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.
These steps should be performed by a PAM user **and one or more MFT users;** one MFT user will play the role of focal point **and the same or other MFT users will perform the role of** reviewer(s). The color codes suggest which step can be performed by which role. Based on the above-written, purple **and** green **roles optionally can be performed by the same MFT user.**

Steps	Description	Action	Notes
1	Navigation	After logging in, click on '*Partnership Opportunities (1)*' in the left navigation bar. Use the filters to find the CFEI to assess	
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 click on the organization 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 you only want to list NGOs that work in country a, location b, then filters can be used to find only those organizations that meet the criteria. You can click on the '*thumbs down*' sign to reject an application.
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 the focal point can add the focal point as a reviewer if the focal point is part of the assessment team but reviewer can be other MFT user as well. Reviewers can be MFT users only. 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 *dashboard* (1), scroll down to '*List of concept notes requiring your scoring* (2)'. Click on the *CFEI ID hyperlink* (3) to be directed to the CFEI	Reviewer can be: a) either one MFT user who, representing the Selection Committee, enters the consolidated decisions for each applicant on the Committee's behalf (described in step 5) b) or all MFT users as Selection Committee members entering their individual scores to each application (described in step 4a-4d)
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	
4c-4d	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. To edit your scores, click 'edit review'. Once all applications are assessed, then you can click on 'complete assessment' - 4d (1) & (2)
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 the Selection Committee (3) in case only one reviewer was added to the CfEI.	You will have to add scores for each application as per the Committee's decision. Once all applications are assessed, then you can click on 'complete assessment'.

OR

Steps	Description	Action	Notes
6	Compare scores	Optional: To compare the scores of applicants, click on the *check boxes* (1) for the organizations you want to compare and click on the '*Compare (2)*' icon.	In the '*Compare modal (3)*' 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 '*Recommend (1)*' to recommend a partner for selection	More than one partner can be recommended
8a	Review Summary and Selection	Step for the PAM user: once the partner is recommended, go 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 PAM user clicks send for decision the results cannot be edited any longer. The meeting minutes of the Selection Committee meeting can be uploaded here. Once PAM user clicks on '*Send for Decision (4)*', the recommendation will be sent to the focal point in order to collect approval from head of office/representative for the selection.
8b	Review Summary and Selection	Step for the MFT user focal point: you can '*Select* (1)' the recommended partner Enter the '*Justification* (1)' and click '*Submit* (2)'	You will receive a notification from the PAM user that a recommended partner was sent for decision – once the decision is reached from head of office/representative you can click 'Select'; Important: the 'Select' button will be enabled only if the partner is verified. Please contact IPMS if the partner needs to be verified (ikon has to be green). Once selected, the partner will receive an e-mail notification about the selection. The partner has to accept the sent 'offer' online in their view in order to enable the CfEI for finalization from UNHCR's end.

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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 the focal point can add the focal point as a reviewer if the focal point is part of the assessment team but reviewer can be other MFT user as well. Reviewers can be MFT users only. 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.

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4a	Assess CFEI as reviewer	In the *dashboard* (1), scroll down to '*List of concept notes requiring your scoring* (2)'. Click on the *CFEI ID hyperlink* (3) to be directed to the CFEI	Reviewer can be: a) either one MFT user who, representing the Selection Committee, enters the consolidated decisions for each applicant on the Committee's behalf b) or all MFT users as Selection Committee members entering their individual scores to each application

STEP 4a

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

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 identifying 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 'complete assessment' is clicked, scores cannot be edited any longer

STEP 4d

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 the Selection Committee (3) in case you are the only one reviewer added to the given CFEI.	You will have to add scores for each application as per the Committee's decision. Once all applications are assessed, you can click complete assessment

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

STEP 6

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

Steps	Description	Action	Notes
8a	Review Summary and Selection	Step for the PAM user: once the partner is recommended, go 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 PAM user clicks send for decision the results cannot be edited any longer. The meeting minutes of the Selection Committee meeting can be uploaded here. Once PAM user clicks on '*Send for Decision (4)*', the recommendation will be sent to the focal point in order to collect approval from head of office/representative for the selection.

STEP 8a

Steps	Description	Action	Notes
8b	Review Summary and Selection	Step for the MFT user focal point: you can '*Select* (1)' the recommended partner Enter the '*Justification* (1)' and click '*Submit* (2)'	You will receive a notification from the PAM user that a recommended partner was sent for decision – once the decision is reached from head of office/representative you can click 'Select'; Important: the 'Select' button will be enabled only if the partner is verified. Please contact IPMS if the partner needs to be verified (⬤ ikon has to be green). Once selected, the partner will receive an e-mail notification about the selection. The partner has to accept the sent 'offer' online in their view in order to enable the CfEI for finalization from UNHCR's end.

STEP 8b