

Assess a Call for Expression of Interest

Overview: Learn how to assess a call for expression of interest (CFEI) and select a civil society organization for partnership.

Steps	Description	Action	Notes
1	Navigation	After logging in, click on ' <i>Partnership Opportunities (1)</i> ' in the left navigation bar. Use the filters to find the CFEI to assess	
2	Shortlist Applications	Click on the ' <i>applications tab (2)</i> ' to view and shortlist the applications on the CFEI Use the filters to assist in shortlisting potential organizations To shortlist the user can click on the organizations you want to shortlist and then click on the ' <i>thumbs up (4)</i> ' sign in the blue band to select multiple applications.	Shortlisting can only be done after the CFEI application deadline has passed and the CFEI status is ' <i>closed/under review (3)</i> ' The filters search against fields in the organization's profile. Therefore, if the user only wants NGOs that work in country a, location b, then they can use the filters to find only those organizations that meet the criteria User can click on the ' <i>thumbs down</i> ' sign to reject an application
3	Reviewers	To add reviewers to your CFEI, click on the ' <i>vertical ellipses (1)</i> ' next to the finalize button. In the dropdown, select ' <i>Manage Reviewers (2)</i> ' Enter the names of the reviewers in the ' <i>modal (3)</i> ' and click ' <i>Send (4)</i> '	The CFEI creator or focal point must add themselves as a reviewer if they are a part of the assessment team. Reviewers can only be advanced editors, basic editors, PAM users or MFT users. The user's must be assigned these roles in the system for their names to be displayed. Reviewers will be sent an email and in-app notification. It is advised to add reviewers after you have shortlisted the applications.
4a	Assess CFEI as reviewer	In the <i>dashboard (1)</i> , scroll down to ' <i>List of concept notes requiring your scoring (2)</i> '. Click on the <i>CFEI ID hyperlink (3)</i> to be directed to the CFEI	4a
4b	Assess CFEI as reviewer	Click on the ' <i>Shortlist tab (1)</i> ' to be directed to the applications to be reviewed. Click on the ' <i>Application ID (2)</i> ' hyperlink to be directed to the CSO's application	
4c	Assess CFEI as reviewer	User can view a summary of the CSOs profile (1). Click on ' <i>Download (2)</i> ' to download the CSOs concept note. Click on ' <i>Add Review (3)</i> ' to add scores to the CSO's application Review the ' <i>Criteria (1)</i> ' and enter ' <i>Your score (2)</i> '. You can optionally add ' <i>Notes (3)</i> ' and click ' <i>Save</i> '	If the criteria are weighted, the score cannot total more than the number set out in the criteria. If the criteria are not weighted, the total score per criteria cannot be more than 100 It is recommended that notes be added by the reviewer as it helps the CFEI manager in making their decision on the best candidate. To edit your scores, click edit review
5	Assess Application on behalf of a Committee	Review the ' <i>Criteria (1)</i> ' and enter ' <i>Your score (2)</i> '. Click that you confirm that the score is entered on behalf of each other (3)	You will have to do this for each application. Once done, the user can click complete assessment

Steps	Description	Action	Notes
6	Compare scores	To compare the scores of applicants, click on the <i>check boxes (1)</i> for the organizations you want to compare and click on the <i>'Compare (2)'</i> icon.	In the <i>'Compare modal (3)'</i> you can view the CSO's score on the application as well as a few details from their profile.
7	Recommend a Partner	Click on <i>'Recommend (1)'</i> to recommend a partner for selection	More than one partner can be recommended
8a	Review Summary and Selection	For the basic editor, once the partner is recommended, the user will be directed to the <i>'Results (1)'</i> tab. On this tab, the <i>'Recommended Partner (2)'</i> name is displayed. Click on <i>'Add summary (3)'</i> . In the Add Review Summary modal, enter you <i>"Comment (1)'</i> and optionally upload a file (2) and click <i>'Ok (3)'</i> Click on <i>'Send for Decision (4)'</i>	Once the user clicks send for decision they can no longer edit the result
8b	Review Summary and Selection	For the advanced editor, you can <i>'Select (1)'</i> the recommended partner Enter the <i>'Justification (1)'</i> and click <i>'Submit (2)'</i>	You will receive a notification from the basic editor that a recommended partner was sent for your decision When you click select, the partner will receive an email notification of their selection

Steps	Description	Action	Notes
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2	Shortlist Applications	Click on the 'applications tab (2)' to view and shortlist the applications on the CFEI Use the filters to assist in shortlisting potential organizations To shortlist the user can click on the organizations you want to shortlist and then click on the 'thumbs up (4)' sign in the blue band to select multiple applications.	Shortlisting can only be done after the CFEI application deadline has passed and the CFEI status is 'closed/under review (3)' The filters search against fields in the organization's profile. Therefore, if the user only wants NGOs that work in country a, location b, then they can use the filters to find only those organizations that meet the criteria User can click on the 'thumbs down' sign to reject an application

STEPS 1 & 2

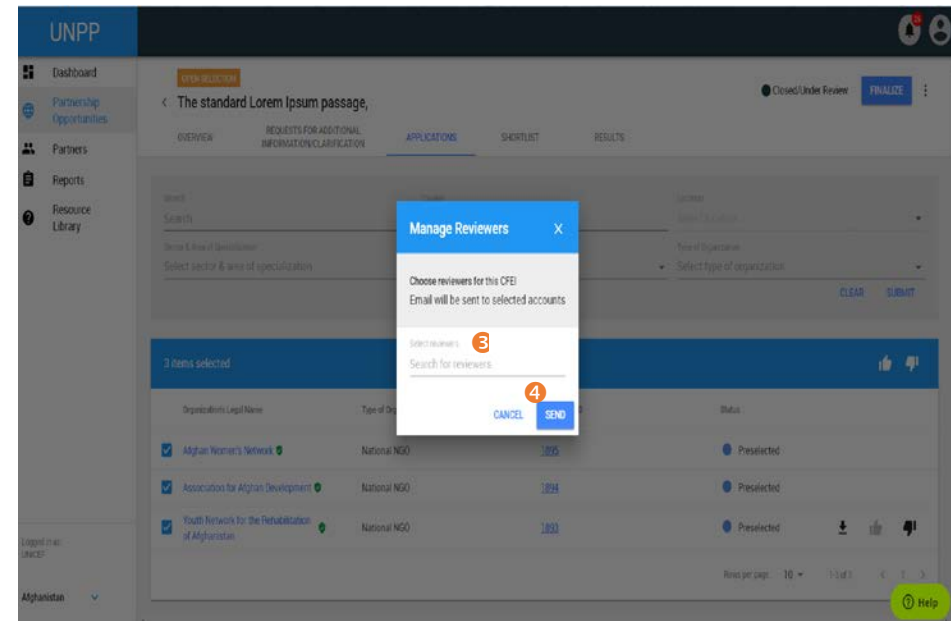
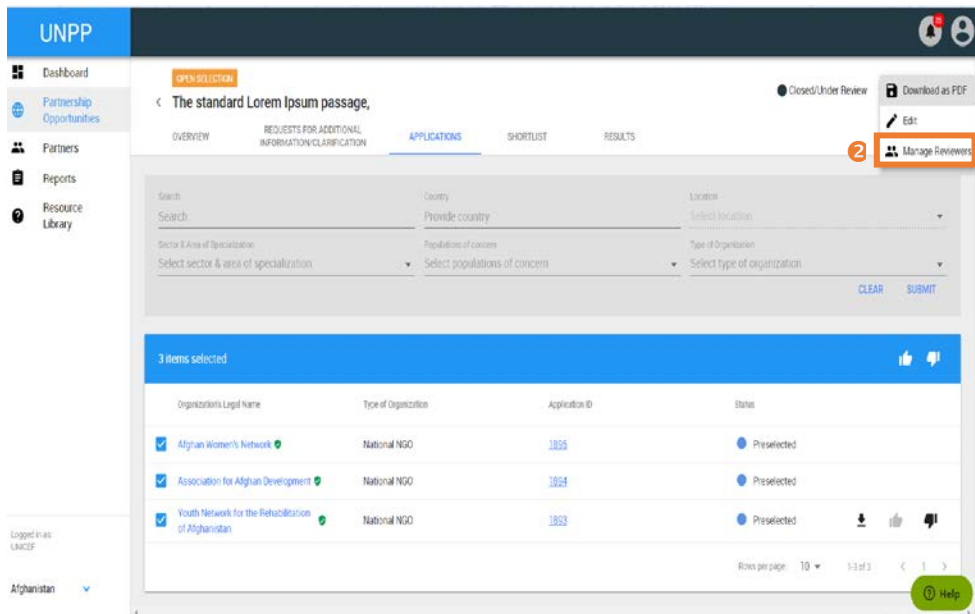
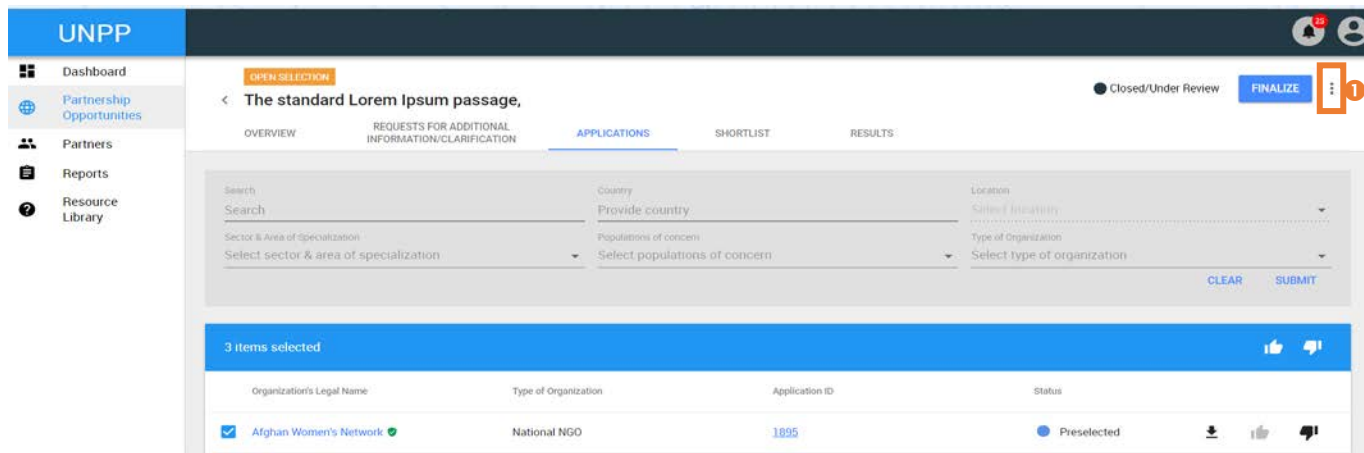
The screenshot displays the UNPP interface. On the left, a navigation menu includes 'Partnership Opportunities' (marked with a red circle 1). The main content area shows a breadcrumb trail: 'The standard Lorem Ipsum passage, APPLICATIONS (2)'. A filter bar at the top right indicates '3 Closed/Under Review' items (marked with a red circle 3) and a 'FINALIZE' button. Below the filter bar, there are search and selection filters for Country, Location, Sector & Area of Specialization, Populations of concern, and Type of Organization. A table below shows '3 items selected' with columns for Organization's Legal Name, Type of Organization, Application ID, and Status. Three organizations are listed, each with a checked checkbox (marked with a red circle 4) and a thumbs up icon (marked with a red circle 4):

Organization's Legal Name	Type of Organization	Application ID	Status
<input checked="" type="checkbox"/> Afghan Women's Network	National NGO	1895	Pending
<input checked="" type="checkbox"/> Association for Afghan Development	National NGO	1894	Pending
<input checked="" type="checkbox"/> Youth Network for the Rehabilitation of Afghanistan	National NGO	1893	Pending

At the bottom right, there is a 'Help' button. The user is logged in as UNICEF, and the location is set to Afghanistan.

Steps	Description	Action	Notes
3	Reviewers	To add reviewers to your CFEI, click on the 'vertical ellipses (1)' next to the finalize button. In the dropdown, select 'Manage Reviewers (2)' Enter the names of the reviewers in the 'modal (3)' and click 'Send (4)'	The CFEI creator or focal point must add themselves as a reviewer if they are a part of the assessment team. Reviewers can only be advanced editors, basic editors, PAM users or MFT users. The user's must be assigned these roles in the system for their names to be displayed. Reviewers will be sent an email and in-app notification. It is advised to add reviewers after you have shortlisted the applications.

STEP 3



Steps	Description	Action	Notes
4a	Assess CFEI as reviewer	In the <i>dashboard</i> (1), scroll down to ' <i>List of concept notes requiring your scoring</i> ' (2). Click on the <i>CFEI ID hyperlink</i> (3) to be directed to the CFEI	

STEP 4a

The screenshot shows the UNPP dashboard interface. On the left, a navigation menu includes 'Dashboard' (1), 'Partnership Opportunities', 'Partners', 'Reports', and 'Resource Library'. The main content area features a top navigation bar with 'UNPP' and user profile icons. Below this is a chart showing data from 10/29 to 11/09. Two summary cards are present: 'Number of New Calls for Expressions of Interest' with a value of 24, and 'Number Of Concept Notes to Score' with a value of 3. A right-hand sidebar lists organization types: Community Based Organization (CBO) - 14, National NGO - 43, International NGO (INGO) - 29, Academic Institution - 3, and Red Cross/Red Crescent Movement - 2. The central section, titled 'List of Concept Notes requiring your scoring' (2), displays '1-1 of 1 results'. A table below lists the results:

Project Title	CFEI	Number of Applications	Notification of results deadline
The standard Lorem Ipsum passage,	CFEI/AFG/2018/012 (3)	3	05 Nov 2018

At the bottom left, it shows 'Logged in as: UNICEF' and 'Afghanistan'. At the bottom right, there is a 'Help' button. The table also includes a 'Rows per page' dropdown set to 10 and a '1 of 1' page indicator.

Steps	Description	Action	Notes
4b	Assess CFEI as reviewer	Click on the 'Shortlist tab (1)' to be directed to the applications to be reviewed. Click on the 'Application ID (2) hyperlink to be directed to the CSO's application	

STEP 4b

The screenshot shows the UNPP dashboard interface. On the left is a navigation menu with options: Dashboard, Partnership Opportunities, Partners, Reports, and Resource Library. The main content area has a header with 'UNPP' and a user profile icon. Below the header, there's a breadcrumb trail: 'OPEN SELECTION' > 'Lorem Ipsum is simply dummy text of the printing and typesetting industry.' > 'Closed/Under Review'. The main content area has three tabs: 'OVERVIEW', 'SHORTLIST 1', and 'RESULTS'. The 'SHORTLIST 1' tab is active and highlighted with a red box. Below the tabs, there's a table with the following data:

Organization's Legal Name	Type of Organization	Application ID 2	Your score
Afghan Women's Network	National NGO	1892	-
Association for Afghan Development	National NGO	1891	-
Youth Network for the Rehabilitation of Afghanistan	National NGO	1890	-

At the bottom of the table, there's a pagination control: 'Rows per page: 10' and '1-3 of 3'. A 'Help' button is visible in the bottom right corner.

Steps	Description	Action	Notes
4c	Assess CFEI as reviewer	User can view a summary of the CSOs profile (1). Click on 'Download (2)' to download the CSOs concept note. Click on 'Add Review (3)' to add scores to the CSO's application Review the 'Criteria (1)' and enter 'Your score (2)'. You can optionally add 'Notes (3)' and click 'Save'	If the criteria are weighted, the score cannot total more than the number set out in the criteria. If the criteria are not weighted, the total score per criteria cannot be more than 100 It is recommended that notes be added by the reviewer as it helps the CFEI manager in making their decision on the best candidate. To edit your scores, click edit review

STEP 4c

Steps	Description	Action	Notes
4d	Complete Assessment	When all the reviews are complete, the reviewer can see their 'Scores (1)' and click 'Complete Assessment (2)'	Once the user has clicked complete assessment, they can no longer edit their score

STEP 4d

The screenshot shows the UNPP interface. The left sidebar contains navigation options: Dashboard, Partnership Opportunities, Partners, Reports, and Resource Library. The main content area is titled 'OPEN SELECTION' and displays a list of results under the 'SHORTLIST' tab. The results table has the following data:

Organization's Legal Name	Type of Organization	Application ID	Your score
Afghan Women's Network	National NGO	1892	75
Association for Afghan Development	National NGO	1891	82
Youth Network for the Rehabilitation of Afghanistan	National NGO	1890	86

Annotations in the screenshot include: a red box around the 'COMPLETE ASSESSMENT' button (labeled '2'), and a red box around the 'Your score' column (labeled '1'). The interface also shows a 'Closed/Under Review' status, a 'Help' button, and the user is logged in as UNICEF in Afghanistan.

Steps	Description	Action	Notes
5	Assess Application on behalf of a Committee	Review the 'Criteria (1)' and enter 'Your score (2)'. Click that you confirm that the score is entered on behalf of a review committee (3)	You will have to do this for each application. Once done, the user can click complete assessment

STEP 5

Add review of the application
×

You are reviewing application of: Afghan Women's Network

Criteria ❶	Your score ❷
Sector expertise and experience <small>Contrary to popular belief, Lorem Ipsum is not simply random text.</small>	35 /50
Relevance of proposal to achieving expected results <small>Contrary to popular belief, Lorem Ipsum is not simply random text.</small>	36 /50

Notes (optional) ❸

Enter any notes/comments

I confirm that these scores are entered on behalf of review committee ❹

CANCEL ❺
SAVE

Steps	Description	Action	Notes
6	Compare scores	To compare the scores of applicants, click on the <i>check boxes (1)</i> for the organizations you want to compare and click on the ' <i>Compare (2)</i> ' icon.	In the ' <i>Compare modal (3)</i> ' you can view the CSO's score on the application as well as a few details from their profile.

STEP 6

OPEN SELECTION

< The standard Lorem Ipsum passage, Closed/Under Review FINALIZE

OVERVIEW REQUESTS FOR ADDITIONAL INFORMATION/CLARIFICATION APPLICATIONS **SHORTLIST** RESULTS

ASSESSMENT COMPLETED

3 items selected

1	Organization's Legal Name	Type of Organization	Application ID	Your score	Average score	Recommend Partner
<input checked="" type="checkbox"/>	Afghan Women's Network	National NGO	1895	71	71.00	RECOMMEND
<input checked="" type="checkbox"/>	Association for Afghan Development	National NGO	1894	75	75.00	RECOMMEND
<input checked="" type="checkbox"/>	Youth Network for the Rehabilitation of Afghanistan	National NGO	1893	85	85.00	RECOMMEND

Rows per page: 10 1-3 of 3

Compare concept notes

Partner	Afghan Women's Network	Association for Afghan Development
Concept Note Id	1895	1894
Average score	71	75
Verification status	✓ Verification Passed	✓ Verification Passed
Flagging status	0 0 1 0	0 0 0 0
Year of Establishment	2015	2011
UN Experience	WFP	UNHCR, UNICEF, WFP, OT
Annual Budget(USD)	Less than \$500,000	\$2,000,001 to \$10,000,00

DOWNLOAD

Steps	Description	Action	Notes
7	Recommend a Partner	Click on 'Recommend (1)' to recommend a partner for selection	More than one partner can be recommended

STEP 7

The screenshot shows a web application interface for partner selection. At the top, there is a navigation bar with tabs: OVERVIEW, REQUESTS FOR ADDITIONAL INFORMATION/CLARIFICATION, APPLICATIONS, SHORTLIST (active), and RESULTS. A 'CLOSED/UNDER REVIEW' indicator and a 'FINALIZE' button are also present. Below the navigation, a table lists three organizations. The first two are unselected, and the third is selected. A red box highlights the 'RECOMMEND' buttons for each row. The table columns are: Organization's Legal name, Type of Organization, Application ID, Your score, and Average score.

Organization's Legal name	Type of Organization	Application ID	Your score	Average score	Action
<input type="checkbox"/> Afghan Women's Network	National NGO	1895	71	71.00	RECOMMEND
<input type="checkbox"/> Association for Afghan Development	National NGO	1894	75	75.00	RECOMMEND
<input checked="" type="checkbox"/> Youth Network for the Rehabilitation of Afghanistan	National NGO	1893	85	85.00	RECOMMEND

At the bottom right, there is a pagination control showing 'Rows per page: 10' and '1-3 of 3'.

Steps	Description	Action	Notes
8a	Review Summary and Selection	For the basic editor, once the partner is recommended, the user will be directed to the 'Results (1)' tab. On this tab, the 'Recommended Partner (2)' name is displayed. Click on 'Add summary (3)'. In the Add Review Summary modal, enter you "Comment (1)" and optionally upload a file (2) and click 'Ok (3)'. Click on 'Send for Decision (4)'	Once the user clicks send for decision they can no longer edit the result

STEP 8a

The screenshot shows a web application interface with a top navigation bar containing tabs: OVERVIEW, REQUESTS FOR ADDITIONAL INFORMATION/CLARIFICATION, APPLICATIONS, SHORTLIST, and RESULTS (1). The main content area is divided into two sections: 'Recommended Partner(s) (2)' and 'Shortlisted Partner(s)'. The 'Recommended Partner(s)' section lists 'Youth Network for the Rehabilitation of Afghanistan' and includes a 'SEND FOR DECISION (4)' button. The 'Shortlisted Partner(s)' section lists 'Afghan Women's Network' and 'Association for Afghan Development'. On the right side, there is a 'Review Summary' panel with a text area for 'Comment' and an 'Attachment' section, and an 'ADD SUMMARY (3)' button. Below that is a 'Reviewers' panel showing 'Sean Kingston' and '3/3 Assessments'. A 'FINALIZE' button is located in the top right corner.

The screenshot shows a modal titled 'Add Review Summary'. The modal has a blue header with the title and a close button. The main content area contains a text input for 'Comment (1)' with the placeholder text 'Lorem Ipsum is simply dummy text of the printing and typesetting indust'. Below that is an 'Attachment (2)' section with an 'UPLOAD FILE' button. At the bottom right, there are 'CANCEL' and 'OK (3)' buttons.

Steps	Description	Action	Notes
8b	Review Summary and Selection	For the advanced editor, you can 'Select (1)' the recommended partner Enter the 'Justification (1)' and click 'Submit (2)'	You will receive a notification from the basic editor that a recommended partner was sent for your decision When you click select, the partner will receive an email notification of their selection

STEP 8b

