Project workflow for OCHA managed funds

- Project
- Interim Financial Reporting
- Progress Narrative Reporting
- Final Financial Reporting
- Final Narrative Reporting
- Timeline
- Monitoring
- Disbursement
- Revision Request
- Project Revision
- Audit

Project Top

Standard Allocation

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LEGEND

- Step 1: Submission of Proposal
- Step 2: Strategic Review
- Step 3: Technical Review
- Step 4: Final Approval and Signature
- Step 5: Disbursement
- Step 6: Implementation and Reporting
Interim Financial Reporting [Top]

You can find a detailed explanation for Interim Financial Reporting under the **Reporting** section.
You can find a detailed explanation for Progress Narrative Reporting under the Reporting section.
Final Financial Reporting Top

You can find a detailed explanation for Final Financial Reporting under the Reporting section.
Final Narrative Reporting [Top](#)

You can find a detailed explanation for Final Narrative Reporting under the [Reporting](#) section.
Timeline  

The timeline tab present in the project enables users to set up timelines for various activities like narrative reporting timelines, Disbursement tranches timeline etc. Projects timelines must be set up and approved by the Fund Managers before the signature of the Grant Agreement. To learn how to set up and validate the Timelines, please refer to the dedicated article of this Help Portal: Timelines Validation.

Monitoring  

One can have multiple instances of monitoring to enable the monitoring of various stages in a project lifecycle.
The HFU will activate the monitoring instance, fill in the necessary information, and update the recommended actions. The HFU can then send them to the Implementing Partner or Cluster Coordinator, as necessary. An email alert will be sent to the IP/CC based on the party who receives the task. The IP and CC will have access to update the recommended actions only and no other data. Once done, they should send the monitoring instance back to the HFU. Once the information is verified, the HFU can update the status as “Monitoring Completed”.

Disbursement Top

You can find a detailed explanation for disbursement under the Disbursement section.
GMS DISBURSEMENT WORKFLOW

Revision Request [Top]

You can find a detailed explanation for Revision Request under the [Project Revision] section.
Revision request
(Step 1)

Revision request in draft
IP

Revision request under review
HFU

Revision request re-draft
IP

Revision request under Cluster review
Cluster Coordinator

Revision request cancelled

Revision request approved

You can find a detailed explanation for Project Revision under the Project Revision section.
Project revision
(Step 2)

1. Project revision in draft
   IP

2. Project revision under review
   HFU

3. Project revision under Finance review
   FCS Finance

4. Project revision under Cluster review
   Cluster Coordinator

5. Project Revision Reviewed and Cleared by HFU
   HFU

   * To reject a project revision at any point press button "Reset" in the Revision Request

6. GA Amendment preparation
   HFU

7. HC approval
   HC

   (no GA Amendment needed)

8. HC approval and signature of GA Amendment
   HC

9. OVERWRITE
   Project revision

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Audit  Top

You can find a detailed explanation for Project Audit under the What is Project Audit in GMS section.