

UNICEF ePD Step by step guide


Purpose: To send the PD for signature, and move it through the different statuses – active, ended and closed.

When: When the ePD review is completed and review is approved.

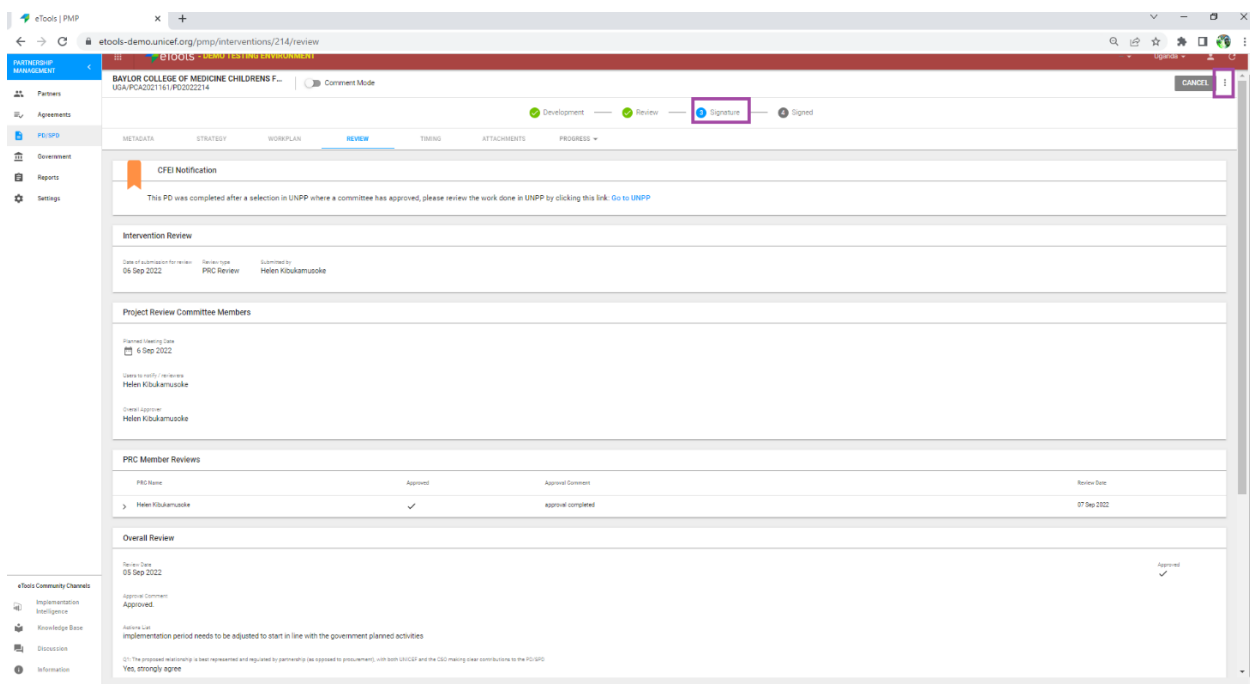
Why: To change the PD status to active and start implementation.

Who: UNICEF staff (PRC secretary and PD focal point)

Once the internal review is approved, the PD moves to the signature status the ePD is ready for signature by UNICEF and partner respective authorizing officers.

 **Knowledge:** The hardcopy PD needs to be signed by both UNICEF and the partner. The dully signed document will then be uploaded.

Step 1: To download the final ePD, click the **3 dots** at the top right corner next to the **cancel** icon to export the PD to PDF



The screenshot shows the 'eTools | PMP' interface with a sidebar on the left containing 'Partners', 'Agreements', 'ePDs', 'Development', 'Reports', and 'Settings'. The main content area is titled 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' and shows a progress bar with stages: Development, Review, Signature, and Signed. The 'Signature' stage is currently active. Below the progress bar, there is a 'CFEI Notification' section, followed by an 'Intervention Review' section with details like 'Date of submission for review: 05 Sep 2022', 'Review type: PRC Review', and 'Submitted by: Helen Kibukamusole'. The 'Project Review Committee Members' section lists 'Planned Meeting Date: 6 Sep 2022' and 'Chairperson: Helen Kibukamusole'. The 'PRC Member Reviews' section shows a table with columns for 'PRC Name', 'Approved', 'Approval Comments', and 'Review Date'. The table contains one entry for 'Helen Kibukamusole' with a checkmark in the 'Approved' column and 'Approval completed' in the 'Approval Comments' column. The 'Overall Review' section shows 'Review Date: 05 Sep 2022' and 'Approval Comments: Approved. Implementer Can implement period needs to be adjusted to start in line with the government planned activities'. At the bottom, there is a note: 'The proposed relationship is being represented and regulated by partnership (as opposed to procurement), with both UNICEF and the DSD making clear contributions to the PRC/GPO. Yes, strongly agree'.

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Step 2: Click export PDF

Export PDF
Export Excel
Export Comments
Export Results

PRC Name	Approval	Approval Comment	Review Date
Helen Kibukamuukie	✓	approval completed	07 Sep 2022

Review Date	Review Comment
05 Sep 2022	Approved

Send the downloaded PD to the respective authorizing officers for signature

To move the PD from signature to signed status

Step 3: When the hard copy document is signed by the respective authorising officers, navigate to the metadata tab and then to the signature and dates section. Click the edit icon to add the names of the authorised offices and the dates when the document was signed by them.

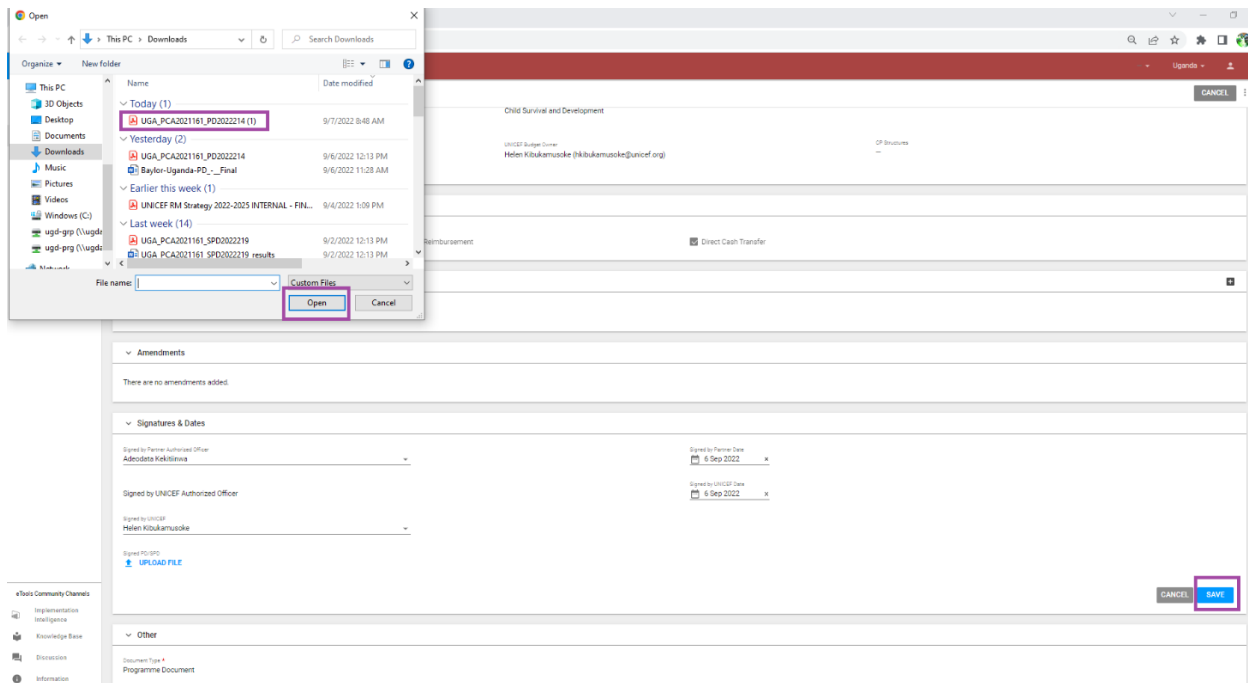
Knowledge: The start date cannot be before the later of signature dates.

Step 4: Click **upload file** to upload the signed document.

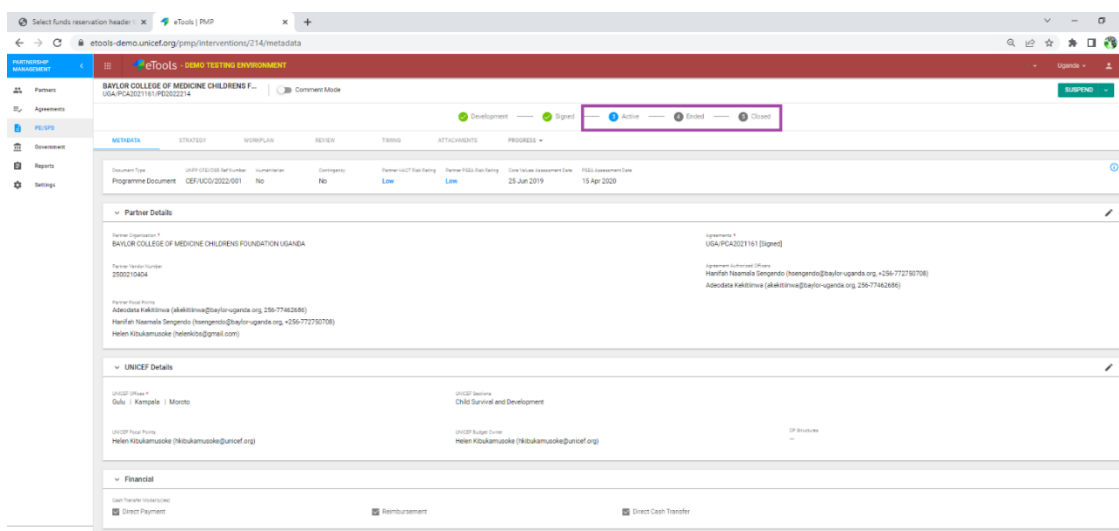
unicef  for every child

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Step 5: Search for and select the signed document, click **open** and then click **save**



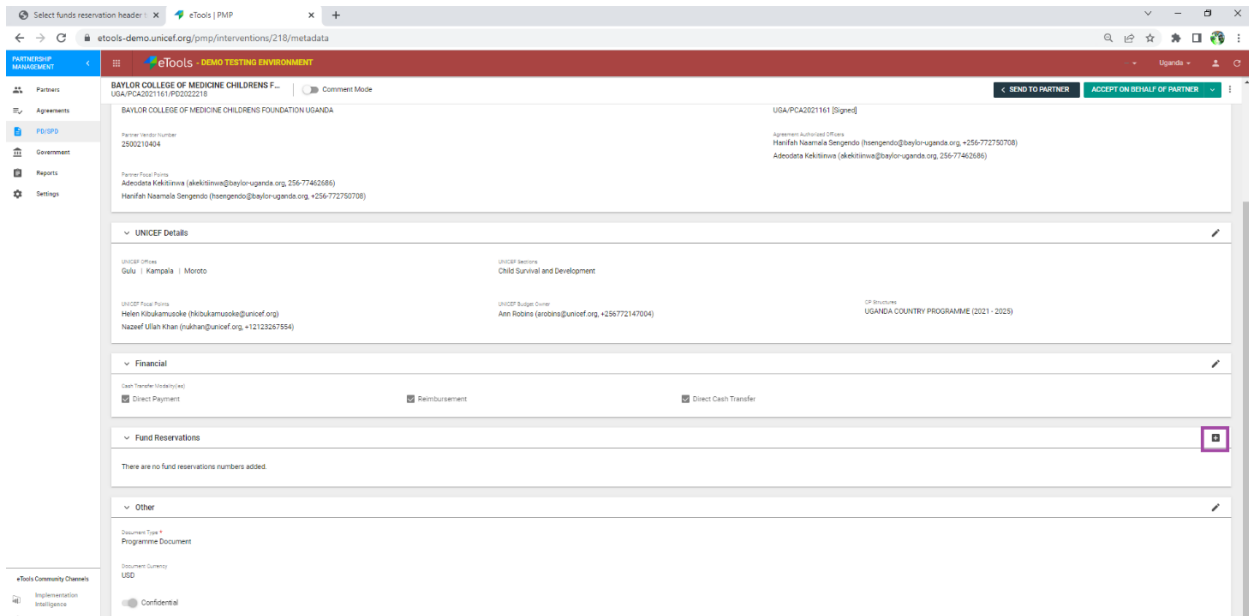
Knowledge: The programme document will move from signature to the signed status once the the signature dates are added and the signed document has been uploaded. The new statuses of the PD; these are Active, Ended and Closed will appear.



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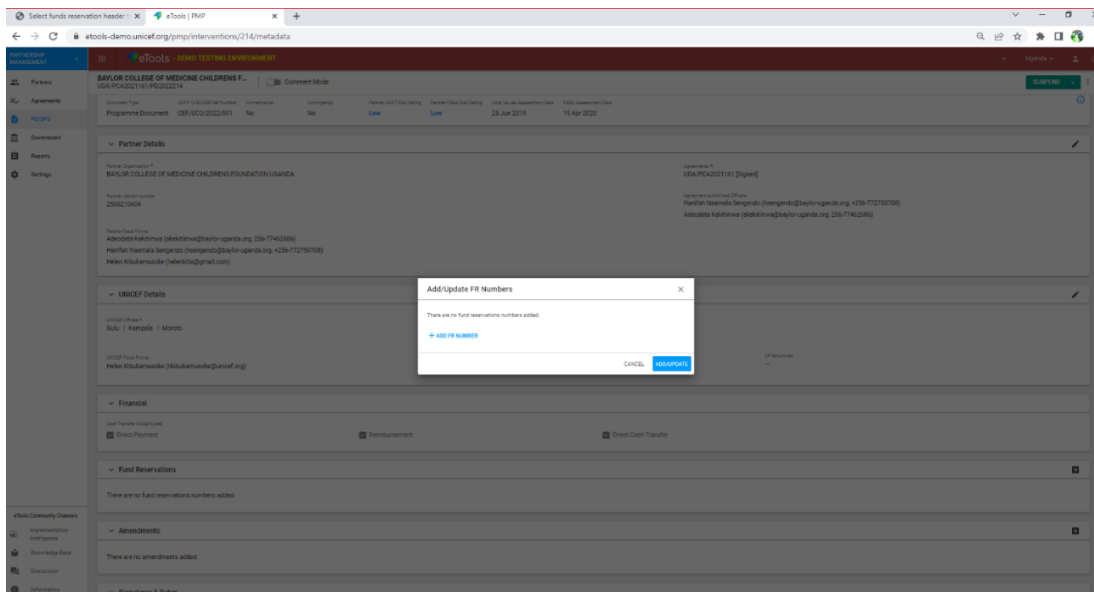
To move the PD to active status

Step 6: To move a PD to **Active** status, add the FR (Funds Reservation) number. Navigate to the metadata tab and navigate to the FR section. Click the **add** icon in the FR section



The screenshot shows the 'eTools | PMP' interface. The left sidebar contains navigation options: Partners, Agreements, **PD/FPD**, Government, Reports, and Settings. The main content area displays the 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' document. The 'UNICEF Details' section shows the document type as 'Programme Document' and the currency as 'USD'. The 'Fund Reservations' section is highlighted with a red box, showing a message: 'There are no fund reservations numbers added.' Below this, there is a red 'add' icon.


Step 7: In the pop-up screen, click the **add FR number**

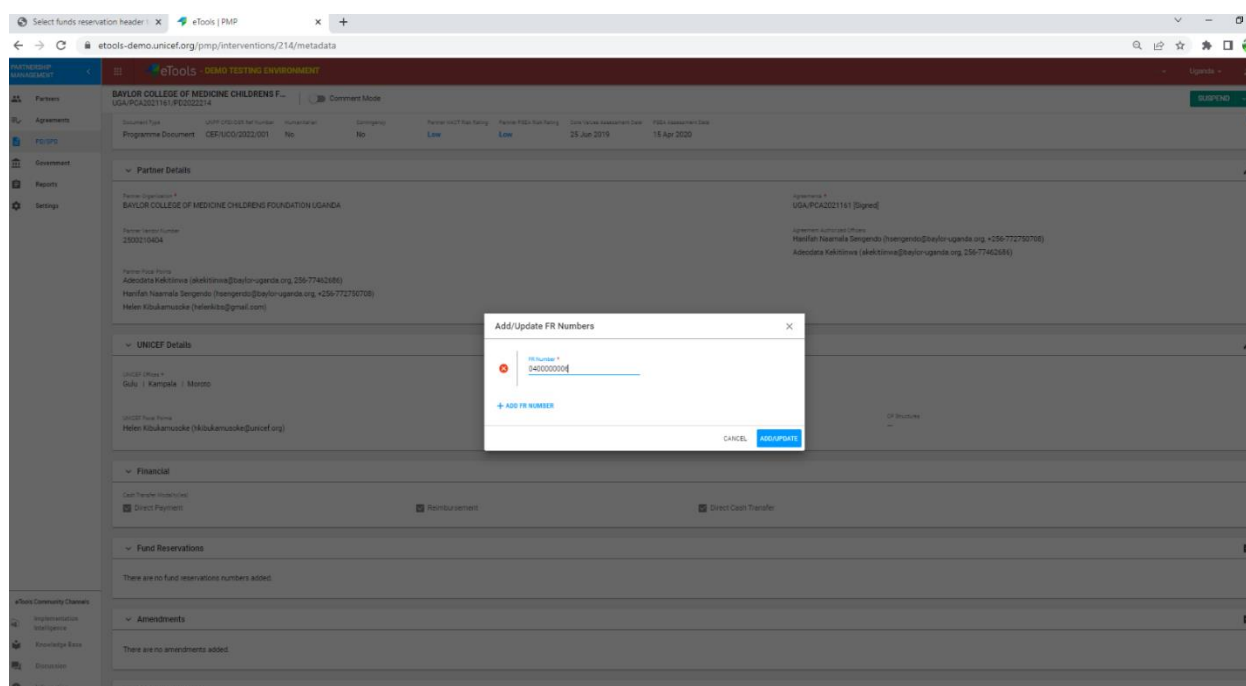


The screenshot shows the 'Add/Update FR Numbers' pop-up screen. The screen has a title bar with 'Add/Update FR Numbers' and a close button. The main content area displays a message: 'There are no fund reservations numbers added.' Below this, there is a red 'add FR number' button. The background shows the same 'eTools | PMP' interface as the previous screenshot, but it is dimmed.

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Step 8: Add the relevant FR number and click **approve**.

 **Knowledge:** Add a zero Infront of the FR number. Several FR validations will be seen depending on the FR. These include validations on start and end date and FR amount

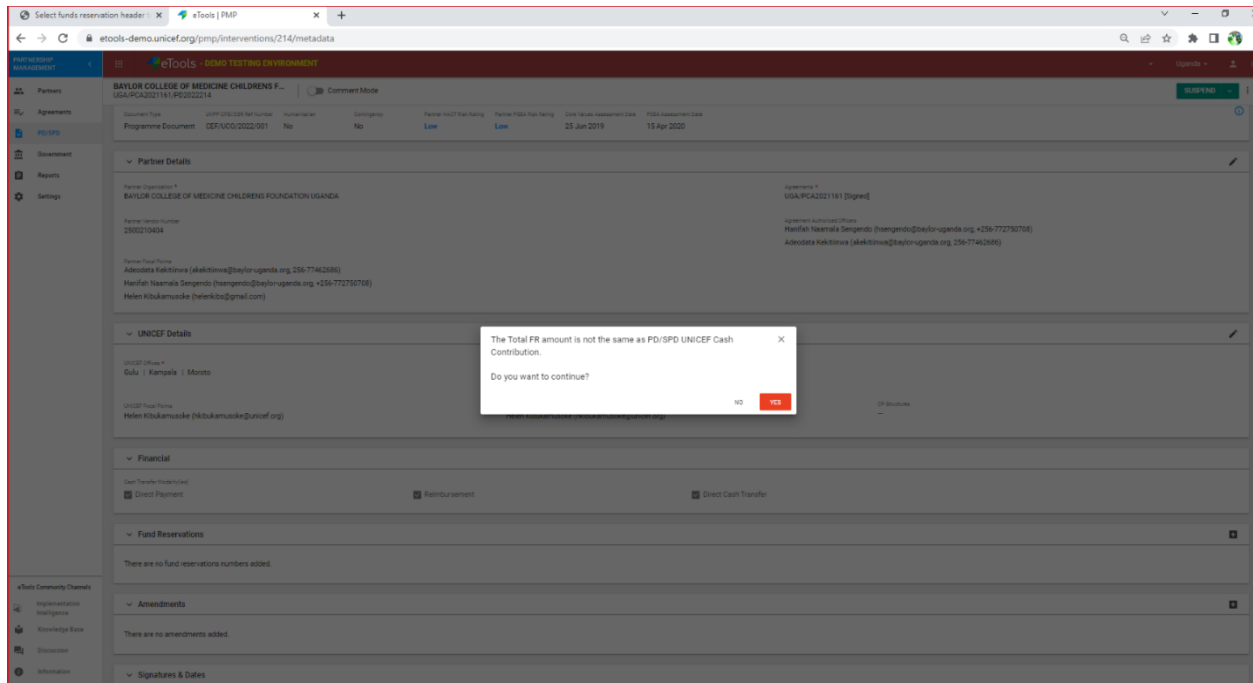


The screenshot shows the UNICEF eTools interface for a demo testing environment. The main window displays the details of a fund reservation for the BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA. A pop-up window titled 'Add/Update FR Numbers' is open, showing a text input field with the value '5400000004' and a red error icon. Below the input field is a button labeled '+ ADD FR NUMBER'. The background interface includes sections for Partner Details, UNICEF Details, Financial, Fund Reservations, and Amendments.

Step 9 (Optional): A pop up window will appear with a notification on the funding availability on the FR. Click **Yes** to continue or return to the FR to adjust the amount to match the PD value.

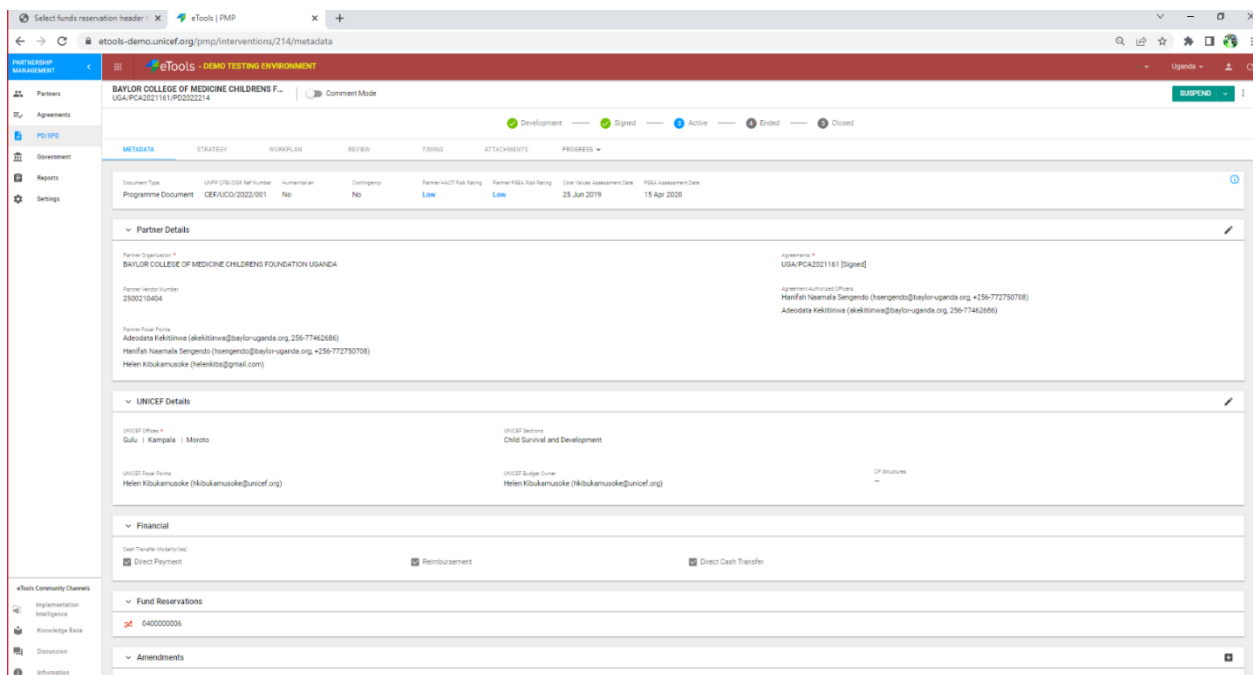
 **Knowledge:** Note that this will change with the introduction of eZHACT 2.0 as the FR will be automatically created

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The screenshot shows the UNICEF eTools interface for a document titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F...". A modal dialog box is open, displaying the message: "The Total FR amount is not the same as PD/SPD UNICEF Cash Contribution. Do you want to continue?". The dialog has two buttons: "NO" and "YES".

Step 10: The PD will move to the active status when the start date is reached.



The screenshot shows the UNICEF eTools interface for the same document. The document status is now "Active", indicated by a blue circle. The "PD/SPD" tab is selected, showing details for the document. The document is titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F...". The document type is "Programme Document". The document number is "CEFAUC/2022/001". The document is currently in the "Active" status.

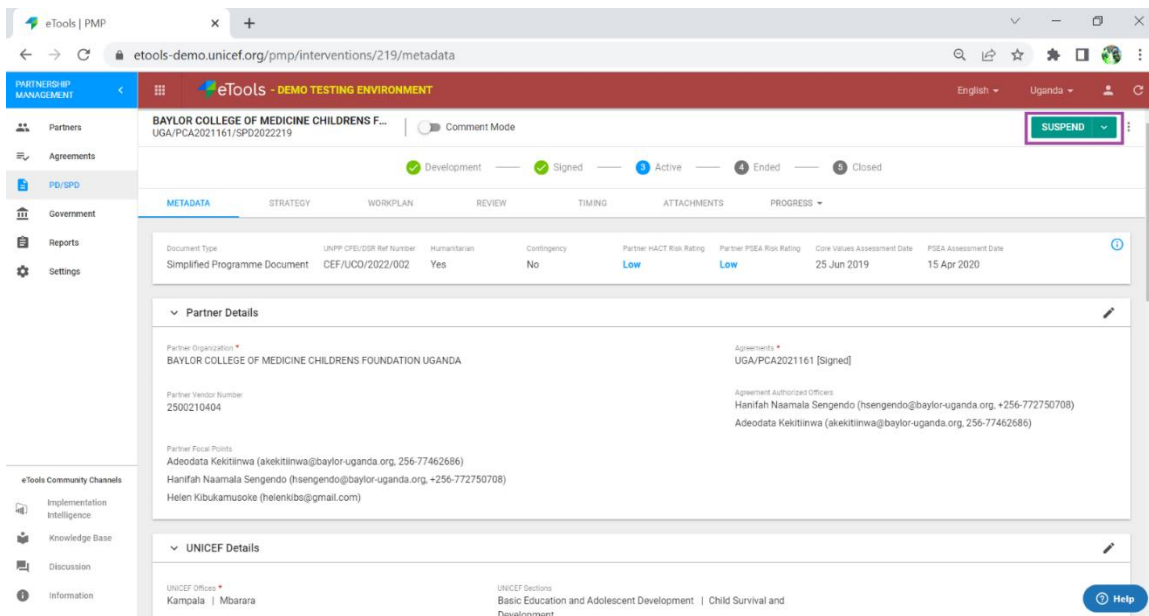
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 **Knowledge:** UNICEF offices may decide to suspend the transfer of resources to the partner if conditions set out in the partnership agreement have not been complied with, or implementation is not proceeding satisfactorily. These conditions include.

- The partner has breached its obligations under the legal agreement.
- Sexual exploitation and abuse, or child safeguarding violations
- Fraud, corruption
- UNICEF's funding has been curtailed or terminated.
- The partner has been adjudged bankrupt, been liquidated, or become insolvent

If UNICEF suspends a programme intervention, no requests for further cash transfers are processed and the partner should not incur any further liabilities regarding the programme intervention.

Step 11: To suspend a PD, navigate to the top of the PD and click **suspend**.



The screenshot shows the eTools PMP interface for a partner organization. The top navigation bar includes a 'PARTNERSHIP MANAGEMENT' menu and a 'SUSPEND' button. The main content area displays the metadata for a partner organization, including details such as the partner organization name, partner vendor number, and partner focal points. The 'SUSPEND' button is highlighted in the top right corner.

Step 12: In the pop-up window click **suspend**

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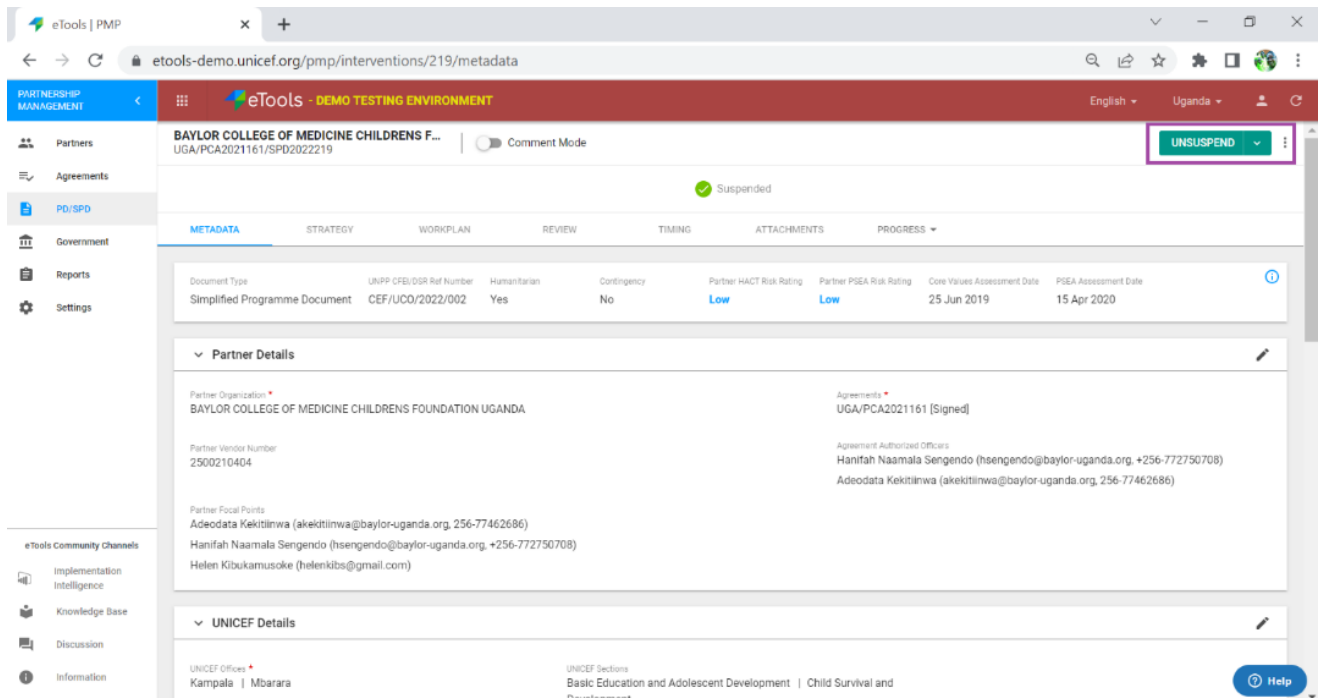
The screenshot shows the UNICEF eTools interface in the 'eTools | PMP' browser window. The URL is etools-demo.unicef.org/pmp/interventions/219/metadata. The interface displays the 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' intervention with a 'SUSPEND' button in the top right. A modal dialog box is open in the center, asking 'Are you sure you want to suspend ?' with 'CANCEL' and 'SUSPEND' buttons. The background shows the 'METADATA' tab with fields for Document Type, UNFP CFE/OSR Ref Number, Humanitarian, Contingency, Partner HACT Risk Rating, Partner PSEA Risk Rating, Core Values Assessment Date, and PSEA Assessment Date. The 'Partner Details' section lists the Partner Organization, Partner Vector Number, and Partner Focal Points.

The Status of the PD will change to **suspended**

The screenshot shows the UNICEF eTools interface in the 'eTools | PMP' browser window. The URL is etools-demo.unicef.org/pmp/interventions/218/metadata. The interface displays the 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' intervention. The status is now 'Suspended', indicated by a green checkmark and the word 'Suspended' in a box. The 'SUSPEND' button has been replaced by an 'UNSUSPEND' button. The background shows the 'METADATA' tab with fields for Document Type, UNFP CFE/OSR Ref Number, Humanitarian, Contingency, Partner HACT Risk Rating, Partner PSEA Risk Rating, Core Values Assessment Date, and PSEA Assessment Date. The 'Partner Details' section lists the Partner Organization, Partner Vector Number, and Partner Focal Points.

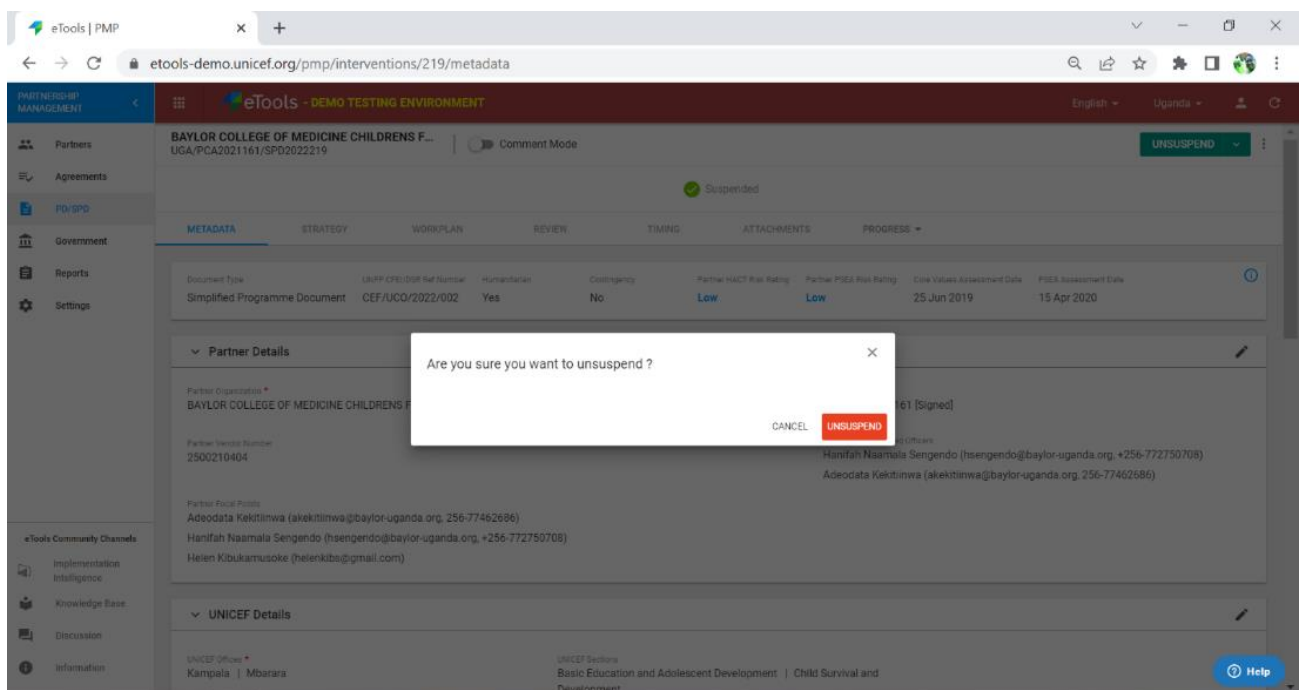
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Step 13: To unsuspend a PD, navigate to the top of the PD and click **unsuspend**.



The screenshot shows the eTools interface for a Partnership Management (PMP) project. The top navigation bar includes 'eTools | PMP' and a search bar. The main header displays the project name 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' and a 'Comment Mode' toggle. A green 'Suspended' status indicator is visible. The left sidebar contains navigation links for 'Partners', 'Agreements', 'PD/SPD', 'Government', 'Reports', and 'Settings'. The main content area shows the 'METADATA' tab with various fields: Document Type (Simplified Programme Document), UNPP CFE/OSR Ref Number (CEF/UCO/2022/002), Humanitarian (Yes), Contingency (No), Partner HACT Risk Rating (Low), Partner PSEA Risk Rating (Low), Core Values Assessment Date (25 Jun 2019), and PSEA Assessment Date (15 Apr 2020). Below this, the 'Partner Details' section lists the partner organization (BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA), partner vendor number (2500210404), and partner focal points (Adeodata Kekitiniwa, Hanifah Naamala Sengendo, Helen Kibukamusoke). The 'UNICEF Details' section lists UNICEF offices (Kampala, Mbarara) and UNICEF sections (Basic Education and Adolescent Development, Child Survival and Development). A blue 'Help' button is located in the bottom right corner.

Step 14: In the pop-up window click unsuspend to reactive the PD.



The screenshot shows the same eTools interface as before, but with a confirmation pop-up window displayed in the center. The pop-up window contains the text 'Are you sure you want to unsuspend?' and two buttons: 'CANCEL' and 'UNSUSPEND'. The background interface is dimmed, showing the same project details and navigation elements.

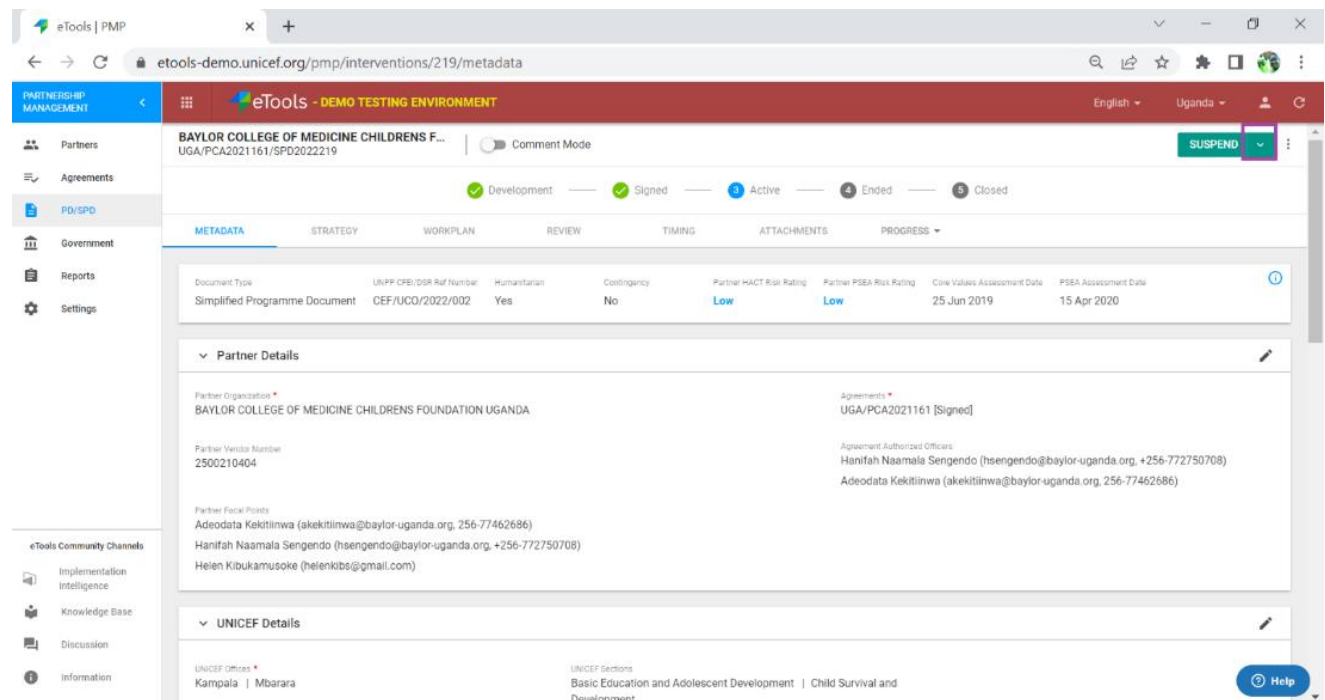
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Termination of a Programme Document

UNICEF offices may, by written notice, terminate a programme intervention. In such cases, the partner will be asked to return unspent funds from advances, submit final reports and return any supplies or UNICEF assets in its possession. Termination of a PD is not reversible.

If a partnership agreement is terminated, the UNICEF programme prepares a Note to Record detailing the reasons for termination. The Note to Record is provided to the PRC Secretary, the regional office and headquarters through email - csopartnership@unicef.org and, in the case of CSO partners, is recorded in eTools ePD module.

Step 15: Navigate to the top of the PD and click the **dropdown arrow** next to suspend.



The screenshot shows the eTools interface for a Programme Document (PD) titled "BAYLOR COLLEGE OF MEDICINE CHILDRENS F...". The interface includes a sidebar with navigation options like Partners, Agreements, PD/SPD, Government, Reports, and Settings. The main content area displays the PD details, including a table with columns for Document Type, UNPP OPE/DOR Ref Number, Humanitarian, Contingency, Partner HACT Risk Rating, Partner PSEA Risk Rating, Core Values Assessment Date, and PSEA Assessment Date. Below this, there are sections for Partner Details and UNICEF Details. A dropdown arrow is visible next to the "SUSPEND" button in the top right corner.

Step 16: Click the **terminate** icon

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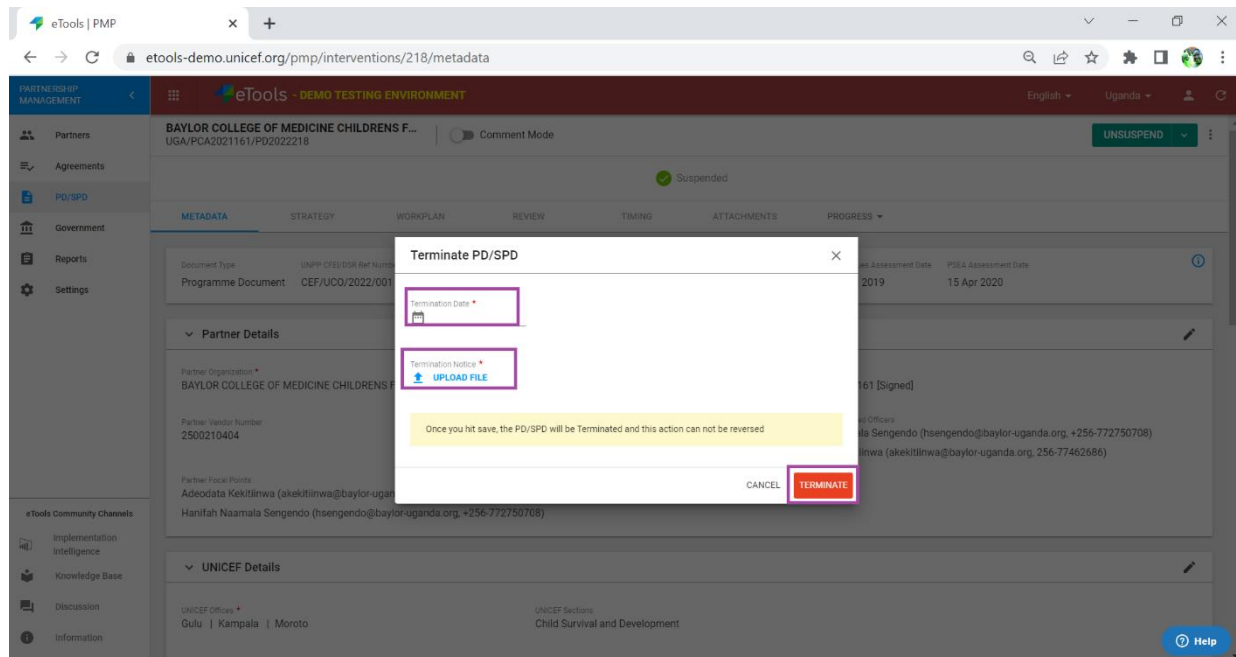
The screenshot shows the UNICEF eTools interface for a specific intervention. The top navigation bar includes 'PARTNERSHIP MANAGEMENT' and 'eTools - DEMO TESTING ENVIRONMENT'. The left sidebar lists various management options. The main content area displays the intervention details for 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' (UGA/PCA2021161/SPD2022219). The status is 'Active', and the 'TERMINATE' button is highlighted in a purple box. Below the status bar, there are tabs for 'METADATA', 'STRATEGY', 'WORKPLAN', 'REVIEW', 'TIMING', 'ATTACHMENTS', and 'PROGRESS'. The 'METADATA' tab is selected, showing a table with columns for Document Type, UNFP CFE/DDR Ref Number, Humanitarian, Contingency, Partner HACT Risk Rating, Partner PSEA Risk Rating, Core Values Assessment Date, and PSEA Assessment Date. Below the table, there are sections for 'Partner Details' and 'UNICEF Details'.

Step 17: In the pop-up window, click **continue** to confirm termination of the PD.

This screenshot shows the same UNICEF eTools interface as the previous one, but with a confirmation pop-up window. The pop-up window has the text 'Are you sure you want to terminate?' and two buttons: 'CANCEL' and 'CONTINUE'. The 'CONTINUE' button is highlighted in red. The background interface remains the same, showing the intervention details for 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...'.

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Step 18: In the popup window, add the **termination date**, click **upload file** to upload the termination notice and click **terminate**

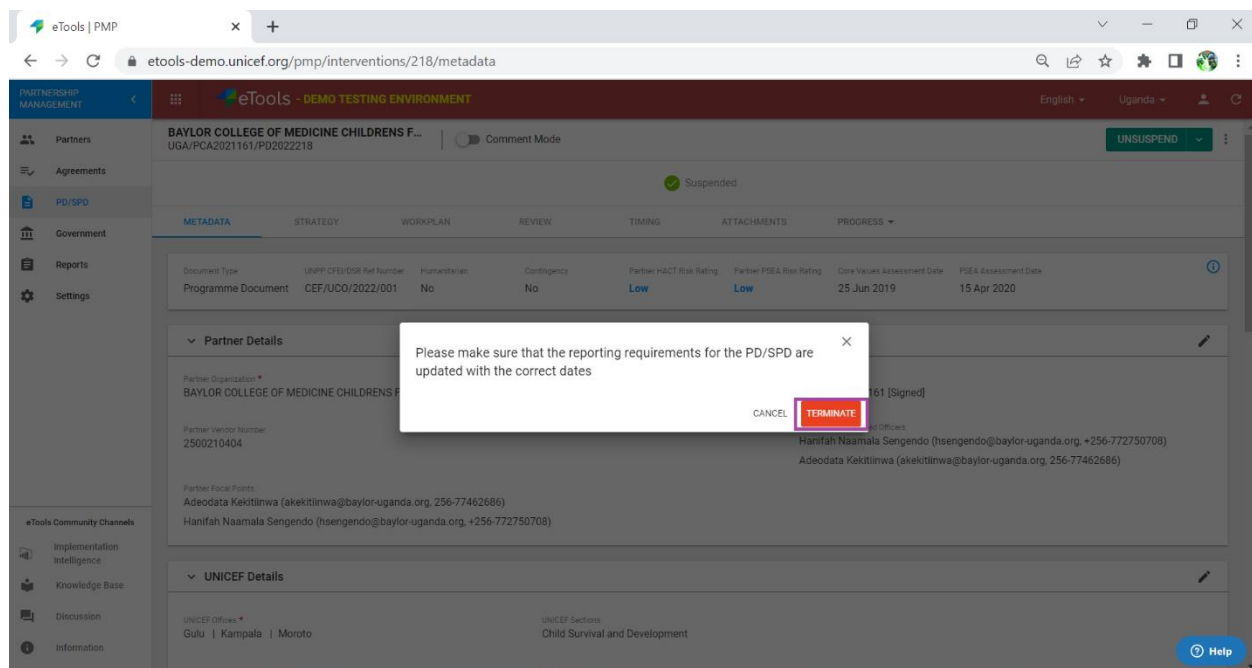


The screenshot shows the eTools interface with a 'Terminate PD/SPD' popup window. The popup contains the following elements:

- Termination Date ***: A date input field.
- Termination Notice ***: A text area with an **UPLOAD FILE** button.
- Warning Message**: A yellow box stating, "Once you hit save, the PD/SPD will be Terminated and this action can not be reversed".
- Buttons**: **CANCEL** and **TERMINATE** buttons at the bottom right.

The background interface shows the 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' entry in the 'PARTNERSHIP MANAGEMENT' section, with tabs for METADATA, STRATEGY, WORKPLAN, REVIEW, TIMING, ATTACHMENTS, and PROGRESS.

Step 19: In the popup window, validations for the update of reporting requirements will appear. Click **terminate** to proceed.



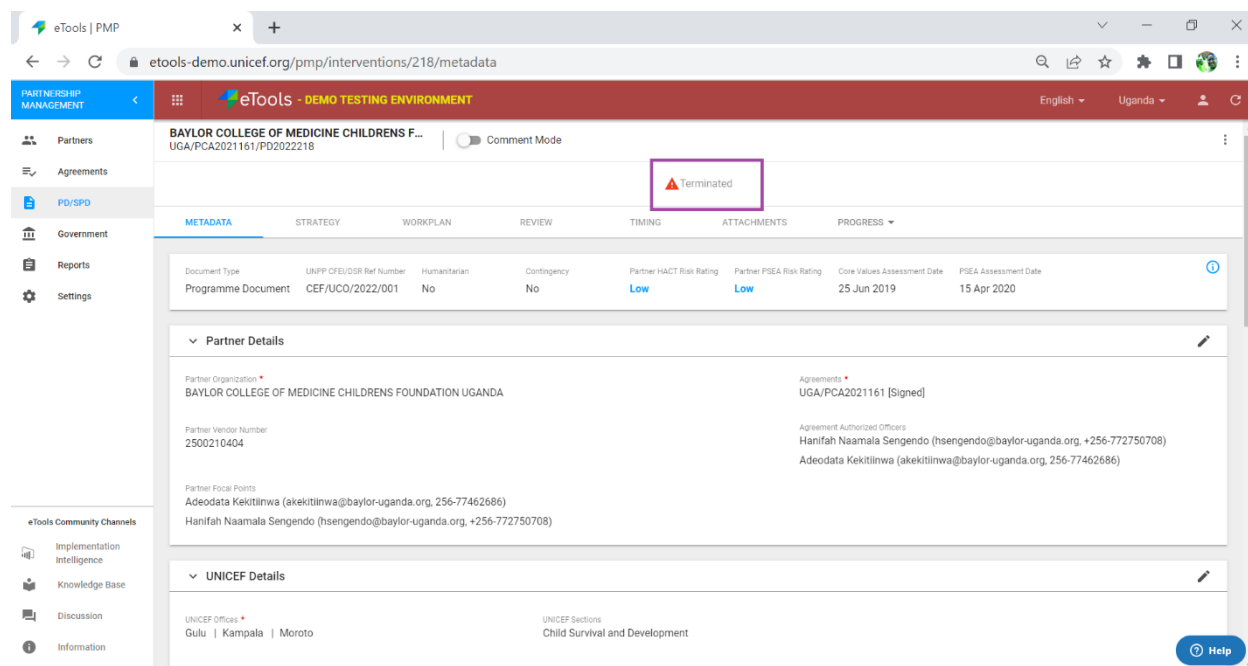
The screenshot shows the eTools interface with a 'Terminate PD/SPD' popup window. The popup contains the following elements:

- Validation Message**: A white box stating, "Please make sure that the reporting requirements for the PD/SPD are updated with the correct dates".
- Buttons**: **CANCEL** and **TERMINATE** buttons at the bottom right. The **TERMINATE** button is highlighted in red.

The background interface shows the 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' entry in the 'PARTNERSHIP MANAGEMENT' section, with tabs for METADATA, STRATEGY, WORKPLAN, REVIEW, TIMING, ATTACHMENTS, and PROGRESS.

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The PD status will change to Terminated



The screenshot shows the eTools PMP interface for a specific intervention. The status is marked as 'Terminated' with a red triangle icon. The interface includes a sidebar with navigation options like Partners, Agreements, PD/SPD, Government, Reports, and Settings. The main content area displays details for a 'Programme Document' under the 'BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA'.

Document Type	UNFP/CFE/CSR Ref Number	Humanitarian	Contingency	Partner HACT Risk Rating	Partner PSEA Risk Rating	Core Values Assessment Date	PSEA Assessment Date
Programme Document	CEU/UCO/2022/001	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)

UNICEF Details

UNICEF Offices: Gulu | Kampala | Moroto

UNICEF Sections: Child Survival and Development

If the partner is not suspended or terminated, it will process to the ended status

Step 18: Change of PD/SPD Status to Ended

When the duration of PD/SPD comes to an end, the status will automatically change to Ended

No action is required from the UNICEF/Partner staff to end the PD/SPD. The transition is automatic once the end date of your PD/SPD has arrived.

All fields are locked once the PD/SPD ends. There is no option to Suspend or Terminate an Ended PD/SPD

Step 19: Closure of a Programme Document

When a PD/SPD has reached the end date, it is necessary to close it. However, the closure happens automatically once the criteria below are met:

- FR amount and Actual amount (both from VISION) must be equal
- 0 outstanding DCT against that particular PD/SPD
- Final progress report is submitted