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 project workflow]

**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
Reserve Allocation

GMS Workflow
Country - Based Pooled Funds
Reserve Allocation

LEGEND
Step 1: Submission of Proposal
Step 2: Strategic Review
Step 3: Technical Review
Step 4: Final Approval and Signature
Interim Financial Reporting [Top](#)

You can find a detailed explanation for Interim Financial Reporting under the [Reporting](#) section.
GMS INTERIM FINANCIAL REPORTING WORKFLOW

Interim Financial Report active

Interim Financial Report under review

Interim Financial Report redraft

Interim Financial Report Approved for disbursement

Interim Financial Report Approved

Certified by FCS for disbursement

Certified by FCS for recording

Progress Narrative Reporting Top

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.
GMS DISBURSEMENT WORKFLOW

Revision Request Top

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

Project revision in draft
IP

Project revision under review
HFU

Project revision under Finance review
FCS Finance

Project revision under Cluster review
Cluster Coordinator

Project Revision Reviewed and Cleared by HFU*
HFU

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

GA Amendment preparation
HFU

Under HC approval (no GA Amendment needed)
HC

HC approval and signature of GA Amendment
HC

OVERWRITE
Project revision
Audit  Top

You can find a detailed explanation for Project Audit under the What is Project Audit in GMS section.
GMS AUDIT WORKFLOW
(NON UN AGENCIES)

Audit Triggered by FCS
HFU

Audit Started by Audit Firm
HFU

Audit finalized by HFU
FCS Finance

Audit approved by FCS
FCS Finance

Audit report received by FCS for closure

Audit report received by FCS for refund

Audit report received by FCS for final disbursement