

UNICEF ePD Step by step guide

Purpose: Adding partner reporting requirement, programme visit requirement and adjusting the PD (Programme Document) duration.

Who: UNICEF Programme Document Focal point

When: In the development stage and adjustments need to be made to the duration of the PD

Why: To plan for the partner reporting, programme visits and to ensure ample PD processing time as the start date of the PD cannot be before the signature date.

 **Knowledge:** The Partner Reporting Portal supports three types of reports: The Quarterly Progress Report, Humanitarian Report, and Special Report.

- The **Quarterly Progress Report (QPR)** is prepared by the partner every three months from the start of the Programme Document to assess the progress towards planned results along with cash expenditure reporting on the FACE form.
- The **Humanitarian Report (HR)** is prepared by the partner every month, or more frequently, to report on the status of high-frequency humanitarian indicators. Humanitarian Reports are simplified and do not require narrative reporting or FACE form.
- The **Special Report (SR)** is prepared by the partner to meet specific reporting requirements. UNICEF may request partners to submit Special Reports as agreed during the Programme Document development phase. These reports may be requested for various reasons, including donor requirements, capturing specific human-interest stories, submitting particular studies or research, or any other unique circumstances. For Special Reports, there is no reporting on the progress of indicators, only the submission of narrative reports and relevant attachments.

Step 1: To add the **Quarterly Progress reports** reporting requirements, navigate to the Partner reporting requirement sections and click the reporting type; then click **add requirements** icon.

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The screenshot shows the 'eTools | PMP' interface with the URL 'etools-demo.unicef.org/pmp/interventions/212/timing'. The left sidebar contains navigation options: Partners, Agreements, PD/SPD, Government, Reports, and Settings. The main content area is titled 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' and 'UGA/PCA2021161/PD2022212'. It features a progress bar with steps: Development, Review, Signature, and Signed. Below this, there are tabs for METADATA, STRATEGY, WORKPLAN, REVIEW, TIMING (selected), ATTACHMENTS, and PROGRESS. The 'TIMING' tab displays a table with dates for various milestones, including 'Date Created' (25 Jul 2022), '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', and 'Days from Review to Signed'. Below the table, there are sections for 'Programme Document Dates' (Start Date: 25 Jul 2022, End Date: 31 Jul 2023), 'Activity Timeframes', 'Partner Reporting Requirements' (with a list of reports: Quarterly Progress Reports (0), Humanitarian Reports - UNICEF (0), and Special Report (0)), and 'Programmatic Visits'. A red box highlights the 'Partner Reporting Requirements' section, and a red box highlights the 'ADD REQUIREMENTS' button.

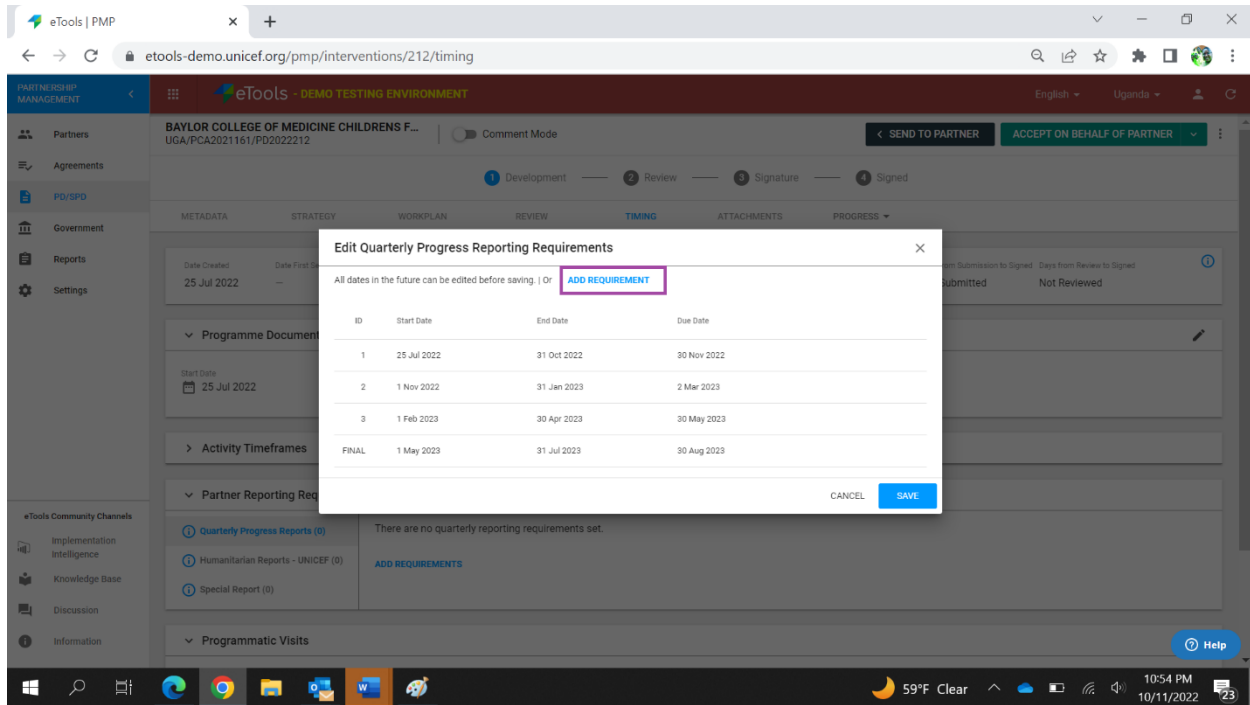
Step 2: In the pop-up window, the system will automatically generate a proposed list of quarterly progress reports. Click save if you agree with the reports schedule.

The screenshot shows the same 'eTools | PMP' interface, but with a pop-up window titled 'Edit Quarterly Progress Reporting Requirements' open. The pop-up window contains a table with columns: ID, Start Date, End Date, and Due Date. The table lists four rows of quarterly progress reports, with the last row labeled 'FINAL'. The 'SAVE' button is highlighted with a red box.

ID	Start Date	End Date	Due Date
1	25 Jul 2022	31 Oct 2022	30 Nov 2022
2	1 Nov 2022	31 Jan 2023	2 Mar 2023
3	1 Feb 2023	30 Apr 2023	30 May 2023
FINAL	1 May 2023	31 Jul 2023	30 Aug 2023

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Step 3: In case the automatically generated quarterly progress reports list is not sufficient, the Reporting requirements can also be adjustment using the **add requirement icon**.

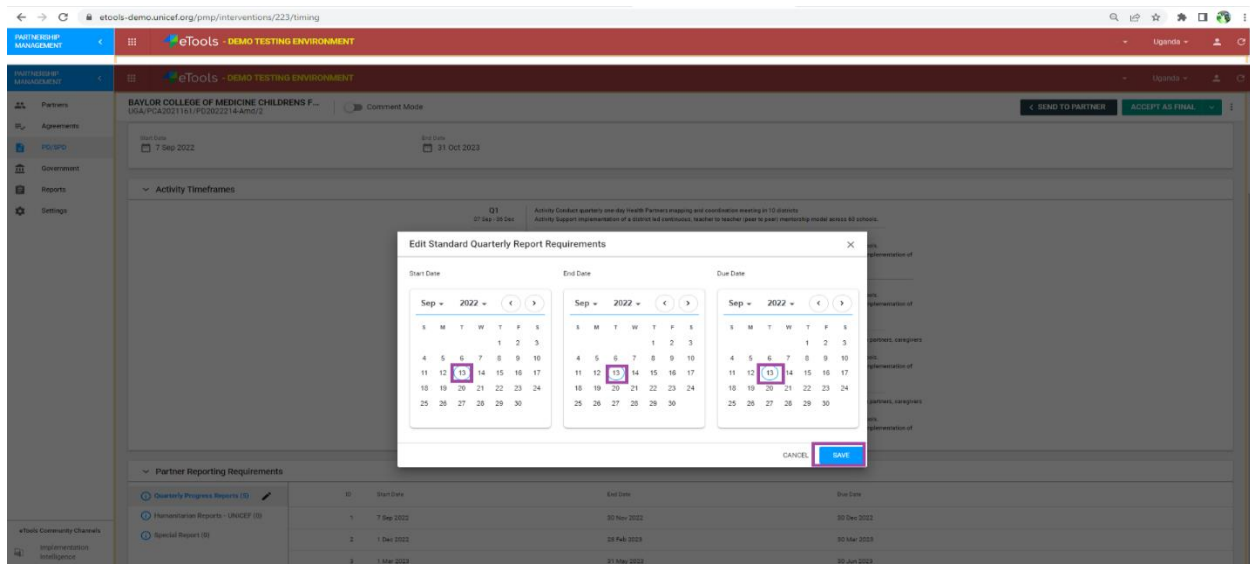


The screenshot shows the eTools interface with a pop-up window titled "Edit Quarterly Progress Reporting Requirements". The window contains a table with the following data:

ID	Start Date	End Date	Due Date
1	25 Jul 2022	31 Oct 2022	30 Nov 2022
2	1 Nov 2022	31 Jan 2023	2 Mar 2023
3	1 Feb 2023	30 Apr 2023	30 May 2023
FINAL	1 May 2023	31 Jul 2023	30 Aug 2023

The window also includes a "CANCEL" button and a "SAVE" button. In the background, the "Partner Reporting Requirements" section is visible, showing a list of requirements with an "ADD REQUIREMENTS" button.

Step 4: A pop-up screen with 3 date selection fields will appear. Select the start date, end date and the report due date. Click save.

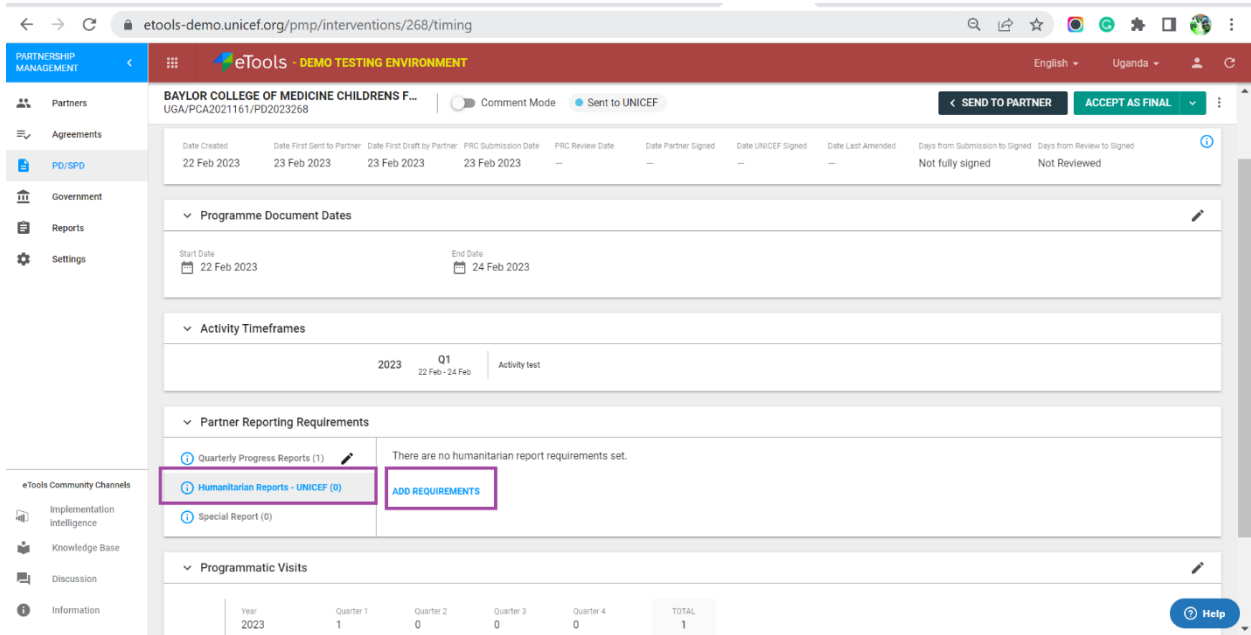


The screenshot shows the eTools interface with a pop-up window titled "Edit Standard Quarterly Report Requirements". The window contains three date selection fields: "Start Date", "End Date", and "Due Date". Each field has a calendar view for September 2022. The "Start Date" is set to 7 Sep 2022, the "End Date" is set to 31 Oct 2022, and the "Due Date" is set to 30 Nov 2022. The window also includes a "CANCEL" button and a "SAVE" button. In the background, the "Partner Reporting Requirements" section is visible, showing a list of requirements with an "ADD REQUIREMENTS" button.

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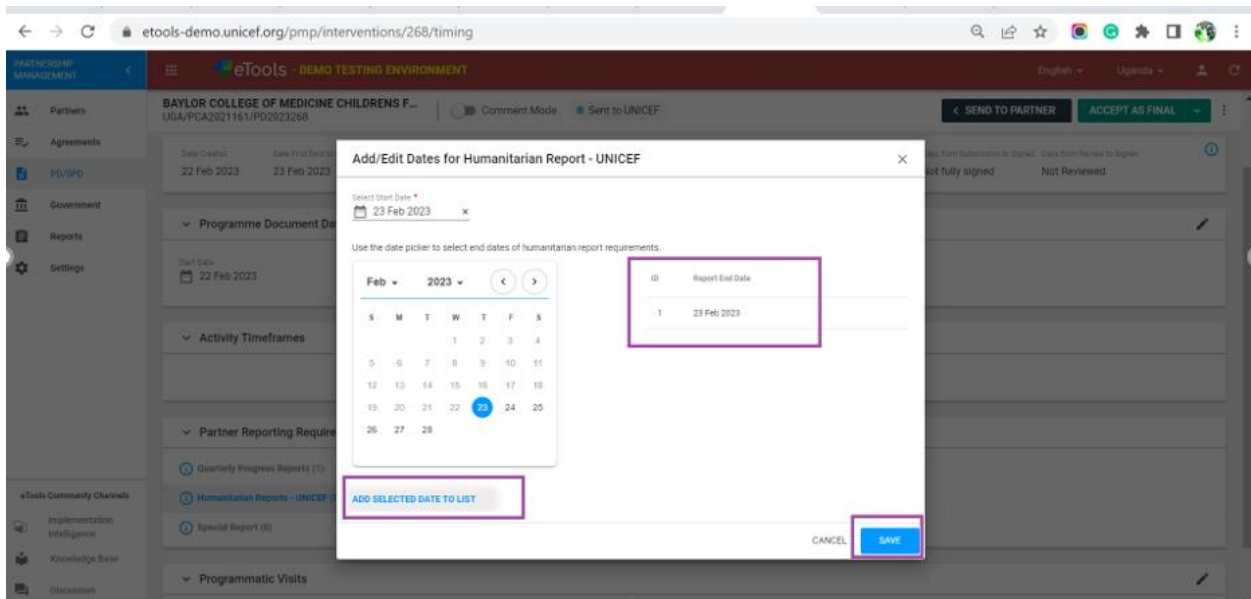
Step 5: To add a **Humanitarian report**, click the **Humanitarian reports** type, click **add requirements** icon.

 **Knowledge:** Humanitarian reports can only be added if an indicator in the workplan tab was tagged as a high frequency humanitarian indicator.



The screenshot shows the 'Timing' tab for a partnership with 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' (UGA/PCA2021161/PD2023268). The 'Partner Reporting Requirements' section is expanded, showing 'Humanitarian Reports - UNICEF (0)' with an 'ADD REQUIREMENTS' button. Other sections include 'Programme Document Dates', 'Activity Timeframes', and 'Programmatic Visits'.

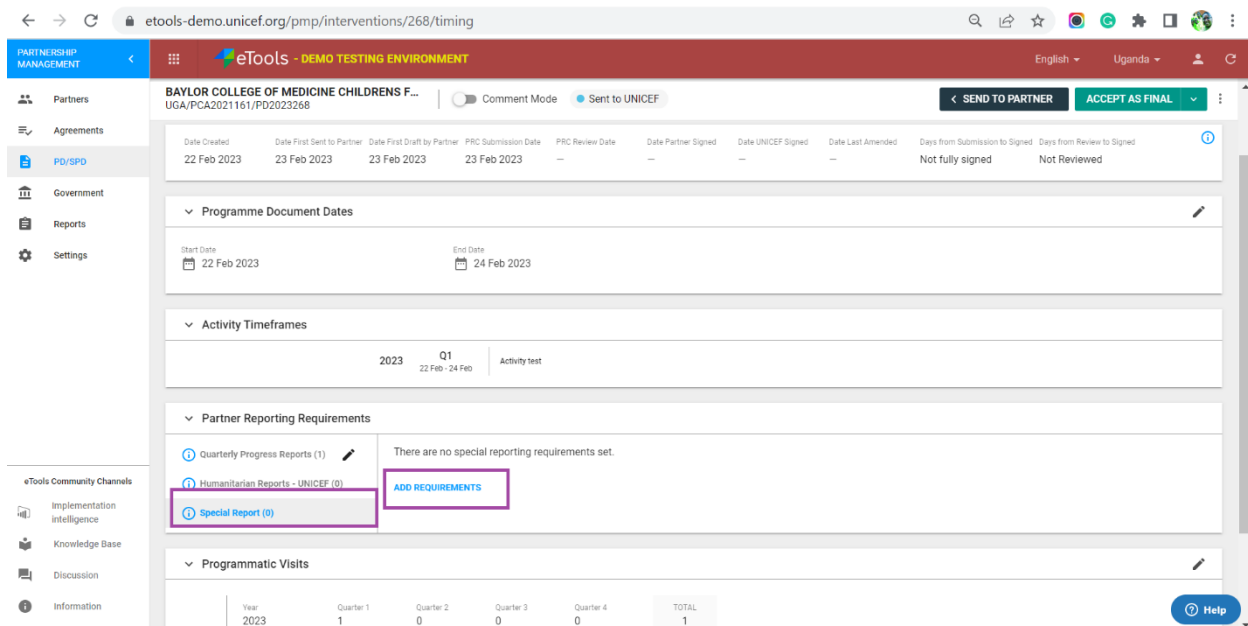
Step 6: Add the relevant dates for the humanitarian report, click add selected date to the list. The reporting requirement will be include under the report end date list and click save



The screenshot shows the 'Add/Edit Dates for Humanitarian Report - UNICEF' dialog box. The 'Report End Date' is set to '23 Feb 2023'. The dialog box includes a date picker and a table with 'ID' and 'Report End Date' columns. The 'ADD SELECTED DATE TO LIST' button is highlighted.

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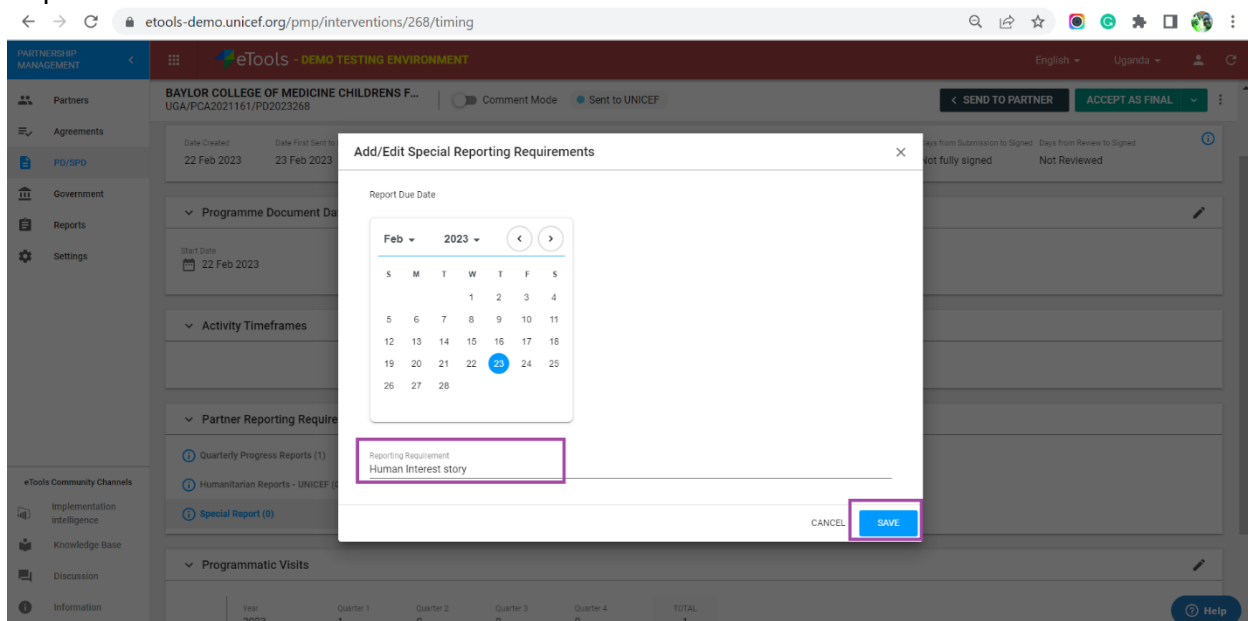
Step 7: To add a **Special report**, click the **Special reports type** and click **add requirement**.



The screenshot shows the eTools interface for a specific intervention. The left sidebar contains navigation options: Partners, Agreements, PD/SPD, Government, Reports, and Settings. The main content area displays various reporting requirements. Under the 'Partner Reporting Requirements' section, the 'Special Report (0)' option is highlighted with a red box, and an 'ADD REQUIREMENTS' button is visible next to it. The 'Programmatic Visits' table at the bottom shows data for the year 2023, with a total of 1 visit.

Year	Quarter 1	Quarter 2	Quarter 3	Quarter 4	TOTAL
2023	1	0	0	0	1

Step 8: Include the relevant dates for the special report and a description of the reporting requirement



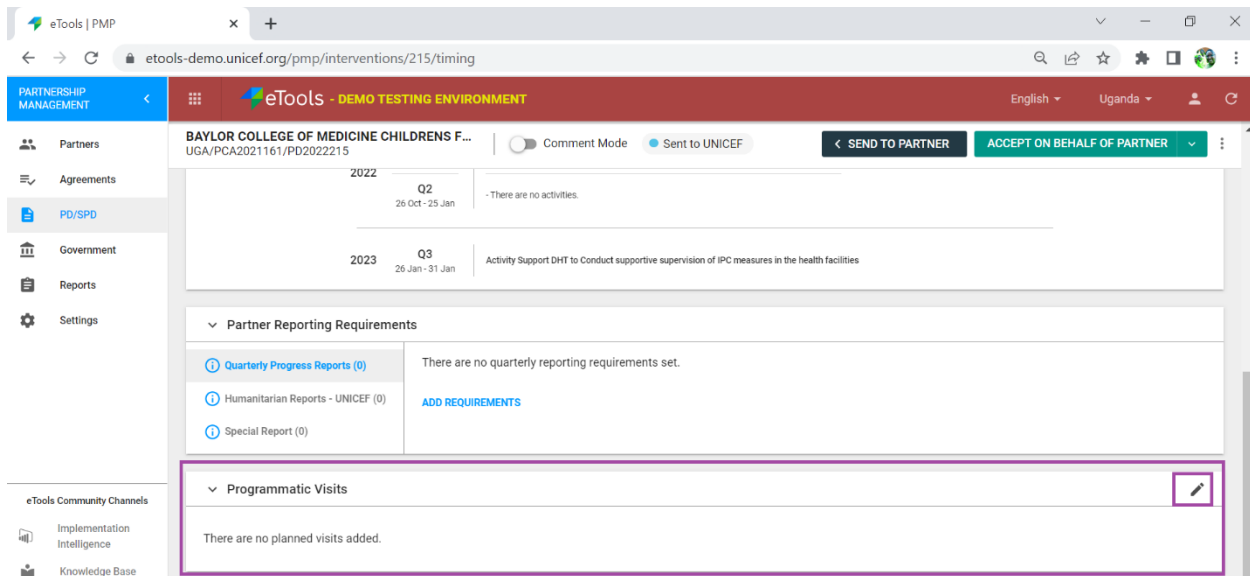
The screenshot shows the 'Add/Edit Special Reporting Requirements' dialog box. It features a date picker for 'Report Due Date' set to February 23, 2023. Below the date picker, there is a text field for 'Reporting Requirement' with the value 'Human interest story'. The 'SAVE' button is highlighted with a red box. The background interface is dimmed, showing the same 'Special Report' option as in the previous screenshot.

Step 9: click save. Hover each of the report types so view the reporting requirements included in the PD.

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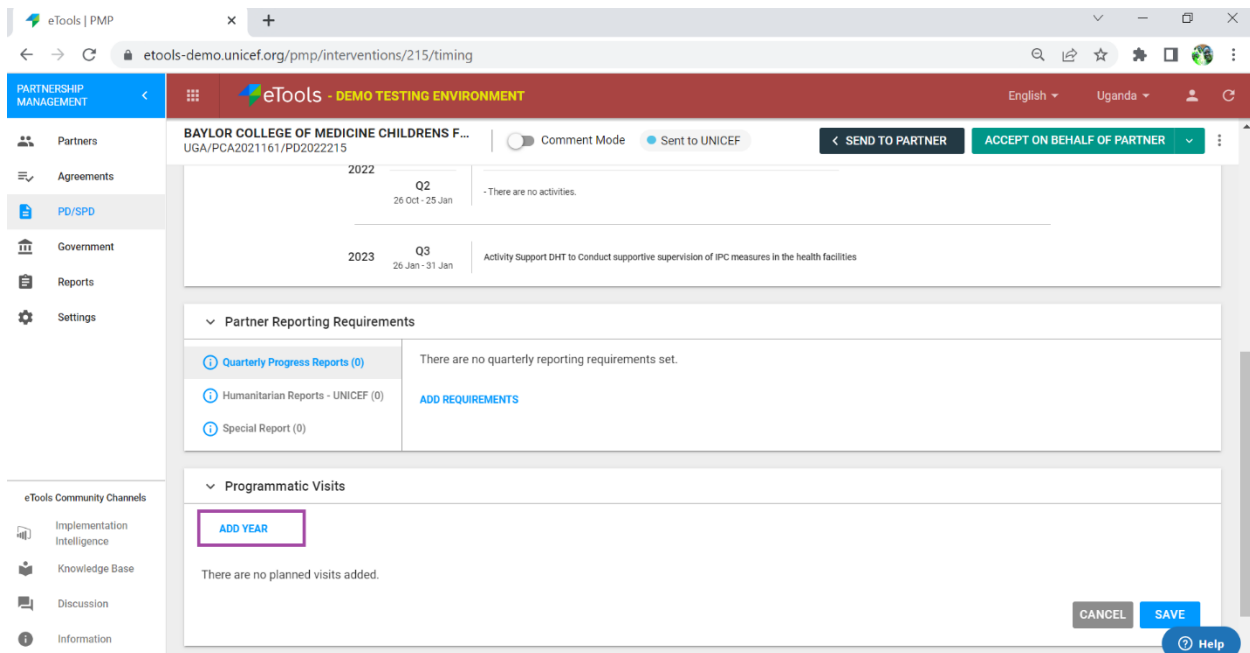
Adding Programme visit requirements

Step 10: Navigate to the programme visits section and click the **edit** icon.



The screenshot shows the eTools interface for a specific intervention. The left sidebar contains navigation options: Partners, Agreements, PD/SPD, Government, Reports, and Settings. The main content area displays the intervention details for 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' with a comment mode toggle and buttons for 'SEND TO PARTNER' and 'ACCEPT ON BEHALF OF PARTNER'. Below this, there are sections for 'Partner Reporting Requirements' and 'Programmatic Visits'. The 'Programmatic Visits' section is highlighted with a red box, and the 'edit' icon (pencil) is also highlighted with a red box.

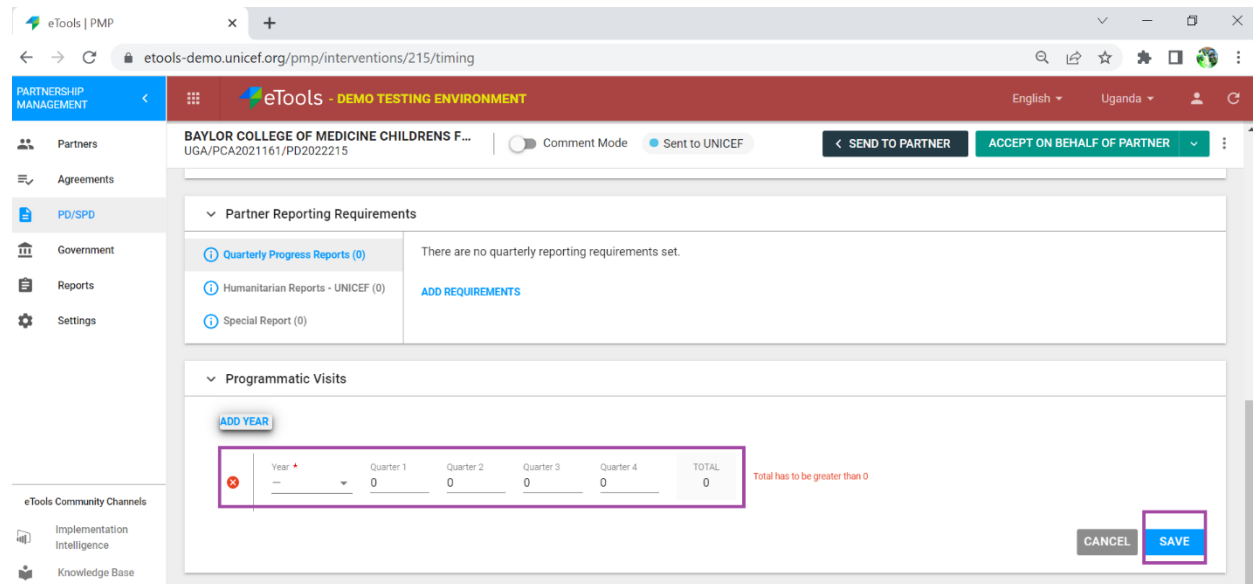
Step 11: Click **add year**



The screenshot shows the eTools interface for the same intervention. The 'Programmatic Visits' section is now expanded, and the 'ADD YEAR' button is highlighted with a red box. The interface also shows the 'Partner Reporting Requirements' section with options for 'Quarterly Progress Reports', 'Humanitarian Reports - UNICEF', and 'Special Report'. At the bottom right, there are 'CANCEL' and 'SAVE' buttons, and a 'Help' icon.

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Step 12: Fill in all the relevant information including the **year** and **planned visits per quarter**. Then click **save**



Partner Reporting Requirements

- Quarterly Progress Reports (0)
- Humanitarian Reports - UNICEF (0)
- Special Report (0)

Programmatic Visits

Year	Quarter 1	Quarter 2	Quarter 3	Quarter 4	TOTAL
2022	0	0	0	0	0

Total has to be greater than 0

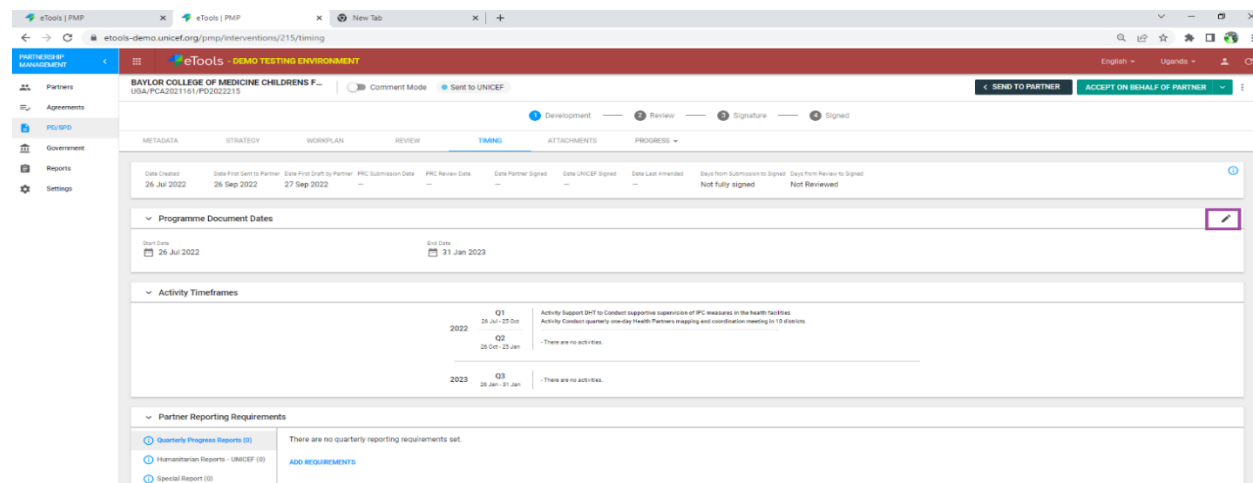
Buttons: CANCEL, SAVE

Knowledge: The Programmatic Visit requirement entered in the timing tab are also reflected as the planned visits in the HACT dashboard.

Adjusting the PD timing

During the development of the PD, the PD dates may need to be adjusted for several reasons.

Step 13: To adjust the timing of a PD, navigate to the timing tab, in the programme document dates section, click the **edit** icon.



Programme Document Dates

Start Date	End Date
26 Jul 2022	31 Jan 2023

Activity Timeframes

Year	Quarter	Activities
2022	Q1	Activity Support DHT to Conduct supportive supervision of IPC measures in the health facilities
2022	Q2	Activity Conduct quarterly one-day Health Partners mapping and coordination meeting in 10 districts
2022	Q3	There are no activities.
2022	Q4	There are no activities.
2023	Q1	There are no activities.
2023	Q2	There are no activities.
2023	Q3	There are no activities.
2023	Q4	There are no activities.

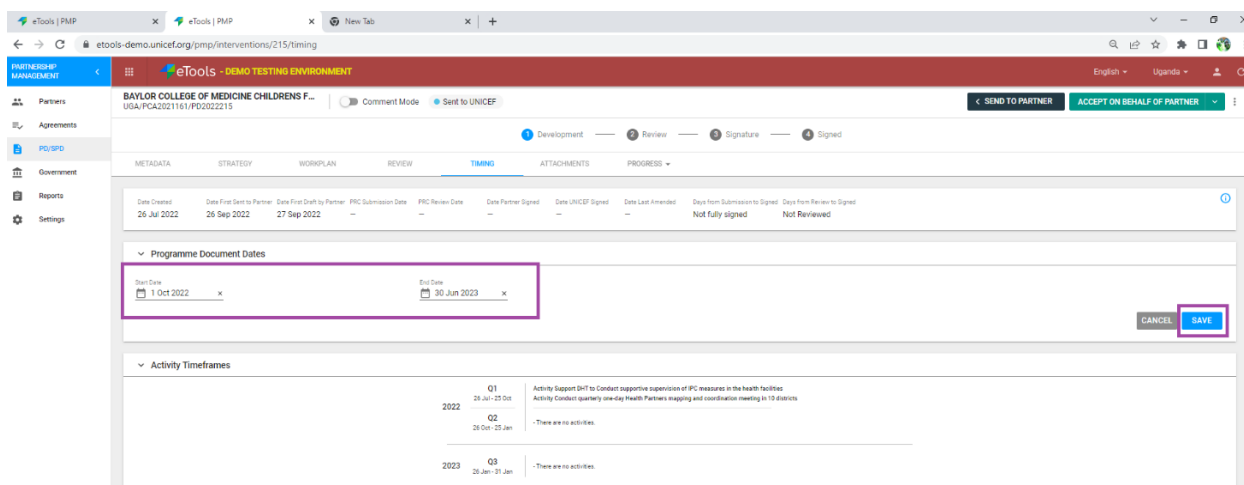
Partner Reporting Requirements

- Quarterly Progress Reports (0)
- Humanitarian Reports - UNICEF (0)
- Special Report (0)

Buttons: CANCEL, SAVE

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Step 14: Change the start and end dates as required and click save

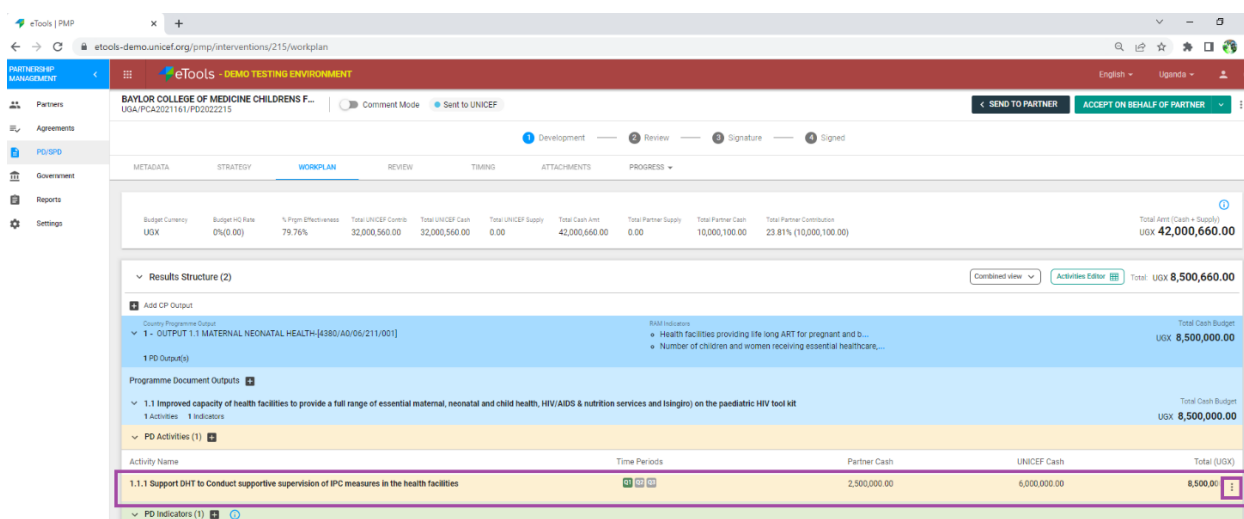


The screenshot shows the 'eTools - DEMO TESTING ENVIRONMENT' interface. The 'TIMING' tab is selected, displaying various dates and a 'Programme Document Dates' section. The 'Start Date' is set to 1 Oct 2022 and the 'End Date' is set to 30 Jun 2023. A 'SAVE' button is visible in the bottom right corner of the date selection area.

Adjusting activities timelines

When the PD timelines are amended, then the activity timelines need to be adjusted.

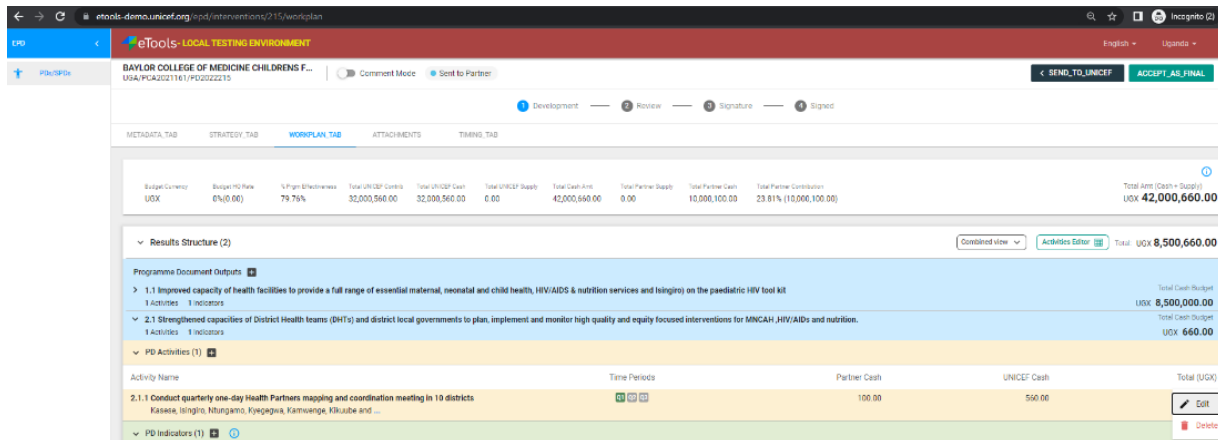
Step 15: Navigate to the workplan tab and hover over the activity you want to change. Click the three dots to the right of the activity.



The screenshot shows the 'eTools - DEMO TESTING ENVIRONMENT' interface with the 'WORKPLAN' tab selected. The 'Results Structure' section is expanded, showing a list of activities. The activity '1.1.1 Support DHT to Conduct supportive supervision of IPC measures in the health facilities' is highlighted with a red box, and its corresponding 'Total (USD)' value of 8,500,000.00 is also highlighted.

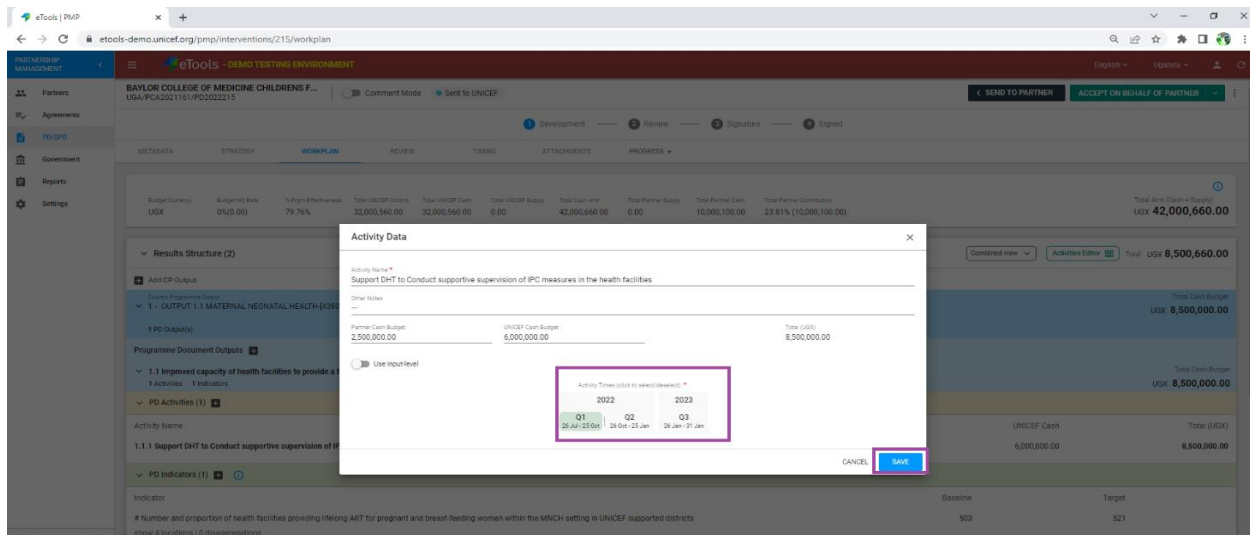
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Step 16: Click the edit icon



The screenshot shows the eTools interface with the 'Workplan' tab selected. The 'Results Structure' section is expanded, showing a list of activities. The activity '2.1.1 Support DHT to Conduct supportive supervision of IPC measures in the health facilities' is selected, and the 'Edit' icon is highlighted.

Step 17: Click the quarter in which the activity will be implemented, then click save.



The screenshot shows the eTools interface with the 'Activity Data' dialog box open. The 'Activity Name' is 'Support DHT to Conduct supportive supervision of IPC measures in the health facilities'. The 'Quarter' is set to Q1 2022. The 'Save' button is highlighted.

Adjust quarterly reporting dates

Step 18: To adjust the quarterly reporting dates, navigate to the timing tab, in the Partner Reporting Requirements section. Select the edit icon.

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Partner Reporting Requirements

ID	Start Date	End Date	Due Date
1	7 Sep 2022	30 Nov 2022	30 Dec 2022
2	1 Dec 2022	28 Feb 2023	30 Mar 2023
3	1 Mar 2023	31 May 2023	30 Jun 2023
4	1 Jun 2023	31 Aug 2023	30 Sep 2023
FINAL	1 Sep 2023	30 Sep 2023	30 Oct 2023

This PD is in amendment. See [eTools/48300](#)

Step 19: Click regenerate to develop a new set of reporting requirements and click save.

Edit Quarterly Progress Reporting Requirements

All dates in the future can be edited before saving. | Or [ADD REQUIREMENT](#)

The PD/SPD start/end dates differ [REGENERATE](#)

ID	Start Date	End Date	Due Date
1	26 Jul 2022	31 Oct 2022	30 Nov 2022
FINAL	1 Nov 2022	31 Jan 2023	2 Mar 2023

[CANCEL](#) [SAVE](#)

Step 20: The **add requirement** icon can also be used to add reporting requirements. Click the add requirement icon.

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eTools | PMP

etools-demo.unicef.org/pmp/interventions/215/timing

English Uganda

BAYLOR COLLEGE OF MEDICINE CHILDRENS F...
UGA/PCA2021161/PD2022215

Comment Mode Sent to UNICEF

SEND TO PARTNER ACCEPT ON BEHALF OF PARTNER

Q1 26 Jul - 25 Oct 2022

Activity Support DHT to Conduct supportive supervision of IPC measures in the health facilities
Activity Conduct quarterly one-day Health Partners mapping and coordination meeting in 10 districts

Edit Quarterly Progress Reporting Requirements

All dates in the future can be edited before saving. | Or **ADD REQUIREMENT**

The PD/SPD start/end dates differ **REGENERATE**

ID	Start Date	End Date	Due Date
1	26 Jul 2022	31 Oct 2022	30 Nov 2022
FINAL	1 Nov 2022	31 Jan 2023	2 Mar 2023

CANCEL SAVE

Step 21: A pop-up screen with 3 date selection fields will appear. Select the start date, end date and the report due date. Click save.

etools-demo.unicef.org/pmp/interventions/223/timing

English Uganda

BAYLOR COLLEGE OF MEDICINE CHILDRENS F...
UGA/PCA2021161/PD2022214-406/2

Comment Mode

SEND TO PARTNER ACCEPT AS FINAL

Start Date 7 Sep 2022 End Date 31 Oct 2023

Activity Timeframes

Q1 07 Sep - 28 Dec

Activity Conduct quarterly one-day Health Partners mapping and coordination meeting in 10 districts
Activity Support implementation of a district led continuous, teacher to teacher (peer to peer) membership model across 90 schools

Edit Standard Quarterly Report Requirements

Start Date End Date Due Date

Sep 2022 Sep 2022 Sep 2022

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

CANCEL SAVE

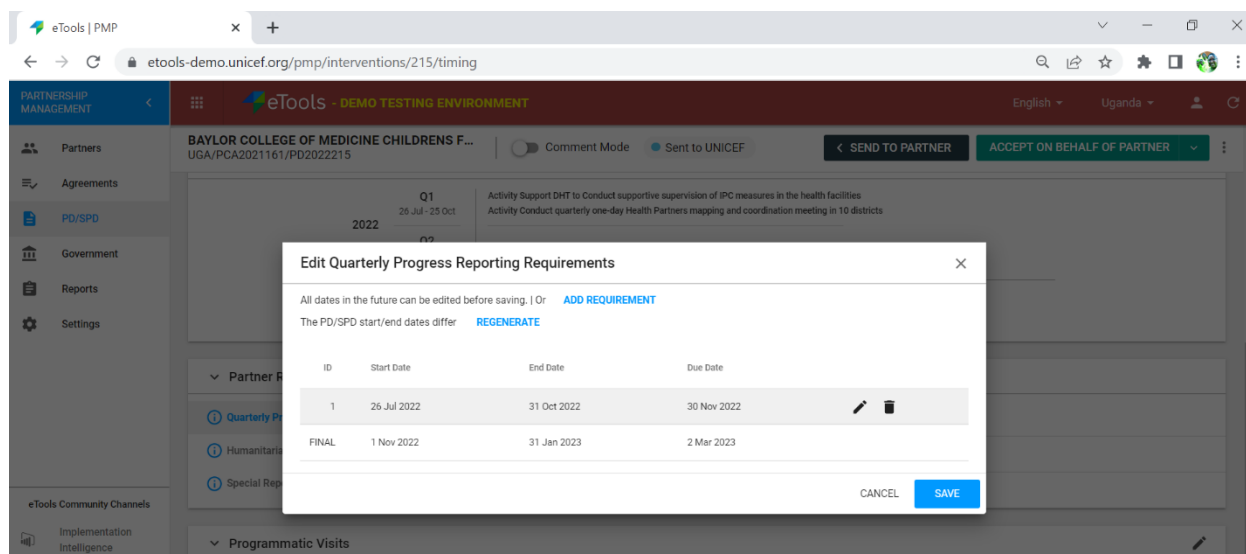
Partner Reporting Requirements

ID	Start Date	End Date	Due Date
1	7 Sep 2022	30 Nov 2022	30 Dec 2022
2	1 Dec 2022	28 Feb 2023	30 Mar 2023
3	1 Mar 2023	31 May 2023	30 Jun 2023

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To edit/ delete a reporting requirement

Step 22: Hover over the existing dates and edit or delete to adjust a reporting requirement included on the list.



The screenshot shows the UNICEF eTools interface in a demo testing environment. A modal dialog titled "Edit Quarterly Progress Reporting Requirements" is open, displaying a table of reporting requirements. The table has columns for ID, Start Date, End Date, and Due Date. The first row shows a requirement with ID 1, Start Date 26 Jul 2022, End Date 31 Oct 2022, and Due Date 30 Nov 2022. The second row shows a requirement with ID FINAL, Start Date 1 Nov 2022, End Date 31 Jan 2023, and Due Date 2 Mar 2023. The dialog also includes a "CANCEL" button and a "SAVE" button.

ID	Start Date	End Date	Due Date
1	26 Jul 2022	31 Oct 2022	30 Nov 2022
FINAL	1 Nov 2022	31 Jan 2023	2 Mar 2023

You have completed adding the reporting requirement, programme visit requirements, adjusting the PD duration and related activity timelines. The programme document is now ready to be submitted for review.