

## UNICEF ePD Step by step guide

**Purpose:** UNICEF Staff - How to access and navigate the Programme document?

**Who:** UNICEF Programme Document Focal Point

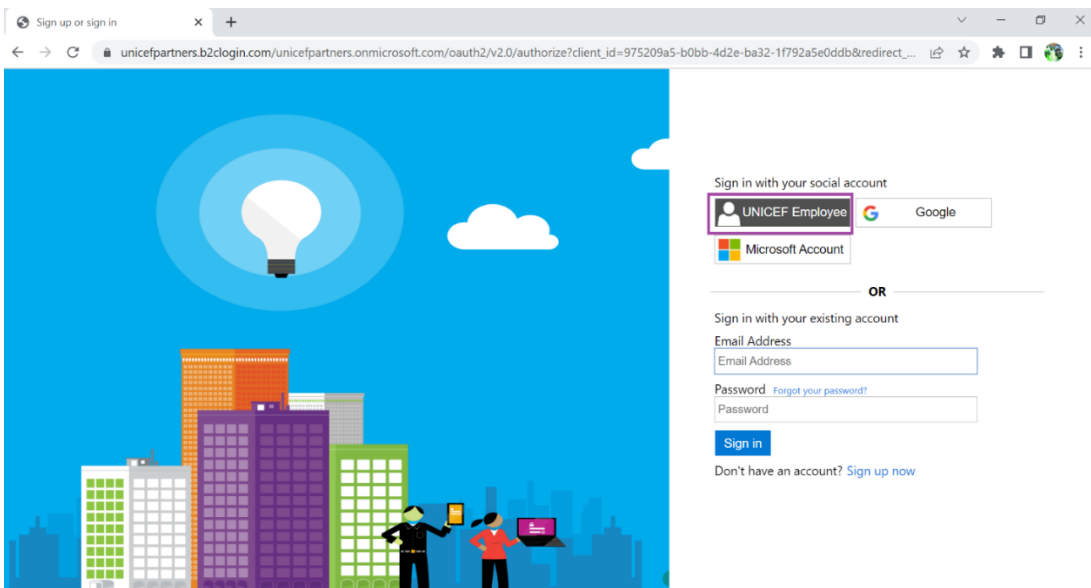
**When:** A Programme document is jointly developed by UNICEF and the partner. In this guide you will learn how to access and navigate the different sections of the ePD and send an ePD to the partner to start development.

**Why:** Workflow an ePD to the partner Focal Point to access eTools and programme document.


**Step 1:** Enter the URL; <https://etools.unicef.org/> and click the **sign-in** icon.



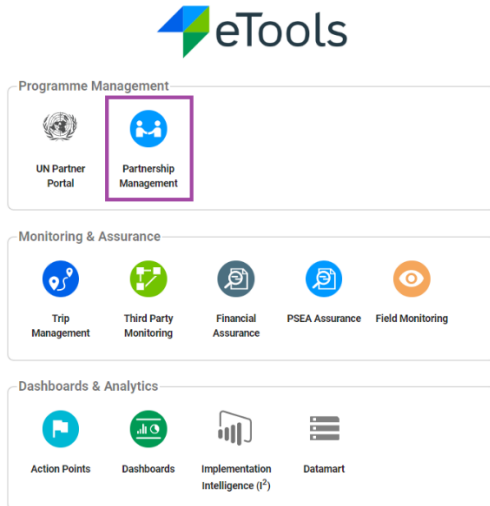
**Step 2:** Go to **sign in with your social account** section, click the “UNICEF Employee” icon



## UNICEF ePD Step by step guide

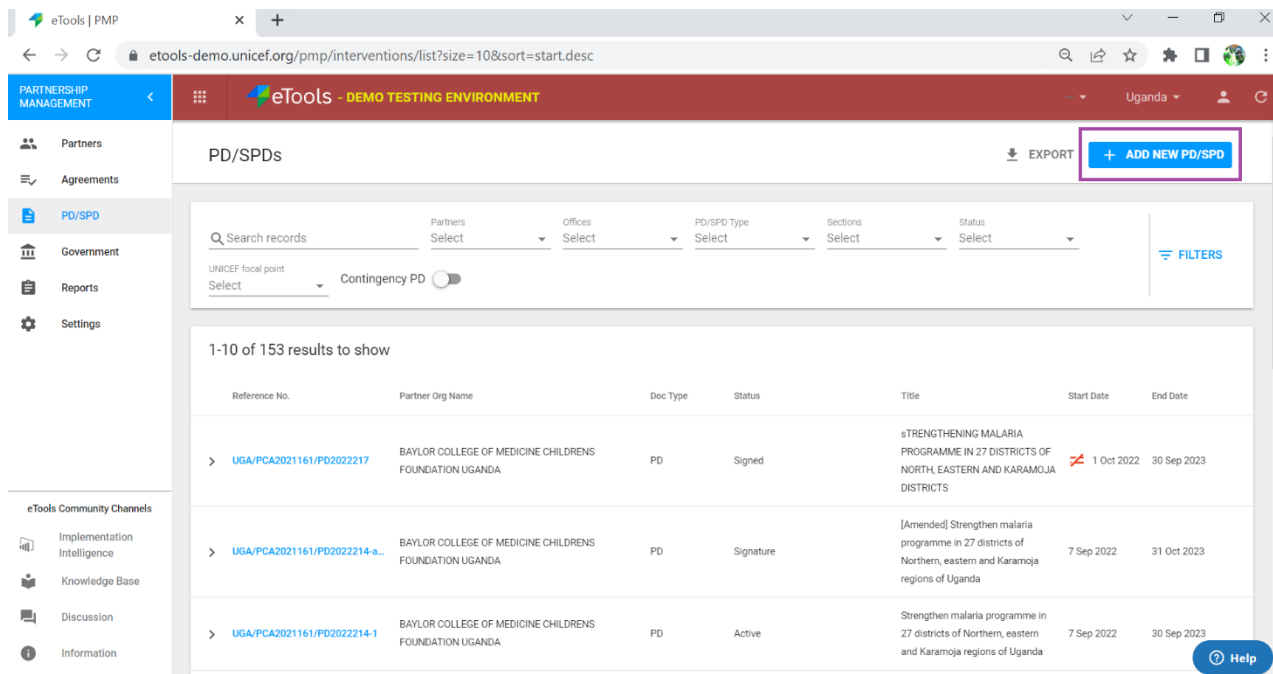
 **Knowledge:** ePD is an enhancement of PMP and the ePD can be accessed there.

**Step 3:** Click **Partnership Management** from the menu.




**Step 4:** To initiate new PD/SPD, click to the PD/SPD icon on the left hand menu of the page, click **“add new PD/SPD”**

Click the Reference number to view an existing PD/SPD

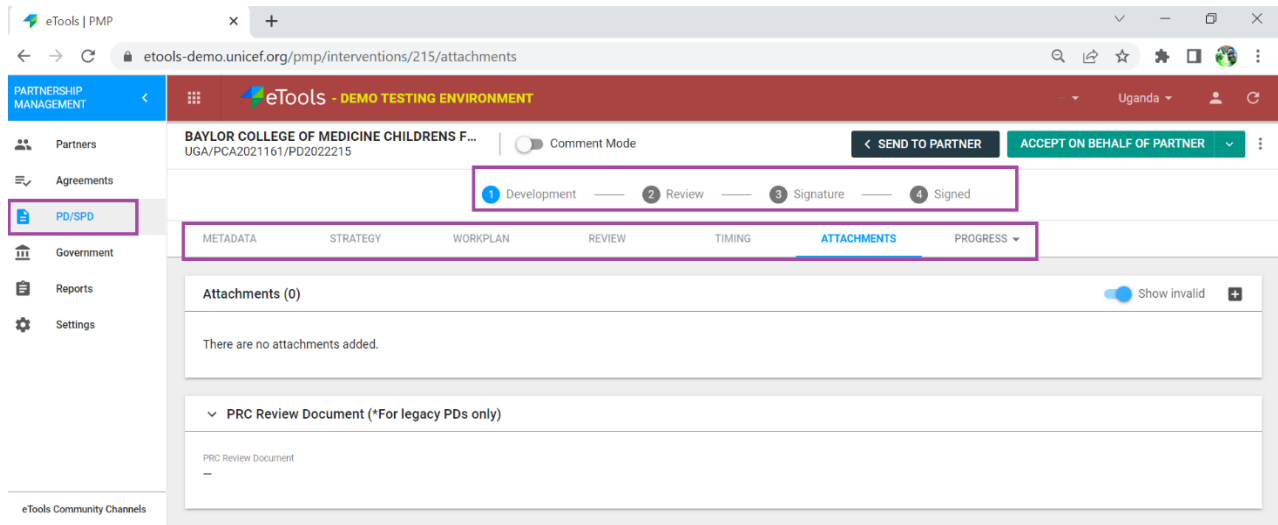


Reference No.	Partner Org Name	Doc Type	Status	Title	Start Date	End Date
> <a href="#">UGA/PCA2021161/PD2022217</a>	BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA	PD	Signed	sTRENGTHENING MALARIA PROGRAMME IN 27 DISTRICTS OF NORTH, EASTERN AND KARAMOJA DISTRICTS	1 Oct 2022	30 Sep 2023
> <a href="#">UGA/PCA2021161/PD2022214-a...</a>	BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA	PD	Signature	[Amended] Strengthen malaria programme in 27 districts of Northern, eastern and Karamoja regions of Uganda	7 Sep 2022	31 Oct 2023
> <a href="#">UGA/PCA2021161/PD2022214-1</a>	BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA	PD	Active	Strengthen malaria programme in 27 districts of Northern, eastern and Karamoja regions of Uganda	7 Sep 2022	30 Sep 2023

## UNICEF ePD Step by step guide

 **Knowledge:** The PD is divided into tabs and statuses through which it progresses from start to completion.

- The tabs are; Metadata, Strategy, Workplan, Review, Timing, Attachments and Progress
- The statuses are; Development, Review, Signature, signed, Active, Ended, Closed



### What do the different PD statuses mean?

Programme Document moves through 4 different statuses before ready for implementation:



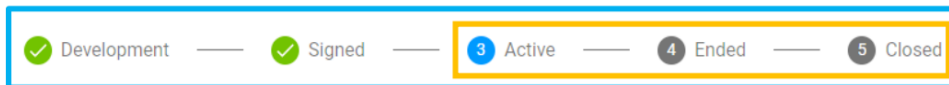
- **Development:** This is the stage in which a new PD is created and the template is populated with content. UNICEF and Partner focal points complete all the required fields in the PD. When both UNICEF and Partner agree that the “development” phase of the draft PD has been finished, then both parties accept the PD, which moves it to the next status.
- **Review:** This is a protected stage, in which the PD, which has gone through the development phase, moves to UNICEF internal review. During this stage, no further changes to the

## UNICEF ePD Step by step guide

developed PD are allowed by either UNICEF or Partner. If during the review stage, a need for further revision to the PD content is required, then the PD moves back to development status.

- **Signature:** This is the stage after successful internal UNICEF review, when both parties prepare to sign the developed and reviewed PD.
- **Signed:** This is the stage after the PD has been signed digitally or on paper, and the duly signed PD is uploaded in the system, with the name of signatories and date of signature entered in metadata tab. After a PD has been developed and signed during the planning stage, it moves to the implementation stage.

After the PD is signed, there are 3 more statuses for a PD:



- **Active:** A PD is assigned “active” status when (a) the related Funds Reservation (FR) has been entered by UNICEF in metadata tab and (b) the start date of the PD has been reached.
- **Ended:** A PD that was once active will automatically change to “ended” after its end date has arrived.
- **Closed:** The closure happens automatically once the following criteria are met:
  - (a) 0 outstanding DCT against PD (FR);
  - (b) FR is closed (mark as completed) or disbursement amount is same as planned budget;
  - (c) Final progress report has been submitted

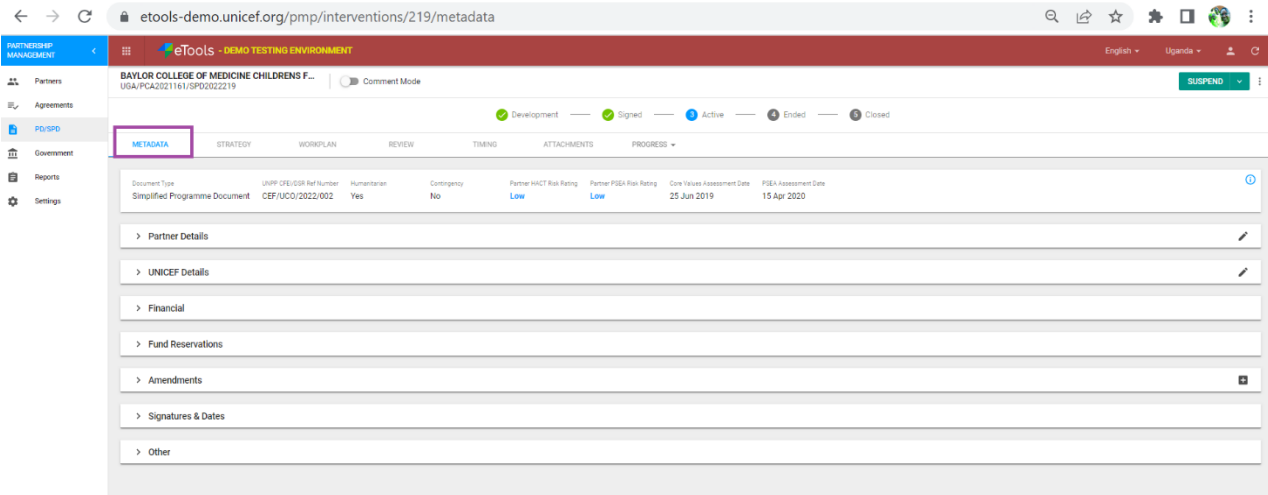
### Lets learn about the information included in the different tabs of the ePD

**MetadataTab:** The metadata tab includes the basic information about the partner and the PD entered into the system by the UNICEF focal point; This basic information includes;

- The partner details (name, focal points, agreement date and status, authorised officers)

## UNICEF ePD Step by step guide

- UNICEF details (focal points, office and sections) details,
- The cash transfer modalities in the financial tab,
- Any other relevant information and the document currency,
- Amendments
- Signatures and dates

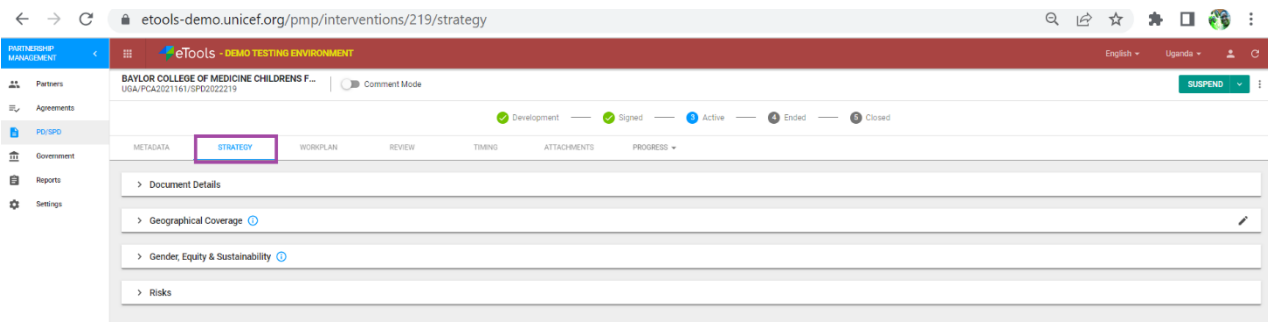


The screenshot shows the UNICEF eTools interface for a document titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F...". The "METADATA" tab is selected, displaying a table with the following data:

Document Type	UNEP DFE/CSR Ref Number	Humanitarian	Contingency	Partner INACT Risk Rating	Partner PSEA Risk Rating	Core Values Assessment Date	PSEA Assessment Date
Simplified Programme Document	CEF/UCO/2022/002	Yes	No	Low	Low	25 Jun 2019	15 Apr 2020

Below the table, there are expandable sections for Partner Details, UNICEF Details, Financial, Fund Reservations, Amendments, Signatures & Dates, and Other.

**Strategy Tab:** The strategy tab includes document details, geographical coverage, gender and equity and risks



The screenshot shows the UNICEF eTools interface for the same document, with the "STRATEGY" tab selected. The content area displays expandable sections for Document Details, Geographical Coverage, Gender, Equity & Sustainability, and Risks.

**Workplan Tab:** The work plan tab includes the results structure, the capacity-strengthening costs, the supply contribution and the partner non-financial contribution. It also avails a summary of all financial information that is included in the PD. It avails different views that can be used for data entry including; the results, combined and budget views and the activities editor view.

## UNICEF ePD Step by step guide

**BAYLOR COLLEGE OF MEDICINE CHILDRENS F...**  
UGA/PCA2021161/SPD2023295

Development — Signed — Active — Ended — Closed

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	Total Partner Supply	Total Partner Cash	Total Amt (Cash + Supply)
UGX	7%(35.00)	0%	535.00	535.00	0.00	827.00	0.00	292.00	UGX <b>827.00</b>
Total Partner Contribution: 35.31% (292.00)									

Results Structure (1) Combined view Activities Editor Total: UGX 792.00

- Effective and Efficient Programme Management TOTAL: UGX 0.00
- Capacity-Strengthening Cost
- Supply Contribution (Planned) TOTAL SUPPLY BUDGET: UGX 0.00
- Partner Non-Financial Contribution

**Review Tab:** The review tab allows the Budget Owner to send the document for PRC/Non PRC review and approval.

**BAYLOR COLLEGE OF MEDICINE CHILDRENS F...**  
UGA/PCA2021161/PO202217

Development — Signed — Active — Ended — Closed

**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	Submitted by
09 Sep 2022	Non-PRC Review	Helen Kibukamusoke

**Project Review Committee Members**

Overall Review

Review Date	Approved
08 Sep 2022	✓

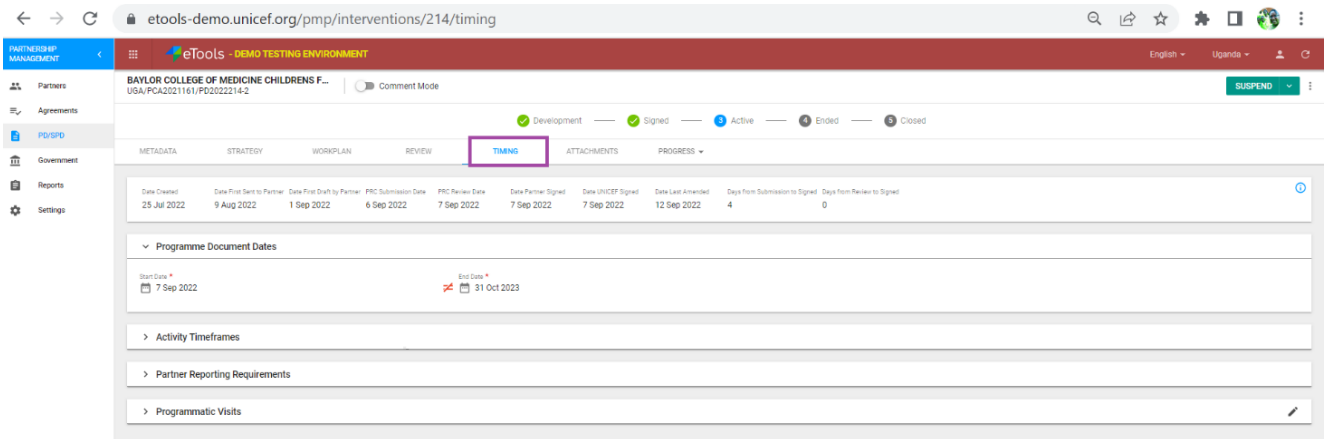
Approval Comment: Not Approved

Actions Log: Review the indicators and budgets

- 01: 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. **No, disagree**
- 02: The partner selection evidences the CSO's comparative advantage and value for money in relation to the planned results. **No, disagree**
- 03: Previous UNICEF/UN relationships with the proposed CSO have been positive. **Yes, agree**

**Timing Tab:** The timing tab shows length of time taken to process a PD and activity timelines. It is where the PD reporting and programmatic visit requirements are planned.

## UNICEF ePD Step by step guide

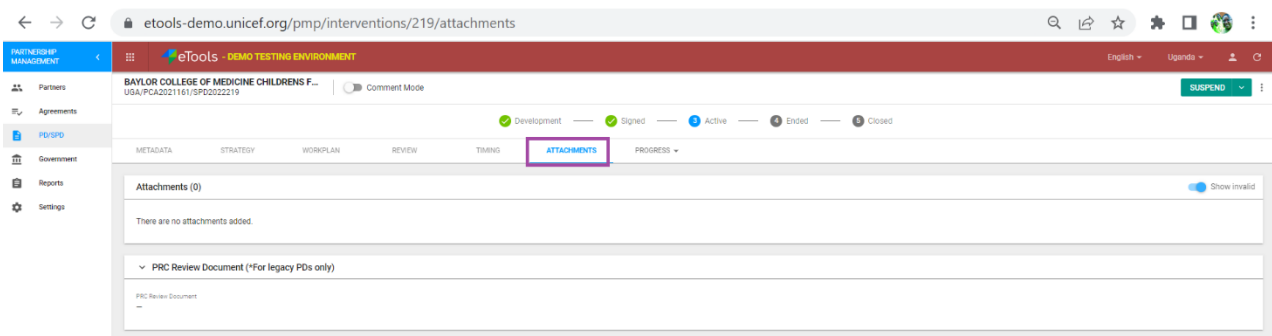


The screenshot shows the 'TIMING' tab selected. It displays a table with columns for various dates and durations:

Date Created	Date First Sent to Partner	Date First Draft by Partner	PRC Submission Date	PRC Review Date	Date Partner Signed	Date UNICEF Signed	Date Last Amended	Days from Submission to Signed	Days from Review to Signed
25 Jul 2022	9 Aug 2022	1 Sep 2022	6 Sep 2022	7 Sep 2022	7 Sep 2022	7 Sep 2022	12 Sep 2022	4	0

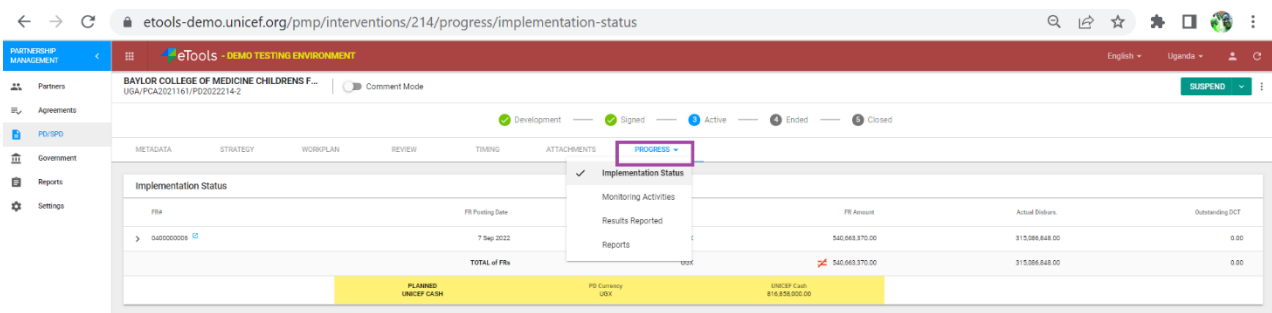
Below the table, there are sections for 'Programme Document Dates', 'Activity Timeframes', 'Partner Reporting Requirements', and 'Programmatic Visits'.

**Attachments Tab:** The attachments tab is used to upload any related documents required during development and implementation.



The screenshot shows the 'ATTACHMENTS' tab selected. It displays a section for 'Attachments (0)' with a 'Show invalid' toggle. Below this, there is a section for 'PRC Review Document (\*For legacy PDs only)' with a table containing one row for the PRC Review Document.

**Progress Tab:** The progress tab allows you to view the different statuses including implementation status, monitoring activities, progress reports during implementation phase of the PD.



The screenshot shows the 'PROGRESS' tab selected. It displays a table for 'Implementation Status' with columns for File#, FR Posting Date, FR Amount, Actual Disburs., and Outstanding DCT.

File#	FR Posting Date	FR Amount	Actual Disburs.	Outstanding DCT
> 0402000004	7 Sep 2022	\$40,063,370.00	\$15,096,848.00	0.00
<b>TOTAL of FRs</b>		\$40,063,370.00	\$15,096,848.00	0.00

At the bottom, there is a summary section with 'PLANNED UNICEF CASH', 'PRC Currency USD', and 'UNICEF Cash: \$14,870,000.00'.

Refer to the guidance documents/videos on creating the strategy, workplan, budget and supplies.