

GMS Registration and Due Diligence Process

The following guidance explains (1) how to get a login ID to access the Grant Management System (GMS), and (2) how to complete the on-line Due Diligence application to apply for ERF funding eligibility for your organisation.

Please follow step 1 below to set up an account in the GMS.

Step 2 explains how to start the process of the due diligence/capacity assessment which is required for all new and existing partners before any new funding can be provided. The due diligence assessment requires the submission of some standard declarations and policy documents and manuals. Existing/past partners may have submitted some of the information in the past, however, as we need to have all of this information in the new system, these partners are asked to resubmit all information that has been previously provided. To ensure that your organisation is eligible to apply for funding, your due diligence eligibility application should be completed as soon as possible.

1. Setting up a Log-in ID

The first step is to set up a log in ID for the system. Organisations can have more than one person who accesses the system, but we recommend that the number of people with access to the system be limited.

1. Go to the GMS home page at <http://cbpf.unocha.org>.
2. Click on the LOGIN button in the middle of the top of the screen. You will be directed to the "OCHA Single Sign-On Passport" page.
3. At the bottom of this page click on the link "Click here to create your OCHA Single Sign-On account"
4. On the next page, enter your first name, last name, and email address that you would like to use for accessing the system (your usual work email address). Complete the CAPTCHA code. Click Next.
5. On the next page, enter and confirm a password according to the password policy described, and click "Create my OCHA Single Sign-On passport"
6. The next page will state that the account has been created and ask you to click "continue".
7. On the next page you will be able to edit your profile. It is important that you select the "ERF Myanmar" from the drop down list. You should also identify your Primary User Group (are you a cluster coordinator, an agency/Partner, etc?). You can also select your organisation from the list. If your organisation is not present, please contact OCHA (erf-myanmar@un.org). When complete, click "Submit Registration".

At this stage, the OCHA Myanmar Humanitarian Financing Unit (HFU) will be notified that a new user has created an account, and will authorise the account. Once the ID has been approved, OCHA will notify the user that the ID is available to be used to log in to the system.

2. Logging in to the system and preparing the due diligence application (UN agencies do not need to complete the due diligence application)

1. Go again to <http://cbpf.unocha.org>, click on LOGIN, and use the newly approved login to enter the system. You will land on a page with a green OCHA banner across the top, with three tabs directly below labelled, "Home", "Risk Assessment" and "Others".
2. As mentioned above, all NGOs will need to complete the due diligence application before being able to apply for a new project.
3. Move the mouse over the Risk Assessment tab, and then the Due Diligence option, which opens up the Application Form option. Click on the Application Form link.
4. A new page will open called "Application Form". The page retains the same banner across the top, with the same three tabs (" Home", "Risk Assessment" and "Others"). Just below these tabs are two blue buttons to save the application, a brown button to submit the application when complete, and below these, four tabs entitled, ("Application Form", "Documents", "Bank Info", and "Application Form Tracking")
5. The attached word document ("ERF Myanmar Off-line Risk Assessment-Feb 2015.docx") is an off-line version with the same information as the website including all of the information that is required/recommended to be submitted through this application.
6. The first tab, the "Application Form," includes basic information about the organisation. Fill in each section. Please ensure that you click save after you finish inputting information into the fields. If you switch to a different tab without saving, the information will not be saved. The information requested on the this page includes:
 7. Contact details of focal person for the eligibility application, the highest ranking official in country (usually country director), the focal point at HQ for INGOs, and the executive director of the organisation (globally). When you add a person for each section, please ensure that the "Is Active" tick box is ticked.
 8. Office locations of HQ, Myanmar head office, and sub offices
 9. Additional information specific to Myanmar operation, including sectors of operation, geographic area of operation, total annual budget, list of donors, coordination structures participated in, and names/titles and a one sentence bio on the members of the Board of Trustees.
10. The second tab, "Documents", includes two sections.
11. The left side includes the list of the documents that are required to be submitted. A template for each document can be downloaded using the download template button. The small icon of a page of paper with an arrow pointing up is used to upload each completed document. The required documents include a bank statement from your USD account to be used for projects in Myanmar (the account does not need to be in Myanmar), identity documents and bio of your organisation's executive director, five required declarations, a list of donors, projects, budgets and sectors implemented in Myanmar over the last three years, copies of your national (Myanmar) registration documents and an organogram.
12. The right side includes additional documents/policies/manuals that are not required, but are recommended. The Off-line Risk Assessment document (attached, also can be downloaded from this page of the website via the download template button) includes a list of all of the documents that will contribute to the application. These documents should be uploaded after clicking the upload documents button, selecting template name "All Other Additional Documents" and writing a meaningful title of the document being uploaded in the comment box.

13. The third tab, "Bank Info", includes the same bank information that is in the attached off-line template. Click "Add New Bank Info" and complete all applicable fields (many fields will remain blank). Click Save before leaving the page.
14. Once all of the information has been completed and uploaded to the system, the application should be submitted for our review using the "Submit due Diligence/Application form" button.

OCHA will review the application, and let the organisation know if any additional information is required. When the due diligence desk review of this information has been completed, OCHA will determine whether a capacity assessment will be required of the applicant organisation. To the extent possible, proxy capacity assessments that have already been conducted by other donors, such as ECHO, DFID, or USAID, and other UN agencies will be used.