THE GLOBAL FUND

EXTERNAL INFORMATION SESSION

Updates to the PR Reporting Process

Part 1: Pulse Checks

21 March 2024

Agenda

1. General Overview: Implementation Oversight in 2024 and Beyond
2. Pulse Check Content
3. Pulse Checks in the Partner Portal
4. Next Steps and Resources
5. Questions

1

General Overview: Implementation Oversight in 2024 and Beyond

Delivering on the Global Fund Strategy 2023-2028 through IO

OUR PRIMARY GOAL	END AIDS, TB AND MALARIA	WORKING WITH AND TO SERVE THE HEALTH NEEDS OF PEOPLE AND COMMUNITIES	
MUTUALLY REINFORCING CONTRIBUTORY OBJECTIVES	Maximizing People-centered Integrated Systems for Health to Deliver Impact, Resilience and Sustainability	Maximizing the Engagement and Leadership of Most Affected Communities to Leave No One Behind	Maximizing Health Equity, Gender Equality and Human Rights
	Mobilizing Increased Resources		
EVOLVING OBJECTIVE	Contribute to Pandemic Preparedness and Response		
DELIVERED THROUGH THE INCLUSIVE GLOBAL FUND PARTNERSHIP MODEL	Partnership Enablers Raising and effectively investing additional resources behind strong, country-owned plans, to maximize progress towards the 2030 SDG targets Operationalized through the Global Fund Partnership, with clear roles & accountabilities, in support of country ownership		

Increasing data quality to enable the rapid generation, analysis and use of high-quality, disaggregated data.

Data validation rules to reduce errors during submission

Data correction to ensure accurate results

Reporting through Aggregated Data Exchange (ADEx)

Elementary indicators to reduce manual entry and increase quality

The Secretariat uses quarterly data for its internal decision-making processes

- GFs commitment to data-driven decision-making allows for early intervention and problem solving.
- Increased reporting requirements from Board / donor constituencies are a critical input to build the business case for the next replenishment.

Process | Output

1. Quarterly monitoring / analysis

Ongoing monitoring of cross-portfolio results

Quarterly monitoring of programmatic and financial and overall grant implementation progress (Pulse Checks, PU/DRs)

2. Reporting

Linking analysis with monitoring and oversight platforms and processes

Quarterly updates to GF Senior Mgmt on portfolio performance, emerging risks & issues

Corporate KPIs on finance performance to AFC, the Board, internal and external stakeholders

Analysis to support **Country Portfolio Reviews**

Analysis to support **Implementation Oversight**

Ad-hoc analysis to respond to specific requests

Quarterly Corporate Forecasting

3. Decision-making & guidance

Outputs of engagement with the data through oversight platforms and processes

Strategic steer and guidance

Insights to support Strategic Performance Reporting to the Board

Approval of risk mitigation strategies and risk acceptance

Engagement with implementers on potential root causes of bottlenecks, emerging risks, mitigations etc.

Discrete analytical outputs to respond to specific requests

Managing cash needs at country level

Implementation Oversight (IO) key changes from 2024 (GC6 & GC7)

Data Quality

Data Validation & Quality
Online data validation rules and reports to ensure right first-time submission

Results Correction* from July
Results from prior periods can be updated within the implementation period

ADEx** Integration*
Data feeds directly into Partner Portal from DHIS to reduce manual entry by defined cohort of PRs

Elementary Indicators
Single entry for numerators and denominators to reduce manual data entry and improve consistency of data

Aligned Reporting Rhythm*

Reducing from 6 reports to 4 yearly for:

- GC7
- GC6
- C19RM

PC removing duplication PC

PC → PU → PC → PUDR

Q1 Q2 Q3 Q4

Performance Rating

Integrated reporting – data previously submitted flows into the next report

Systems Enhancements

Reporting via Online Forms
Phased transition to reporting through online PU/DR forms, including Financial Closure Reports

*Impacting HI and Core portfolios only

**ADEx - Aggregated Data Exchange DHIS – Data Health Information System

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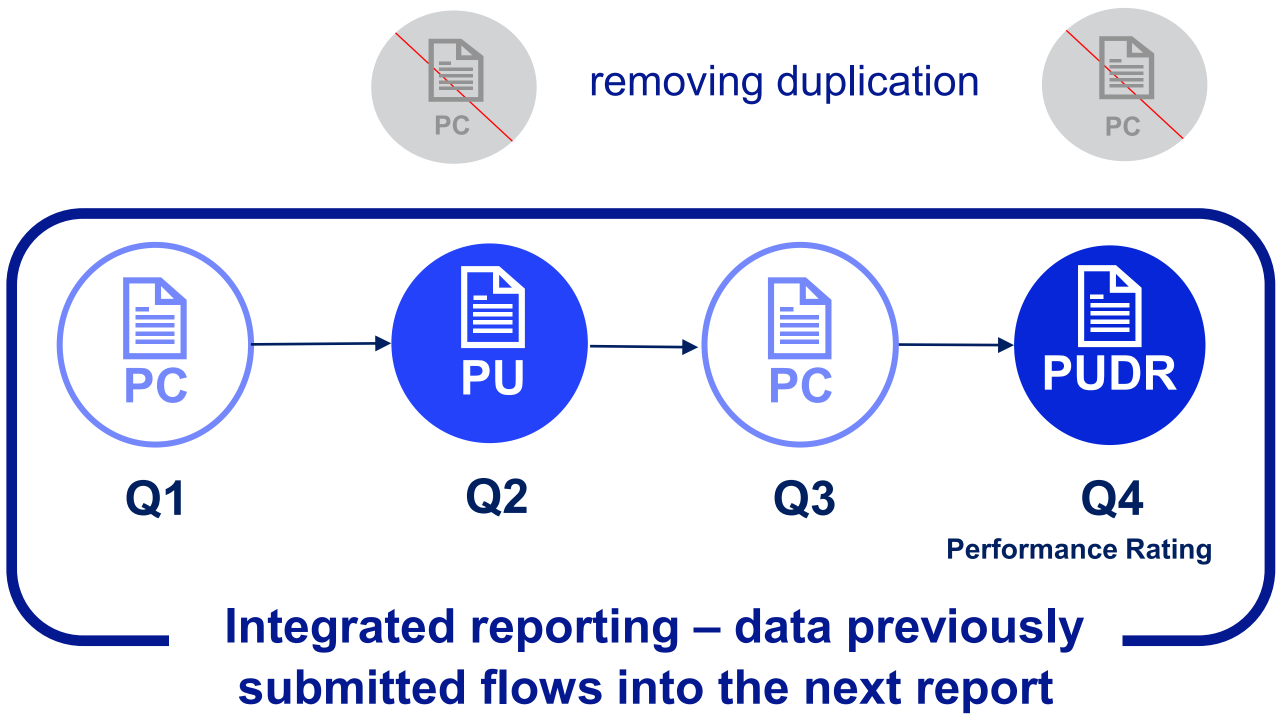
The aligned reporting rhythm removes duplication and reduces the reporting burden for PRs

- All forms are now reconfigured into an integrated reporting mechanism where previously submitted data flows into the next report.
- Two Pulse Checks (PCs) per year are being removed, eliminating duplication. PR self-evaluation tab removed.
- Comparing the number of data points for GC6 IP PCs there are fewer data points being requested in total.

Reducing from 6 reports to 4 yearly* for:

- **GC7 IPs**
- **GC6 IPs**
- **C19RM IPs**



**impacting HI and Core portfolios only*

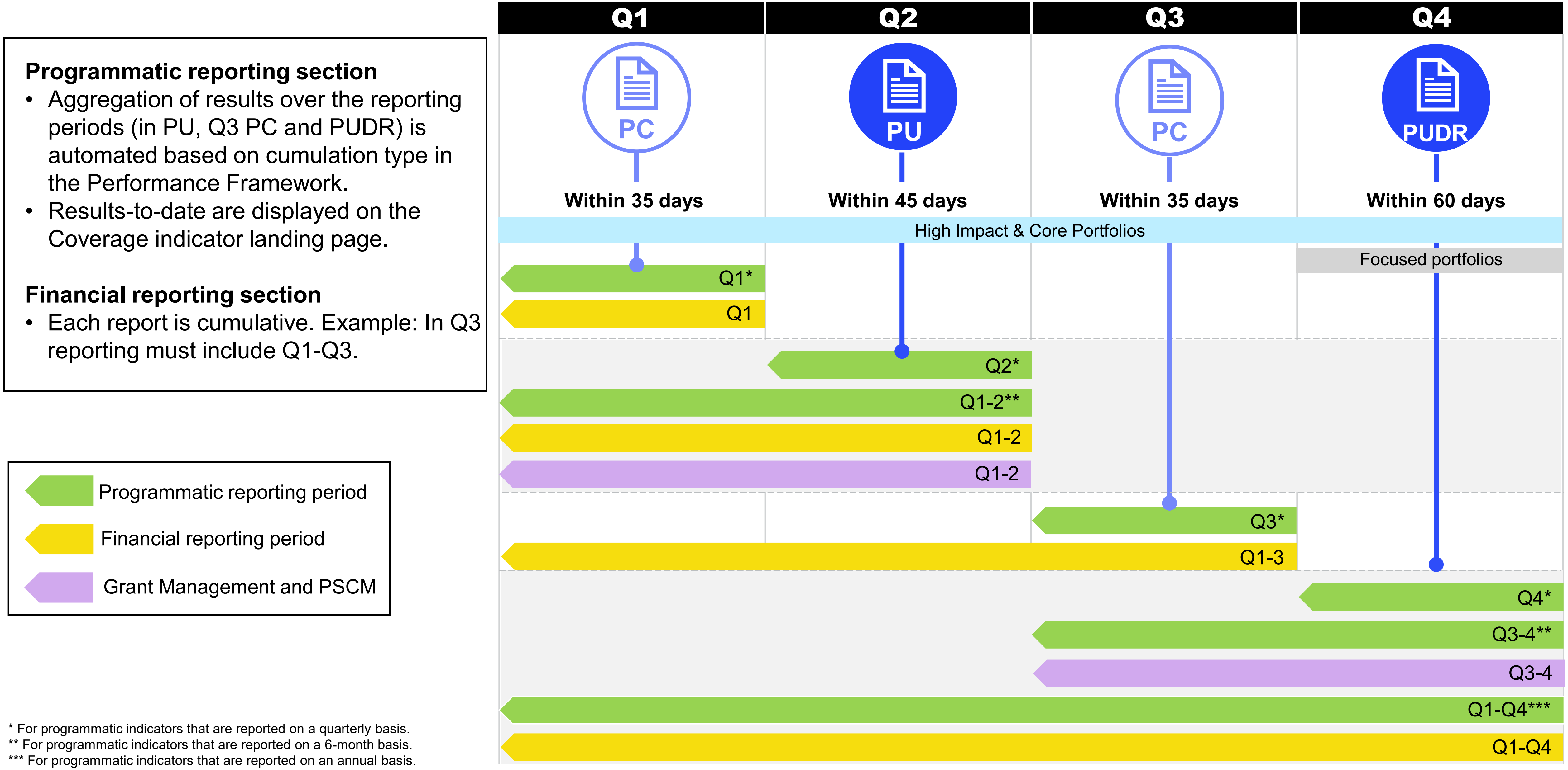
Forthcoming:
Will be captured in the upcoming IO policy update

PR reporting is reduced to 4 reports per year per IP; If a PR has an ongoing GC6 C19RM IP and a GC7 HTM IP, this translates into 2x4 reports per year.

Data is automatically aggregated for integrated reporting across all forms

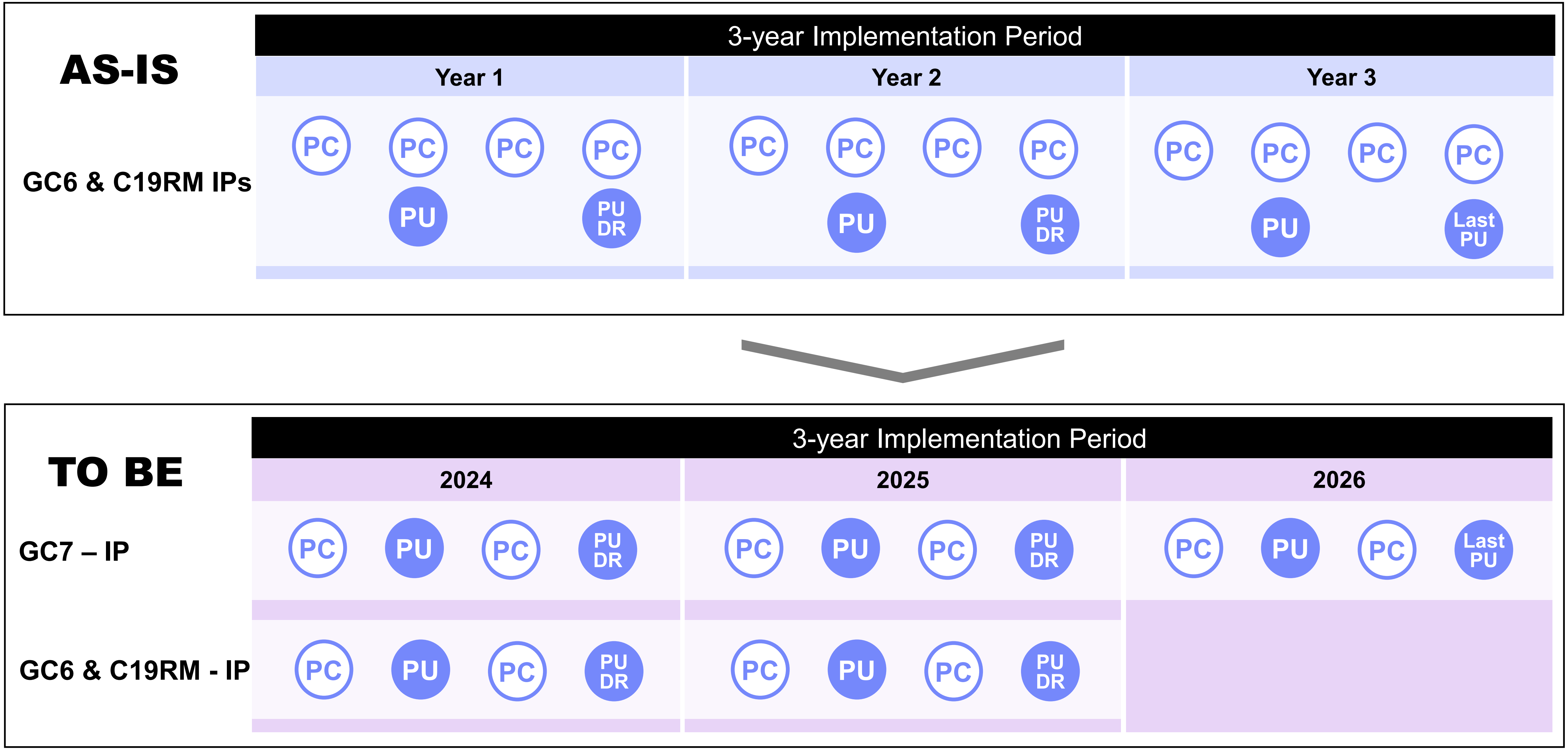
Programmatic reporting section
- Aggregation of results over the reporting periods (in PU, Q3 PC and PUDR) is automated based on cumulation type in the Performance Framework.
- Results-to-date are displayed on the Coverage indicator landing page.

Financial reporting section
- Each report is cumulative. Example: In Q3 reporting must include Q1-Q3.



* For programmatic indicators that are reported on a quarterly basis.
** For programmatic indicators that are reported on a 6-month basis.
*** For programmatic indicators that are reported on an annual basis.

The overall reporting burden for PRs per IP is reduced thanks to the removal of two Pulse Checks per year



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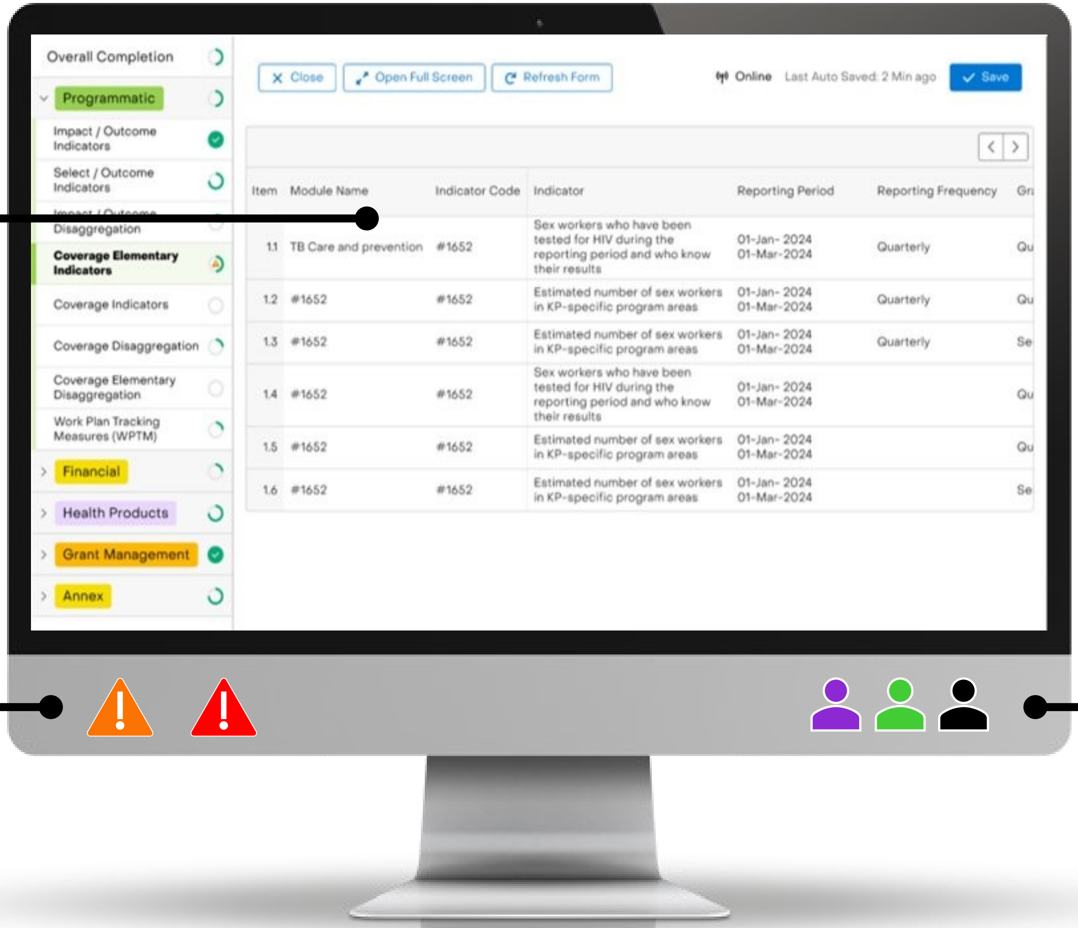
**ADEx - Aggregated Data Exchange DHIS – Data Health Information System

Online forms enable multiple users to collaborate simultaneously; data validation rules are applied prior to submission to ensure data quality

PRs access, complete and submit PU/DRs and Pulse Checks using online forms in Partner Portal.

All reporting to be completed through **online forms**, including Financial Closure Reports.

Online validation rules
Introduced to support right-first-time submission by PRs. CTs can comment on discrepancies, reducing rollbacks to PRs.



Excel will not be used for Pulse Check. **PU/DR Excel version** can still be used for data collection and is then imported into the Partner Portal and subject to the online validation rules. The **online form is the final submission**.

Multiple users can work on the form simultaneously. It is recommended that these users work in separate sections of the form.

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**ADEx - Aggregated Data Exchange DHIS – Data Health Information System

Targeted data validation rules and results correction enable more accurate reporting

Data Validation and Quality

There are 2 types of validation flags in the Partner Portal:

Warning

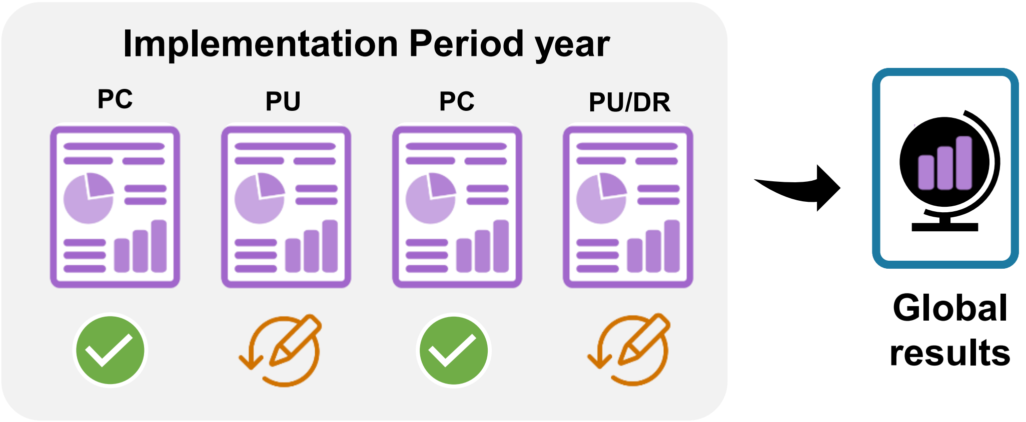
- Flags system user to check if the data captured is correct or contains a potential error.
- Requires a justification comment if the warning is overruled.
- Allows PR to proceed and submit.

Error

- Alerts when data does not comply with a validation rule.
- Does not allow PR to submit until the error is corrected.
- Allows the system user to review and correct the data before submitting the form.

- Targeted data validation rules support the PRs in right-first-time report submission.
- The validation rules are part of the online submission process for all forms.

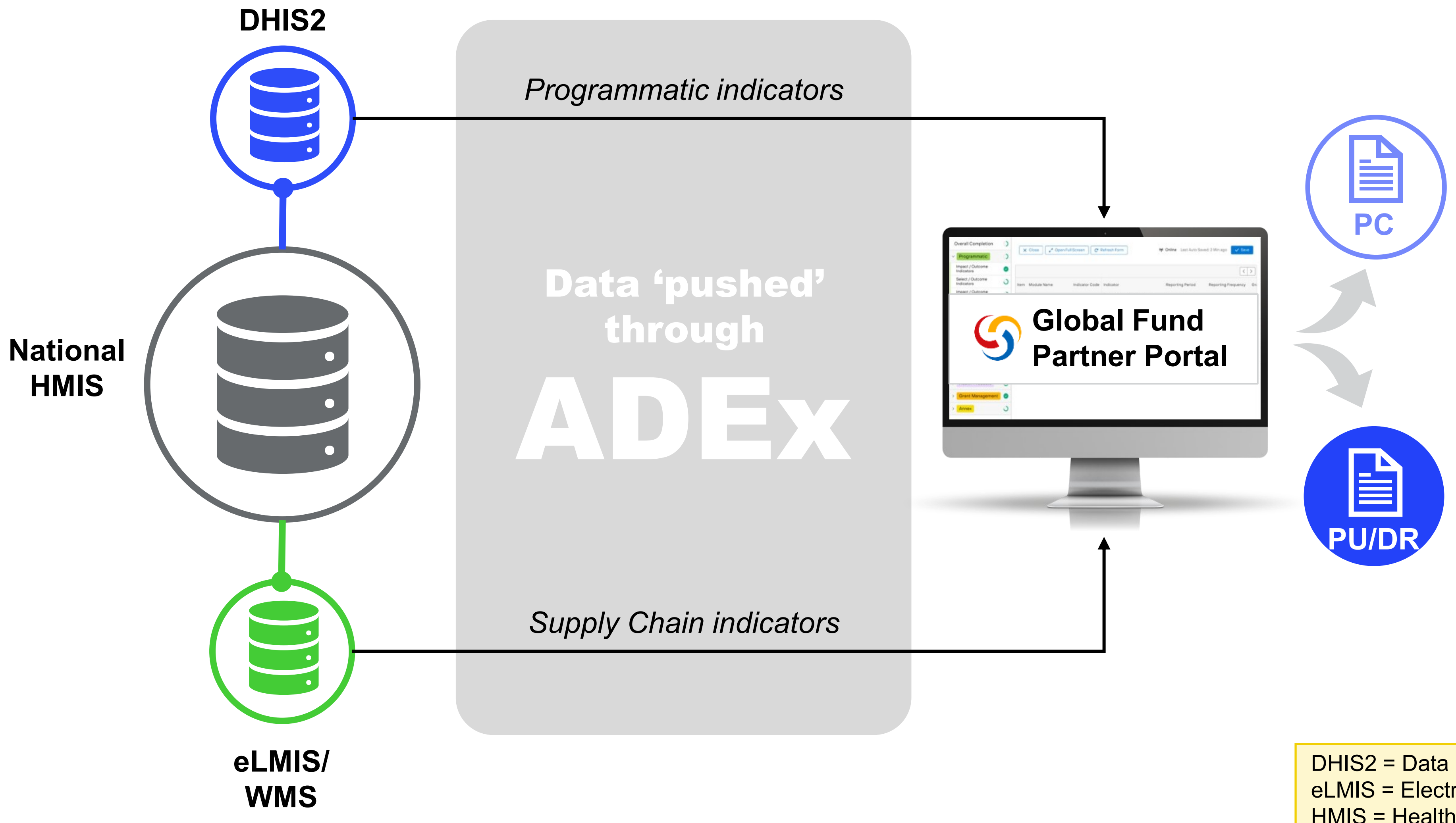
Results Correction



- From July 2024, results reported in previous reporting periods can be **updated or corrected through the online PU/DR form.** For example, results reported in the Q1 PC can be updated or corrected during the Q2 PU.
- Updates or corrections can only be made within the same implementation period year.
- This new feature ensures more accurate reporting for the Global Fund to its to donors.

Aggregate Data Exchange Integration (ADEx) automatically populates elementary indicator results in Global Fund forms increasing the quality of data

How does it work for ADEx countries?



Data submitted via ADEx **populates the elementary indicator results*** directly into the PC and PU/DR online forms.

(All results not reported from ADEx will be entered in the online form manually).

* Depending on the timing of the ADEx submission, results may not appear immediately.

DHIS2 = Data Health Information System 2
eLMIS = Electronic Logistics Management Information System
HMIS = Health Management Information System
WMS = Warehouse Management System

Aggregate Data Exchange Integration (ADEx) automatically populates Global Fund form elementary indicator results increasing the quality of data

ADEx facilitates tailored reporting and analysis, while strengthening countries' national HMIS and data quality.

PRs do not need to manually input results into the online form in Partner Portal for data available in HMIS.

ADEx is a 'push' mechanism only and does not automatically send the results to the Partner Portal.

PRs own the data and decide when to send it, based on a mutually agreed frequency.

- The initial focus is on **GC7 Performance Framework indicators for HI and Core portfolios**, which will populate data in the Partner Portal. Offline reporting is not in scope.
- ADEx is initially being set up in countries with DHIS2-based national HMIS and includes data quality enhancements in DHIS2.

DHIS2 = Data Health Information System 2
HMIS = Health Management Information System

2 Pulse Check Content

Overview of content included in the different PR reporting tools

Programmatic
Financial

Grant Cycle IP	Grant Type	Tabs included in the Pulse Check				
GC7 IP	HTM	Coverage Elementary Indicators	Coverage Indicators	Cash Reconciliation	Open Advances	
GC6 IP	HTM		Coverage Indicators	Cash Reconciliation	Open Advances	
GC6 IP	HTM + C19RM		Coverage Indicators	Cash Reconciliation	Open Advances	Work Plan Tracking Measures (WPTM)
GC6 IP	C19RM only			Cash Reconciliation	Open Advances	Work Plan Tracking Measures (WPTM)

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Programmatic reporting – Coverage Elementary indicators

Elementary indicators	• Elementary indicators are the **numerators** and **denominators** of the standard indicators in the latest Performance Framework. • Definitions of elementary indicators are derived from Indicator Guidance Sheets. • They are used to construct the standard Coverage Indicators on the coverage tab.
Coverage Elementary indicators tab-online form	• The elementary indicators due for reporting are pre-populated on this tab. • This is the main data entry tab for standard GC7 Coverage Indicators. • Numerators (N) and Denominators (D) are reported on separate lines. • N and D definition is visible to the user when entering data in this tab. • Data entered only once for data elements that are common across indicators. • These are then reused to construct respective standard Coverage Indicator results.
Benefits	• Avoids duplicate data entry on the same data elements. • Eliminates errors. • Ensures consistent reporting.

- There are no elementary indicators for GC7 IPs with custom indicators, GC6 HTM and C19RM.
- The results for these indicators are reported through the coverage indicator tab (as in the current PU/DR).

Programmatic reporting – Coverage Elementary indicator tab

Coverage Elementary Indicators | Coverage Indicators | Cash Reconciliation | Open Advances | WPTM

Example

$$\frac{60}{100}$$

60 ← *Numerator [N]*

100 ← *Denominator [D]*

EI. Code	Elementary coverage indicator	Standard coverage indicator
CM-1a [N]	Number of all suspected malaria cases that received a parasitological test at public sector health facilities	CM-1a: Proportion of suspected malaria cases that receive a parasitological test at **public sector** health facilities.
CM-1a [D]	Number of all suspected malaria cases that present at public sector health facilities	
TCS- 9 [N]	Number of people living with HIV and currently on ART who received 3 – 5 or >6 months of ARV medicine at their most recent ARV medicine pick-up	TCS-9: Percentage of people living with HIV and currently on antiretroviral therapy who are receiving multi month dispensing of antiretroviral medicine.
TCS-1.1 [N]	Number of people on ART at the end of the reporting period	TCS-1.1: Percentage of people on ART among all people living with HIV at the end of the reporting period.
TCS-1.1 [D]	Estimated number of people living with HIV	

The N and D values are used to automatically construct the standard coverage indicator result on the coverage indicator tab.

One elementary indicator may be used multiple times to construct other standard coverage indicator results

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GC6 IP	C19RM only			Cash Reconciliation	Open Advances	Work Plan Tracking Measures

Programmatic reporting - Coverage indicators

GC7 IP standard coverage indicators	• Constructed from elementary indicators and auto populated on the Coverage Indicator tab. • The results are auto calculated from the elementary indicator results and auto-populated on the Coverage Indicator tab. • The results are visible but not editable on this page.
GC7 IP custom coverage indicators **GC6 IP (HTM & C19RM) coverage indicators**	• There are no elementary indicators for GC7 custom indicators, GC6 HTM and C19RM. • The coverage indicators due for reporting are pre-populated on this tab. • The results for these indicators are reported directly through the coverage indicator tab as in the current PU and PUDR. • The coverage indicator tab is editable for these indicators.

Overview of content included in the different PR reporting tools

Programmatic
Financial

Grant Cycle IP	Grant Type	Tabs included in the Pulse Check				
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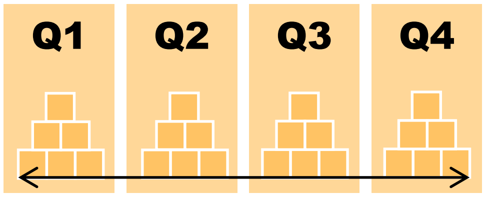
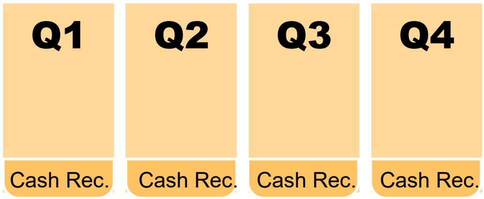
Financial reporting – Cash reconciliation

Overview

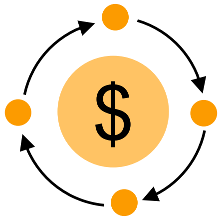
Cash reconciliation captures relevant financial data to calculate the PR cash balance at the end of the reporting period.



The overall structure is harmonized across all four quarters through the **existing PUDR** PR Cash Reconciliation tab.



The Cash Reconciliation tab is **replicated in each reporting quarter** in the same way, with the exception of the FCR, where supplementary information on closing balances is now included.



Multiple funding source flow is being introduced to monitor cash inflows and outflows at various funding source levels.

A new section on refunds is incorporated to address triangulation variances at the time of the PUDR

Financial reporting – Cash reconciliation

Vertical funding source breakdown to split the cash position by funding sources

A. Principal Recipient cash reconciliation statement in IP currency

1.1. PR Cash Balance: beginning of the current financial reporting period

Item	Description	Regular Funds	C19RM Funds	**Total**	1.Comment on cash flows 2.Outline the data source(s) 3.Provide any other contextual information
1.1	PR Cash Balance: beginning of the current financial reporting period	-	-	-	

Financial reporting – Cash reconciliation

Coverage Elementary Indicators | Coverage Indicators | **Cash Reconciliation** | Open Advances | WPTM

2. IP Income

Vertical funding source breakdown to split the cash position by funding sources

The first part of the income section remains the same

Item	Description	Regular Funds	C19RM Funds	**Total**	1.Comment on cash flows 2.Outline the data source(s) 3.Provide any other contextual information
2.1	Disbursements made directly by the GF to the PR	-	-	-	
2.2	Disbursements made by the GF through PPM / wambo	-	-	-	
2.3	Other direct disbursements made by the GF	-	-	-	
2A	Total disbursements made by the GF	**-**	**-**	**-**	
2.4	Interest received on PR bank accounts			-	
2.5	PR's revenue from income-generating activities and other income (e.g. income from disposal of assets, etc.), if applicable			-	
2B	Total other income for PR	**-**	**-**	**-**	

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Financial reporting – Cash reconciliation

Coverage Elementary Indicators | Coverage Indicators | **Cash Reconciliation** | Open Advances | WPTM

The second part of the income section is further detailed to show the relevant refunds to PR

2.7.1	Refunds received at PR level from third parties			-	
2.7.2	Refunds received from SRs			-	
2.7.3	Tax refunds received (e.g. VAT/other tax returns)			-	
2.7.4	Reimbursement of ineligible expenses made into PR account			-	
2C	Total Refunds received	-	-	-	
2.7	Total IP income	-	-	-	

Financial reporting – Cash reconciliation

Coverage Elementary Indicators | Coverage Indicators | **Cash Reconciliation** | Open Advances | WPTM

Vertical funding source breakdown to split the cash position by funding sources

3. IP cash outflows

Item	Description	Regular Funds	C19RM Funds	**Total**	1.Comment on cash flows 2.Outline the data source(s) 3.Provide any other contextual information
3.1	PR Payments (including advance payments)			-	
3.2	PPM / wambo payments made by the GF on behalf of the PR	-	-	-	
3.3	Payments to other third parties by the GF on behalf of the PR	-	-	-	
3.4	PR disbursement(s) to sub-recipients			-	
3.5	Bank charges on disbursements and payments for PR		0	-	
3.6	Total payments and disbursements	-	-	-	

Financial reporting – Cash reconciliation

Coverage Elementary Indicators | Coverage Indicators | **Cash Reconciliation** | Open Advances | WPTM

4. Reconciling adjustments: (PR only)

Vertical funding source breakdown to split the cash position by funding sources

Item	Description	Regular Funds	C19RM Funds	**Total**	1.Comment on cash flows 2.Outline the data source(s) 3.Provide any other contextual information
4.1	Other reconciliation adjustments (including for previous financial reporting periods)			-	
4.2	Net exchange gains/losses on translation of balances			-	
4.3	Total reconciling adjustments	-	-	-	

5. Total cash balance: end of the current financial reporting period

Item	Description	Regular Funds	C19RM Funds	**Total**	1.Comment on cash flows 2.Outline the data source(s) 3.Provide any other contextual information
5.1	Total PR cash balance	-	-	-	

Financial reporting – Cash reconciliation

Coverage Elementary Indicators | Coverage Indicators | **Cash Reconciliation** | Open Advances | WPTM

B. Bank Reconciliation Statement balances

Item	Description	**Total**	1.Comment on cash flows 2.Outline the data source(s) 3.Provide any other contextual information
9.1	PR balance as per bank statements (for information only)		
9.2	Bank reconciliation net amount		
9.3	Variance between bank statement balance and PR cash balance	-	
9.4	Variance between bank reconciliation statement balance and PR cash balance	-	

Variance between the bank statement and PR cash balance and bank reconciliation and PR cash balance is introduced. In case of variance, commentary is mandatory.

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Financial reporting – Open advances

Overview

Open advances are cash outflows for which no corresponding expenditure has been recognized by the PR.

- For Q1, Q2 and Q3 reports simplified report on open advances is requested by funding sources.
- The detailed reconciliation of open advances will be requested in Q4.

Item	Open advances at the end of the current financial reporting period	Regular Funds	C19RM Funds	**Total**
14.1	SR advances			-
14.2	PR procurement advances (PPM/Wambo only)			-
14.3	PR other advances (GDF, prepayments, etc.)			-

Open advances are entered by the PR by funding source and summed automatically.

C19RM and GC6 IP reporting

The PC has been updated to include reporting on the C19RM Performance Framework

Work Plan Tracking Measures (WPTM) only

It contains only WPTM with milestones/targets due within the PC reporting period.

Part of GC6 Pulse Check

In GC6 HTM+C19RM IPs, the form includes the GC6 HTM coverage indicators + C19RM WPTM sections.

In GC6 C19RM only IPs, the form includes the C19RM WPTM section.

Finance Reporting

Remains as-is, integrated in the existing Finance sections

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C19RM reporting – Work Plan Tracking Measures (WPTM)

C19RM WPTM

- WPTMs are prepopulated. If the milestone/target end date falls within the Pulse Check's reporting period, it appears in the pulse check.
- The PR is required to select one of the four status options for each WPTM (i.e., Not started, Started, Advanced, Completed). The score auto-populates based on the status selected.
- The PR is to provide a performance analysis on the progress made, commenting on the following:
  - Progress made and results achieved;
  - Reasons for deviation from workplan activities and milestones, as applicable;.
  - Describe catch-up plans and any other contextual information.

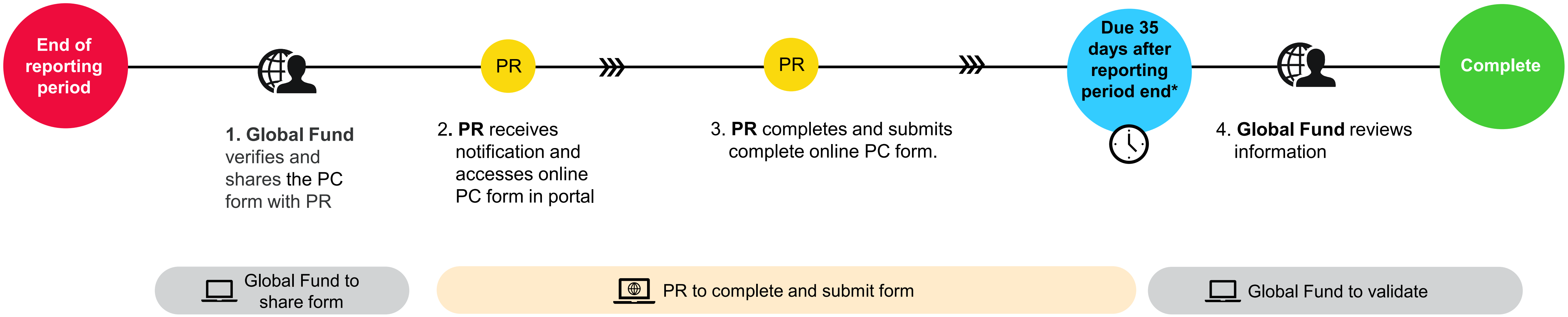
3 Pulse Checks in Partner Portal

Pulse Check Reporting

Overview of Process and Statuses

Last updated: 4 March 2024

Global Fund status
PR Principal Recipient
Global Fund
Partner Portal status



Process is the same as today – the online form in Partner Portal has changed

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* Portfolios categorized as Challenging Operating Environments can request for flexibilities per the COE policy

How to navigate PCs in Partner Portal – Landing page

Home

Click on the rubik's cube to access applications

Welcome to the Global Fund Partner Portal!

he Partner Portal allows you to view, update and manage the following information depending on your access rights:

- Your organization's Grant Entity Data
- LFA Services and Performance Evaluation Tool (for LFAs only)

ner Portal is only accessible to Country Coordinating Mechanisms, Principal Recipients and Local Fund Agents.

nt: users will be required to enter a verification code sent via SMS when logging into the Global Fund Partner Portal. Contacts with Partner Portal access rights must ensure their mobile phone number is kept up to date in the Portal. If the mobile number is outdated, please raise an Update Contact change request, as soon as possible.

Language

To change the Portal language, select one of the language options at the top of the page. The LFA Services module is only available in English.

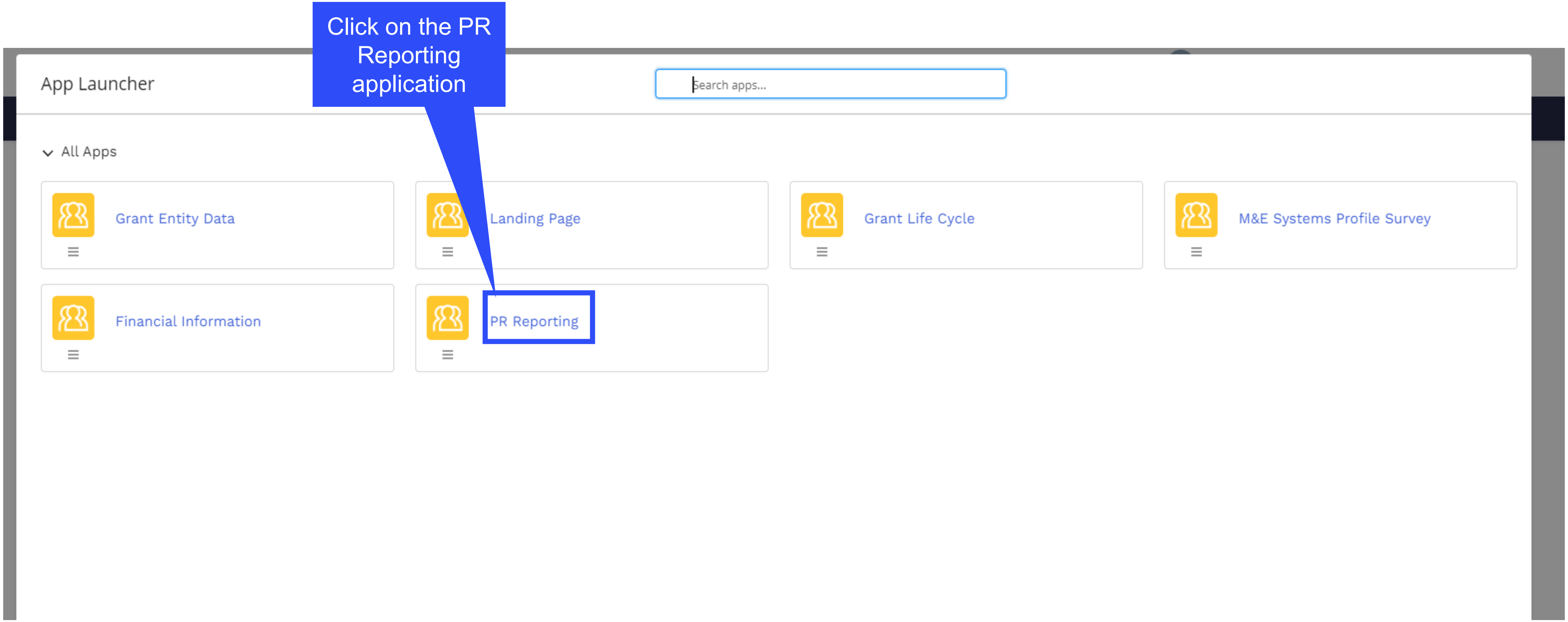
English Français Español

Home

How to Navigate

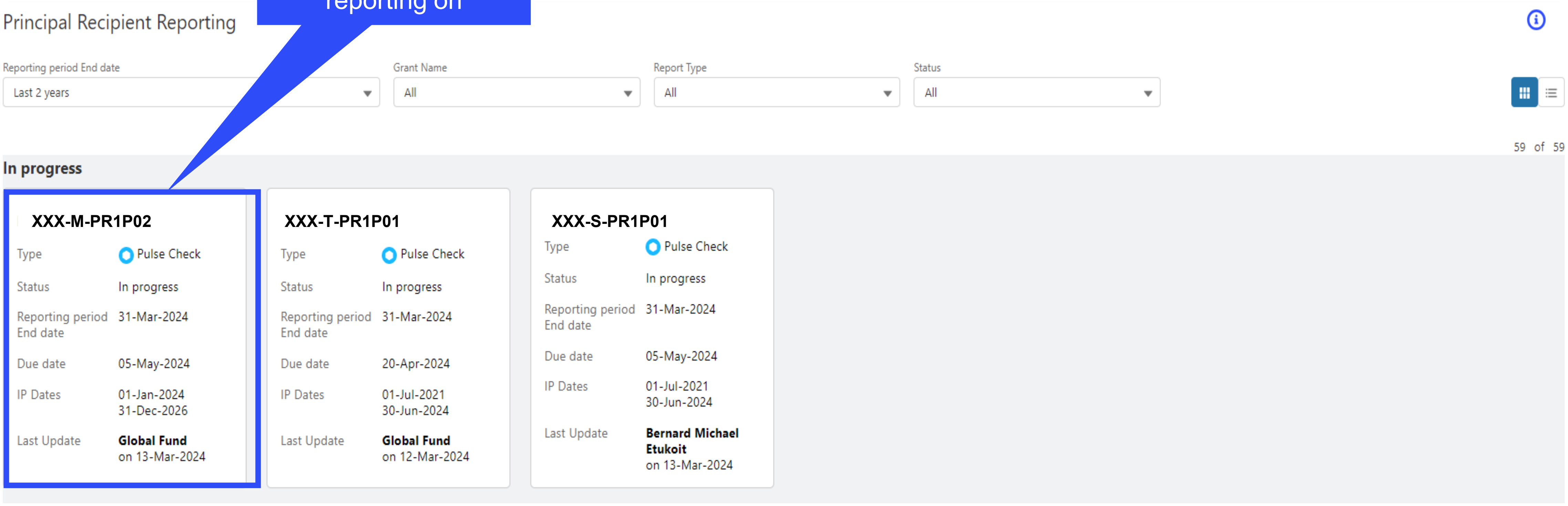
To navigate to the different Partner Portal modules, click on the icon at the top left of the page (App Launcher). You will only have access to the modules for which you have been granted permission.

How to navigate PCs in Partner Portal – Landing page



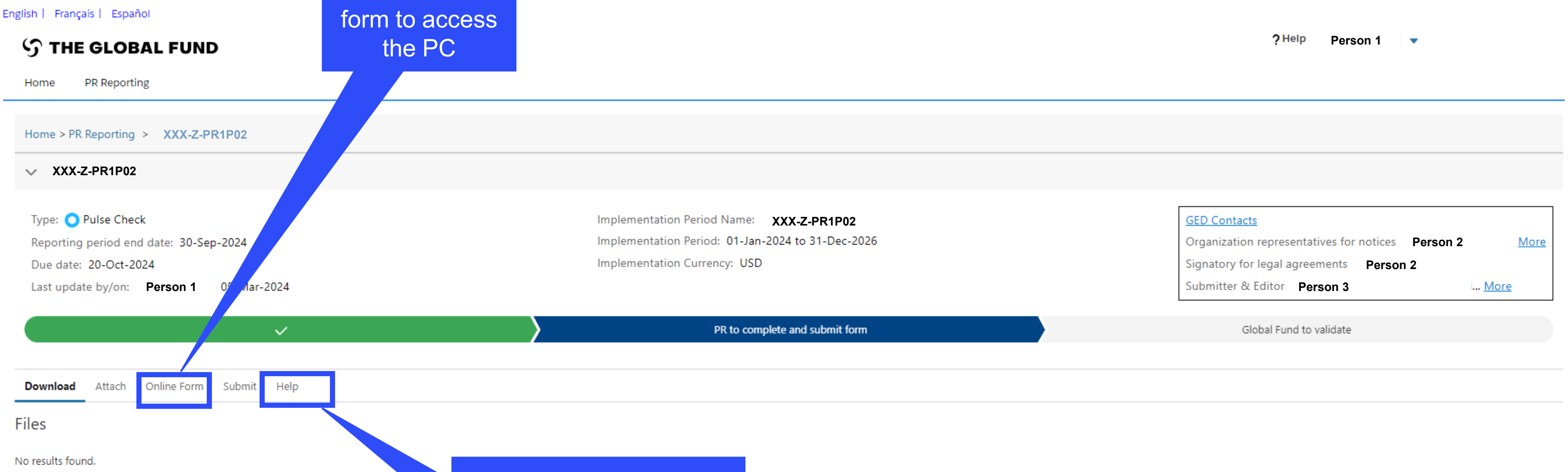
How to navigate PCs in Partner Portal – Landing page

Click on the tile of the grant you are reporting on



How to navigate PCs in Partner Portal – Access the online Pulse Check form

Click online form to access the PC



Note: the help section contains a button which opens an email to Country Support

How to navigate PCs in Partner Portal – Data entry

Shows PR if they are connected to the internet

Overall completion

- Programmatic
  - **Coverage Elementary Indicator**
  - Coverage Indicator
- Financial

Open full screen | Refresh form

Online Last auto saved: Save

XXX-Z-PR1P02

Coverage Elementary Indicator

Validations Validate form 19 Warnings

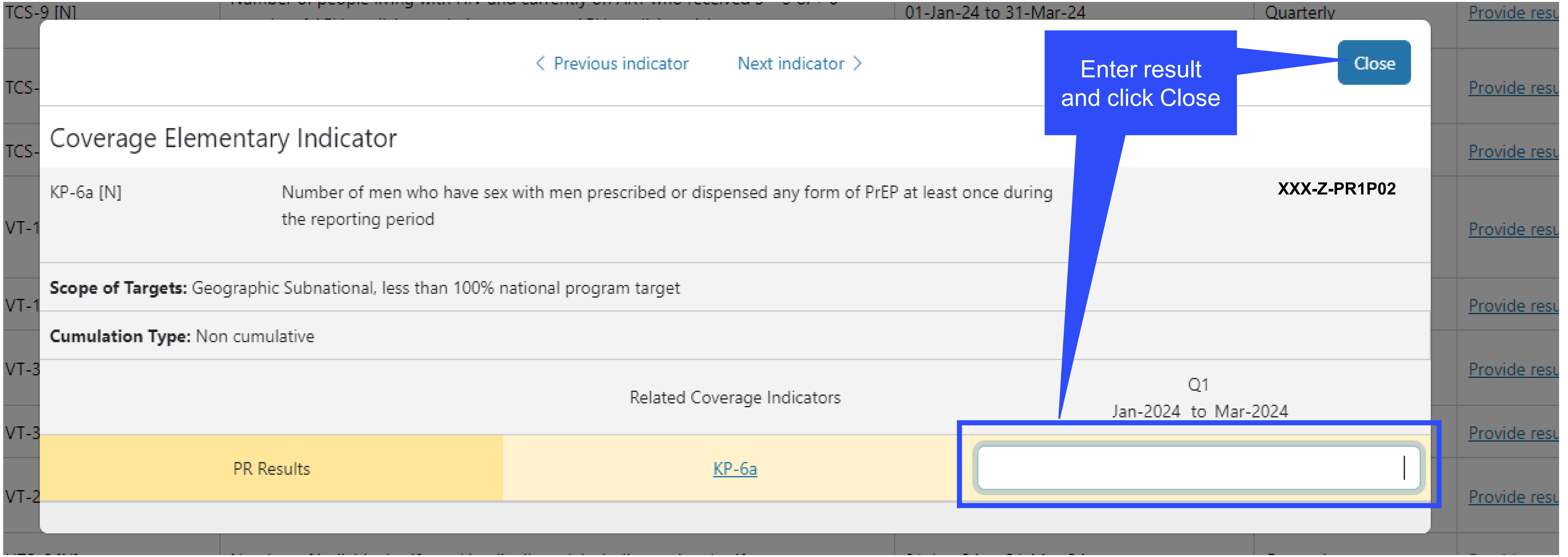
Item	Code	Indicator	Results reporting period	Frequency	Provide results	Results
1	KP-6a [N]	Number of men who have sex with men prescribed or dispensed any form of PrEP at least once during the reporting period	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	-
2	TCS-1b [N]	Number of adults (15 and above) on ART at the end of the reporting period	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	**0**
3	TCS-1b [D]	Estimated number of adults (15 and above) living with HIV	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	**0**
4	TCS-1c [N]	Number of children (under 15) on ART at the end of the reporting period	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	-
5	TCS-1c [D]	Estimated number of children (under 15) living with HIV	01-Jul-24 to 30-Sep-24	Quarte	Provide results	-

Click to expand and the tabs below appear

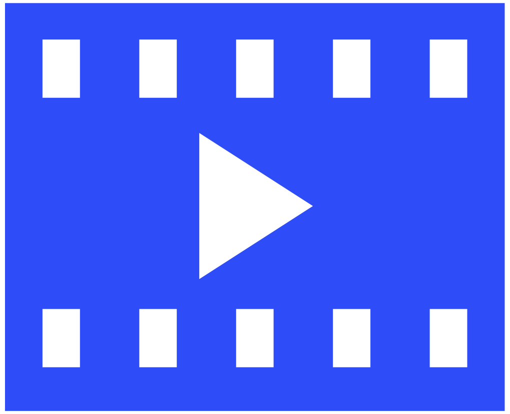
- Financial
  - **Cash Reconciliation**
  - Open Advances (simplified)

Click to provide results

How to navigate PCs in Partner Portal – Data entry



Partner Portal demo – Data entry



How to navigate PCs in Partner Portal – Validate data

Click validate. On the right you will see the number of errors and warnings.

Overall completion

- Programmatic
  - Coverage Elementary Indicator
  - Coverage Indicator
- Financial

Open full screen | Refresh form

((Online Last auto saved: ✓ Save

Coverage Elementary Indicator

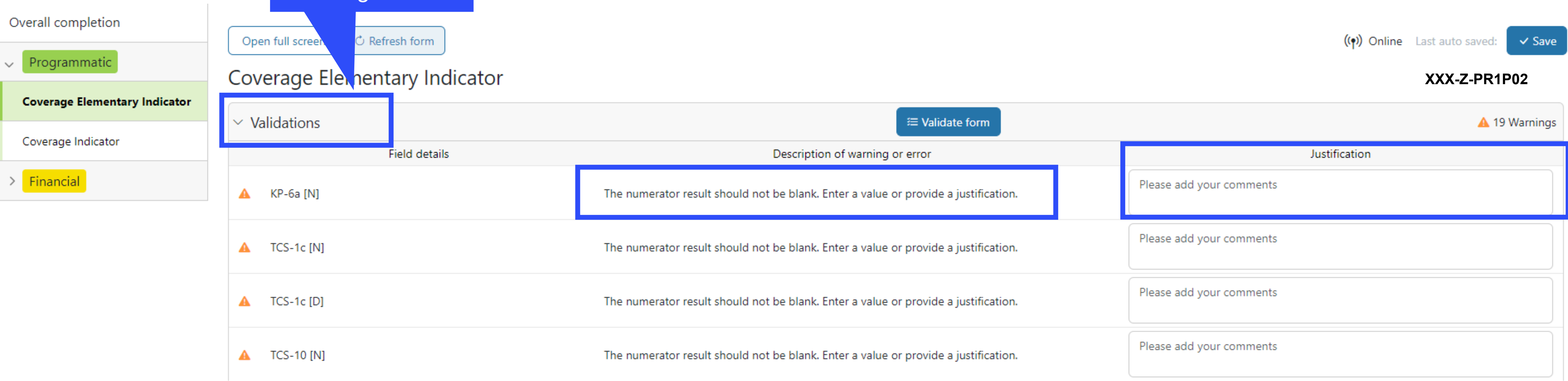
XXX-Z-PR1P02

Validations | Validate form | 19 Warnings

Item	Code	Indicator	Results reporting period	Frequency	Provide results	Results
1	KP-6a [N]	Number of men who have sex with men prescribed or dispensed any form of PrEP at least once during the reporting period	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	100
2	TCS-1b [N]	Number of adults (15 and above) on ART at the end of the reporting period	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	50
3	TCS-1b [D]	Estimated number of adults (15 and above) living with HIV	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	0
4	TCS-1c [N]	Number of children (under 15) on ART at the end of the reporting period	01-Jul-24 to 30-Sep-24	Quarterly	Provide results	-

How to navigate PCs in Partner Portal – Validate data

Click to expand and view all warnings/errors.



Validation rules added to improve data quality and ensure PR submissions are accurate and complete upon submission

- Data validation rules are a set of automated actions that the system performs to flag irregularities. The data validation rules support to:
  - Improve data quality by flagging potentially incorrect data
  - Prevent data entry errors
  - Improve data integrity and consistency
  - Speed up the validation process of the submitted data by Global Fund

- Validation rules are used to check data type, format, range, uniqueness and consistency across entries.

There are 2 types of validation flags in Partner Portal:

Warning
- Flags the system user to check if the data captured is correct or contains a potential error.
- Requires a justification comment if the warning is overruled.
- Allows PR to proceed and submit.

Error
- Alerts when the data does not comply with validation rule
- Does not allow PR to submit until the error is corrected.
- Allows the system user to review and correct the data before submitting the form.

Validation rules prompt users to ensure programmatic data has been entered correctly

Pulse checks: Programmatic warnings and actions needed (for coverage indicators)

Example

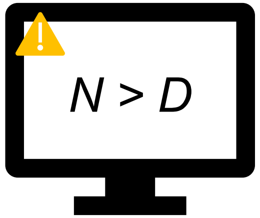
$$\frac{60}{100}$$

60 ← *Numerator [N]*

100 ← *Denominator [D]*

⚠ Warnings require **correction** or a **justification comment** to allow users to proceed.

For **missing results:**
- User checks if there is no result available for this period or if it's an omission.
- If result due BUT not available, provide a justification comment.



If **Numerator is greater than the Denominator**:
- User revises the result if data is incorrect, or
- If not an error (e.g., in cases of overachievement) provide the justification comment.

For interlinked **related indicators*:**
- User revises the result if data is incorrect, or
- Provide a justification comment (if applicable).

* Related indicators means where result of one indicator is related to another indicator or either same N and D result is used for multiple coverage indicators.

Validation rules prompt users to ensure programmatic data has been entered correctly

Pulse checks: Programmatic warnings and actions needed (for coverage indicators)

⚠ Warnings require **correction** or a **justification comment** to allow users to proceed.

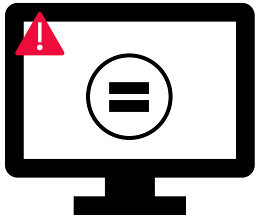
Description	Type
Missing results (numerators and/or % results)	⚠ Warning
If N is greater than D for Percentage indicators	⚠ Warning
If CM-2a Numerator more than CM-1a Numerator*	⚠ Warning
If CM-2b Numerator more than CM-1b Numerator*	⚠ Warning
If CM-2c Numerator more than numerator of CM-1c*	⚠ Warning
If TB/HIV-7.1 Denominator is not equal to TCS-1.1 Numerator**	⚠ Warning

* The number of confirmed malaria cases treated cannot be greater that the number of suspected cases tested.
** The number of PLHIV on ART captured as denominator for TB/HIV-7.1 should match the number of PLHIV on ART captured as numerator for TCS-1.1.

Validation rules prompt users to ensure programmatic data has been entered correctly

Pulse Checks: Programmatic error alerts and actions needed (for coverage indicators)

⚠ Errors require the **correction** of inputted data to allow users to proceed.



- These rules check that the related indicators have the **same values**.
- The system will not save data or allow form to be submitted **if values are not the same**.

Description		Type
CM-8 Denominator should be equal to CM-7 denominator	⚠	Error
DRTB-3 denominator should be equal to DRTB-2 numerator	⚠	Error
HTS-5 Numerator cannot be more than TCS-1.1 numerator	⚠	Error
TBDT-4 Denominator should be equal to TBDT-1 numerator	⚠	Error
TCS-9 Denominator should be equal to TCS-1.1	⚠	Error
VT-2 Denominator cannot be greater than denominator for VT-1	⚠	Error
TB/HIV-5 denominator should be equal to TBDT-1 numerator	⚠	Error
VT-2 Denominator should be equal to TCS-10 denominator	⚠	Error

Validation rules are embedded in the financial report to support users to overcome common mistakes for cash reconciliation

Validation Rules

The following triggers are embedded in the online report to support users to overcome common mistakes prior submission of the report.

- **Errors** - block submission unless corrected
- **Warnings** - flag for correction / justification comment

Description	Type
All value fields need to be filled in either with a number or 0. Not including comments	Error
"Comments" field under item 4.1 should be mandatory if an amount other than 0 is entered	Error
"Comments" field under items 9.3 and 9.4 should be mandatory if there is a variance greater/less than 1	Error
A bank statement or equivalent must be attached – If there is no document attached of file type bank statement/equivalent	Error
A bank reconciliation statement must be attached – If there is no document attached of file type bank reconciliation	Error
If the item 5.1 is negative	Warning
If the current reported amount is less than previous validated amounts for item 2 to item 4	Warning

Validation rules are embedded in the financial report to support users to overcome common mistakes for cash advances

Validation Rules

The following triggers are embedded in the online report to support users to overcome common mistakes prior submission of the report.

Errors block submission

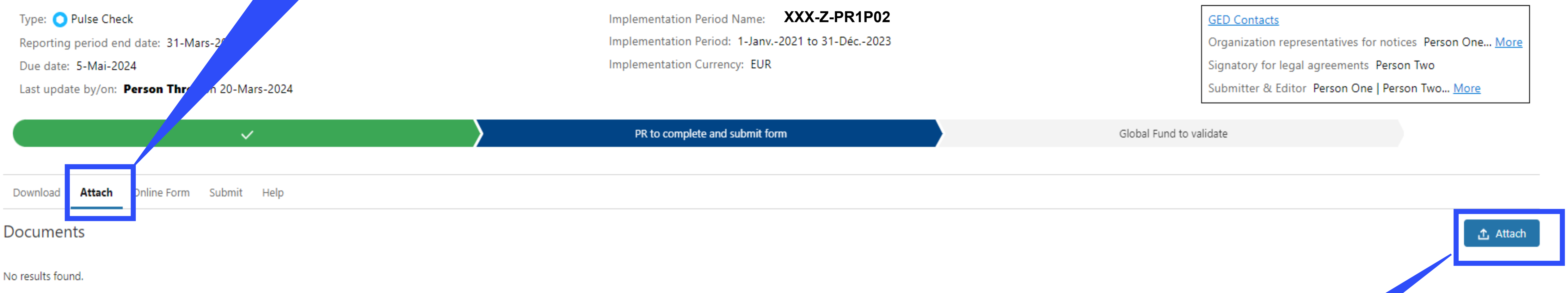
Warnings flag for attention/ justification comment

Description	Type
All value fields need to be filled in either with a number or 0. Not including comments	Error

Demo – data validation

How to navigate PCs in Partner Portal – Attach document

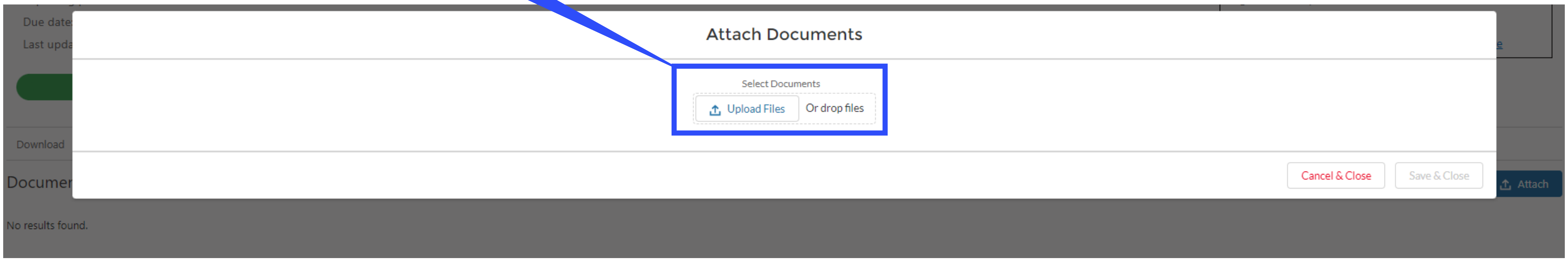
Click to open the attach tab



Click to select document to attach

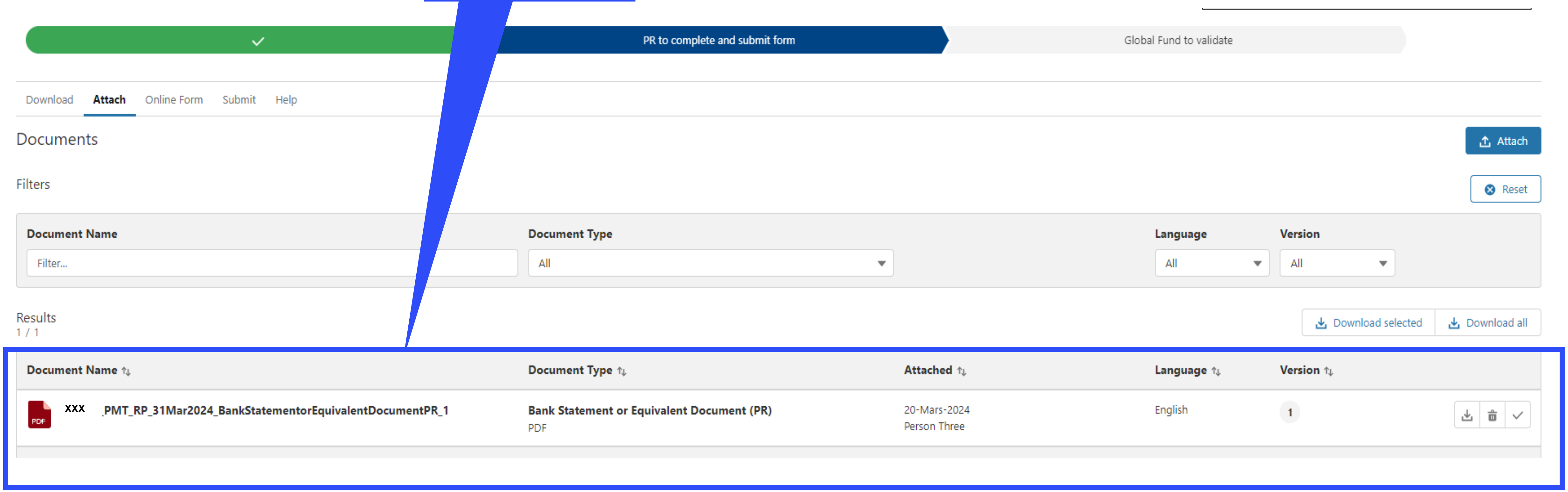
How to navigate PCs in Partner Portal – Attach document

Click to select files to attach

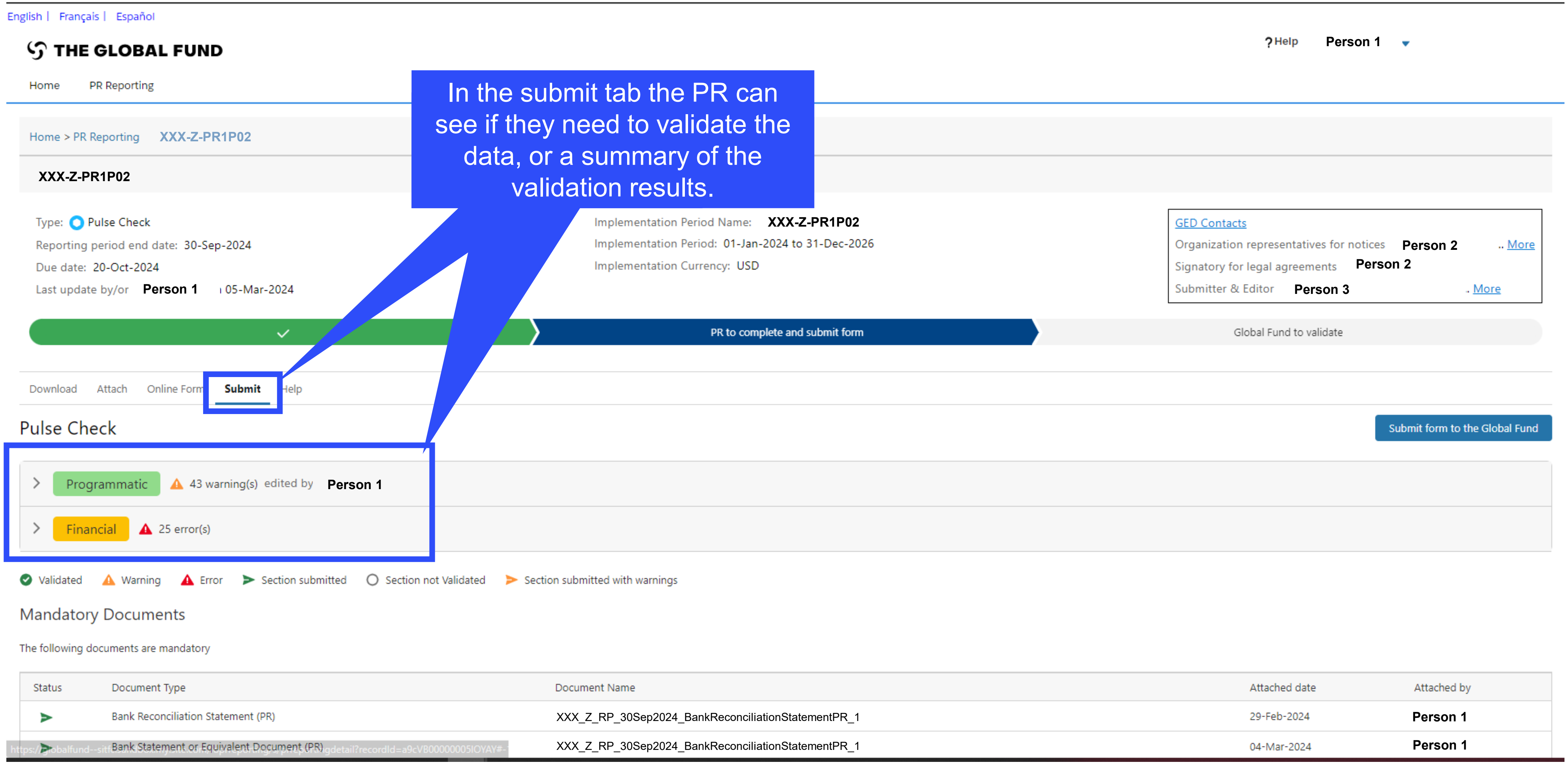


How to navigate PCs in Partner Portal – Attach document

Once attached documents will show here



How to navigate PCs in Partner Portal – Submit



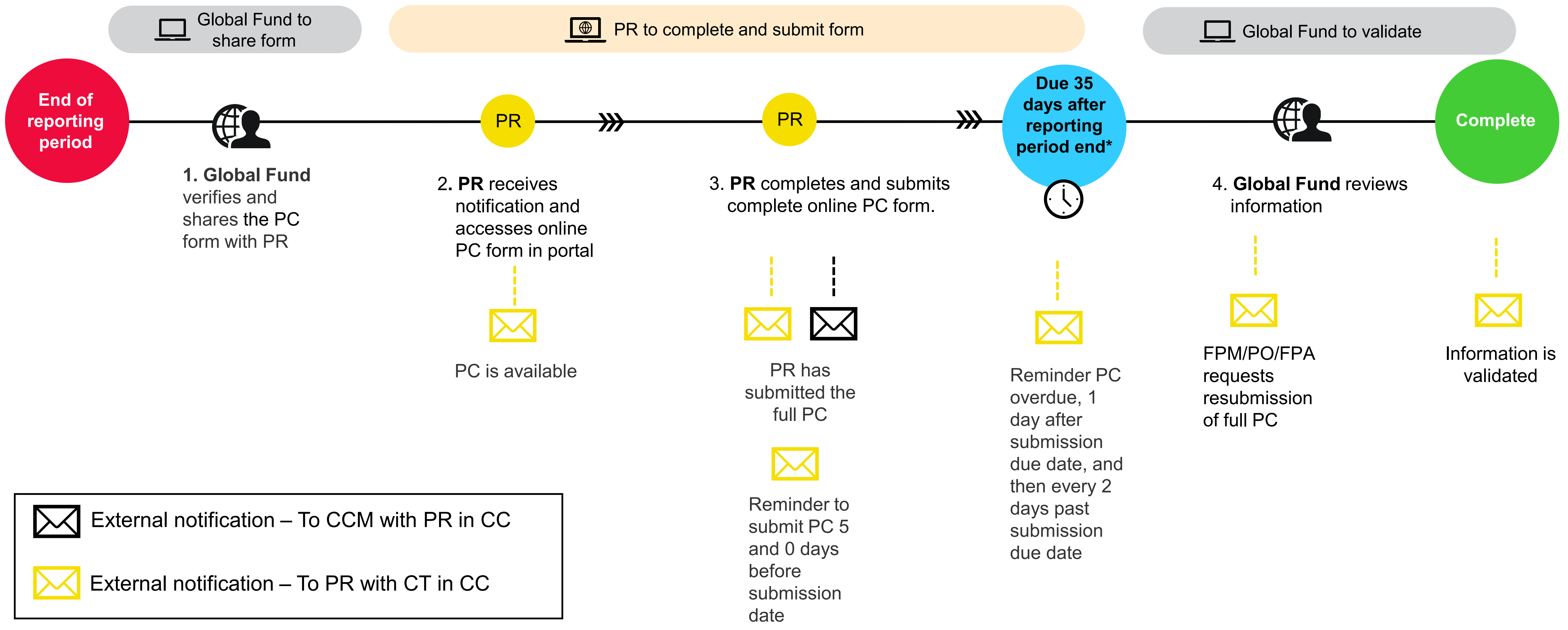
Demo –submission

Pulse Check Reporting

Overview of Process and Statuses

Last updated: 4 March 2024

Global Fund status
PR Principal Recipient
Global Fund
Partner Portal status



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* Portfolios categorized as Challenging Operating Environments can request for flexibilities per the COE policy

4

Next Steps and Resources

Internal and external info sessions, clinics and Q&A are planned to align with reporting timelines and corresponding system releases

There will be a series of online information sessions on the key changes for implementation oversight in 2024.

	Pulse Check		PU and FCR	PUDR
	March		**June**	**November**
External information sessions	**English**	**French**		
	Today **21 March** **9.30-12.00** Info Session and Q&A	**28 March** **14.00-16.30** Info Session and Q&A	*(Date TBD)* Info Session and Q&A	*(Date TBD)* Info Session and Q&A
	PRs, CCMs		PRs, LFAs, CCMs	PRs, LFAs, CCMs

For a complete list of materials for updated implementation oversight processes, please refer to the [Resources](#) slide.

Resources

Resources	Links
System Guidance	GOS Manual with detailed guidance on CT system steps *(link forthcoming)*
	Instructions: Pulse Check content *(link forthcoming)*
	Pulse Check example *(link forthcoming)*
	Partner Portal Guide with detailed guidance on PR system steps *(link forthcoming)*
Infographic and demo videos	Pulse Check Process *(links forthcoming)*
Monitoring & Evaluation	GC7 Modular Framework Handbook English | French | Spanish
	GC7 Indicator Guidance sheets: Landing page (available in English French, Spanish)
	C19RM Modular Framework handbook - English
	C19RM Indicator Guidance sheets – English | French | Spanish

5 Questions

Questions and Answers

1. Will GF consider the Pulse Check data in grant rating?
A. No, there is no grant rating at Q1, Q2 and Q3. Grant ratings (alphabetical) will be generated at Q4 at the time of PUDR submission. At Q2, at the time of PU, % achievement will be calculated, but no letter ratings will be generated.

2. Does that mean C19RM/CCM and GC7/RSSH reporting is integrated?
A. No. C19RM reporting remains within GC6 reports and are separate from GC7 reports.

3. For the PU and PUDR submission timeline, will the country under the COE get the extra 15 days as the current policy?
A. The COE flexibilities will remain the same as before as agreed with the CT.

4. How to report a semi-annual report when you have an annual budget?
A. The expenditures for the half year will inform progress towards the annual budget. There will be dedicated sessions on PU and PUDR reporting later in the year when these will be rolled out.

Questions and Answers

5. What will be the cycle for 4 reportings?
A. PC (Q1), PU (Q2), PC (Q3), PUDR (Q4) – per grant, per IP year. So, 4 reports per IP year except in Y3 the PUDR will be a Last PU

6. I understand the PU will pull information from the previous Pulse Check, Will the pulse check include the information from previous PU? Given the pulse check have less indicators compared to the PU.
A. At Q1 Pulse Check, there will be no previous information shown. At Q2, results reported in Q1 will be visible and editable. At Q3, both Q1 and Q2 data will be visible (but not editable). At Q4, results reported at Q1, Q2 and Q3 will be visible and editable (if PR wishes to make a correction).

7. Will the semesterly targets be maintained in the pulse check template or considerations for quarterly targets will be made (for non-cumulative indicators) ?
A. In the pulse checks, there are no targets shown on elementary indicators tab. PRs will be able to see the semester targets on the coverage indicator tab (for ease of reference). There will be no quarterly targets set.

8. How will data validation work for custom indicators? Is it only for the core/standard indicators?
A. Validation rules will apply to the custom indicators as well

Questions and Answers

9. Do we have to verify and revise our data in the following reporting period?

A. There is no requirement to revise the data reported in previous reporting periods. PRs do have a possibility to check the previously reported data and correct any errors if they want to do so. This will be possible at Q2 (they can update Q1 data) and at Q4 (PRs can update Q1, Q2 and Q3 data).

10. For the Pulse Checks is it just a sub-set indicators still or will it be for all the indicators in the GC7 grant?

A. For the Pulse Check only a sub-set of Performance Framework indicators are to be reported.

11. How will the custom indicators work in elementary coverage indicator tab?

A. Custom indicators will be included in the coverage indicator tab and results for these indicators will be reported in the coverage indicator tab. These will not be included in the elementary indicator tab.

12. For C19RM, previously there were no indicators in the Pulse Check and we only reported through the PR self evaluation tab, elaborating the grant modules as on track/ off-track /Not applicable. Will C19RM have indicators tab in the Pulse Check or only considered in the PU?

A. Only those grants that have a performance framework that includes quarterly Workplan Tracking Measures are required to report in the Pulse Checks. PR self-evaluation tab is no longer in any Pulse Check.

Questions and Answers

13. If the PR working for 4 grants using only 1 bank account receiving funds from the GF. How can we input the bank balance into the financial section of the Pulse Check (it will be always the variance with the grant funds)?

A. The PR will submit a bank statement and a bank reconciliation as well. For grants that use the same account, the bank reconciliation should have the details for each grant. In addition, in section 9 there is a mandatory comment section to explain the variances between the statement and the cash balance and between the reconciliation and the cash balance.

14. Can you clarify which Financial tabs will be included in the Progress Update? If a budget variance analysis is required at the time of the PU, which budget figure will be used given that GC7 budgets are now annual (and not split by quarters?)

A. The PU will include the cash reconciliation, expenditure, and simplified table of open advances. There will be sessions later in the year as we roll them out. To note that the cash reconciliation section is the same for all financial reports whether PC, PU or PUDR.

15. Just to clarify - there is no offline template/excel sheet for the Pulse check?

A. As today, the PC will be fully using the online form for entry and submission of the PC.

16. Do we also consider the advance payment to LI?

A. Lead implementers are accounted in the same way as SRs and therefore advances to them should be accounted as such.

Questions and Answers

17. Would it be ok to also be able to download and excel version of the Pulse Check. So we can work outside the platform too?

A. As today, for the PC, there is no Excel version available and the full form is prepared and submitted online.

18. Just to be clear, in GC7 for IP that had WPTM not for C19RM (for HTM) will not be reported like in GC6?

A. GC7 IPs have WPTMs that are to be reported every six-months or annually, unlike C19RM WPTMs that are reported quarterly. The GC7 WPTMs will be reported at Q2 and Q4 as per the reporting frequency in the Performance Frameworks.

19. I am concerned how Pulse Checks will work in relation to how KP indicators (HIV prevention) are currently measured across different countries and whether country specific information systems could measure when a person is considered reached (therefore included in the numerator or not) on a quarterly basis depending on the different components/frequency of contact (1 or 2 per semester) under the specific prevention package in question. Has any guidance been developed for these indicators?

A. The KP indicators are not part of quarterly reporting. These will be reported as per the agreed frequency and measurement methodology in the grant performance framework.

Questions and Answers

20. It seems we will need multiple access to be able to complete the document, at least 2, one each for the programmatic side and another for the financial side

A. Editors and submitters will need access to the form. Please check your Grant Entity Data to ensure that the correct people have the proper access.

21. Will it show a message like "ready to submit"? the reason is we as editors prepare and then ask organization top management to push the submit button

A. There is no “ready to submit” message but in the online form under the submit tab, there is a summary of each section. If it has already been validated and there are no unaddressed warnings/errors and all the relevant supporting documents are attached the report can be submitted.

22. If during PU submission PR realize that there was some discrepancy in the Pulse Check can we correct it later on in the same year?

A. Yes, this is possible for GC7. PRs will be able to make adjustments to previously reported data retrospectively at Q2 (for Q1 results) and at Q4 (for Q1, Q2 and Q3 reported results). Changing previously reported data cannot be done.

Questions and Answers

23. Is the PR Reconciliation Template same with what we have in the PUDR?
A. Yes, there will be a total alignment of the cash reconciliation section across financial reports. Starting with the PC first, you can expect to see the same template across the cycles. The triangulation template will only be required for the PUDR. The cash reconciliation statement ends at the closing cash balance line. Open advances, commitments and obligations and triangulation are not included as in the PUDR.

24. On the validation check-Warning, any idea guidance on justification- for example, an indicator that is just slightly overachieved (101%) may not need much of justification...
A. You can just put ‘Results overachieved’ – that will be the justification.

25. If we can also have some examples of regional grants. I suppose we are still reporting annually. The cumulative aspects, does it mean i.e Yr1 and Yr2
A. There is no change for regional grant reporting requirements versus GC6 reporting requirements. If in GC6 the requirement was only annual reporting for your regional grant that will remain the same. For the second part of the question, asking if the results are cumulated across the years, the answer is no. The results are only cumulated within the year.

Questions and Answers

26. Do these changes affect GC6 since GC6 is left with only 9 months?
A. From Q1 2024 onwards, irrespective of cycle.

27. So, it mean that it is not mandatory to correct PC data? (in relation to Question 6)
A. Yes, correct. It is not mandatory to correct PC data.

28. So for a pulse checks, it is still only a sub-set of indicators? And there are no quarterly targets and we don't need to revise the Q1 or Q3 data?
A. Yes, for a pulse check, it is still a sub-set of indicators to be reported. There are no quarterly targets, only results for this sub-set of indicators is to be reported at Q1 and Q3. There is no need to revise the performance framework to set quarterly targets.

Questions and Answers

29. When is Q1 Pulse check expected to be submitted this year?
A. For a grant with an IP that begins January 1, the first Pulse Check will cover reporting from January 1-March 31. The Pulse Check is due 35 days after the reporting period end date, in this example 35 days after March 31.

30. Can you share the list of pulse-check indicators to be included/focused on under GC7?
A. The list is included in this slide deck that will be shared after this session.

31. This Pulse Check reporting style focus on aggregated data quality for program and finance not focus on data quality from disease perspective gaps and technical concern. Any future disease data reporting in align with WHO report?
A. The reporting to GF is as per the grant cycle (start and end dates) but is aligned to the national reporting cycles. It is difficult to align reporting with WHO reports as the timelines do not always match.

32. If there is budget reprograming how will this work or updated under the PC/PU?
A. The PC is indifferent from the budget as it only includes cash reconciliation. The PU and PUDRs will contain the expenditures sheet and variance analysis. The budget will always shown there as the latest approved budget. We will dive into the expenditures and variance analysis when we do the info sessions for PUs and PUDRs.

Questions and Answers

33. In case of more than one PR, will the pulse check be PR-specific or national, like the PU/PUDR?
A. Results in the PC are reported by each PR as per the indicators and targets set in their respective performance frameworks.

34. Do we need all approved PF indicators to be reported in PC? how do we agree to report indicators in PC?
A. No, Pulse Checks do not include all approved PF indicators. Only a subset of indicators are to be reported in the pulse checks. Pulse checks will include a fixed set of indicators (if part of the latest signed PF) with a possibility for CTs to include any additional indicators that require close follow up.

35. Clarification for PU: is it still the same as before in 2023 using excel or the same as PC, full input online
A. The PU will be submitted via the online form but an excel file will still be available to download and collect data. The excel will then be uploaded into the online form and subject to the same validation rules. More information on the PU will be provided during the information sessions in June.

Questions and Answers

36. Is the PR Reconciliation Template same with what we have in the PUDR? with triangulation of financial figures?
A. The triangulation template will only be required for the PUDR. The cash reconciliation statement ends at the closing cash balance line. Open advances, commitments and obligations and triangulation are not included as in the PUDR.

37. When will we start this new reporting system?
A. The system will be live on March 28.

38. Will GF issue the Guideline on how to fill in the new PC form?
A. Yes.

Questions and Answers

39. Which reports are LFAs expected to review?
A. This will be communicated as we roll out the PU/DR. For now, PCs are still not subject to LFA review.

40. Please share the comprehensive list of data validation flags/rules.
A. This will be included in the slides.

41. For joint indicator between PR who are responsible to put it in the pulse check?
A. Both PRs will report on these indicators if they are included in their grant performance frameworks.

42. Ending cash balance - will it be theoretical or as per bank statement?
A. Theoretical. And then there is a requirement to provide the reconciliation statement.

Questions and Answers

43. Do we consider vendors also as Lead Implementer.
A. No, these are considered as suppliers. But payments to them will still count as open advances until the goods or services are delivered.

44. If we have a GC7 HIV TB Grant and a GC6 C19RM , will we have to submit separate reports for the two cycles?
A. Yes, these grants are in two different IPs, and will require separate reports.

45. If it is theoretical will there be a section to explain the difference between bank statement figure Vs theoretical
A. Yes. There will be a comments section.

Questions and Answers

46. A humble suggestion: while we will submit PCs & PUs online, please simultaneously share the Excel versions, so that it would be easy to cascade down the templates to the multiple SIs/SSIs/SSSIs, collect the information, compile and consolidate and submit online - this will avoid too many people to be given access to the portal and minimize coordination across multiple implementers. Save time and maximize efforts

A. An Excel version will be available for the PU/DR and the PC will remain online only, however the suggestion and reasonings are well noted and will be considered.

47. How can we consider the "payment directly paid by GF" (e.g. WAMBO) into the cash outflow while the PR recognize the expenses when received the good only? There will be a time different on how to recognize the expenses.

A. Answer

48. The LFA will continue to review the PU ?

A. Yes the LFA will continue to review PU and PUDRs but there will be some changes that will be shared in June during the PU info session.

ANNEX

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GC7 quarterly reporting-mandatory indicators

Included in the Pulse Check if part of the latest signed performance frameworks

28 November 2023

GC7 PF indicators required for Q1 & Q3 reporting in HI and Core countries

HIV

S/N	Indicator code	Indicator Prioritization (Group 1,2,3)	Available in routine HMIS/DHIS2?	Name of indicator
1	HIV O-29	2	Y	% of HIV-positive results among the total HIV tests performed during the reporting period.
2	HTS-5	3	Y	% of people newly diagnosed with HIV initiated on ART.
3	TCS-8	3	Y	% of people living with HIV and on ART with viral load test result.
4	TCS-1.1	1	Y	% of people on ART among all people living with HIV at the end of the reporting period.
5	TCS-1b	1	Y	% of adults (15 and above) on ART among all adults living with HIV at the end of the reporting period.
6	TCS-1c	1	Y	% of children (under 15) on ART among all children living with HIV at the end of the reporting period.
7	TCS-10	1	Y	% of pregnant women living with HIV who received antiretroviral medicine to reduce the risk of vertical transmission of HIV.
8	VT-3	3	Y	% of women accessing antenatal care services who were tested for syphilis.

**All PF indicators will be in Q2 & Q4 PR reporting as per the PF reporting requirements.*

GC7 PF indicators required for Q1 & Q3 reporting in HI and Core countries

TB

S/N	Indicator code	Indicator Prioritization (Group 1,2,3)	Available in routine HMIS/DHIS2?	Name of indicator
1	TBDT-1	1	Y	Number of patients with all forms of TB notified (new and relapse).
2	TBDT-4	1	Y	% of new and relapse TB patients tested using WRD tests at the time of diagnosis.
3	DRTB-2	1	Y	Number of people with confirmed RR-TB and/or MDR-TB notified.
4	DRTB-3	1	Y	% of people with confirmed RR-TB and/or MDR-TB that began second-line treatment.
5	TBP-1	1	Y	Number of people in contact with TB patients who began preventive therapy.
6	TB/HIV-6	1	Y	Percentage of HIV-positive new and relapse TB patients on ART during TB treatment.

**All PF indicators will be in Q2 & Q4 PR reporting as per the PF reporting requirements.*

GC7 PF indicators required for Q1 & Q3 reporting in HI and Core countries

Malaria

S/N	Indicator code	Indicator Prioritization (Group 1,2,3)	Available in routine HMIS / DHIS2?	Name of indicator
1	CM-1a	1	Y	Proportion of suspected malaria cases that receive a parasitological test at public sector health facilities
2	CM-2a	1	Y	Proportion of confirmed malaria cases that received first-line antimalarial treatment at public sector health facilities
3	CM-1b	3	Y	Proportion of suspected malaria cases that receive a parasitological test in the community
4	CM-1c	3	Y	Proportion of suspected malaria cases that receive a parasitological test at private sector sites
5	CM-2b	3	Y	Proportion of confirmed malaria cases that received first-line antimalarial treatment in the community
6	CM-2c	3	Y	Proportion of confirmed malaria cases that received first-line antimalarial treatment at private sector sites
7	CM-9	3	Y	Proportion of detected malaria patients who contacted health care provider within 48 hours of onset of symptoms (elimination settings)
8	CM-10	3	Y	Proportion of cases reported at national reporting system within 24 hours of treatment (elimination settings)

**All PF indicators will be in Q2 & Q4 PR reporting as per the PF reporting requirements.*