

UNICEF ePD Step by step guide

Purpose: How to access and navigate the Programme document.

Who: Partner Programme Document Focal Point.

When: A Programme document is jointly developed by UNICEF and the partner. The PD has been initiated with necessary information by the UNICEF focal point and sent to the partner. Partner staff is entered by UNICEF focal point in PD to access the ePD.

Note: Contact UNICEF focal point to provide access to multiple staff members.

Why: To access and navigate the different sections of the ePD.

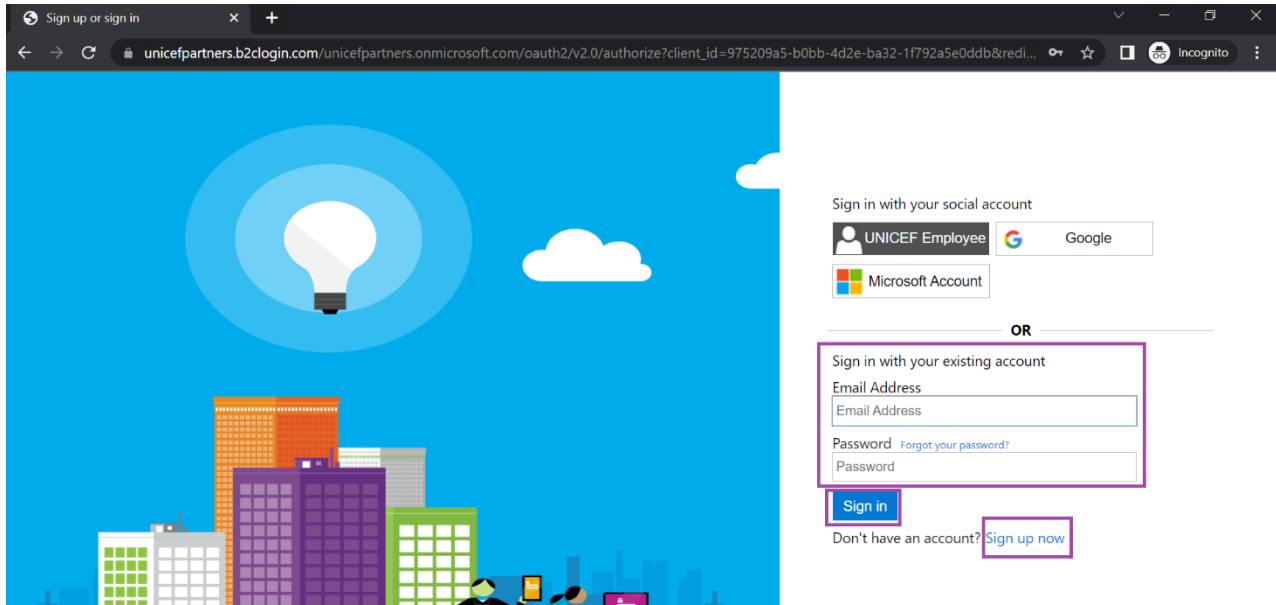
Step 1: Enter the URL; <https://etools.unicef.org/> and click the **sign-in** icon.



Step 2: Go to the “**Sign in with your existing account**” section.

Sign in with your credentials if you have an account or click “**sign up now**” to register as a first time user.

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Sign up or sign in

unicefpartners.b2clogin.com/unicefpartners.onmicrosoft.com/oauth2/v2.0/authorize?client_id=975209a5-b0bb-4d2e-ba32-1f792a5e0ddb&redi...

Sign in with your social account

UNICEF Employee Google Microsoft Account

OR

Sign in with your existing account

Email Address
Email Address

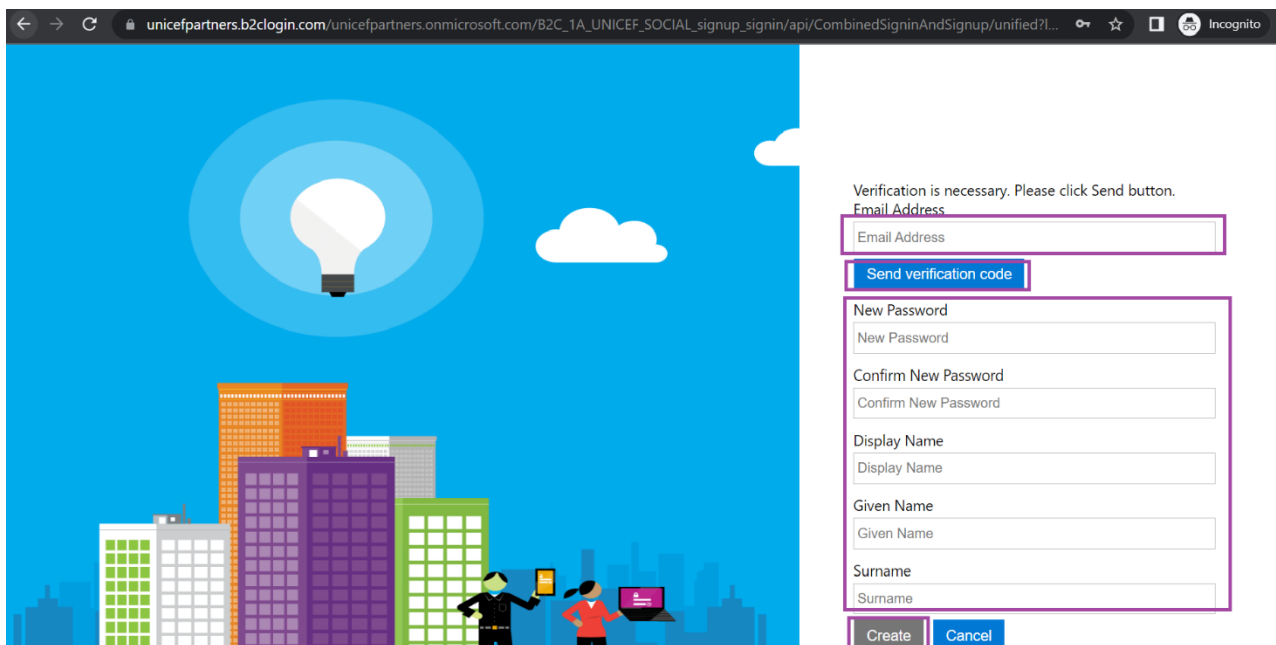
Password [Forgot your password?](#)
Password

Sign in

Don't have an account? [Sign up now](#)

To sign up, follow the steps below (only for first time user)

Step 3: Enter your email, click “**send verification code**”, check your email inbox (check junk folder as well) for the verification code



unicefpartners.b2clogin.com/unicefpartners.onmicrosoft.com/B2C_1A_UNICEF_SOCIAL_signup_signin/api/CombinedSignInAndSignUp/unified?l...

Verification is necessary. Please click Send button.

Email Address
Email Address

Send verification code

New Password
New Password

Confirm New Password
Confirm New Password

Display Name
Display Name

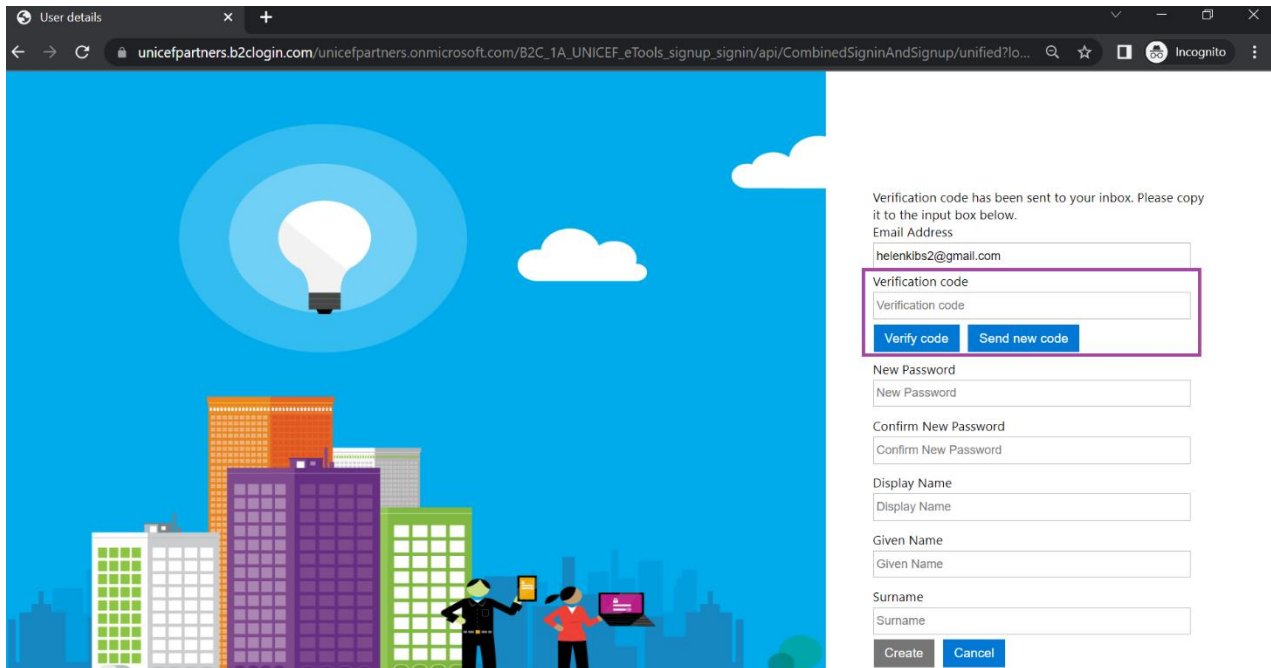
Given Name
Given Name

Surname
Surname

Create Cancel

Step 4: Enter the verification code here, click “**verify code**” and fill all the fields and click “**create**”

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Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address
helenkib2@gmail.com

Verification code
Verification code

[Verify code](#) [Send new code](#)

New Password
New Password

Confirm New Password
Confirm New Password

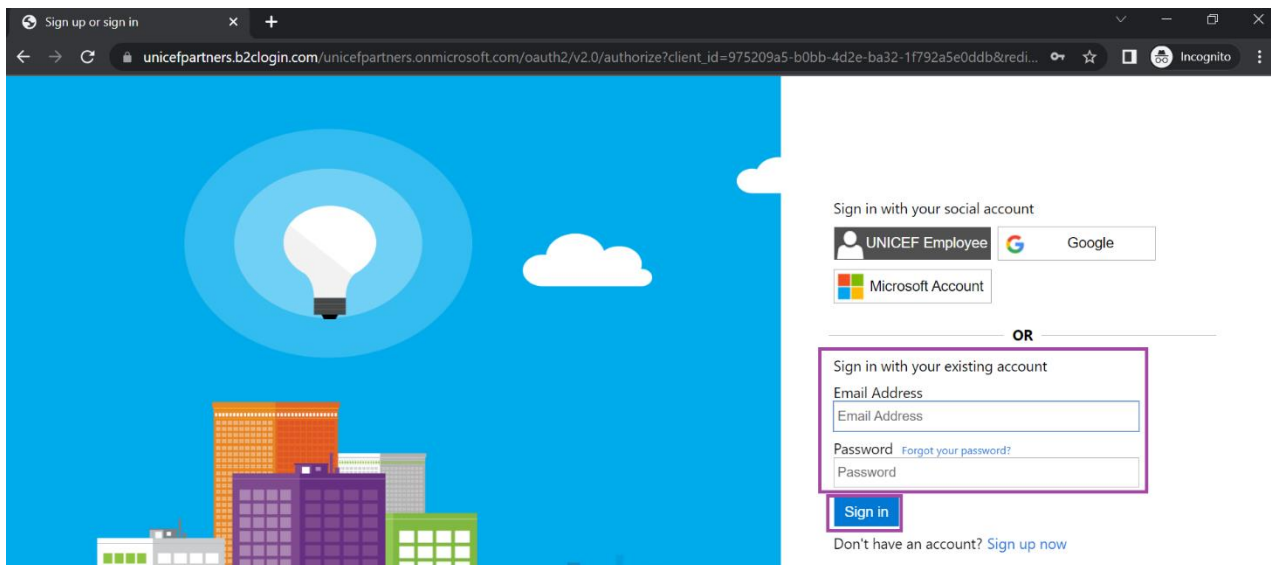
Display Name
Display Name

Given Name
Given Name

Surname
Surname

[Create](#) [Cancel](#)

Step 5: Enter the registered email address and registered password and click **sign in**.



Sign in with your social account

[UNICEF Employee](#) [Google](#)

[Microsoft Account](#)

OR

Sign in with your existing account

Email Address
Email Address

Password [Forgot your password?](#)
Password

[Sign in](#)

Don't have an account? [Sign up now](#)

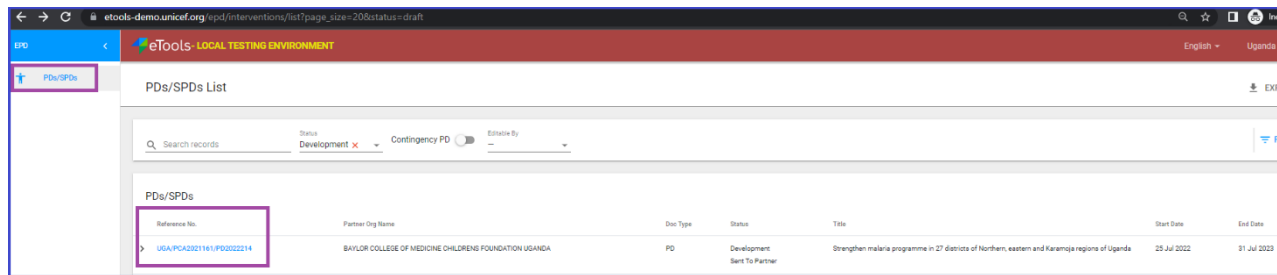
Step 6: Click ePD from the menu.



To start developing the Programme document;

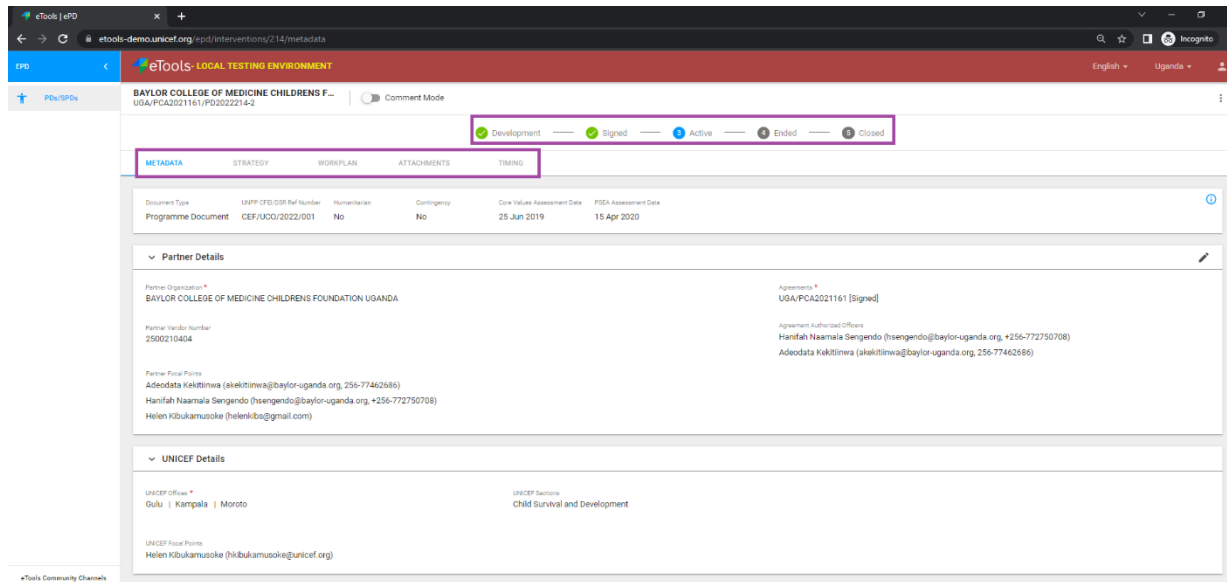
Step 7: Click the reference number to view the PD details entered by the UNICEF focal point and start data entry.

Note that you can only view PDs where you have been selected as partner focal person. The list will show the PD reference number, partner organization name, the document type, status, PD title and duration of the PD



Knowledge: The PD is divided into tabs and statuses through which it progresses from start to completion.

- The tabs are **Metadata, Strategy, Workplan, Review, Attachments and Timing**
- The statuses are **Development, Review, Signature, signed, Active, Ended, Closed**



➤ What do the different PD statuses mean?

In ePD, each Programme Document moves through 4 different statuses during the planning stage:



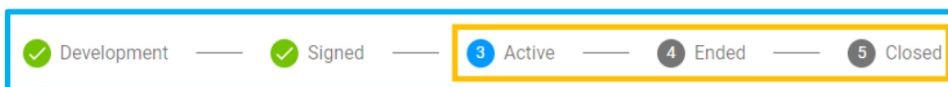
- **Development:** This is the stage in which a new PD is created, and the template is populated with content. UNICEF and Partner focal points complete all the required fields in the PD. When both UNICEF and Partner agree that the “development” phase of the draft PD has been finished, then both parties accept the PD, which moves it to the next status.

- **Review:** This is a protected stage, in which the PD, which has gone through the development phase, moves to UNICEF internal review. During this stage, no further changes to the developed PD are allowed by either UNICEF or Partner. If during the review stage, a need for further revision to the PD content is required, then the PD moves back to development status.

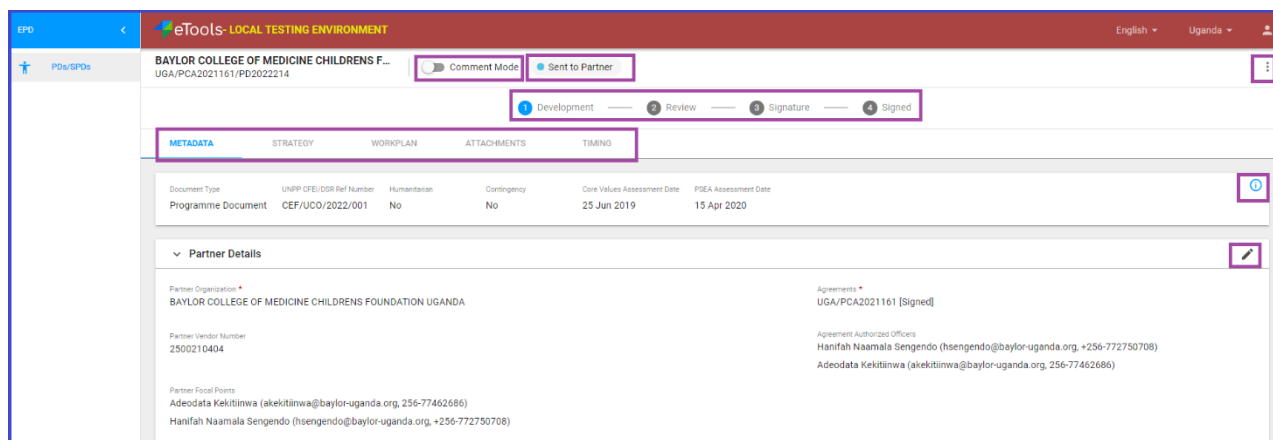
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- **Signature:** This is the stage after successful internal UNICEF review, when both parties prepare to sign the developed and reviewed PD.
- **Signed:** This is the stage after the PD has been signed digitally or on paper, and the duly signed PD is uploaded in the system, with the name of signatories and date of signature entered in metadata tab. After a PD has been developed and signed during the planning stage, it moves to the implementation stage.

After the PD is signed, there are 3 more statuses for a PD:



- **Active:** A PD is assigned “active” status when (a) the related Funds Reservation (FR) has been entered by UNICEF in metadata tab and (b) the start date of the PD has been reached.
- **Ended:** A PD that was once active will automatically change to “ended” after its end date has arrived.
- **Closed:** The closure happens automatically once the following criteria are met:
 - 0 outstanding DCT against PD (FR).
 - FR is closed (mark as completed) or disbursement amount is same as planned budget.
 - Final progress report has been submitted



BAYLOR COLLEGE OF MEDICINE CHILDRENS F...
UGA/PCA2021161/PD2022214

Comment Mode | Sent to Partner


1 Development — 2 Review — 3 Signature — 4 Signed

METADATA	STRATEGY	WORKPLAN	ATTACHMENTS	TIMING	
Document Type	UNFP CFE/DIR Ref Number	Humanitarian	Contingency	Core Values Assessment Date	PEEA Assessment Date
Programme Document	CEF/UCO/2022/001	No	No	25 Jun 2019	15 Apr 2020

Partner Details

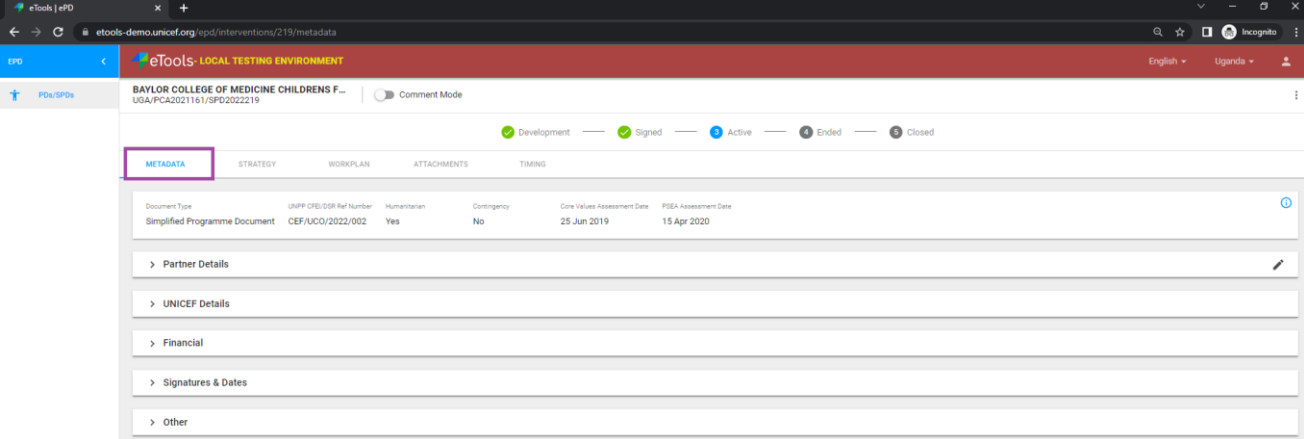
<p>Partner Organisation</p> <p>BAYLOR COLLEGE OF MEDICINE CHILDRENS FOUNDATION UGANDA</p> <p>Partner Vendor Number</p> <p>2500210404</p> <p>Partner Focal Points</p> <p>Adeodata Kekitiniwa (akekitiniwa@baylor-uganda.org, +256-77462686)</p> <p>Hanifah Naamala Sengendo (hsengendo@baylor-uganda.org, +256-772750708)</p>	<p>Agreements</p> <p>UGA/PCA2021161 [Signed]</p> <p>Agreement Authorized Offices</p> <p>Hanifah Naamala Sengendo (hsengendo@baylor-uganda.org, +256-772750708)</p> <p>Adeodata Kekitiniwa (akekitiniwa@baylor-uganda.org, +256-77462686)</p>
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 **Knowledge:** Different tabs of the ePD and the sections

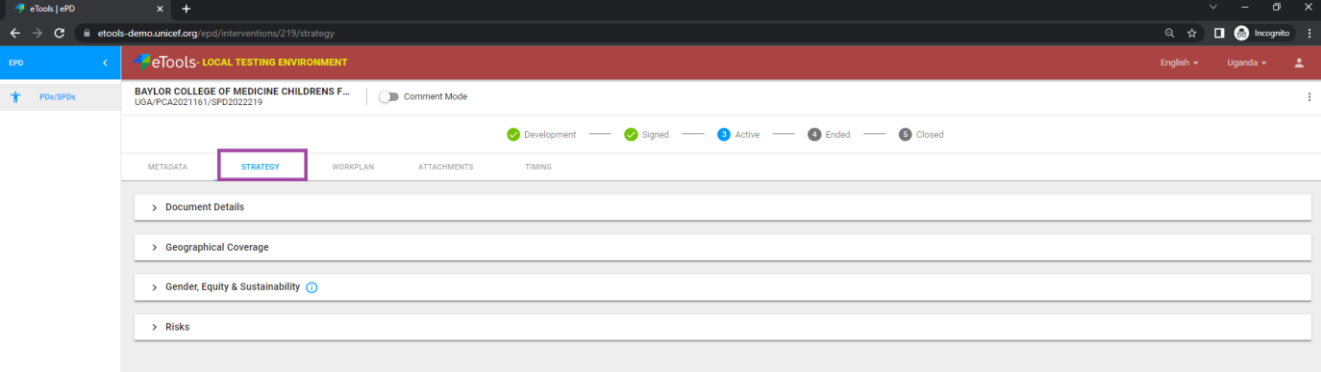
Metadata Tab: The metadata tab includes the basic information about the partner and the PD entered in the system by the UNICEF focal point; This basic information includes;

- The partner details (name, focal points, agreement date and status, authorised officers)
- UNICEF details (focal points, office, and sections) details,
- The cash transfer modalities in the financial tab,
- Any other relevant information and the document currency,



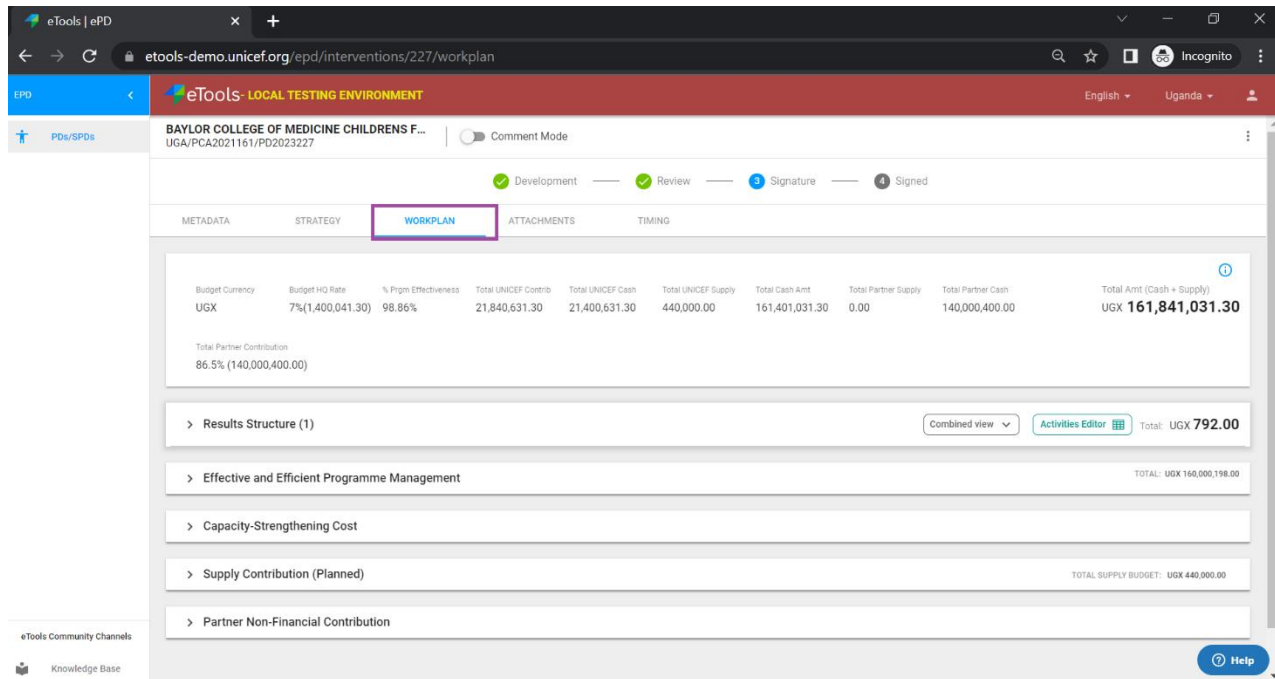
Document Type	UNFP CDF/CSR Ref Number	Humanitarian	Contingency	Core Values Assessment Date	PSEA Assessment Date
Simplified Programme Document	CEF/UCO/2022/002	Yes	No	25 Jun 2019	15 Apr 2020

Strategy Tab: The strategy tab includes document details, geographical coverage, gender & equity and risks



Workplan Tab: The work plan tab includes the results structure, the capacity strengthening cost, the supply contribution, and the partner non-financial contribution. It also avails a summary of all financial information that is included in the PD. It provides different views that can be used for data entry including; the results, combined and budget views and the activities editor view.

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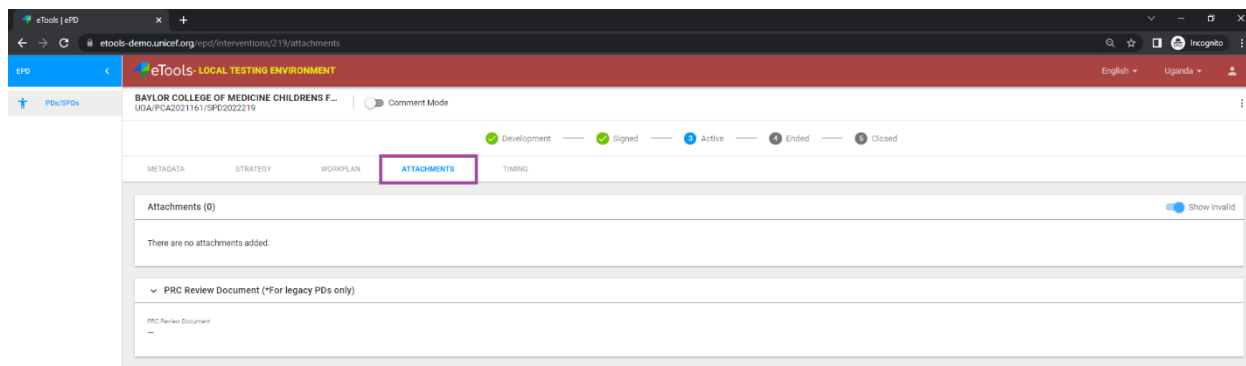


The screenshot shows the 'WORKPLAN' tab selected in the eTools interface. The page title is 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' and the ID is 'UGA/PCA2021161/PD2023227'. The status is 'Development'. The 'WORKPLAN' tab is highlighted with a purple box. Below the tabs, there is a table with the following data:

Budget Currency	Budget HQ Rate	% Prgm Effectiveness	Total UNICEF Contrib	Total UNICEF Cash	Total UNICEF Supply	Total Cash Amt	Total Partner Supply	Total Partner Cash	Total Amt (Cash + Supply)
UGX	7%(1,400,041.30)	98.86%	21,840,631.30	21,400,631.30	440,000.00	161,401,031.30	0.00	140,000,400.00	UGX 161,841,031.30

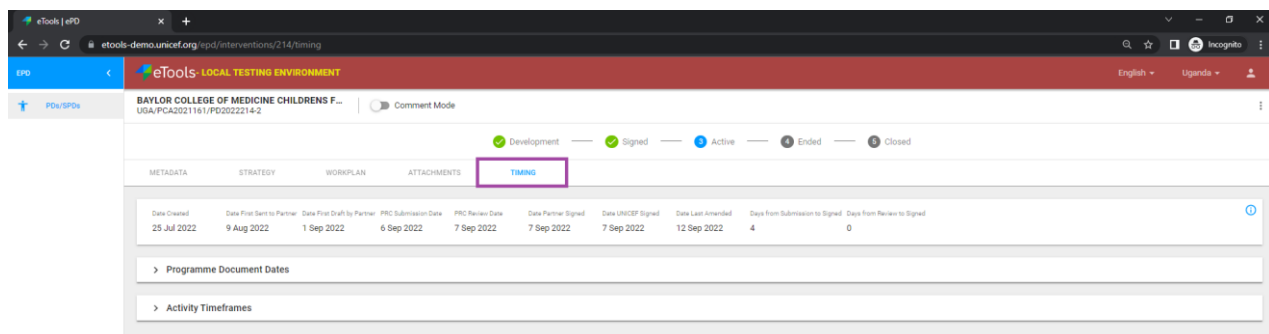
Below the table, there is a section for 'Results Structure (1)' with a total of 'UGX 792.00'. Other sections include 'Effective and Efficient Programme Management' (TOTAL: UGX 160,000,198.00), 'Capacity-Strengthening Cost', 'Supply Contribution (Planned)' (TOTAL SUPPLY BUDGET: UGX 440,000.00), and 'Partner Non-Financial Contribution'.

Attachments Tab: The attachments tab is used to upload any attachments relevant or required during development and implementation



The screenshot shows the 'ATTACHMENTS' tab selected in the eTools interface. The page title is 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' and the ID is 'UGA/PCA2021161/SPD202219'. The status is 'Development'. The 'ATTACHMENTS' tab is highlighted with a purple box. Below the tabs, there is a section for 'Attachments (0)' with a 'Show invalid' button. Below that, there is a section for 'PRC Review Document (*For legacy PDs only)' with a 'PRC Review Document' field.

Timing Tab: The timing tab shows length of time taken to process a PD and activity timeframe. PD progress reporting and programmatic visit requirements are entered in this tab.



The screenshot shows the 'TIMING' tab selected in the eTools interface. The page title is 'BAYLOR COLLEGE OF MEDICINE CHILDRENS F...' and the ID is 'UGA/PCA2021161/PD2022142'. The status is 'Development'. The 'TIMING' tab is highlighted with a purple box. Below the tabs, there is a table with the following data:

Date Created	Date First Sent to Partner	Date First Draft to Partner	PRC Submission Date	PRC Review Date	Date Partner Signed	Date UNICEF Signed	Date Last Amended	Days from Submission to Signed	Days from Review to Signed
29 Jul 2022	9 Aug 2022	1 Sep 2022	6 Sep 2022	7 Sep 2022	7 Sep 2022	7 Sep 2022	12 Sep 2022	4	0

Below the table, there is a section for 'Programme Document Dates' and a section for 'Activity Timeframes'.