

PARTNER(/EN/CONTENT/P

HFU(/EN/CONTENT/HFU)

CBPF

CLUSTER

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Fill in and submit the Operational Modalities template

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I) Populate the Operational Modalities template

From the template's draft page, HFU officers are required to insert all operational modalities as set in the Fund's Operational Handbook.

1) Add a modality

To add a new modality line, click on **[Add new Operation Modality]**.

Operation Modality Template
Tracking

Created By: gms@trigyn.com Created On: 12/02/2021 15:14:11

Mandatory fields are marked with an asterisk *

* Template Name: <input type="text" value="Lebanon Humanitarian Fund - 2018"/>	Template Code: LEB004
* Start Date: <input type="text"/>	End Date: <input type="text"/>
* Advisory Approved Date: <input type="text"/>	* Scope: <input type="checkbox"/> Global <input checked="" type="checkbox"/> Pooled Fund

Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

Categories that need at least one document to be uploaded
1 - CBPF OM Document(s)

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Operation Modalities
Add New Operation Modality

Id	Partner Type	Risk Level	Duration	Budget	Disbursements	Financial Reporting	Narrative Reporting	Monitoring	Actions
1602	Non UN	High	>0 to <=7	0.00 to 250000.00	2 (60.00%-40.00%)	Interim- Yes	8+3 Progress- Yes (1)	Monitoring Visit- 1	

2) Configure a modality

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operation Modality
Draft

Save & Stay Save & Exit Close

Created By: Created On:

Template Name: Lebanon Humanitarian Fund - 2018	Start Date:	End Date:
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Mandatory fields are marked with an asterisk *

Operation Modality Specification

* Partner type:	Select Partner Type	* Risk Level:	Select Risk Level
* Duration From:	>	* Duration To:	<= <input type="checkbox"/> No Limit
* Budget From:		* Budget To:	<input type="checkbox"/> No Limit

Disbursement Tranches

Tranche #	Tranche Percent	User Actions
Total	0.00	+ Add Tranche

Financial Reports

Report Type	Is Mandatory	Required for Year End	User Action
			+ Add Financial Report

Narrative Reports

Report Type	Report Count	Is Mandatory	User Action

CBPF GRANT MANAGEMENT SYSTEM (GMS)

[+ Add Narrative Report](#)

Fields Description:

Monitoring

• **Partner Type:** Select from the drop-down list the partner type this modality applies to.

• **Risk Level:** Select from the drop-down list the partner risk level this modality applies to.

• **Duration from:** Enter in this field the minimum number of months taken into consideration by this modality (for instance, for a modality which applies to a project from 0 to 3 months, enter 0 in this field).

Select from drop-down list next to the field whether the minimum duration is strictly greater than (>), or greater than or equal to (≥) the number of months inserted. (For instance, for a modality which applies to projects from 7 to 12 months, you need to enter 7 in this field, and you can select the superior and equal (≥) sign)

• **Duration To:** Enter in this field the maximum number of months taken into consideration by the modality (for instance, for a modality which applies to a project from 0 to 3 months, enter 3 in this field). Select from drop-down list next to the field whether the maximum duration is strictly less than (<), or less than or equal to (≤) the number of months inserted. (For instance, for a modality which applies to projects from 0 to less than 3 months, you need to enter 3 in this field, and you can select the strictly inferior sign (<). This means that the 3 months + 1 day projects will not be included in this modality line, but will be included in the modality which applies to [3 to XX months] projects).

If the modality does not include a duration top limit, please tick the box **[no limit]**.

• **Budget From:** Enter in this field the minimum budget taken into consideration by the modality (for instance, for a modality which applies to a project with a budget from 0 to 250 000 \$US, enter 0 in this field).

• **Budget to:** Enter in this field the maximum budget amount taken into consideration by the modality (for instance, for a modality which applies to a project with a budget from 250 000 to 500 000\$US, enter 500 000 in this field).

If the modality does not include a budget top limit, please tick the box **[no limit]**.

Do not forget to click on **[save and stay]** or **[save and exit]**.

a) Disbursement tranches

To add the disbursement tranches of the modality, click on **[Add tranche]**. Enter the tranche percentage in the editable field, then repeat the process for all tranches, according to the modality.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operation Modality
Draft

Save & Stay
Save & Exit
Close

?

Created By: gms@trigyn.com Created On: 12/02/2021 15:14:11

Template Name: Lebanon Humanitarian Fund - 2018	Start Date:	End Date:	Status : Draft
--	--------------------	------------------	-----------------------

Mandatory fields are marked with an asterisk *

Operation Modality Specification

* Partner type: <input type="text" value="Non-UN"/>	* Risk Level: <input type="text" value="High"/>
* Duration From: <input type="text" value="0"/> <input type="text" value=">"/>	* Duration To: <input type="text" value="7"/> <input type="text" value="<="/> <input type="checkbox"/> No Limit
* Budget From: <input type="text" value="0.00"/>	* Budget To: <input type="text" value="250000.00"/> <input type="checkbox"/> No Limit

Disbursement Tranches

Tranche #	Tranche Percent	User Actions
1	60.00	<input type="checkbox"/> <input type="checkbox"/>
2	<input style="border: 1px solid red;" type="text" value="40"/>	<input type="checkbox"/> <input type="checkbox"/>
Total	100.00	<input style="border: 1px solid red;" type="button" value="Add Tranche"/>

⚠ The following issues found in this section -

Operation Modality Total disbursement percentage is less than 100

Do not forget to click on **[save and stay]** or **[save and exit]**.

If the tranches' sum does not amount to 100%, the system will display an error message. This message will disappear once the tranches' sum amount to 100% and you click on **[Save]**.

b) Financial reports

To add the Financial Reporting requirements, click on **[Add Financial Report]**. Select from the drop-down list the type of Financial Report, tick the 'Is mandatory' box if the report is mandatory, and tick the 'Required for year end' box if it is a year-end required report.

Repeat the process to add all financial reports' requirements.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Do not forget to click on **[save and stay]** or **[save and exit]**.

Financial Reports			
Report Type	Is Mandatory	Required for Year End	User Action
Interim	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
			+ Add Financial Report

c) Narrative reports

To add the Narrative reporting requirements, click on **[Add Narrative Report]**. Select from the drop-down list the report type, enter in the field the number of this report type that is required, and tick the 'Is Mandatory' box if this(ese) report(s) is(are) mandatory.

Narrative Reports			
Report Type	Report Count	Is Mandatory	User Action
8+3 Progress	2	<input checked="" type="checkbox"/>	✗
8+3 Final	1	<input checked="" type="checkbox"/>	✗
			+ Add Narrative Report

Do not forget to click on **[save and stay]** or **[save and exit]**.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

d) Monitoring

To add a monitoring requirement, click on **[Add Monitoring]**, select from the drop-down list whether it is a Monitoring visit or a Financial Spot Check, enter in the field the number of instances for this monitoring type. If the monitoring type is required for each partner per year, tick the box 'One/Partner/Year'.

Monitoring			
Monitoring Type	Count	One / Partner / Year	User Action
Monitoring Visit <input type="text" value="v"/>	<input type="text" value="1"/>	<input type="checkbox"/>	<input type="text" value="x"/>
Financial Spot Check <input type="text" value="v"/>	<input type="text" value="1"/>	<input type="checkbox"/>	<input type="text" value="x"/>
			<input type="button" value="+ Add Monitoring"/>

Do not forget to click on **[save and stay]** or **[save and exit]**.

After configuring the modality, do not forget to click on [save and stay] or [save and exit].

Operation Modality
Draft

Created By: Created On:

Template Name:	Start Date:	End Date:
Lebanon Humanitarian Fund - 2018		

Mandatory fields are marked with an asterisk *

Operation Modality Specification

To better understand how to configure a modality, let's take a concrete example and configure the line in red in the screenshot below, taken from the Global Operational Handbook Operational Modalities table.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operational Modalities

Risk level	Project duration (months)	Project value (thousand USD)	Maximum amount per project (thousand USD)	Disbursements (in % of total)	Financial reporting			Narrative reporting		Monitoring		Audit
					For disbursements	31-Jan	Final	Progress	Final	Project monitoring	Financial spot-check	
					NGOs							
High	< 7	< 250	-	60-40	Yes	Yes	Yes	1 mid	Yes	1	1	As per plan
		> 250	500	50-50	Yes	Yes	Yes	1 mid	Yes	1	1	
	7 - 12	< 250	-	40-40-20	Yes	Yes	Yes	2	Yes	1	1	
	> 250	800	40-30-30	Yes	Yes	Yes	2 - 3*	Yes	1-2**	1		
Medium	< 7	< 250	-	100	-	Yes	Yes	1 mid	Yes	-	-	
		> 250	700	80-20	Yes	Yes	Yes	1 mid	Yes	1	-	
	7 - 12	< 250	-	80-20	Yes	Yes	Yes	1 mid	Yes	0-1**	-	
	> 250	1,200	60-40	Yes	Yes	Yes	1 mid	Yes	1	0 - 1		
Low	< 7	< 400	-	100	-	Yes	Yes	-	Yes	-	-	
		> 400	-	80-20	Yes	Yes	Yes	-	Yes	-	-	
	7 - 12	< 400	-	100	-	Yes	Yes	1 mid	Yes	-	-	
	> 400	-	80-20	Yes	Yes	Yes	1 mid	Yes	1	1 / partner		
UN Agencies												
N/A	< 7	-	-	100	-	Yes	Yes	-	Yes	Op. Manual***	-	No
	7 - 12	-	-	100	-	Yes	Yes	1 mid	Yes	Op. Manual***	-	

Below is how this line should be configured on the OneGMS:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operation Modality Specification

* Partner type: <input type="text" value="Non-JIN"/>	* Risk Level: <input type="text" value="High"/>
* Duration From: <input type="text" value="0"/> >=	* Duration To: <input type="text" value="7"/> < <input type="checkbox"/> No Limit
* Budget From: <input type="text" value="0"/>	* Budget To: <input type="text" value="280000"/> <input type="checkbox"/> No Limit

Disbursement Tranches

Tranche #	Tranche Percent	User Actions
1	<input type="text" value="60"/>	✘
2	<input type="text" value="40"/>	✘
Total	100.00	<input type="button" value="Add Tranche"/>

Financial Reports

Report Type	Is Mandatory	Required for Year End	User Action
<input type="text" value="Interim"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✘
<input type="text" value="Final"/>	<input type="checkbox"/>	<input type="checkbox"/>	✘
<input type="button" value="Add Financial Report"/>			

Narrative Reports

Report Type	Report Count	Is Mandatory	User Action
<input type="text" value="8+3 Progress"/>	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	✘
<input type="text" value="8+3 Final"/>	<input type="text" value="1"/>	<input type="checkbox"/>	✘
<input type="button" value="Add Narrative Report"/>			


Monitoring

Monitoring Type	Count	One / Partner / Year	User Action
<input type="text" value="Monitoring Visit"/>	<input type="text" value="1"/>	<input type="checkbox"/>	✘
<input type="text" value="Financial Spot Check"/>	<input type="text" value="1"/>	<input type="checkbox"/>	✘
<input type="button" value="Add Monitoring"/>			













Please note: audit requirements are not configured in this module of the OneGMS. To learn more about audit requirements, [please refer to this article of the Help Portal\(/content/project-audit-0\)](/content/project-audit-0).


CBPF GRANT MANAGEMENT SYSTEM (GMS)

3) Edit or delete a modality













To edit a modality already saved in the template, click on the edit icon  of its line.

Please note: it is not possible to edit a modality in a template which has been approved.

Operation Modalities Add New Operation Modality									
Id	Partner Type	Risk Level	Duration	Budget	Disbursements	Financial Reporting	Narrative Reporting	Monitoring	Actions
1602	Non UN	High	>0 to <=7	0.00 to 250000.00	2 (60.00%-40.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
1603	Non UN	High	>0 to <=7	250000.00 to No Limit	2 (50.00%-50.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
1604	Non UN	High	>7 to No Limit	0.00 to 250000.00	3 (40.00%-40.00%-20.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (2) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
1605	Non UN	High	>7 to No Limit	250000.00 to No Limit	3 (40.00%-30.00%-30.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (2) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  

To delete a modality already saved in the template, click on the red cross  of its line.

Please note: it is not possible to delete a modality line of a template which has been approved.

Operation Modalities Add New Operation Modality									
Id	Partner Type	Risk Level	Duration	Budget	Disbursements	Financial Reporting	Narrative Reporting	Monitoring	Actions
1602	Non UN	High	>0 to <=7	0.00 to 250000.00	2 (60.00%-40.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
1603	Non UN	High	>0 to <=7	250000.00 to No Limit	2 (50.00%-50.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
1604	Non UN	High	>7 to No Limit	0.00 to 250000.00	3 (40.00%-40.00%-20.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (2) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
1605	Non UN	High	>7 to No Limit	250000.00 to No Limit	3 (40.00%-30.00%-30.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (2) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  

OneGMS tip: how to transpose the asterisk modalities in the OM template

There are cases where you will need to create multiple modality lines even though the modality fits on one line in the OM table of the Operational Handbook. This will be the case when you see asterisks in the OM table of the handbook.

For instance, in the screenshot below, you can see the modality which is outlined has different narrative and monitoring requirements depending on project duration. According to the table, 10-months projects and more will require 3 progress narrative reports and 2 monitoring visits.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operational Modalities

Risk level	Project duration (months)	Project value (thousand USD)	Maximum amount per project (thousand USD)	Disbursements (in % of total)	Financial reporting			Narrative reporting		Monitoring		Audit
					For disbursements	31-Jan	Final	Progress	Final	Project monitoring	Financial spot-check	
NGOs												
High	< 7	< 250	-	60-40	Yes	Yes	Yes	1 mid	Yes	1	1	As per plan
		> 250	500	50-50	Yes	Yes	Yes	1 mid	Yes	1	1	
	7 - 12	< 250	-	40-40-20	Yes	Yes	Yes	2	Yes	1	1	
	> 250	800	40-30-30	Yes	Yes	Yes	2 - 3*	Yes	1-2**	1		
Medium	< 7	< 250	-	100	-	Yes	Yes	1 mid	Yes	-	-	
		> 250	700	80-20	Yes	Yes	Yes	1 mid	Yes	1	-	
	7 - 12	< 250	-	80-20	Yes	Yes	Yes	1 mid	Yes	0-1**	-	
	> 250	1,200	60-40	Yes	Yes	Yes	1 mid	Yes	1	0-1		
Low	< 7	< 400	-	100	-	Yes	Yes	-	Yes	-	-	
		> 400	-	80-20	Yes	Yes	Yes	-	Yes	-	-	
	7 - 12	< 400	-	100	-	Yes	Yes	1 mid	Yes	-	-	
	> 400	-	80-20	Yes	Yes	Yes	1 mid	Yes	1	1 / partner		
UN Agencies												
N/A	< 7	-	-	100	-	Yes	Yes	-	Yes	Op. Manual***	-	No
	7 - 12	-	-	100	-	Yes	Yes	1 mid	Yes	Op. Manual***	-	

* Three progress reports are only required for projects of 10 months or more.
 ** Additional field visits are only required for projects of 10 months or more.

*** Monitoring arrangements for projects implemented by UN agencies will be determined at the country level according to specific agreements outlined by the HC and the AB. Monitoring of UN agency projects is mandatory and should be based on a sampling methodology considering country-specific factors as required (see 4.5 Monitoring).

To properly reflect this in the OneGMS OM module, you are required to split the modality in your OM into two different lines in the OneGMS, as shown in the screenshot below:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

1643	Non UN	High	>=7 to <10	250000.00 to 800000.00	3 (40.00%-30.00%-30.00%)	Interim- Yes Final- Yes	B+3 Progress- Yes (2) B+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
1664	Non UN	High	>=10 to <=12	250000.00 to 800000.00	3 (40.00%-30.00%-30.00%)	Interim- Yes Final- Yes	B+3 Progress- Yes (3) B+3 Final- Yes	Monitoring Visit- 2 Financial Spot Check- 1

OneGMS Focus: UN Agencies Operational Modalities

The OM module on the OneGMS requires a specific configuration regarding UN Agencies' modalities. Although the UN Agencies do not have associated Risk Level in the operational modalities as defined in the handbook, the OneGMS requires HFU officers to configure the UN Agencies' modalities as if they had Risk Levels.

Therefore, the HFU must enter and save the UN modalities 3 times, for Low, Medium, and High Risk Level, as you can see in the screenshot below.

2682	UN	High	>0 to <7	0.00 to 2000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Final- Yes	Monitoring Visit- 1
2683	UN	High	>=7 to <=12	0.00 to 2000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1
2680	UN	Low	>0 to <7	0.00 to 2000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Final- Yes	Monitoring Visit- 1
2681	UN	Low	>=7 to <=12	0.00 to 2000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1
2684	UN	Medium	>0 to <7	0.00 to 2000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Final- Yes	Monitoring Visit- 1
2685	UN	Medium	>=7 to <=12	0.00 to 2000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1

If all Risk Levels are not saved for UN Agencies, the system will display the following error message:

"The combination of Partner type and Risk level should be covered in order to make the operation modality valid"

The system will consequently prevent users to approve the OM template. To fix this error, please make sure that the UN Agencies modalities are entered 3 times, once for each Risk Level. You can also refer to the below section on troubleshooting. (#11) Operational Modalities erros)

CBPF GRANT MANAGEMENT SYSTEM (GMS)

II) Operational Modalities errors

The OneGMS will issue error messages in case of an invalid entry. If you encounter one of the errors messages displayed in red, the system will not allow the OM template to be submitted for technical approval. Please find below all the different error messages you can see, and how to fix the problem.

- The combination of Partner type and Risk level should be covered in order to make the operation modality valid(#error_1)
- Start date can not be blank / Approved date can not be blank(#error_2)
- Start date of the template should be greater than the existing templates. Please change the start date.(#error_3)
- Invalid template as there is no operational modality defined under this template.(#error_4)
- Please upload Pooled fund operational handbook against each operational modality template which will be published on the CBPF BI portal (CBPF Data Hub)(#error_5)
- Issues Found in this template, please correct them to proceed further (#error_6)

1- The combination of Partner type and Risk level should be covered in order to make the operation modality valid

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operation Modality
Draft

Save & Stay Save & Exit Close [Add Comments] [More Comments]

Issue(s) found in this template - please correct them to proceed further.
The combination of Partner type and Risk level should be covered in order to make the operation modality valid

Operation Modality Template Tracking
Created By: gms-support@un.org Created On: 24/09/2020 16:51:00

Mandatory fields are marked with an asterisk *

* Template Name:	Lebanon Humanitarian Fund - 2019 OM	Template Code:	LEB005		
* Start Date:	16/02/2021	End Date:		* Advisory Approved Date:	23/02/2021
			* Scope:	<input type="checkbox"/> Global	<input checked="" type="checkbox"/> Pooled Fund

Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

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This error will appear when the system detects missing data. In order to complete the Operational Modalities template, all partner types and risk levels should be reflected. This means that the HFU must create the modalities for both:

- UN Partners
- Non-UN partners

And should, for both partner types, reflect the modalities applicable for all three Risk Levels:

- High Risk Level,
- Medium Risk level
- Low Risk level

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Please make sure that UN Agencies' modalities are entered 3 times to reflect all risk levels! Even if UN Agencies do not have associated Risk Levels, the GMS requires this configuration in the Operational Modalities module to approve the OM template.

To solve this error, make sure that all combinations of Partner Types and Risk Levels are covered before clicking on **[save and stay]**.

2- Start date cannot be blank / Approved date cannot be blank

Operation Modality

Draft

Save & Stay Save & Exit Close
[Add Comments] [More Comments]

Issue(s) found in this template - please correct them to proceed further.

Approved date can not be blank
Start date can not be blank

Operation Modality Template
Tracking

Created By: gms-support@un.org Created On: 23/02/2021 16:02:17

Mandatory fields are marked with an asterisk *

* Template Name: Lebanon Humanitarian Fund - 2017 OM	Template Code: LEB005	
* Start Date: <input type="text"/>	End Date: <input type="text"/>	* Advisory Approved Date: <input type="text"/> * Scope: <input type="checkbox"/> Global <input checked="" type="checkbox"/> Pooled Fund

Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

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The system will display this error message when you save the template without inserting the template's Start Date or Approved by Advisory Board date. Both date fields are located at the top of the template (see screenshot above). Please fill in these fields before clicking on **[Save]** to solve the error.

3- Start date of the template should be greater than the existing templates. Please change the start date.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operation Modality
Draft

Save & Stay Save & Exit Close

[Add Comments] [More Comments]

⚠ Issue(s) found in this template - please correct them to proceed further.
Start date of the template should be greater than the existing templates. Please change the start date

Operation Modality Template Tracking

Created By: gms-support@un.org Created On: 23/02/2021 16:02:17

Mandatory fields are marked with an asterisk *

<small>* Template Name:</small> <input type="text" value="Lebanon Humanitarian Fund - 2017 OM"/>	<small>Template Code:</small> LEB005
<small>* Start Date:</small> <input style="border: 2px solid red;" type="text" value="12/02/2014"/>	<small>End Date:</small> <input type="text"/>
<small>* Advisory Approved Date:</small> <input type="text" value="16/02/2021"/>	<small>* Scope:</small> <input type="checkbox"/> Global <input checked="" type="checkbox"/> Pooled Fund

Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

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The system will store all previously saved OM templates in the list displayed in the ['Manage Operation Modality'\(/content/create-operational-modalities-template-onegms#l\)%20Access%20the%20Operational%20Modalities%20module\)](#) page.

There can only be one authorized set of Operational Modalities for a specific period, and the templates should be listed in a chronological order.

Therefore, you cannot save a template which start date is included or lower than an already approved template from the list.

For instance, if the current list of OM templates on GMS is the following :

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Manage Operation Modalities

[Add New Template](#)

Global Operation Modality Templates

Template Code	Template Name	Scope	Start Date	End Date	Approved On	Status	Clone	Actions
CBPF001	Operation Modality - v1.0	Global	01/01/2001		01/01/2001	Approved		

Pooled Fund Operation Modality Templates

Template Code	Template Name	Scope	Start Date	End Date	Approved On	Status	Clone	Actions
LEB005	Lebanon Humanitarian Fund - 2020 OM	Lebanon	01/06/2020		01/06/2020	Approved		
LEB004	Lebanon Humanitarian Fund - 2019 OM	Lebanon	16/01/2019	01/06/2020	16/01/2019	Approved		
LEB003	Lebanon Humanitarian Fund - 2018 OM	Lebanon	01/03/2018	15/01/2019	01/03/2018	Approved		
LEB002	Lebanon Humanitarian Fund - 2017 OM	Lebanon	01/04/2017	28/02/2018	01/04/2017	Approved		

And you wish to create a new template for the year 2021, this 2021 new template's start date cannot be before '01/06/2020' (the start date of the 2020 OM template). The start date of the 2021 template must be later than '01/06/2020'.

4- Invalid template as there is no operational modality defined under this template.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operation Modality
Draft

Save & Stay
Save & Exit
Close

[Add Comments]
[More Comments]

⚠ Issue(s) found in this template - please correct them to proceed further.
Invalid template as there is no operational modality defined under this template.

Operation Modality Template Tracking

Created By: gms-support@un.org Created On: 23/02/2021 16:05:03

Mandatory fields are marked with an asterisk *

* Template Name: <input type="text" value="lebanon 2021"/>	Template Code: LEB005
* Start Date: <input type="text" value="28/02/2021"/> End Date: <input type="text"/>	* Advisory Approved Date: <input type="text" value="16/02/2021"/> * Scope: <input type="checkbox"/> Global <input checked="" type="checkbox"/> Pooled Fund

Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

Add Document
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CBPF OM Document(s)

This error message will be displayed by the system when the template is empty, i.e. when there are no operational modality lines in the template. To solve this error, the HFU must fill in the template with the OM, as they are defined in the Fund's operational handbook.

5- Please upload Pooled fund operational handbook against each operational modality template which will be published on the CBPF Data Hub

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Operation Modality
Draft

Save & Stay Save & Exit Close

[Add Comments] [More Comments]

⚠ Issue(s) found in this template - please correct them to proceed further.
Please upload Pooled fund operational handbook against each operational modality template which will be published on the CBPF BI portal.

Operation Modality Template Tracking

Created By: gms@trigyn.com Created On: 12/02/2021 15:14:11

Mandatory fields are marked with an asterisk *

* Template Name:	Lebanon Humanitarian Fund - 2021	Template Code:	LEB004
* Start Date:	24/02/2021	End Date:	
* Advisory Approved Date:	09/02/2021	* Scope:	<input type="checkbox"/> Global <input checked="" type="checkbox"/> Pooled Fund

Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

Categories that need at least one document to be uploaded
1 = CBPF OM Document(s)

Add Document
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This error message will be displayed by the system when the Fund's Operational Manual has not been uploaded. The Fund's OM must be uploaded for each Operational Modalities template on GMS. The HFU can upload the manual at the top of the template's page by clicking on **[add document]** (please see screenshot above).


***Please note** that following donors' requirements, the operational handbooks of all funds are published on the CBPF Data Hub, under the [Allocation Timeline visualization\(/content/allocation-timeline-0?query\)](/content/allocation-timeline-0?query).

6- Issues Found in this template, please correct them to proceed further (blank error message box).

Operation Modality
Draft

Save & Stay
Save & Exit
Close

[Add Comments]
[More Comments]

 Issue(s) found in this template - please correct them to proceed further.

Operation Modality Template Tracking


Created By: gms@trigyn.com Created On: 12/02/2021 15:14:11

Mandatory fields are marked with an asterisk *


<small>* Template Name:</small>	<input type="text" value="Lebanon Humanitarian Fund - 2018"/>	<small>Template Code:</small>	LEB004
<small>* Start Date:</small>	<input type="text" value="24/02/2021"/>	<small>End Date:</small>	<input type="text"/>
		<small>* Advisory Approved Date:</small>	<input type="text" value="09/02/2021"/>
		<small>* Scope:</small>	<input type="checkbox"/> Global <input checked="" type="checkbox"/> Pooled Fund

Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

Add Document
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The system will display this error message when it detects a discrepancy in the data inserted in the Operational Modality lines. It often points out to either budget or duration mismatches. To locate the discrepancy when seeing this message, scroll down to see the modality lines, and look for an error icon  in the lines.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

 Issue(s) found in this template - please correct them to proceed further.

Operation Modality Template Tracking

Created By: gms-support@un.org Created On: 19/02/2020 10:12:47


Mandatory fields are marked with an asterisk *

* Template Name:	Operation Modality - Yemen - 2015	Template Code:	YEM005		
* Start Date:	07/07/2021	End Date:	07/09/2016	* Advisory Approved Date:	02/07/2015
			* Scope:	<input type="checkbox"/> Global <input checked="" type="checkbox"/> Pooled Fund	












Note : New Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

[Add Document](#) [Download All Files](#)

CBPF OM Document(s)

Document Title	Action
Operation Modality - Yemen - v 1.0 (YEM005) -Yemen(3420) - YHPF_Operational_Manual_July_2015.pdf	 [View] [Edit] [Delete]


Operation Modalities Add New Operation Modality

Id	Partner Type	Risk Level	Duration	Budget	Disbursements	Financial Reporting	Narrative Reporting	Monitoring	Actions
2060	Non UN 	High	0 - 7	0.00 - 350000.00	2 (60.00%-40.00%)	Interim- Yes Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
2061	Non UN 	High	0 - 7	250000.00 - 500000.00	2 (60.00%-40.00%)	Interim- Yes Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1	  
2062	Non UN	High	7 - 12	0.00 - 250000.00	3 (40.00%-30.00%-30.00%)	Interim- Yes	Progress- Yes (1)	Monitoring Visit- 1	  

For instance, in the screenshot above, we can see that there is an overlap in the budget distribution between the two lines.

- o The first line (2060) has a budget range from 0 to 350 000 USD (*non-UN partner, high risk level, duration 0 to 7*).
- o However the second line (2061) has a budget range from 250 000 to 500 000 USD (*same characteristics: non-UN partner, high risk level, duration 0 to 7*).

Which means that projects with a budget ranging from 250 000 to 350 000 USD could theoretically be linked to either of these two lines, which is impossible, as each project should only have the possibility to be linked to one modality line.

To solve this discrepancy, one of the lines must be modified. To do so, click on the pen icon  of the line, and check the configuration. The system should also indicate an error message in the modality line

CBPF GRANT MANAGEMENT SYSTEM (GMS)

page. In our situation, the following message is displayed: 'Budget To is within existing range'.

Operation Modality
Draft

Save & Stay Save & Exit Close

Created By: gms-support@un.org Created On: 19/02/2020 10:12:47

Template Name: Operation Modality - Yemen - 2015 Start Date: 07/07/2021 End Date: 07/09/2016 Status : Draft

Mandatory fields are marked with an asterisk *

Operation Modality Specification

* Partner type:	<input type="text" value="Non-UN"/>	* Risk Levels:	<input type="text" value="High"/>
* Duration From:	<input type="text" value="0"/>	* Duration To:	<input type="text" value="7"/> <input type="checkbox"/> No Limit
* Budget From:	<input type="text" value="0.00"/>	* Budget To:	<input type="text" value="350000.00"/> <input type="checkbox"/> No Limit

Disbursement Tranches

Tranche #	Tranche Percent	User Actions
1	60.00	
2	40.00	
Total	100.00	<input type="button" value="Add Tranche"/>

The following issues found in this section -
Budget To is with in the existing range

Modify the budget range and click on **[Save]** before exiting the modality line page. Back in the template draft, the error icon from the OM lines should disappear.

Then click on **[Save and Stay]** at the top of the template's page to save the whole OM template. The error message 'Issues Found in this template, please correct them to proceed further' should also disappear.

III) Submit the Operational Modalities template for approval

Once your OM template is finalized on the OneGMS, you need to submit it to technical review by the OneGMS Support.

To submit it, please send an email to the OneGMS Support, copying the Programme Unit in New York, to notify them that the new OM template needs to be reviewed and approved on the OneGMS.

OneGMS Support will make sure that the Programme Unit in New York has reviewed and approved your new Operational Modalities, and that all the modalities are properly transposed into the OneGMS module,

CBPF GRANT MANAGEMENT SYSTEM (GMS)

before approving the template on the system.

Once the OM is approved on the OneGMS, it will start being applied to newly approved projects as of the Start Date saved in the template. The OM line is linked to each project's Timelines at Budget Approval stage, so it is important to make sure that the correct OM template is saved and approved on the OneGMS before new projects reach the Budget Approval stage. *To learn more on the Timelines process and OM linkage, please refer to [this article\(/content/timelines\)](#).*

After the OM template is approved and linked to projects, it is no longer possible to edit nor delete it.

1) The Operational Modality template Tracking tab

The Operation Modality Template tracking tab allows users to track the who, what, when, pertaining to the approval of the OM template. This tab shows all the steps of the OM workflow, including the dates when its status changed, and the user who pushed it to the next stage.

Operation Modality Approved

Close

Tracking

Operation Modality Template
Created By: [User] Created On: 20/04/2020 10:08:01

Template Name:	Start Date:	End Date:	Status :
Operation Modality - Yemen - 2020	01/05/2020		Approved
Review	(05/05/2020 11:21 AM)		Approved
	↑		
Draft	(04/05/2020 05:14 PM)		Review