implementation Intelligence
- Knowledge Base
- Discussion

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 **Knowledge:** As part of the remote review, every PRC member needs to review the documents individually. This action can only be done by staff / members of the PRC that were included under the partnership review committee members section and that received notifications.

**Step10: Individual review** - To add a review, click **individual review**.



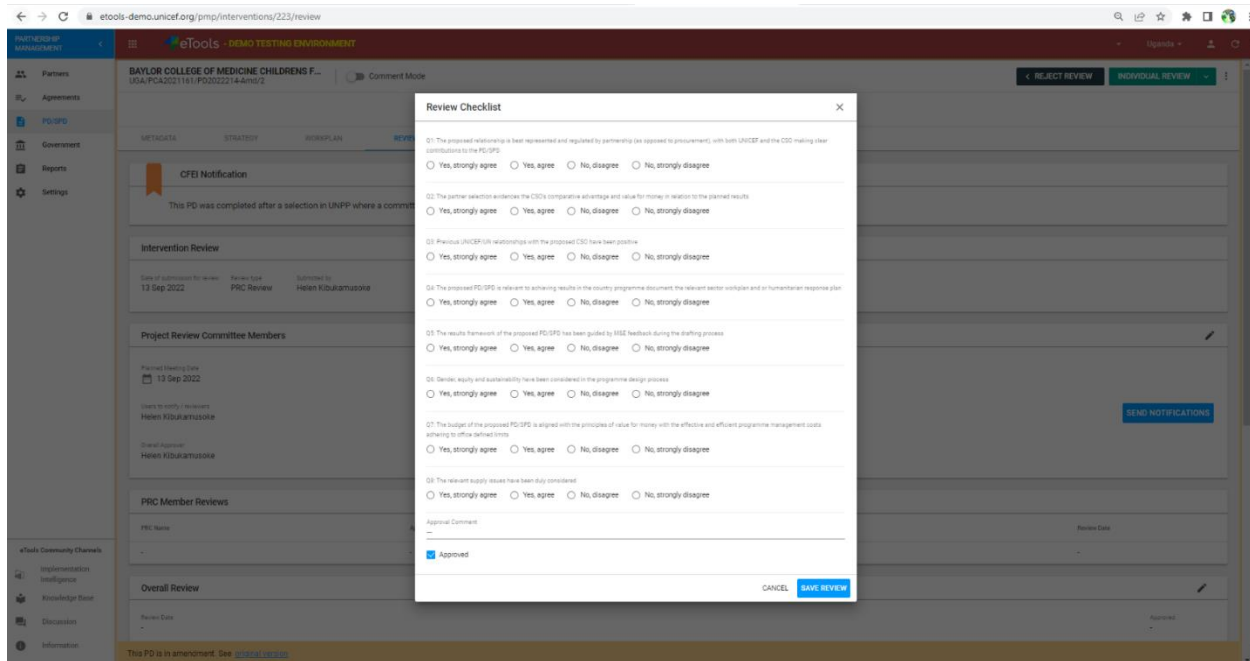
The screenshot shows the UNICEF eTools interface for reviewing a project. The top navigation bar includes 'Partnership Management' and 'eTools - DEMO TESTING ENVIRONMENT'. The main content area is titled 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' and includes a 'Comment Mode' toggle. The 'Individual Review' button is highlighted in the top right corner. The main content area is divided into several sections: 'CFEI Notification', 'Intervention Review', 'Project Review Committee Members', 'PRC Member Reviews', and 'Overall Review'. The 'Project Review Committee Members' section includes a 'Planned Meeting Date' of 13 Sep 2022 and a 'Send Notifications' button. The 'PRC Member Reviews' section is a table with columns for 'PRC Name', 'Approved', 'Approval Comment', and 'Review Date'. The 'Overall Review' section includes a 'Review Date' and an 'Approved' checkbox.

**Step 11:** In the popup screen, answer the 8 questions by rating them on a scale of:

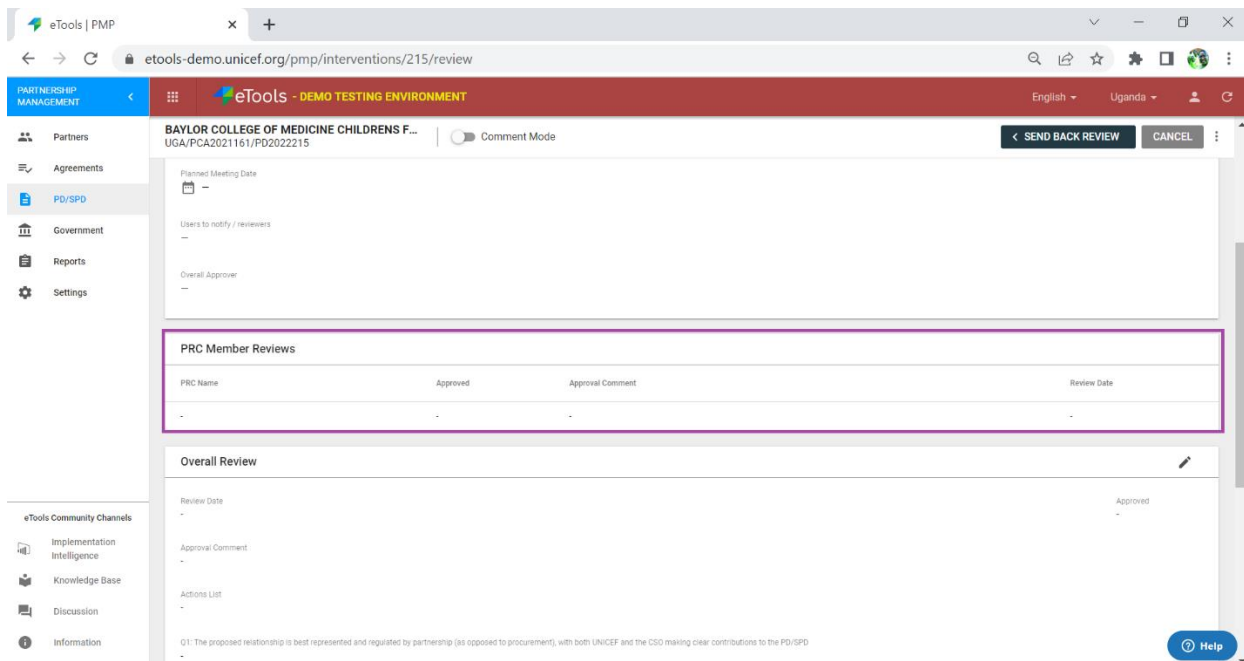
- Yes, strongly agree,
- Yes agree,
- No, disagree and
- No, strongly disagree.

Add an approval comment and click save review.

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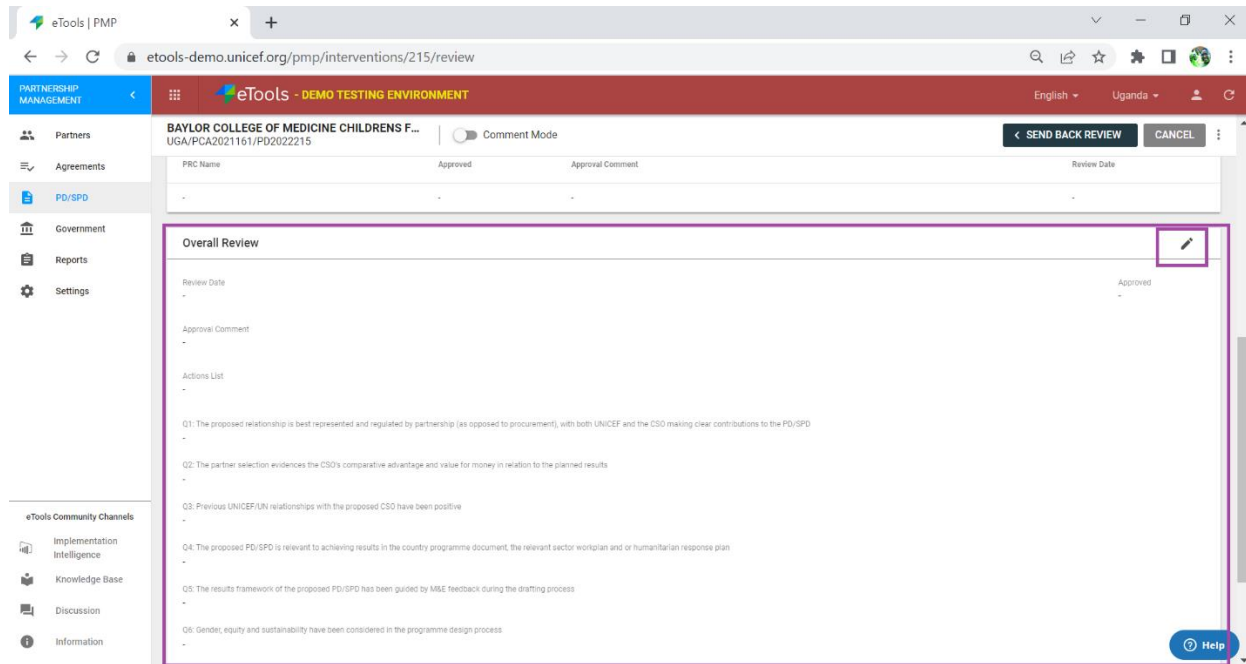
**Step 12:** Navigate to the **PRC Members Reviews** section to see who has submitted a review and which review is still pending.



**Knowledge:** If in person review is determined, an overall review can be completed by the PRC secretary on behalf of all the PRC members

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**Step 13:** As a PRC secretary, navigate to the **Overall review** section and click the edit icon.



The screenshot shows the eTools interface for a PRC review. The main content area is titled 'Overall Review' and contains a table with the following columns: Review Date, Approved, and Approval Comment. Below the table, there are eight review questions (Q1-Q8) related to the proposed relationship and its impact. An edit icon (pencil) is highlighted in the top right corner of the review section.

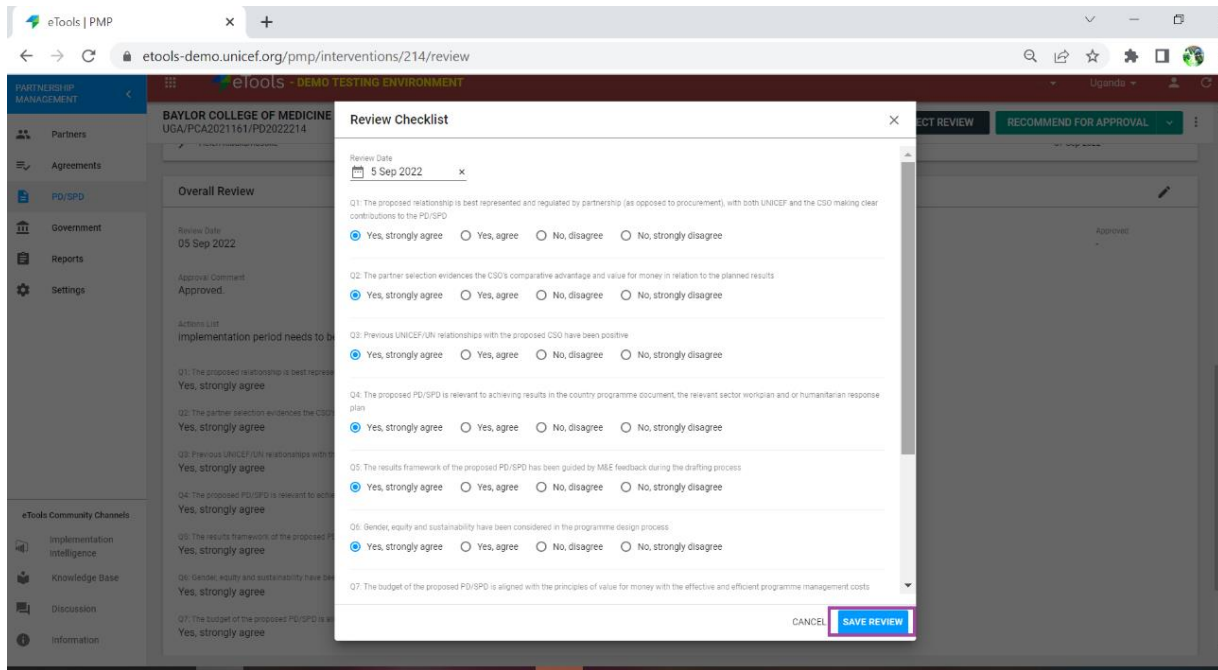
**Step 14:** Fill in all the overall rating for the PD on the 8 questions from the PRC in person meeting. Click **save review**.

Answer the 8 questions by rating them on a scale of:

- Yes, strongly agree,
- Yes agree,
- No, disagree and
- No, strongly disagree.

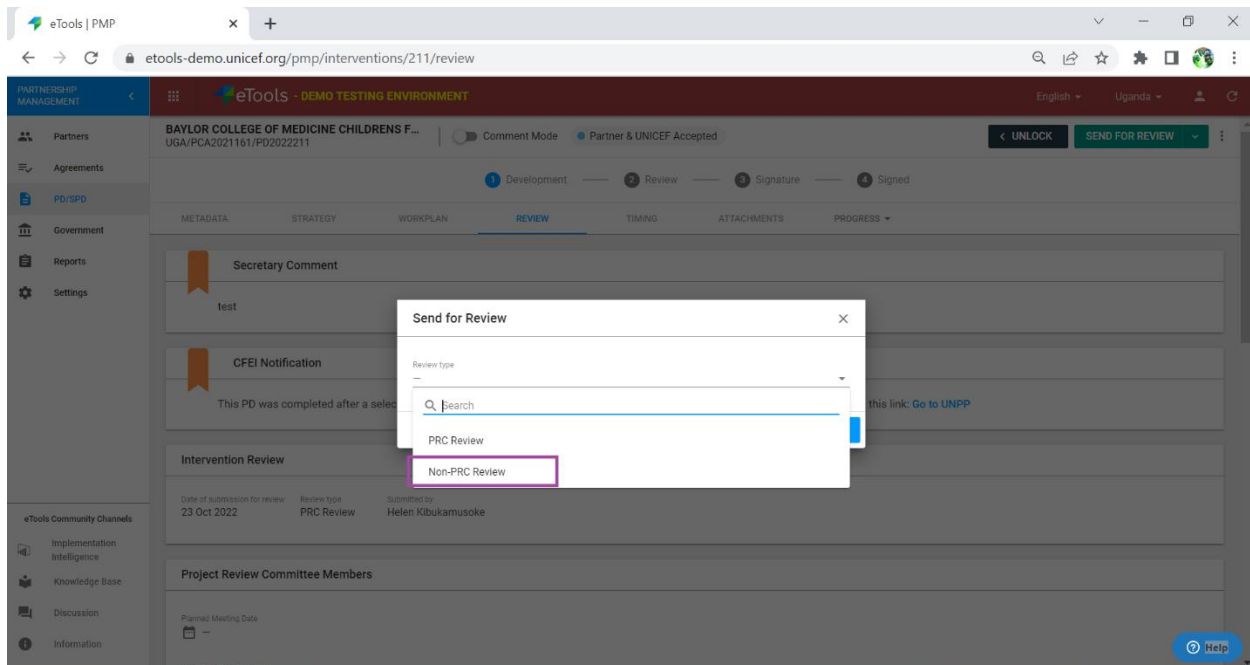
Add an approval comment and click save review. The PRC review is now ready for approval.

# UNICEF ePD Step by step guide



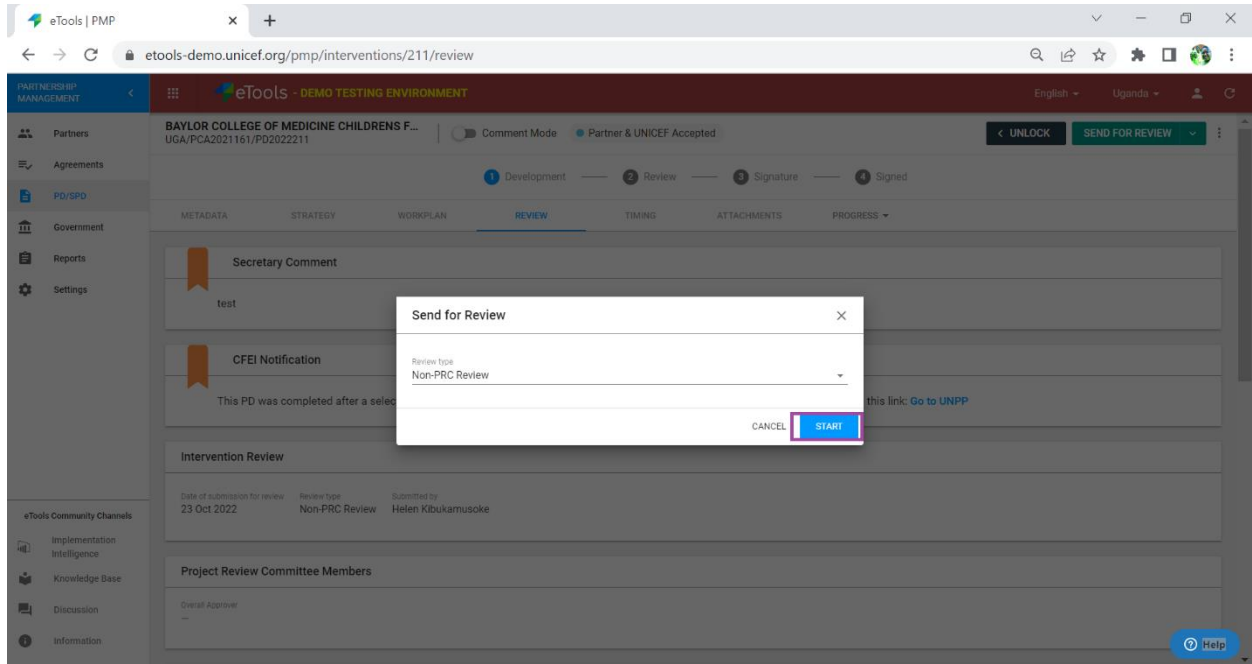
## Non- PRC review

**Step 15:** To complete a non-PRC review, Select Non-PRC review

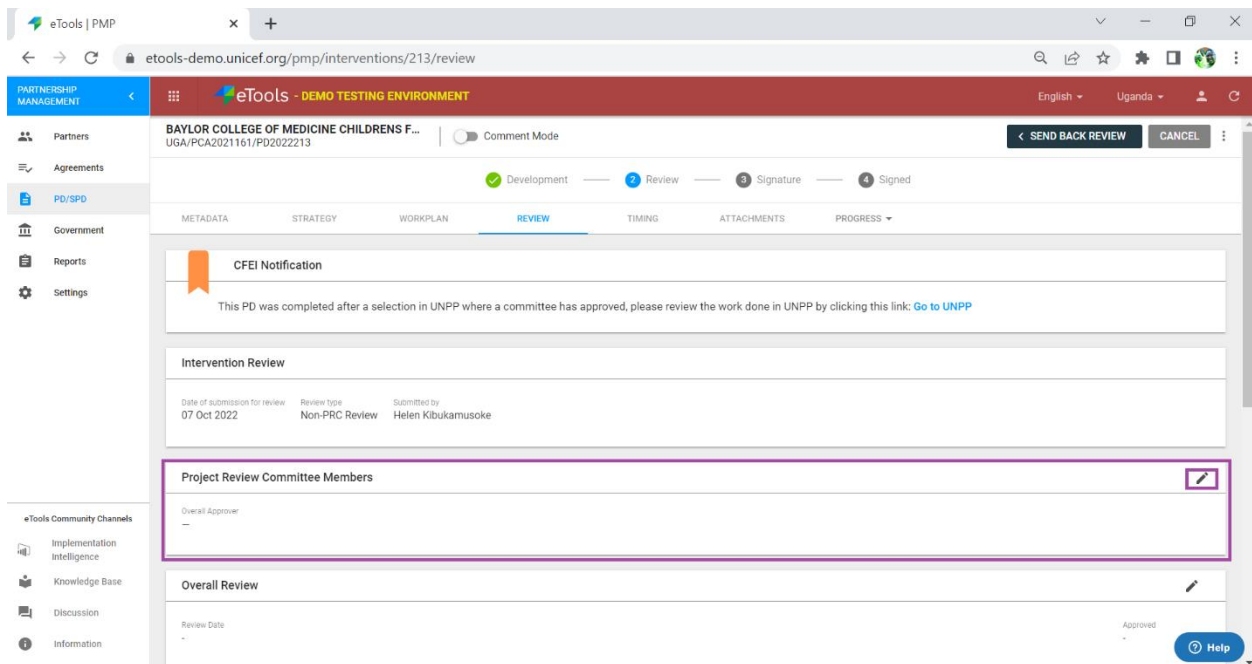


**Step 16:** Click **Start**

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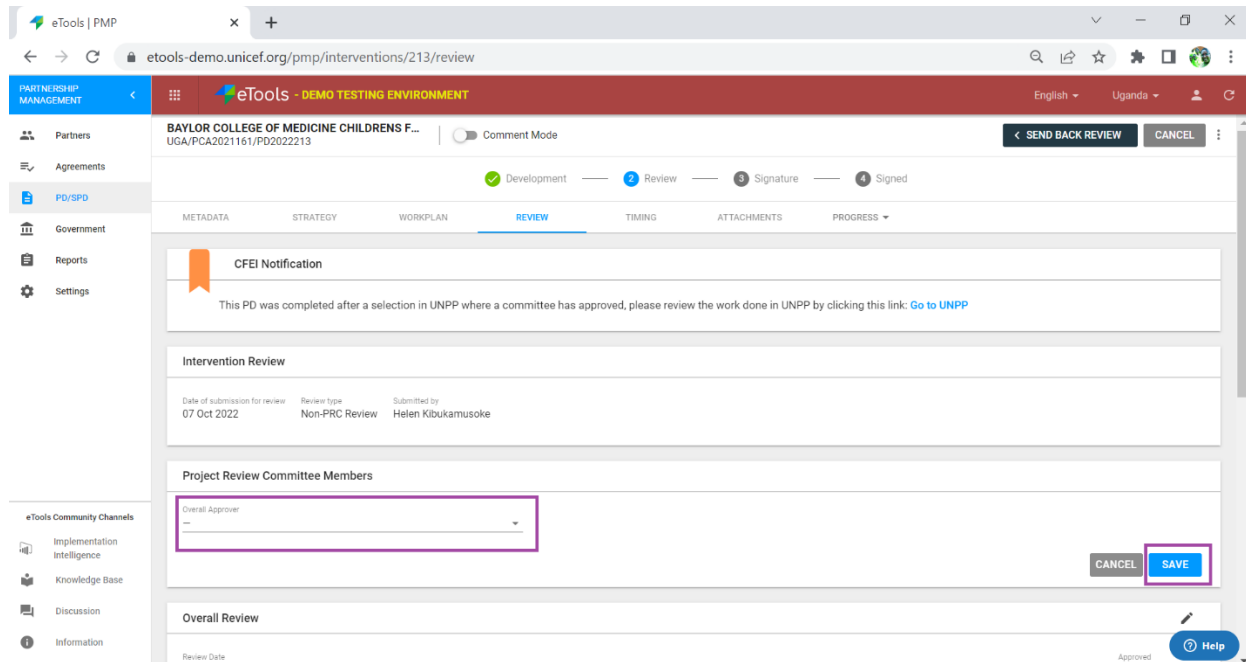


**Step 17:** Navigate to the **Partnership Review Committee members** section, click the edit icon

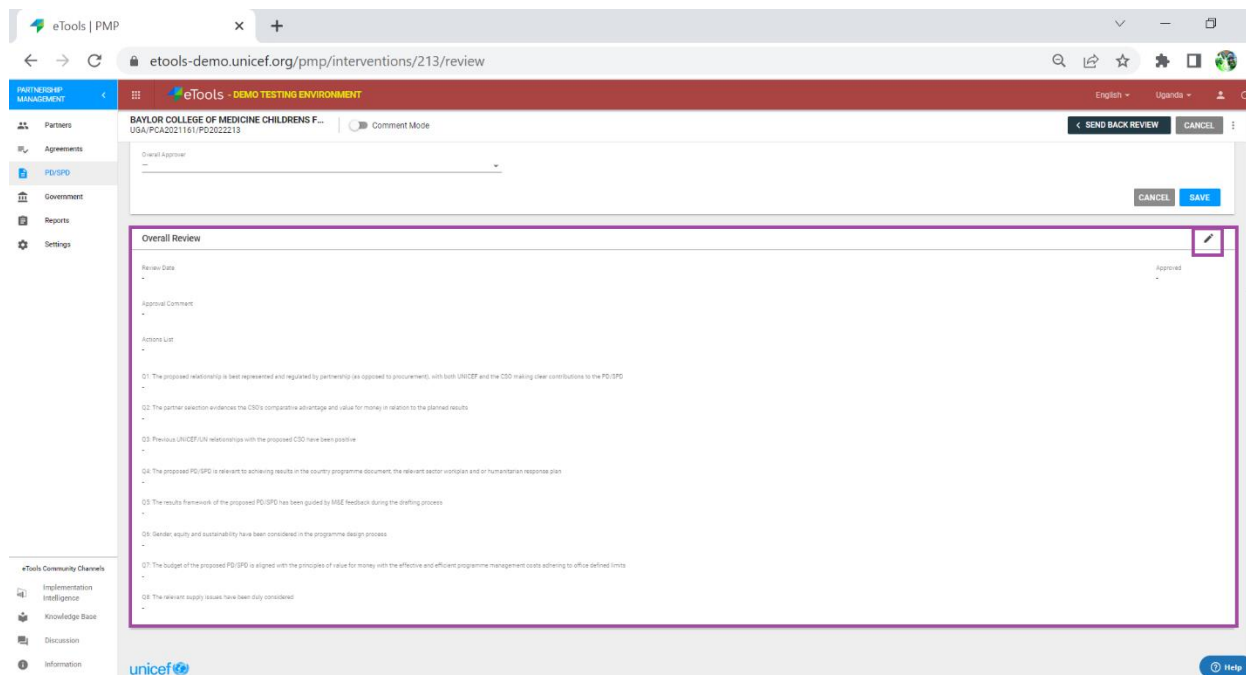


**Step 18:** Add the overall approver/PRC Chair then click **save**.

## UNICEF ePD Step by step guide



**Step 19:** Navigate to the **overall view** section and click edit icon, fill in the review date, the approval comment, the actions list, a response to the 8 questions.

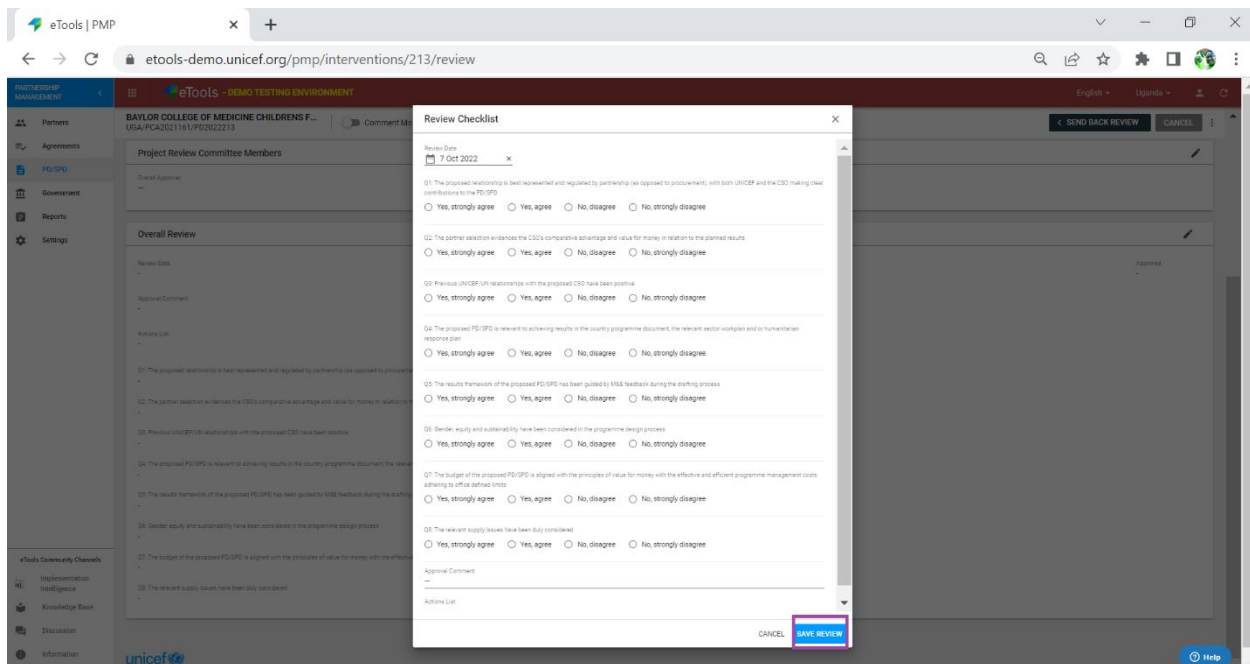


**Step 20:** Click save review. Answer the 8 questions by rating them on a scale of:


## UNICEF ePD Step by step guide

- Yes, strongly agree,
- Yes agree,
- No, disagree and
- No, strongly disagree.

Add an approval comment and click save review. The Non-PRC review is now ready for approval.



The PRC or Non-PRC Reviews are now complete, and the PD is ready for approval.

 **Knowledge:** Download the PD and PRC documents and send them to the Head of Office to review and ensure that any changes suggested by the Head Of Office can be included in the PD. Click **reject review to include any suggested changes**. This action cancels the approvals and sends the PD back to the development status. This will enable UNICEF and the IP (Implementing Partners) to address any changes that the Head of Office may suggest. **Proceed to step 24** to learn how to reject reviews.

**Step 21:** To download a PD, click the three dots in the right-hand corner

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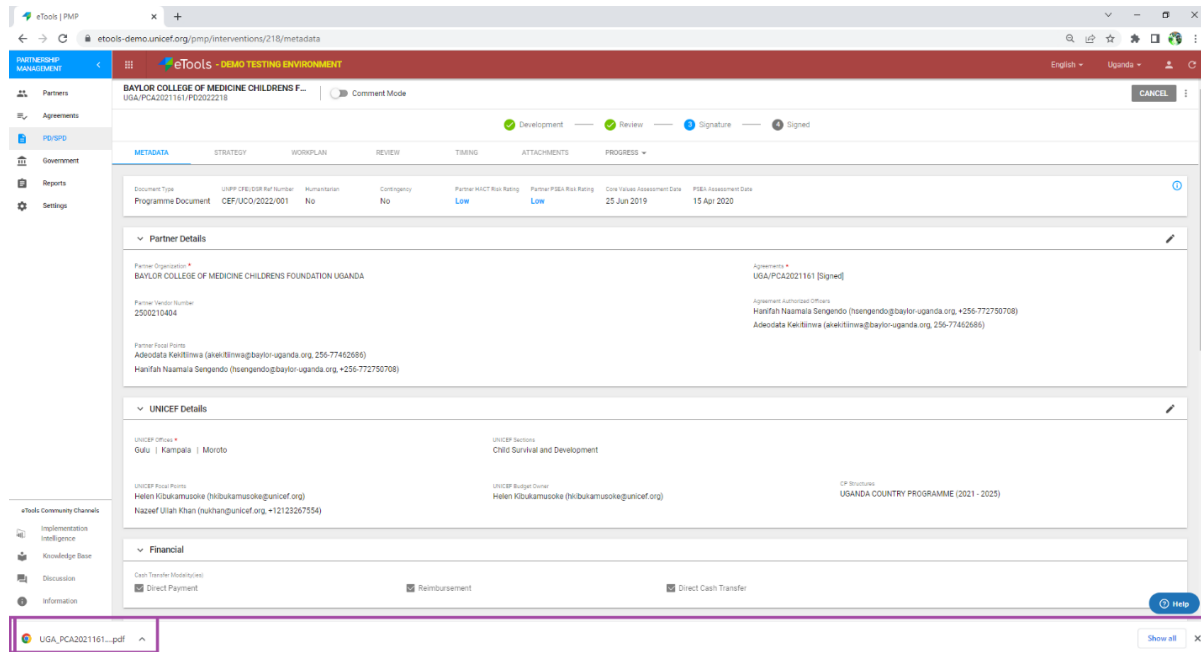
The screenshot shows the eTools interface for a document titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F... UGA/PCA2021161/PD2022218". The document is in the "Development" stage. The interface includes a sidebar with navigation options like "Partners", "Agreements", "PD/SPD", "Government", "Reports", and "Settings". The main content area displays document metadata, partner details, UNICEF details, financial information, and fund reservations. A "CANCEL" button is highlighted in a red box in the top right corner.

## Step 22: Click export PDF

The screenshot shows the same eTools interface as in Step 21. In this step, the "Export PDF" option is highlighted in a red box in the top right corner of the document details section. Other options visible include "Export Excel", "Export Comments", and "Export Results".

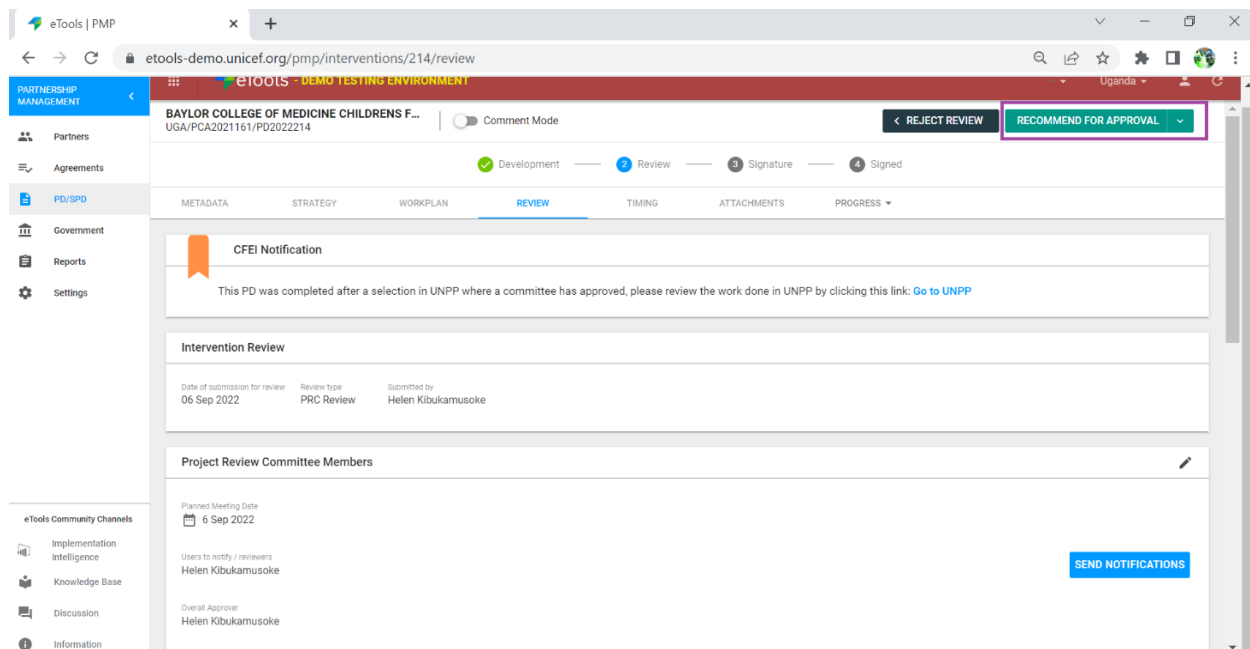
Step 23: The document will be downloaded. Click the document to review the whole PD.

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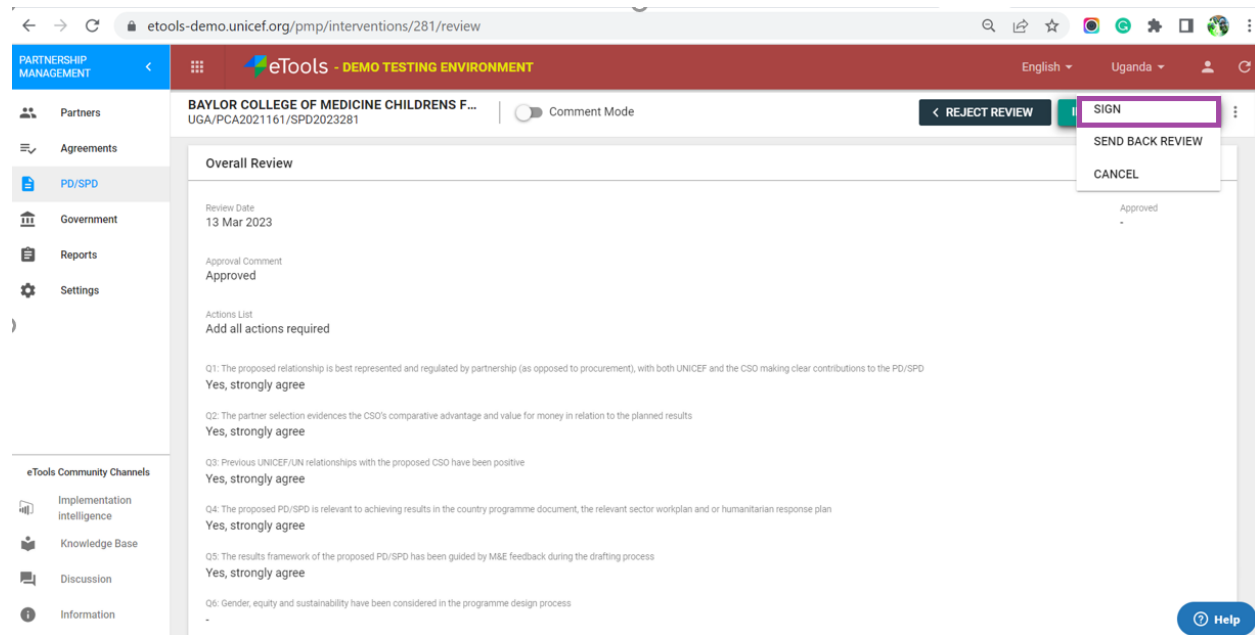
After the review by the Head of Office is completed and the PD has progressed through internal review, the PRC change can recommend it for approval. Note that no changes can be made to the PD after it is recommended for approval.

**Step 24:** The PRC chair clicks **Recommend for approval** when the overall review is completed, for final approval by the Head of Office.



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Or click the dropdown arrow next to **Recommend for Approval** and click **Sign** if an overall review was completed by the PRC Secretary.



The screenshot shows the UNICEF eTools interface in a demo testing environment. The browser address bar shows the URL: `etools-demo.unicef.org/pmp/interventions/281/review`. The page title is "BAYLOR COLLEGE OF MEDICINE CHILDRENS F..." with the ID "UGA/PCA2021161/SPD2023281". The interface includes a left sidebar with navigation options: Partners, Agreements, PD/SPD (selected), Government, Reports, and Settings. The main content area is titled "Overall Review" and displays the following information:

- Review Date: 13 Mar 2023
- Approval Comment: Approved
- Actions List: Add all actions required

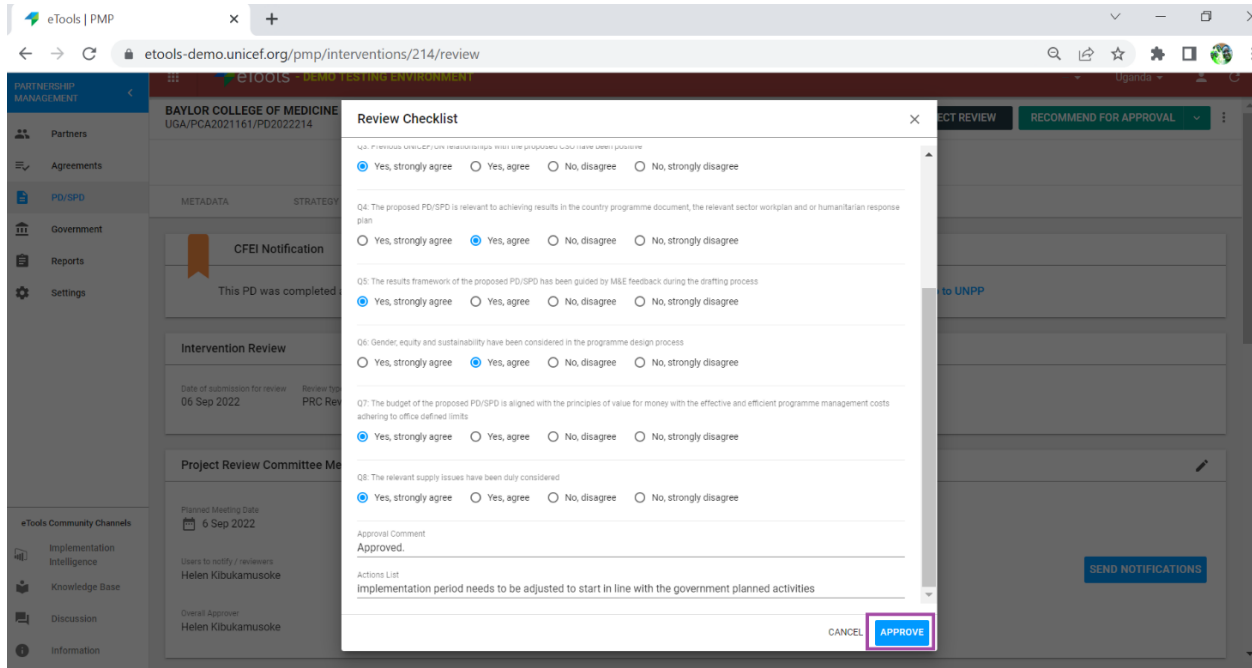
Below the actions list, there are six questions (Q1-Q6) with their respective responses:

- Q1: The proposed relationship is best represented and regulated by partnership (as opposed to procurement), with both UNICEF and the CSO making clear contributions to the PD/SPD. **Yes, strongly agree**
- Q2: The partner selection evidences the CSO's comparative advantage and value for money in relation to the planned results. **Yes, strongly agree**
- Q3: Previous UNICEF/LIN relationships with the proposed CSO have been positive. **Yes, strongly agree**
- Q4: The proposed PD/SPD is relevant to achieving results in the country programme document, the relevant sector workplan and/or humanitarian response plan. **Yes, strongly agree**
- Q5: The results framework of the proposed PD/SPD has been guided by M&E feedback during the drafting process. **Yes, strongly agree**
- Q6: Gender, equity and sustainability have been considered in the programme design process. **-**

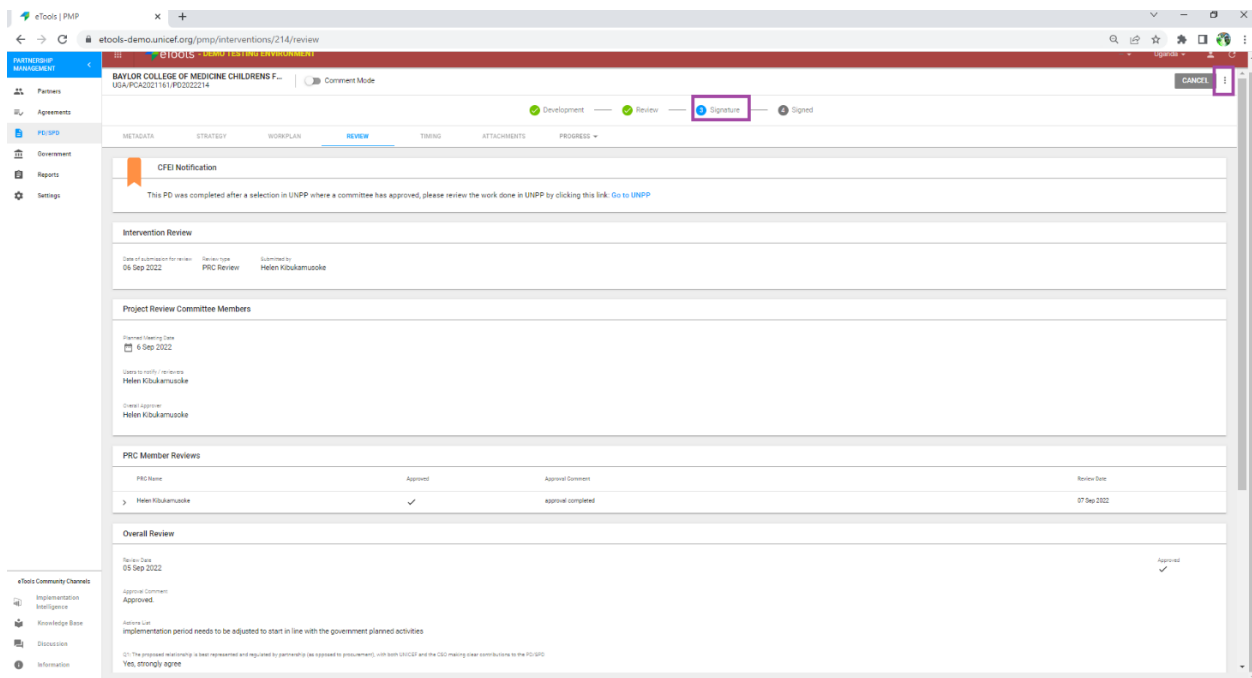
At the top right of the main content area, there are two buttons: "REJECT REVIEW" and "SIGN". The "SIGN" button is highlighted with a purple border, and a dropdown menu is open below it, showing options: "SIGN", "SEND BACK REVIEW", and "CANCEL". The "SIGN" option is selected. Below the dropdown menu, the word "Approved" is visible. A "Help" button is located at the bottom right of the page.

**Step 25:** Review the responses filled (for PRC review) or fill in the 8 questions and action list (for non-PRC review), include the approval comments and click approve.

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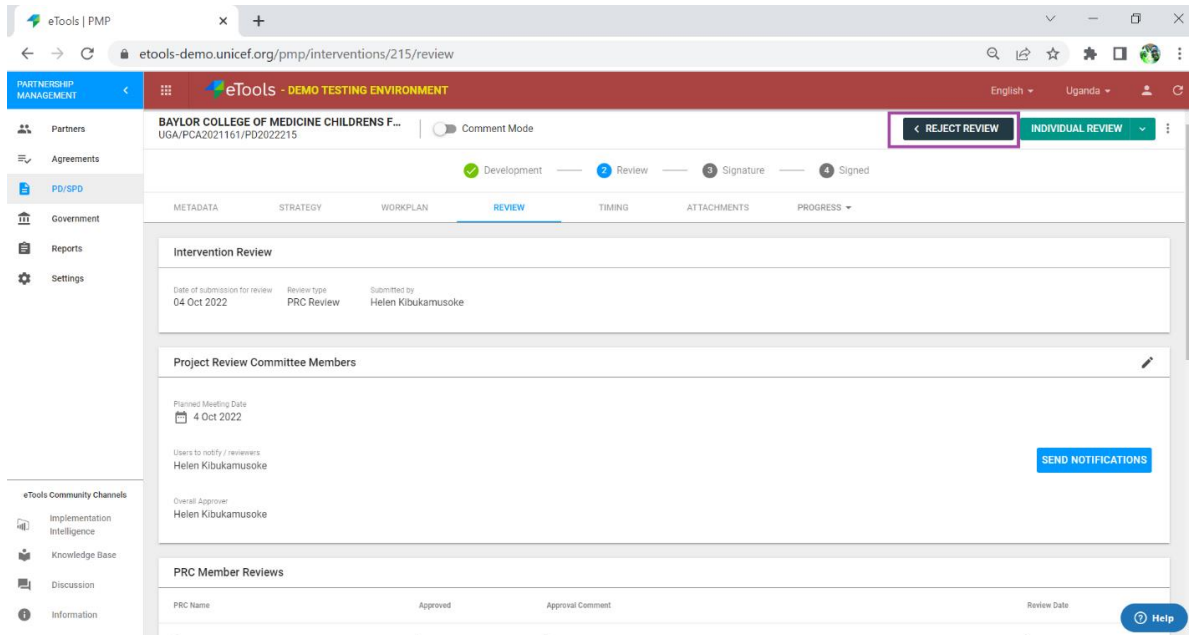
**Step 26:** This action moves the PD to signature phase; the review phase will become green and the signature phase in blue.



**Step 27:** To reject review, the PRC chair will navigate to the top of the page and click “reject review”.

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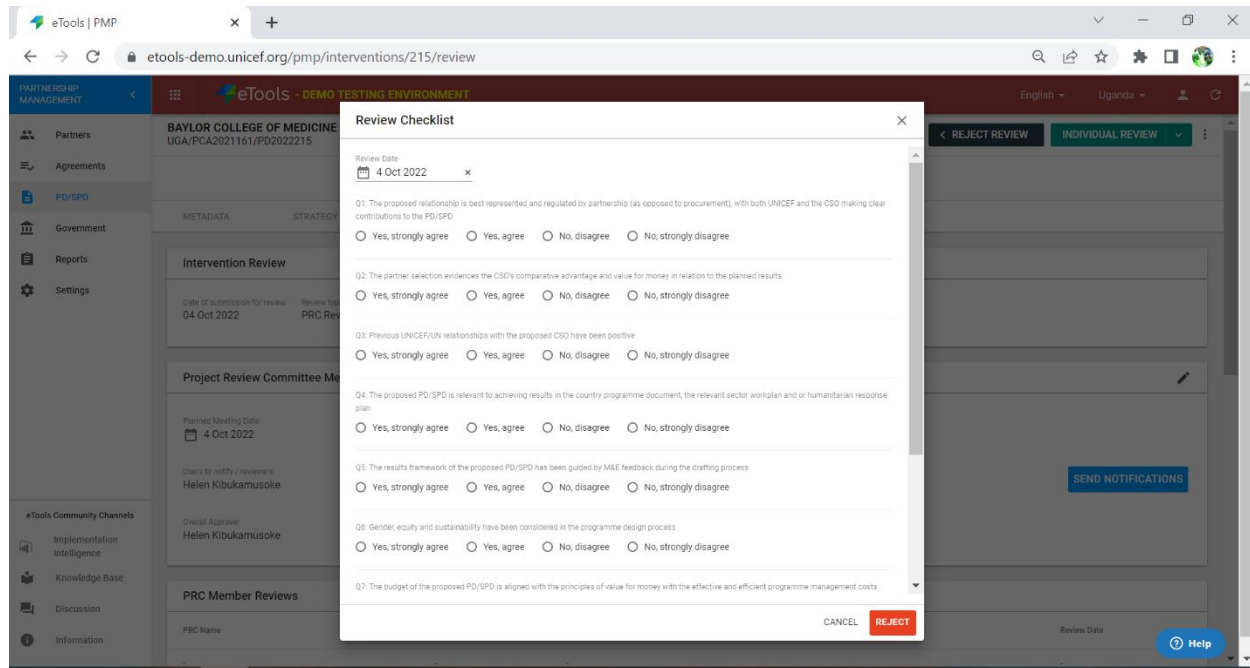
 **Knowledge:** Clicking reject review removes all approvals and sends the PD back to development status.



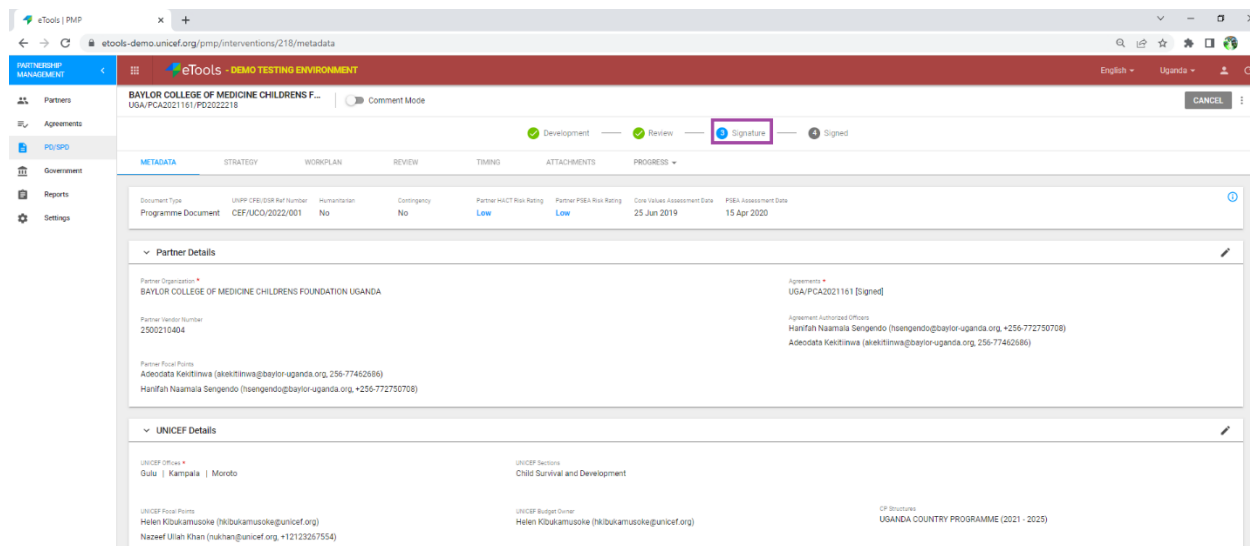
The screenshot displays the eTools PMP interface for a project review. The browser address bar shows the URL: `etools-demo.unicef.org/pmp/interventions/215/review`. The page title is "eTools - DEMO TESTING ENVIRONMENT". The project name is "BAYLOR COLLEGE OF MEDICINE CHILDRENS F..." with ID "UGA/PCA2021161/PD2022215". A "Comment Mode" toggle is visible. The review progress bar shows four steps: 1. Development (green checkmark), 2. Review (blue circle), 3. Signature (grey circle), and 4. Signed (grey circle). The "REJECT REVIEW" button is highlighted with a red box. Below the progress bar, there are sections for "Intervention Review", "Project Review Committee Members", and "PRC Member Reviews". The "Intervention Review" section shows the date of submission for review as "04 Oct 2022", the review type as "PRC Review", and the submitter as "Helen Kibukamusoke". The "Project Review Committee Members" section shows the planned meeting date as "4 Oct 2022" and the user to notify/reviewers as "Helen Kibukamusoke". The "PRC Member Reviews" section is a table with columns for "PRC Name", "Approved", "Approval Comment", and "Review Date". A "SEND NOTIFICATIONS" button is located in the "Project Review Committee Members" section. A "Help" button is visible in the bottom right corner.

**Step 28:** Fill in the checklist in the popup screen, include the review date and comments and click reject

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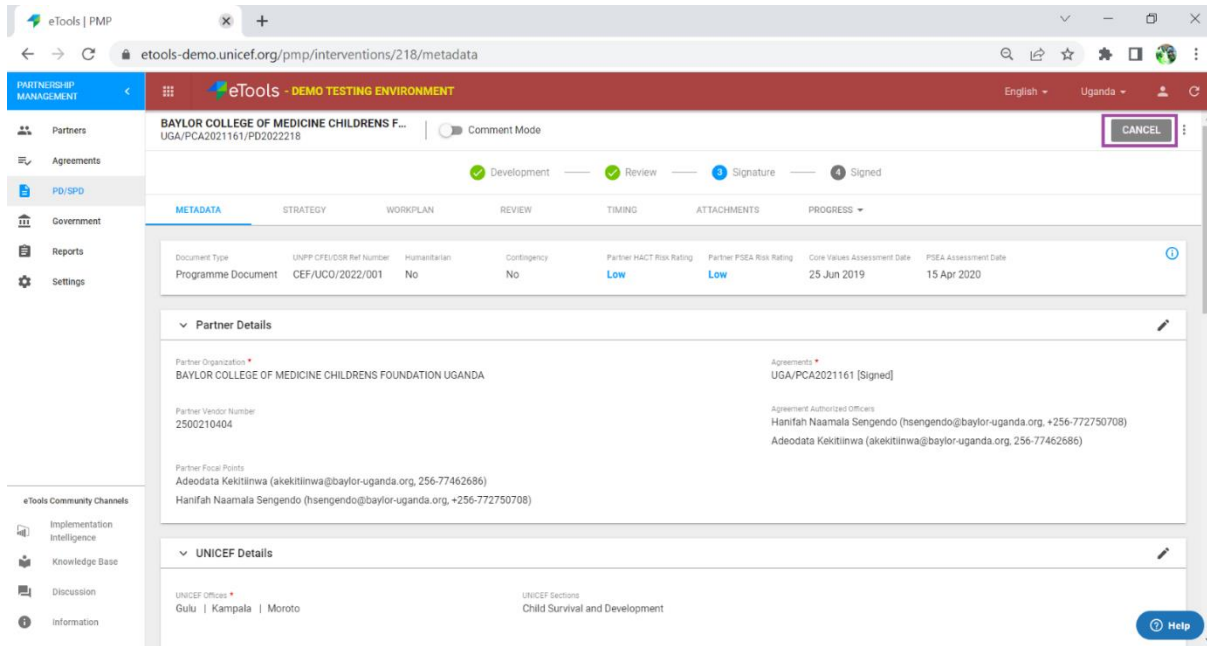


After all changes are completed, the PD will need to be “accepted as final” by UNICEF and partner to return it to the review phase and the PRC will need to approve the PD and recommend it for approval. This action moves the PD to signature phase; the review phase will become green and the signature phase in blue.



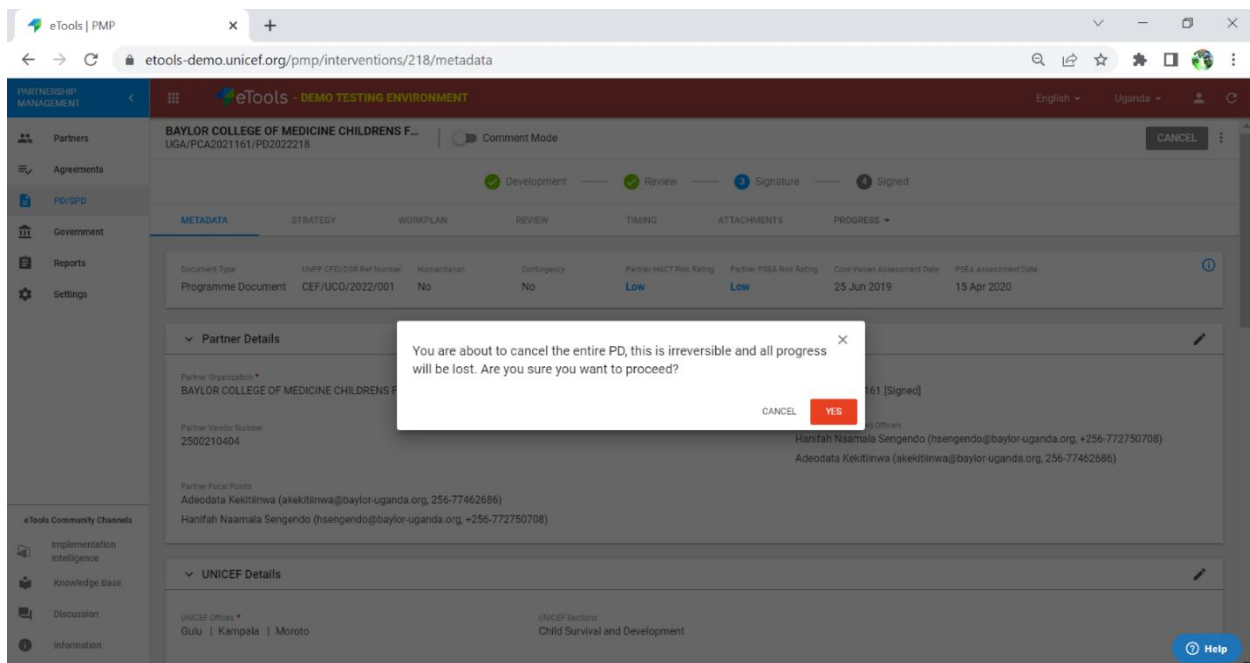
**Step 29:** The PD can also be cancelled at this stage. To cancel the PD, navigate to the top of the page and click **cancel**

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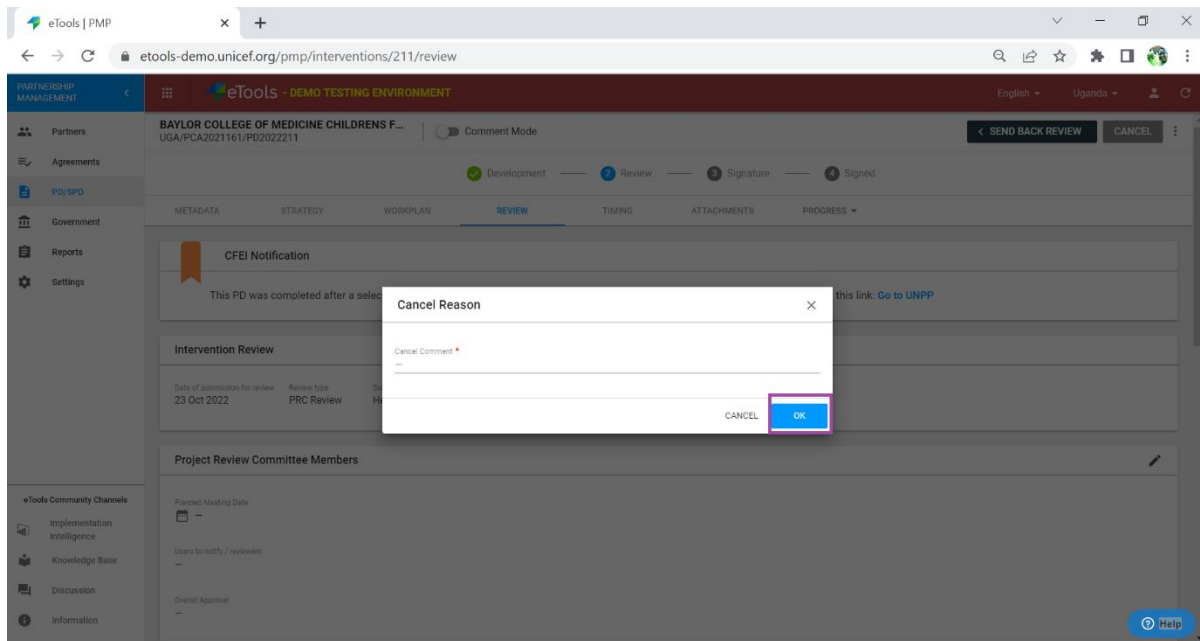
**Step 30:** In the pop-up window, click **yes** to confirm the cancellation.

Knowledge: When a PD is cancelled, this action is irreversible, and all progress will be lost.



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**Step 30:** In the pop-up window, click **yes** to confirm the cancellation.



The internal Reviews are now complete, and the PD is ready for approval and signature. Download the PD and PRC review documents, send them to the Head of Office to review the final recommendations and for signature.