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

Standard Allocation

[Diagram of workflow process]

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 Top

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 Top

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.
Revision Request Top

You can find a detailed explanation for Revision Request under the Project Revision section.
Project Revision [Top]

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