

PULSAR 



Public Sector Accounting Assessment

PULSE

TOOL USER MANUAL

June 2023



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Public Sector Accounting Assessment

PULSE

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1

INTRODUCTION

The PULSE web-based tool facilitates the management of a PULSE assessment. Since the assessment process may take up to six months and involves many experts to perform tasks (like scoring and quality assurance), the PULSE Tool enables the process to be managed easily in a logical, methodical way. It guides the Assessment Team Leader and other experts through the assessment lifecycle such that no important step can be overlooked. The PULSE Tool is available 24x7 and also contains a communications module that keeps all the experts informed of progress.

The PULSE Handbook contains all the details and definitions of the assessment process. This manual assumes that users are at least familiar with the Handbook and the assessment process. In the introductory paragraphs that follow, important concepts that pertain to use of the PULSE Tool will be reiterated for the convenience of users.

1.1. PULSE Methodology

The PULSE methodology consists of 29 indicators and 102 dimensions, classified in six pillars. The methodology also contains rules for scoring each dimension.

The methodology will be updated on a regular basis; however, only one version of the methodology can be associated with a given assessment. The PULSE Tool allows the PULSE administrators to manage different versions of the methodology. Definitions can be found in the PULSE Handbook.

1.2. User Roles and Responsibilities

To initiate the assessment process, the Lead Agency or Institution assigns an Assessment Team Leader (ATL) to lead the assessment. The ATL provides oversight of the entire assessment process and manages the PULSE Tool.

After assignment of the ATL, to establish the participation of relevant experts in the assessment process, the Assessment Team Leader (ATL) must assign subject matter experts to work on the assessment. Each expert is given a defined role which indicates what sort of tasks s/he is to perform. Possible roles and responsibilities of the experts are shown in **Table 1**.

Table 1. Responsibilities in the PULSE Tool

Role	Responsibilities in the PULSE tool
Assessment Team Leader (ATL)	Provide oversight of the entire assessment process and manage the PULSE Tool. Create the assessment record in the PULSE Tool. Assign roles to other participants who will be working on the assessment in various capacities. Perform the change of statuses in the assessment to follow the assessment lifecycle.
Assessment Team	Assist the ATL in carrying out the Quality Assurance (QA) process, including revision of assessment's raw data, draft and final PULSE reports, and preparation of matrix of comments and responses, based on the feedback received from Peer Reviewers.
Peer Review Team	Review draft PULSE Concept Note (CN).
External Validation Team	Participate in the QA process, including review and validation of assessment's raw data, and review of feedback on the first draft of the complete PULSE report.
Oversight Team	Review and approve the Concept Note and the final PULSE report.
Pulsar Team	Provide feedback on the Concept Note. Conduct the PULSE Check.

1.3. PULSE Check

An important aspect of the Quality Assurance (QA) process is the PULSE Check. The PULSE Check is a QA touchpoint performed by the PULSAR Team which ensures that the PULSE methodology has been applied correctly, scoring is properly evidenced, and the report structure follows the PULSE Handbook, among other things. Although the PULSE Check may be optional in some circumstances, it is very strongly recommended. The PULSE Tool accommodates the PULSE Check – it is part of the lifecycle of an assessment. Please see the dark green rows in **Table 2** of the next section. Further details are also included in the Handbook (page 9).

1.4. Lifecycle of an Assessment

The lifecycle of an assessment is the list of process steps from the beginning to end. An assessment has up to 12 steps (the exact number depends on whether there is a PULSE Check). The lifecycle is described in detail in the Handbook (page 5), but is summarized in **Table 2** for convenience.

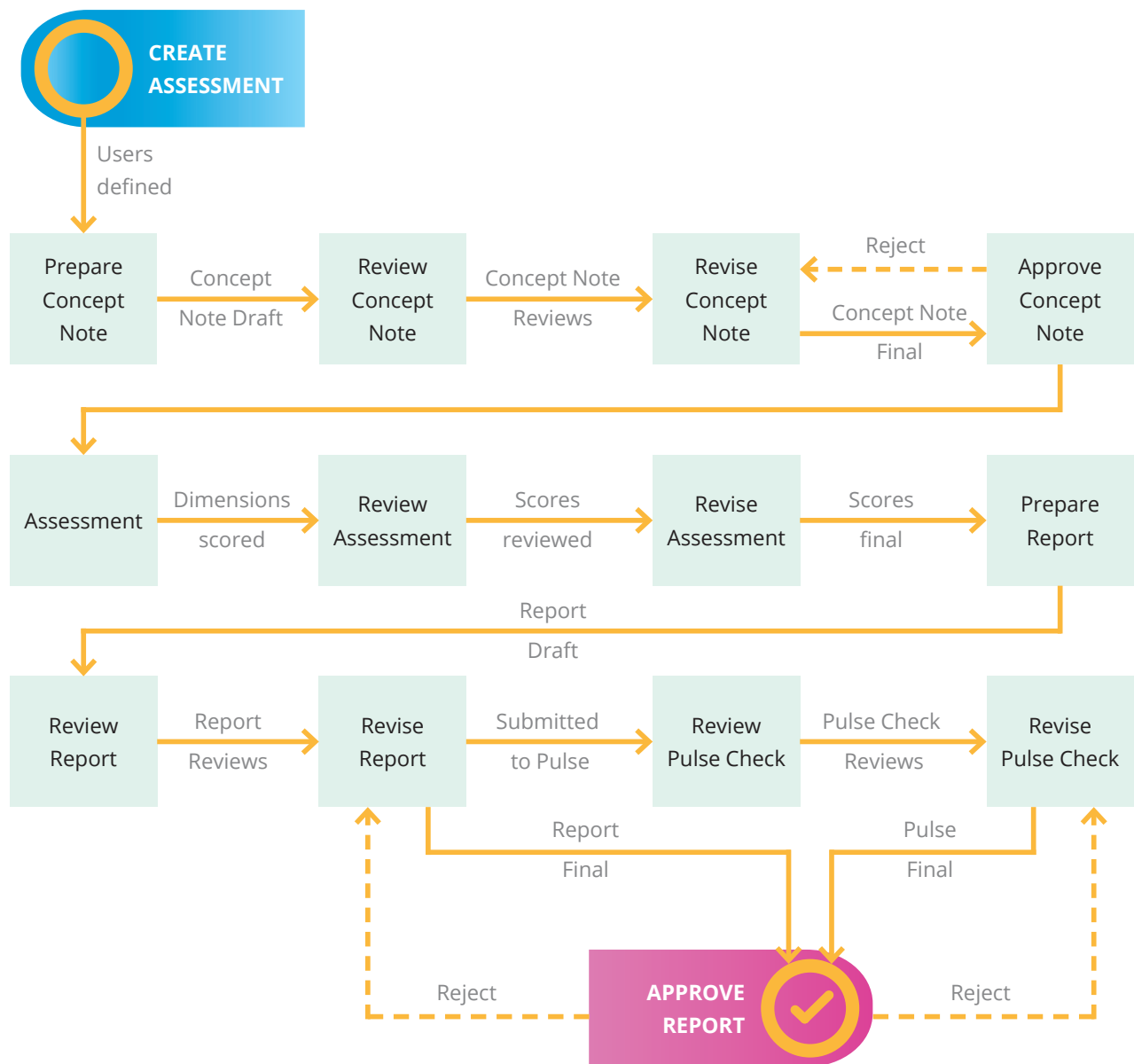
Figure 1 provides a process flow diagram showing all the steps in the lifecycle in logical order. The start and end of the process are marked with double circles.

At each step in the lifecycle, one or more of the experts perform certain work. **Table 2** gives a description of each step and the work that is performed in that step. Rows in light blue color pertain to the Concept Note; rows in light green color pertain to the performance of the actual assessment. Rows in dark green color pertain to the PULSE Check.

Table 2. Lifecycle Steps of an Assessment

#	Step / Status	Description
1	Create	The ATL sets up the administration of the assessment, assigns experts to work on the various steps, and establishes the timeframe.
2	Prepare Concept Note	The system enables the ATL to upload a draft of the Concept Note. The system allows this status only if relevant experts were assigned in the previous step.
3	Review Concept Note	In this status, the reviewers can review the Draft Concept Note and submit their feedback. The system allows this status only if the assessment has a Draft Concept Note and Peer Reviewers have been assigned.
4	Revise Concept Note	The ATL can upload a final version of the Concept Note. The system allows this status if the assessment has reviews of the Concept Note and these reviews were submitted.
5	Approve Concept Note	The Designated Approver can review all the documentation and approve or reject the CN. This status is possible only if there is a final version of the Concept Note in the system.
6	Assessment	In this step, Assessment Team members score the dimensions. This status is only possible after approval of the Concept Note in the prior step, and after assigning all the Assessment Team members.
7	Validate Assessment	In this step, the External Validators verify the reliability and completeness of all assessment data, and suggest new scores and add comments.
8	Revise Assessment	In this step, the system allows the Assessment Team members and to rescore any dimension, provide additional information, and revise the original assessment data as needed. The system allows this status if all of the dimensions were validated and reviewed at least once.
9	Prepare Report	The system allows upload of a draft of the report. This status is only possible after all assessment data was revised in the prior step.
10	Review Report	In this step, the reviewers can review the draft report and submit their feedback. The system allows this status only if the assessment has a draft report.
11	Revise Report	In this step, the ATL can upload a revised version of the report. The system allows this status if the draft report was reviewed by at least one External Validator.
11a	Review Pulse Check	This step is only enabled when the assessment has been marked as PULSE Check. The system will automatically assign the report previously submitted as revised as the new Draft for this review stage. Only the PULSAR Team may provide feedback during the PULSE Check.
11b	Revise Pulse Check	This step is only enabled when the assessment has been marked as PULSE Check. The system allows this state only when the PULSAR team has provided comments, and the draft PULSE report is reviewed by the ATL and Assessment Team.
12	Approve Report	Once the ATL has uploaded a revised or PULSE Check version of the final report, the system allows the report to be approved. The Designated Approver can login and approve or reject the document. This step is the last step in the assessment lifecycle. After approval, the assessment is completed, and no further actions are necessary.

Figure 1. Lifecycle Process Flow



1.5. Documents of an Assessment

Many types of documents can be “attached” to an assessment. There is a system storage folder called the Document Repository into which all forms of documents may be placed. These documents may be uploaded as support evidence for the assessment. Later, during the scoring process, these documents may be used to support the dimension scores. Every document in this repository may be assigned to a category to make it easier to organize and locate. For further details on the Document Repository and the storage categories please see **section 3.6.4** of this manual.

Types of documents that may typically be stored in the Document Repository include: (a) Supporting Evidence (these documents may be attached or linked to specific dimensions); (b) Concept Notes; and (c) Reports.

1.6. Document Templates

The CN and the PULSE Report are detailed documents that must follow already established guidelines. These guidelines are already programmed in the system in the form of template documents. Although the Handbook describes exactly what these guidelines are for each document, the PULSE Tool allows these guidelines to be changed. Established templates can be downloaded for an assessment. Instructions for downloading are included later in this manual.

2

LOGIN AND SECURITY

2.1. Login

To perform tasks in the PULSE Tool, users must login to the system using a Username and a Password (**Figure 2**). The Username is the registered email address.

2.2. Forgot Password

If the user forgets his/her password it can be recovered directly by clicking on the option *Forgot your password?* as depicted in **Figure 3**.

The user will receive an email with instructions as shown in **Figure 4**. When the user clicks on the link in the email the system will display a page requesting the user to enter and confirm a new password (**Figure 5**).

Figure 2. Login Screen

PULSE

PULSAR

PULSE Online Tool

PULSE, the IT support system for the Public Sector Accounting and Reporting Program (PULSAR), which supports the development of public sector accounting and financial reporting frameworks in line with international standards and good practices

Username / Email

Username to log in with

Password

You must use the password you used to register.

Login

[Forgot your password?](#)

Figure 3. Reset Password Dialog

Forgot your password?

Enter your email address and your password will be reset and sent to the address you entered.

Email

E-mail address

We will send instructions on how to reset your password.

Reset Password

Figure 4. Notification to Reset Password

Public Sector Accounting Assessment

PULSE

Dear Vladimir Calderon,

A request to renew your password has been submitted. If you did not make this request then please ignore this email.

Otherwise, [please click this link](#) to change your password

If you have any comments about this email, please contact PULSE

mail: something@pulse.org
telf. +1 3684 6545 654
PULSE

Figure 5. Reset a Password

Reset Password

In this page you can reset your password by typing the new password in the form below

Email

johndoe@pulsetool.org

New password

Confirm password

Set new password

2.3. Change Password

To change the password, select the *Change Password* option from the menu on the left side of the display (Figure 6).

Figure 6. Change Password Dialog

Public Sector Accounting Assessment
PULSE
John Doe Team Leader

- Home
- Classifiers
- Assessments
- Pulsar
- Security
 - Change Password**
 - Users
 - Roles
 - System Settings

Change password

The * besides every field indicates it is mandatory

Old password*

New password*

Confirm new password*

Set new password

3

ASSESSMENT MANAGEMENT

The assessment list (**Figure 7**) displays the current assessments to which a user/role has access. Any user / role may view the list of assessments window. However, the system will only display the assessments to which the user has been assigned by the Assessment Team Leader. In some cases, only one assessment will be displayed.

The columns on the right give an overview of the status of the assessment and its progress towards completion. The column abbreviations on the right stand for:

- * **CN** - Concept Note
- * **% NA** - Percentage of dimensions scored as Not Available
- * **% D*** - Percentage of dimensions scored with D*
- * **% Comp** - Percentage of scored dimensions


For the ATL role, clicking on the button () in the left-most column of the assessment list opens a contextual menu (**Figure 8**). The contextual menu provides several options. These options are described in the next several pages.

Figure 7. List of Assessments







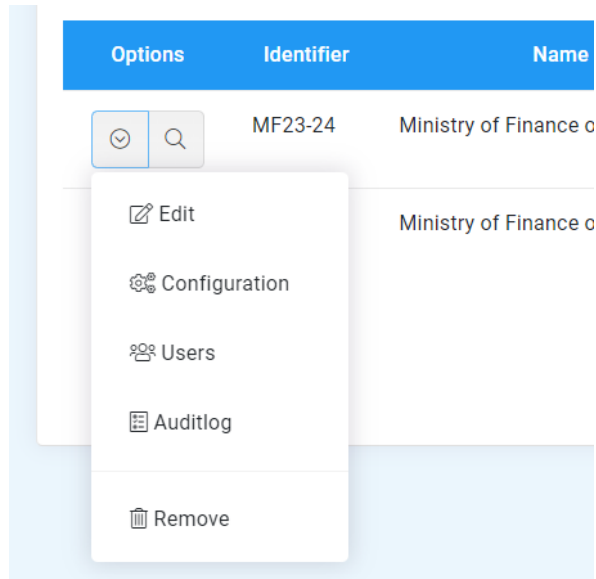
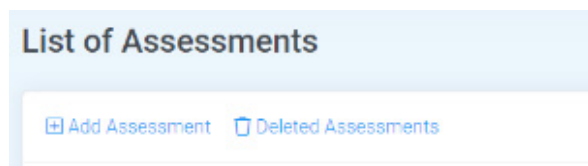
List of Assessments										
Add Assessment Deleted Assessments										
Search										
<input type="text" value="Search..."/> <input type="button" value="Search"/>										
Options	Identifier	Name	Country	Date Started	Last Step	CN	% NA	% D*	% Comp	Report
 	MF23-24	Ministry of Finance of Ukraine	Ukraine	11/23/2022	Configure	-	0 %	0 %	0.0 %	-
 	MFG2023	Ministry of Finance of Georgia	Georgia	11/8/2022	Assessment		17.65 %	20.59 %	100.0 %	

Figure 8. Contextual Menu**Figure 10.** Create Assessment Form

The screenshot shows the 'Create Assessment' form. It includes a back link to the list of assessments. The form fields are: Methodology (Version: 1.3), Institution (Ministry of Finance Azerbaijan), Country (Azerbaijan), Subnational region (grayed out), Period (empty), Language (English), and Description (empty). At the bottom, there are two buttons: 'Save and Define Users' and 'Save'.

3.1. Create an Assessment (Add Command)

The first step in the assessment process is the creation of a system record of the assessment. For the ATL role, the link to create an assessment **+ Add Assessment** is displayed on top of the list of assessments.

Figure 9. Add Assessment Link

Click on **+Add Assessment** and the system opens a form (**Figure 10**) to create a new assessment.

The system automatically assigns the current methodology version and the correct dimensions for the methodology. Typically, this function will only be performed once.

The ATL should have the following information at hand to create an assessment:

- * The **institution** at which the assessment will be performed.
- * The **period of time** of the assessment.
- * A **description** of the assessment.

The ATL selects the institution that will lead the assessment. The system automatically populates the country and region fields of the institution. Please note that the country and region fields are “grayed out,” meaning that they do not accept data entry.

3.2. Edit an Assessment (Edit Command)

Click on *Edit* from the contextual menu to revise the general information of the assessment, if needed. The same dialog as in the creation process appears (**Figure 11**). Make the appropriate revisions and then click the Save button to save the changes. Please note that the methodology was assigned automatically earlier and cannot be changed in this form.

3.3. Set Deadlines for Steps in the Lifecycle (Configuration Command)

This feature enables notifications to users about deadlines for different steps in an assessment cycle (**Figure 12**). The system takes the number of days specified and sends an appropriate message to users when the days specified have elapsed.

Enter values in whole days (integers) on each line. Do not enter other values, text, or punctuation. The total number of days for all steps should not exceed 180 (approximately 6 months). The system counts the total number of days and displays a message in the lower right corner of the form.

Figure 11. Edit Details of the Assessment

Figure 12. Configure Deadlines of the Assessment

Concept Note	Assessment	Report	Pulse Check
Preparation of the Concept Note 20	Conduct the Assessment 60	Prepare Report 20	Pulse Check Review of Report 5
Review Concept Note 5	Review Assessment 5	Review Report 5	Pulse Check Revision of Report 5
Revise Concept Note 5	Revise Assessment 5	Revise Report 5	
Approve Concept Note 5		Approve Report 5	

Total number of days: 150

3.4. Managing Users and Roles

3.4.1. Management in the Matrix Display

After the ATL has created the assessment and configured the reminders, the system asks the ATL to assign the experts who will work on it in various capacities (roles). The display (**Figure 13**) enables the ATL to manage the user setup process. This form allows the ATL to assign existing and new users, and to view the assignments of users and roles in a matrix format.

To select the experts and their roles, use the first (left) dropdown list options to pick the name of an expert and then the second (middle) dropdown list to choose

the expert's role. It is also possible to create the user account directly here via **+Create User** if the user does not yet exist in the system.

Instructions on the form remind the ATL about the applicable rules for defining users/roles. There are also two important rules for users/roles that are always relevant:

- * Each role must have at least one expert assigned to it.
- * An expert can have more than one role, e.g., a Peer Reviewer and an External Validator could be the same person.

When the users/roles have been selected and all rules have been complied with, the system enables the green button **Finalize Defining Users**. Click this button to save the selections.

Figure 13. Assign Users and Define Roles

Configure users for the evaluation for Assessment MFG2023

On this page you can configure users for an evaluation

[← Back to Assessment Dashboard](#)
[🔗 Import Users](#)
[👤 Create User](#)

Define users for concept note preparation, review and approval. The button will be **ENABLED** when the following conditions are met:

- Define at least one user for the Oversight team
- Define at least one user for the Pulsar team
- Define at least one user as Peer reviewer

➔ Finalize Defining Users

Type letters in user name or la...

Type letters in role

Save users and roles

User	Assessment Team Leader	Oversight	Pulsar Team	Peer Reviewer	Assessment	External Validation
John Doe Team Leader	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Mary Doe Peer Reviewer		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Robert Doe External Validator		<input checked="" type="checkbox"/> 👤	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Anthony Doe Oversight		<input checked="" type="checkbox"/> 👤	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

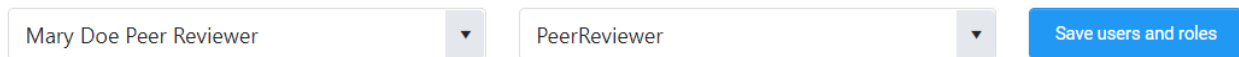
3.4.2. Add Existing Users to an Assessment

Use the first (left) dropdown list options to select the name of an expert and then the second (middle) dropdown list to select the expert's role (**Figure 14**). Click *Save users and roles*.

3.4.3. Add New Users to the Assessment

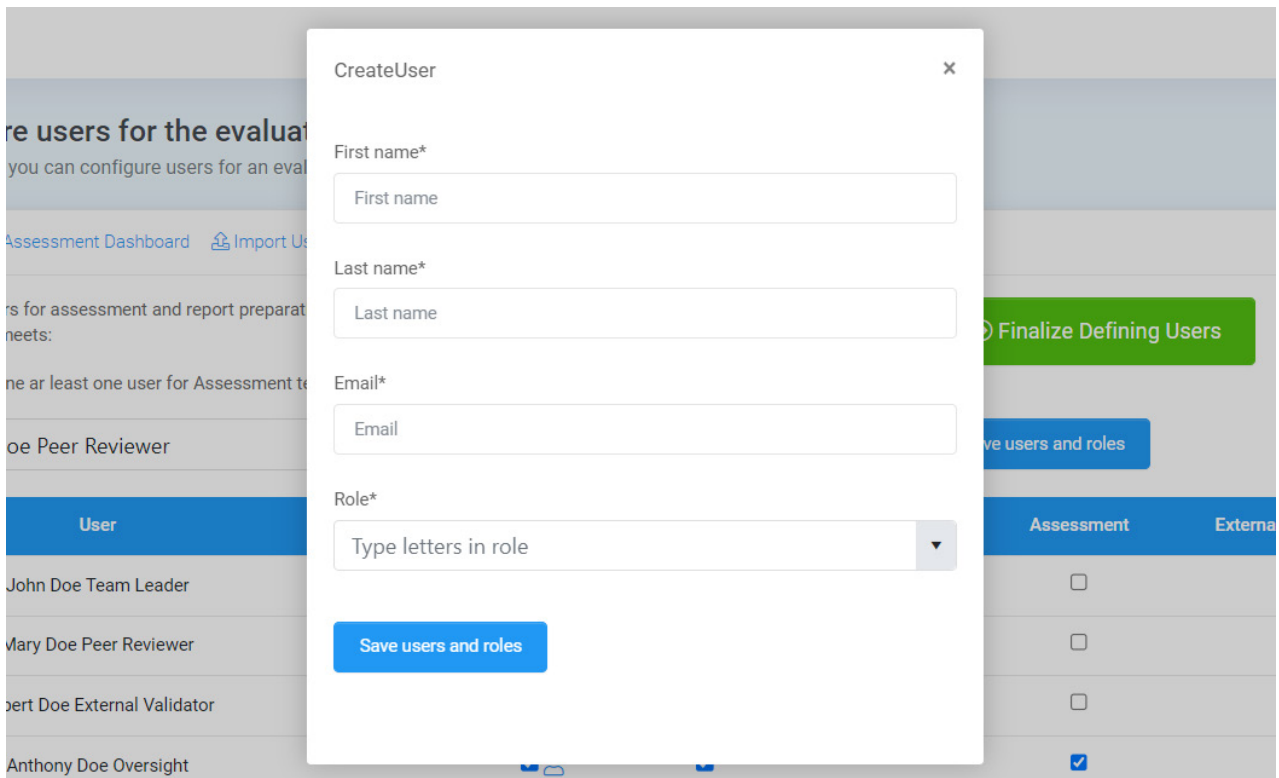
Click on the *Create User* link to define the name and email address of a new user. A dialog opens (**Figure 15**). Enter appropriate data in all the fields and then click Save users and roles. All fields are required.

Figure 14. User and Role Dropdown Menus



The image shows two dropdown menus and a button. The first dropdown menu contains the text "Mary Doe Peer Reviewer" and a downward arrow. The second dropdown menu contains the text "PeerReviewer" and a downward arrow. To the right of these menus is a blue button with the text "Save users and roles".

Figure 15. Add New User Dialog



The image shows a "CreateUser" dialog box with a close button (X) in the top right corner. The dialog contains the following fields:

- First name* (text input field)
- Last name* (text input field)
- Email* (text input field)
- Role* (dropdown menu with the placeholder text "Type letters in role")

At the bottom of the dialog is a blue button labeled "Save users and roles". The background shows a blurred view of the assessment management interface, including a table of users and a "Finalize Defining Users" button.

The system will automatically send an email to the new user asking that the email address be verified, and the user will be required to set a password (**Figure 16**). When clicking the link, the user will be able to set the password and will be confirmed as system's user (**Figure 17**).

Once the new user sets a password, the system will redirect to the login page. The system automatically checks whether there is at least one assessment linked to this user. If there is more than one assessment the system redirects to the list of assessments. If there is only one assessment the system redirects to the assessment Dashboard as shown in **Figure 18**.

Figure 16. Notification to New User with Link to Password

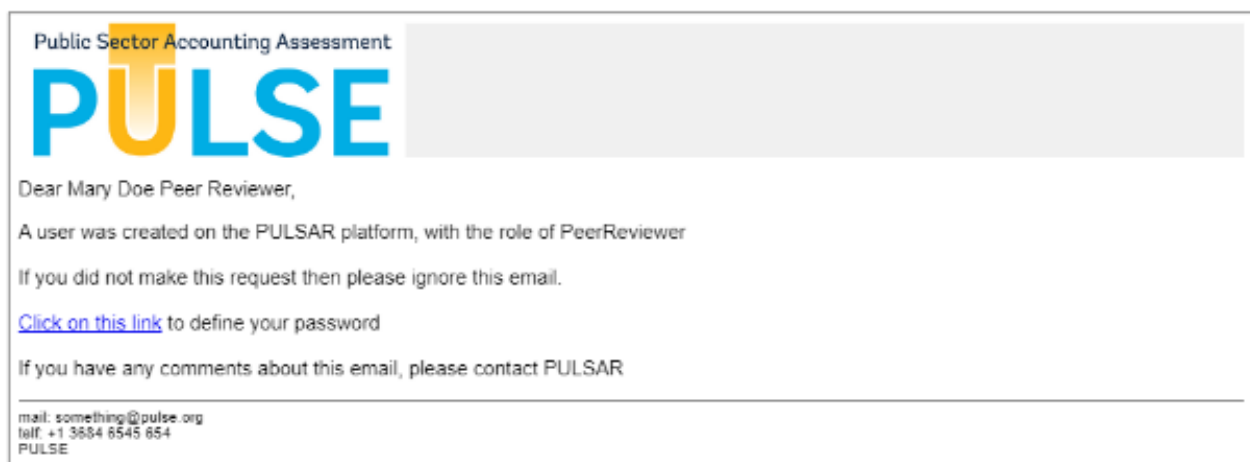
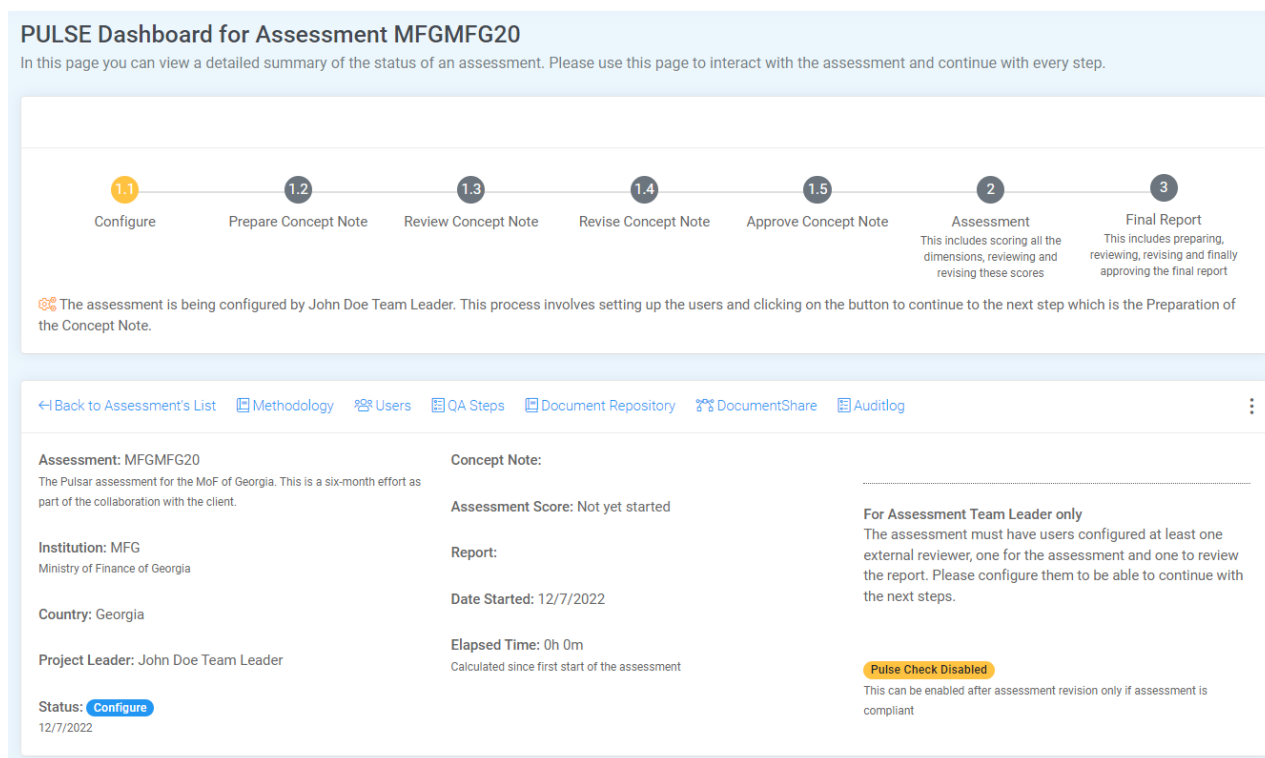


Figure 17. Reset Password Dialog

The image shows a "Reset Password" dialog box with a blue background. The title "Reset Password" is at the top. Below the title, it says "In this page you can reset your password by typing the new password in the form below". The form contains three input fields: "Email" with the value "maydoe@pulsarool.org", "New password" with the value "New password", and "Confirm password" with the value "Confirm password". A red button labeled "Set new password" is at the bottom.

Figure 18. Assessment Dashboard



3.5. Move an Assessment to the Recycle Bin (Remove Command)

Because an assessment record is the fundamental unit of the system, the system will not allow an immediate, full deletion of any assessment. The ATL can move

an assessment to the “Recycle Bin” using the *Remove* command from the contextual menu (**Figure 19**). Assessments in the Recycle Bin are not permanent deletions and can be restored later.

Once the user confirms the move into the recycle bin the assessment can be viewed immediately in the list of recycled assessments (**Figure 20**).

Figure 19. Move Assessment to the Recycle Bin

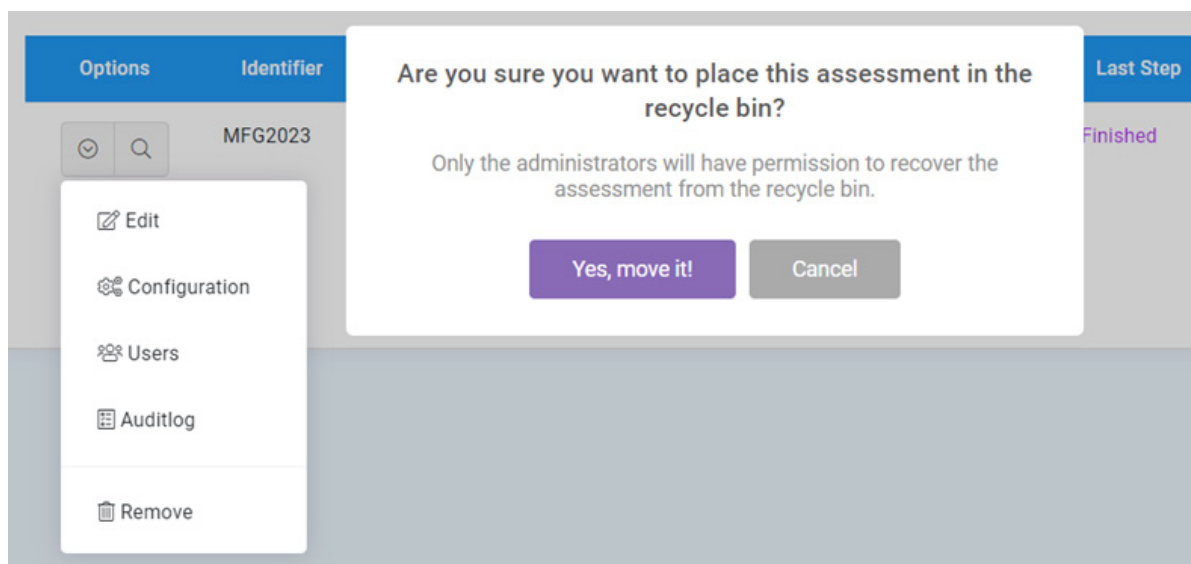




Figure 20. Assessments in the Recycle Bin

Deleted Assessments

In this page you can see the list of assessments that have been deleted in the past. You can recover any of these assessments. Note that restored assessments will only be accessed by the appropriate users.

[← Back to deleted assessments](#)

Search

Options	Identifier	Name	Country	LastStatus	LastStep	CNLbl	PercNaLbl	PercDLbl	PercCompLbl	ReportLbl
 	MFG2023	Ministry of Finance of Georgia	Georgia	STARTED	Configure	-	0 %	0 %	0.0 %	-

It is possible to undo this operation by going to the list of recycled assessments and restoring these assessments if necessary.

3.6. Dashboard of an Assessment

The information presented in the Dashboard is an overview of the status of the assessment. To reach

the Dashboard, click on the magnifying glass button on the left side of the assessment list. The Dashboard for the selected assessment opens. In **Figure 21**, the assessment is “MFGMFG20.”

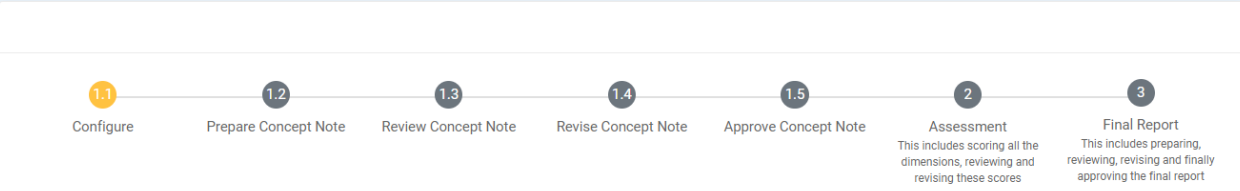
The Dashboard contains vital information about the status of the CN, assessment, and PULSE report. All users can view the Dashboard. However, the content and options displayed vary according to the user’s role.


The following several paragraphs refer to the option in blue in the middle of the Dashboard.

Figure 21. Assessment Dashboard Showing Configure Step

PULSE Dashboard for Assessment MFGMFG20

In this page you can view a detailed summary of the status of an assessment. Please use this page to interact with the assessment and continue with every step.



 The assessment is being configured by John Doe Team Leader. This process involves setting up the users and clicking on the button to continue to the next step which is the Preparation of the Concept Note.

[← Back to Assessment's List](#) [Methodology](#) [Users](#) [QA Steps](#) [Document Repository](#) [DocumentShare](#) [Auditlog](#)

<p>Assessment: MFGMFG20 The Pulsar assessment for the MoF of Georgia. This is a six-month effort as part of the collaboration with the client.</p> <p>Institution: MFG Ministry of Finance of Georgia</p> <p>Country: Georgia</p> <p>Project Leader: John Doe Team Leader</p> <p>Status: Configure 12/7/2022</p>	<p>Concept Note:</p> <p>Assessment Score: Not yet started</p> <p>Report:</p> <p>Date Started: 12/7/2022</p> <p>Elapsed Time: 0h 0m Calculated since first start of the assessment</p>	<p>For Assessment Team Leader only The assessment must have users configured at least one external reviewer, one for the assessment and one to review the report. Please configure them to be able to continue with the next steps.</p> <p>Pulse Check Disabled This can be enabled after assessment revision only if assessment is compliant</p>
---	--	--

3.6.1. Methodology

To view all the details of the methodology for this assessment, click on the [Methodology](#) link.

A display opens with details of the methodology for that assessment (see **Figure 22**). Click on any title or phrase to view the description of the relevant pillar, indicator, or dimension.

3.6.2. Users

Assessment users and roles can be managed from the [Users](#) link on the Dashboard. Management of system

users was discussed earlier in the section, "Managing users and roles." Please refer to that section for detailed instructions.

3.6.3. QA Steps

QA stands for quality assurance. This is a small window with information on the progression of the changes in status that have occurred from the beginning. The window indicates the date and user who caused the change in status (**Figure 23**). This is accessible from the link [QA Steps](#) in the middle of the Dashboard.

Figure 22. Looking Up Methodology Details

Pillars	Indicators	Dimensions
I. PSA Framework	PI-1. Conceptual Framework	1.1. Qualitative Characteristics 1.2. Reporting Entity 1.3. Elements of financial statements
	PI-2. Accounting policies, estimations, errors and events after the reporting date	2.1. Accounting policies 2.2. Estimations 2.3. Errors 2.4. Reporting of events after reporting date
	PI-3. Foreign currency transactions and inflation effects	3.1. Initial recognition of exchange differences resulting from foreign currency transactions 3.2. End of year reporting of foreign currencies transactions 3.3. Compliance with hyperinflation requirements
	PI-4. Financial assets	4.1. Short-term receivables at cost 4.2. Financial assets at amortized cost

Figure 23. Status Change Display

Step	Date	User
Configure	5/27/2022	vladimir.calderon@gmail.com
ConceptNotePrepare	5/27/2022	vladimir.calderon@gmail.com
ConceptNoteReview	5/27/2022	vladimir.calderon@gmail.com

3.6.4. Document Repository

The experts in charge of the assessment need to collect evidence and documentation from the institution to support the scores. For that purpose, there is a set of pre-defined categories in the PULSE Tool to which documents may be assigned. To browse the documents and the categories, click on the [Document Repository](#) link. The display shown in **Figure 24** opens. In this example, there are 14 possible categories.

The display will only show the categories for which the assessment actually has some documents uploaded.

To upload a document simply click on the [+Add Item](#) link. The window opens as shown in **Figure 25**.

Select the category from the dropdown list, select a file, type the description, and click [Upload](#). This will put the document on the list available later for scoring the dimensions. In the Description, be as specific as possible – this will be helpful later when reviewing the documents.

In the list of documents click to view the categories that do not already contain uploaded documents. This allows the user to quickly identify the documents that have been uploaded.

Figure 24. Assessment Dashboard Showing Configure Step





























Repository Template			
+Add Item			
Edit	Remove	Order	Section Name
		1	The constitution under which the reporting entity operates
		2	Any laws and bylaws relating to budget and/or accounting
		3	Annual budget law/documentation/estimates, as appropriate, approved by the legislature
		4	Accounting standards
		5	Accounting policies/frameworks
		6	Accounting manual/procedures
		7	Internal memos/guidelines/process descriptions
		8	Asset register for fixed and non-fixed assets
		9	Chart of accounts (CoA)
		10	Annual financial statements or reports
		11	Interim (e.g., monthly, quarterly, etc.) financial statements or reports
		12	Audit reports
		13	FMS outputs/screenshots
		14	Job profiles/responsibilities

Figure 25. Upload Document to a Category

Upload New Document for Assessment MFG2023
Here you can upload a document that will be included in the repository of the assessment. This document can then be included as evidence when scoring dimensions

[← Back to Document Repository](#)

Select Category
Accounting standards

Document
Select files...
65883a0a06.pdf
153.61 KB

Description
The standard used in the ministry of economy

Upload

3.6.5. Document Share

The system allows users to distribute specific documents via an email distribution list.

The dropdown list *Document to Share* (Figure 26) will show the following documents only when they are available to be shared. Select the appropriate document from the dropdown list.

- * Draft Concept Note
- * Final Concept Note
- * Draft Report

- * Final Report
- * Final Report after Pulse Check

After selecting the document to share, the ATL must next create the email distribution list. The text box *Emails* (Figure 27) allows a list of formatted or unformatted email addresses to be pasted into the box. Simply copy and paste email addresses into the box. The system will extract the emails from the text (and ignore other text) and send once to every unique address found in the text. Every identified email address in the list will receive the message shown in Figure 28.

Figure 26. Selecting a Document to Share

DocumentShare

Document to Share
Document to Share

- Concept Note Draft
- Concept Note
- Report Draft
- Final Report
- Final Pulse Report

Share Document

Figure 27. Creating the Email Distribution List

DocumentShare

Document to Share
Concept Note Draft

Emails
from: vladimir calderon <vladimir.calderon@gmail.com>
to: Jose Simon Rezk <jrezk@worldbank.org>
cc: Dmitri Gourfinkel <dgourfinkel@worldbank.org>, Vladimir Omar Calderon Yksic <vcalderonyksic@worldbank.org>, Natalia Konovalenko <nkonovalenko@worldbank.org>

Share Document

Methodology Users QA Steps Document Repository DocumentShare

Figure 28. Document Shared Message

3.6.6. AuditLog

The audit log is a list of all the events that have taken place in the system, for example, the creation of an assessment, change in status of an assessment,

assignment of users, changes of experts on an assessment, etc. The audit log is only available to the ATL. To view the log, click on **Auditlog**. A sample audit log display is shown in **Figure 29**.

Figure 29. Audit Log

Audit log for Assessment MFG2023

[← Back to Assessment Dashboard](#)

Search

Event Date	User	Event Type	Description
11/8/2022 9:12:51 PM	john.doe@pulsetool.org	AssessmentFinished	Assessment finished
11/8/2022 9:10:48 PM	anthony.doe@pulsetool.org	ApproveReport	Report Approved
11/8/2022 9:05:08 PM	john.doe@pulsetool.org	ApproveReport	Changed step to Approve Report
11/8/2022 9:04:49 PM	john.doe@pulsetool.org	ReviseReport	Uploaded revised report document
11/8/2022 9:04:19 PM	john.doe@pulsetool.org	ReviseReport	Changed step to Revise Report
11/8/2022 9:03:52 PM	robert.doe@pulsetool.org	ReviewConceptNote	Concept Note review finished
11/8/2022 9:02:54 PM	robert.doe@pulsetool.org	ReviewReport	Uploaded review report document
11/8/2022 9:00:05 PM	john.doe@pulsetool.org	ReviewConceptNote	Reviewer may.doe@pulsetool.org of concept note deleted
11/8/2022 8:59:53 PM	john.doe@pulsetool.org	ReviewReport	Changed step to Review Report

4

ASSESSMENT – CONCEPT NOTE PHASE

The next step in the assessment lifecycle is to prepare a CN. In order to initiate this step, it is assumed that an assessment has already been created (see **section 3.1. "Create an Assessment"**), configured, and that experts were assigned to the assessment (see **section 3.4. "Managing Users and Roles"**).

4.1. Prepare Concept Note

Once the ATL has defined the experts that will participate in this assessment, s/he can mark the assessment and proceed to the next step, Prepare Concept Note. This button can be found on the right side of the assessment Dashboard (**Figure 30**).

Please note that the *Prepare Concept Note* button is only available to Assessment Team Leaders.

The concepts "upload" and "download" are very important to the following processes:

- * **Upload** = Move a document from the user's own system (e.g., laptop) to the PULSE Tool
- * **Download** = Move a document from the PULSE Tool to the user's own system

An upload documents dialog opens (**Figure 31**). The ATL may **upload** a CN, if one is already available. To do so, select a file and then click *Upload*.

Figure 30. Dashboard with Prepare Concept Note

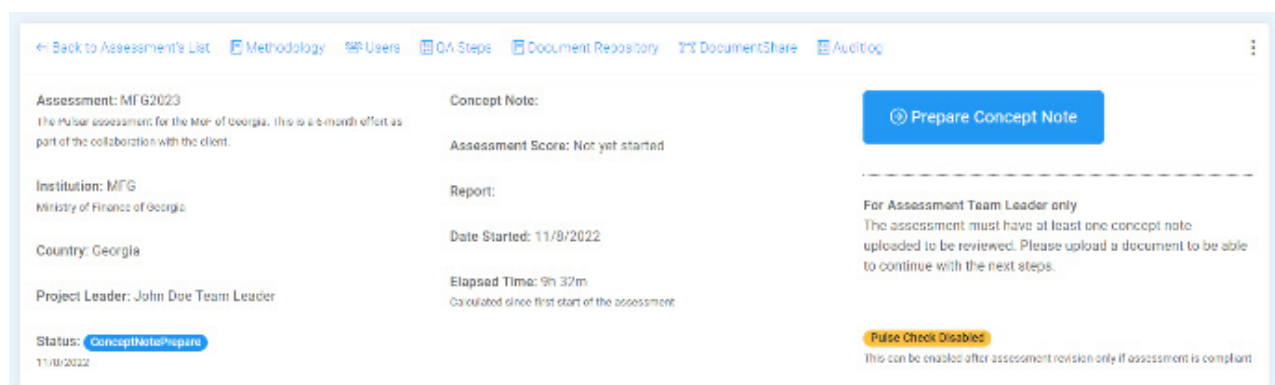


Figure 31. Upload a Concept Note Dialog

PULSE Concept Note

[← Back to Assessment](#) [Download template](#)

Assessment: MFG2023
 Country: Georgia
 ProjectLeader: John Doe Team Leader

A concept note must be uploaded to the system. Please download the template and fill-in the document to complete it. Once finished you can submit the document for review.

Concept Note for this Assessment is not defined yet. Upload a document file first.

Select a File

Select files...

Optional Notes

Upload

4.1.1. Download Concept Note Template

If there is no CN developed yet, an option allows the ATL to **download** a Concept Note template.

A template is an empty document that provides guidance on the required structure of the CN, which helps the author to develop the CN more easily (**Figure 32**). The user will only have to fill in appropriate text in spaces provided, as explained in the instructions in the template.

Figure 32. Concept Note Template with Instructions

AutoSave Off Concept Note (1)... Saved

File Home Insert Draw Design Layout References Mailings Review View WakaTime Help PDFsam Enhanced 5 Creator

1 2 3 4 5 6 7

ConceptNote

Background

Country jurisdiction background and context. PSA reform, including the mention of: (i) any recent PSA assessments; and (ii) recent, ongoing, and planned PSA reform

PSA reform

(i) any recent PSA assessments; and (ii) recent, ongoing, and planned PSA reform

Purpose

Purpose, scope, coverage, and mode of the assessment

Timing

Timeline, including assessment implementation schedule, and estimated cost of the assessment, including a raw breakdown of the main cost items

4.1.2. Upload Concept Note

Once the author has completed a draft of the CN (in accordance with the instructions / guidelines), s/he can upload it to the system using the **Upload** button (Figure 33).

Uploading the first draft of the CN will enable the Assessment Team Leader to move to the next step

in the assessment lifecycle, Review Concept Note (Figure 34). Alternatively, the ATL can also upload a new version of the CN.

Once the ATL is sure that this CN is ready to be reviewed, it can be sent to the assigned Peer Reviewers. The ATL will first confirm the action by clicking **Proceed to Review** (Figure 35).

Figure 33. Upload a Concept Note

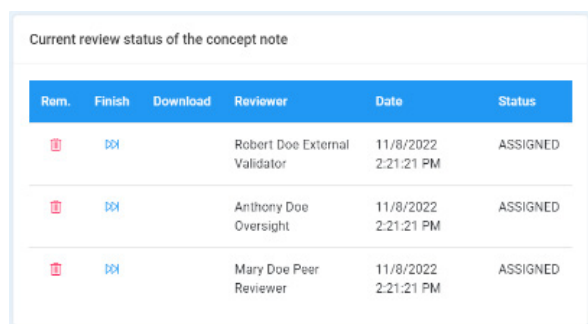
Figure 34. Review Concept Note with Current Version

Ver.	FileName	DateUploaded	Optional Notes	Status
1	Concept Note.docx (11 Kb)	11/8/2022	The concept note is complete and the assessment development planning has been coordinated with the client	Draft

Figure 35. Confirmation Dialog

The system will recognize that Peer Reviewers now must complete their tasks, and it will temporarily disable any possible action for the ATL. The system now displays the Dashboard and a new follow-up window appears below the Dashboard (**Figure 36**).

Figure 36. User Assignments and Status

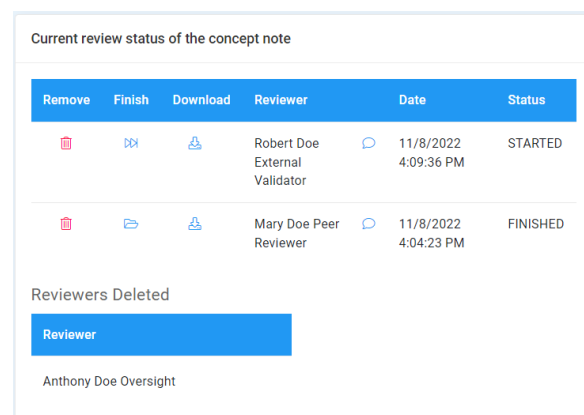


Rem.	Finish	Download	Reviewer	Date	Status
			Robert Doe External Validator	11/8/2022 2:21:21 PM	ASSIGNED
			Anthony Doe Oversight	11/8/2022 2:21:21 PM	ASSIGNED
			Mary Doe Peer Reviewer	11/8/2022 2:21:21 PM	ASSIGNED

This follow-up window indicates who has been assigned to review the CN and the status of their review.

- * The CN has been ASSIGNED to be reviewed.
- * The Peer Reviewer has STARTED reviewing the document by accessing the details.
- * The Peer Reviewer has SUBMITTED the review to the system.

Figure 37. Follow-up Actions



Remove	Finish	Download	Reviewer	Date	Status
			Robert Doe External Validator	11/8/2022 4:09:36 PM	STARTED
			Mary Doe Peer Reviewer	11/8/2022 4:04:23 PM	FINISHED

Reviewers Deleted

Reviewer

Anthony Doe Oversight

4.1.3. Manage Reviews from Follow-up Window

In the follow-up window the ATL can choose to release a Peer Reviewer from his/her duty, mark the task as reviewed without any comments, or review the document (**Figure 37**).

In **Figure 36** “Rem.” (in the first column) stands for “remove.” For example, if the ATL chooses to remove a Peer Reviewer from the list, the system will clearly show this event and add it to the Audit Log of the assessment.

4.2. Review Concept Note

Every Peer Reviewer of the CN receives an email notification when the CN is ready to be reviewed (**Figure 38**).

From the link in the email notification, the reviewer can login to the system and access the assessment. Once in the assessment Dashboard, Peer Reviewers only will see a button to review the CN. When the Peer Reviewer clicks on this button, the review is started (**Figure 39**).

Figure 38. Start Review Message to Peer Reviewers

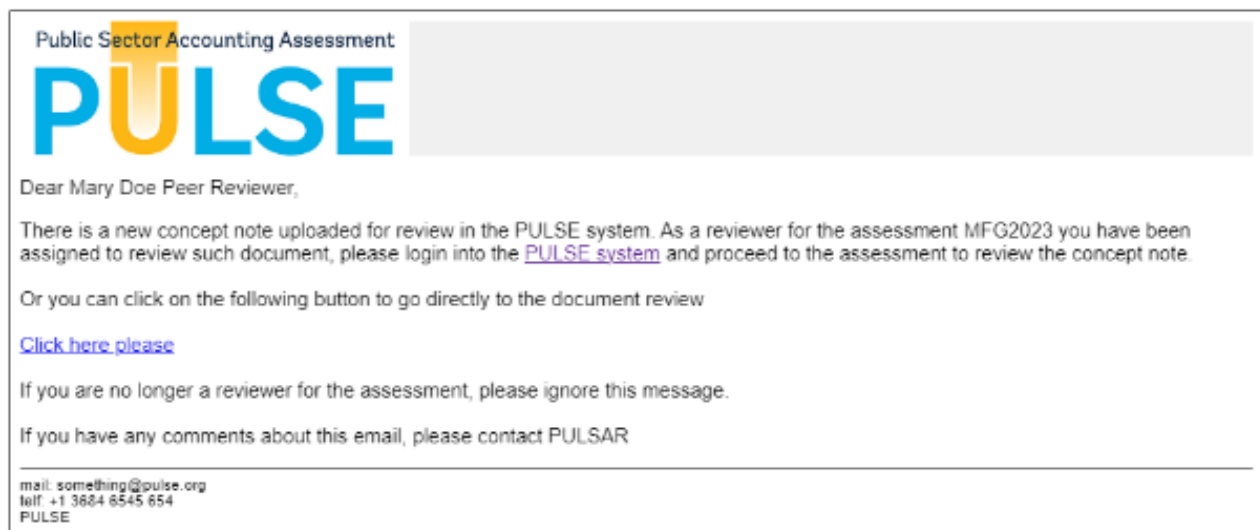


Figure 39. Peer Reviewer Display with Comments Box

The image shows the 'Review Assessment Concept Note' interface. At the top, there are navigation links: 'Back to Assessment' and 'Download template'. The main content area displays the following information:

- Assessment: MFG2023
- Country: Georgia
- Project Leader: John Doe Team Leader
- Current Concept Note: [Concept Note.docx](#)
- Comments: The concept note is complete and the assessment development planning has been coordinated with the client.

On the right side, there is a button labeled 'Submit review with no observations'.

Below the main content, there is a blue instruction bar: 'Download the concept note draft. Review it in word with track changes and upload the reviewed document. After that, just submit your review with your comments.'

The interface includes a 'Select a File' section with a 'Select files...' button. Below this is a 'Main Comments (Optional)' text area with a 'Submit' button at the bottom left.

4.2.1. Peer Reviewer Feedback

The Peer Reviewer can now download the Draft Concept Note and review it. When the CN has been reviewed, the Peer Reviewer typically uploads the revised CN and provides his/her feedback directly in the system. However, it is also possible for Peer Reviewers to give their written feedback directly in the system without uploading any document. The Peer Reviewer writes comments, if desired, in the **Main Comments** field (Figure 39, lower left). Finally, the reviewer clicks **Save** to save the review.

The reviewer can upload a new version of the review at any time while the CN is still in the Review Concept Note step.

4.2.2. No Observations or Comments

It is also possible to submit a review without any comments, thereby accepting the CN as it is. To submit without comments, leave the **Main Comments** field blank (Figure 39), and click on the gray button **Submit Review with No Observations** on the upper right. The practice of submitting a review without comments is discouraged.

4.2.3. Notification of Newly Reviewed Document

It should be noted that even if the reviewer has not yet submitted the review, the document uploaded is already available to the ATL via the download icon in the follow-up window from the assessment Dashboard.

In the list of reviewers of the Concept Note, the ATL already has access to download the reviewed document and the comments that were introduced by the reviewer (Figure 40). This is available even before the user submits the review.

Figure 40. Status Display

Rem.	Finish	Download	Reviewer	Date	Status
			Robert Doe External Validator	11/8/2022 2:21:21 PM	ASSIGNED
			Mary Doe Peer Reviewer	11/8/2022 2:25:06 PM	STARTED

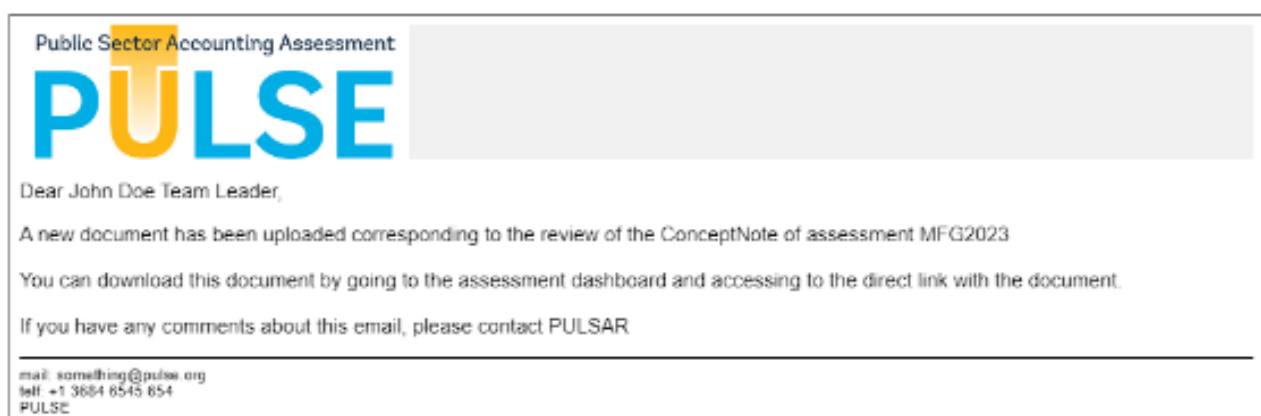
Reviewers Deleted

Reviewer

Anthony Doe Oversight

Once the Peer Reviewer provides his/her feedback and/or uploads the revised CN, the ATL will receive a notification of this event (Figure 41).

Figure 41. Notification Message to ATL



4.2.4. Submit Review

To submit the review, the reviewer clicks on the green button. This button appears on the same page where the user has uploaded the review (**Figure 42**).

4.3. Revise Concept Note

Once **all** the reviewers have finished the review of the document (with or without observations) the ATL will revise the CN and upload its final version. The system will change the status of the assessment to **Revise Concept Note** automatically.

The system will change the status of the assessment and will allow the ATL only to revise the document by clicking on the **Revise Concept Note** button (**Figure 43**).

In the revision display (**Figure 44**), the ATL can upload the revised version of the CN and add observations or comments to indicate whether all the comments from the review were included in the document. From this page it is easy to see the reviewed documents and analyze the main comments made by the reviewers. The user must upload the final version of the CN to be able to submit the document for approval.

Figure 42. Submit Review Button

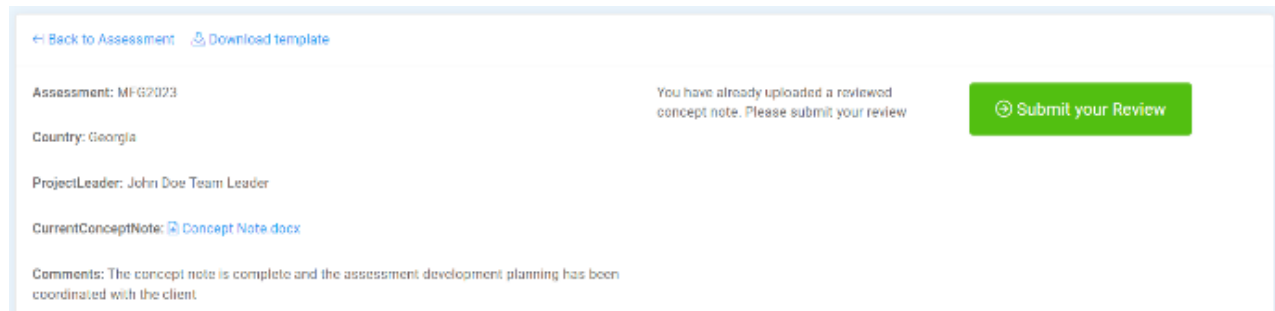


Figure 43. Ready to Revise the Concept Note

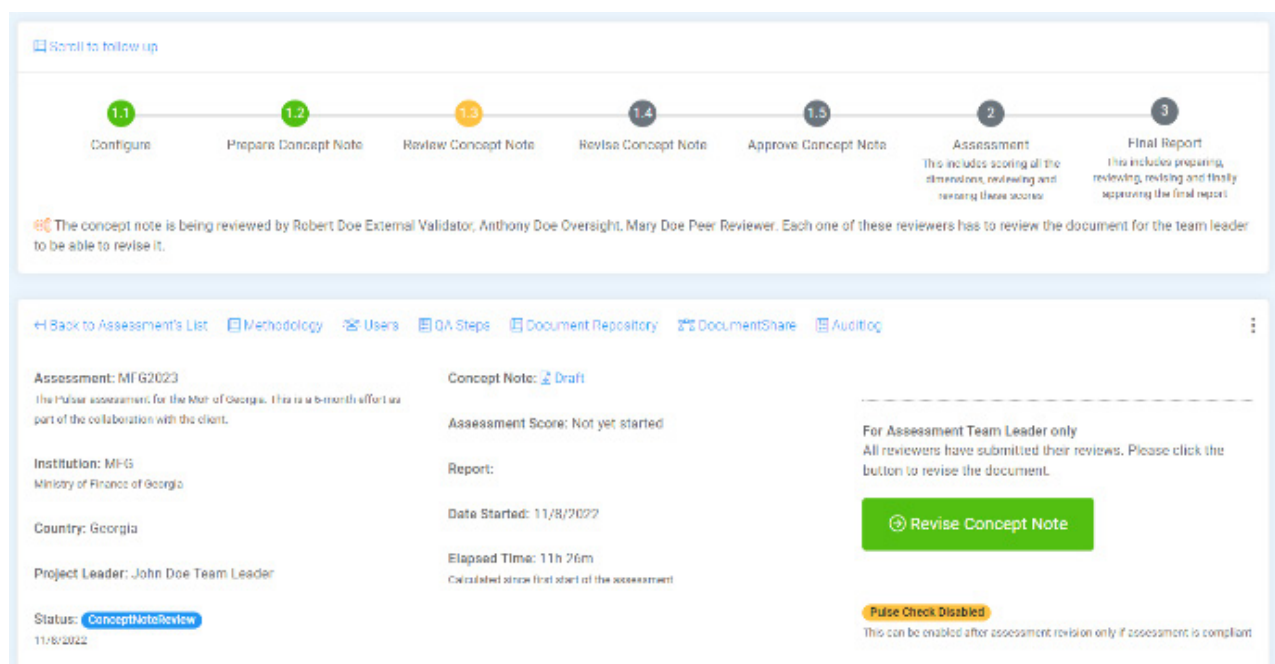


Figure 44. Revise Concept Note with Documents

Revise Concept Note

In this page you are able to revise all Concept Note observations and Upload a Final Concept Note

← Back to Assessment

Assessment: MFG2023

Country: Georgia

ProjectLeader: John Doe Team Leader

Please upload the final version of the concept note. Afterwards you will be able to submit for approval.

Upload Final Document

Select files...

ReviseComments

Upload

Reviews:

Document Uploaded	Reviewer	Comments	Date
Concept Note Rev2.docx (11 Kb)	Robert Doe External Validator	Just the table with the budget needs a little more detail.	11/8/2022 4:10:18 PM
Concept Note Rev1.docx (11 Kb)	Mary Doe Peer Reviewer	In the introduction paragraph just make sure to include the reference to the project	11/8/2022 4:04:23 PM

4.4. Approve Concept Note

Once the revised CN has been uploaded, the system will open the *Submit for Approval* dialog (**Figure 45**).

On the Dashboard the Approve Concept Note step is highlighted in orange color (**Figure 46**).

Additionally, the Designated Approver from the Oversight Team will receive an email notification about the required action (**Figure 47**). The Designated Approver logs in and the system will display the interface to start the approval process of the CN.

Figure 45. Submit for Approval Button

Revise Concept Note

In this page you are able to revise all Concept Note observations and Upload a Final Concept Note

← Back to Assessment

Assessment: MFG2023

Country: Georgia

ProjectLeader: John Doe Team Leader

The document to be approved has been uploaded. You can change it if necessary or click on the button to submit it for approval.

Submit for Approval

Figure 46. Dashboard Showing Approve Concept Note Step

1.1

1.2

1.3

1.4

1.5

2

3

Configure

Prepare Concept Note

Review Concept Note

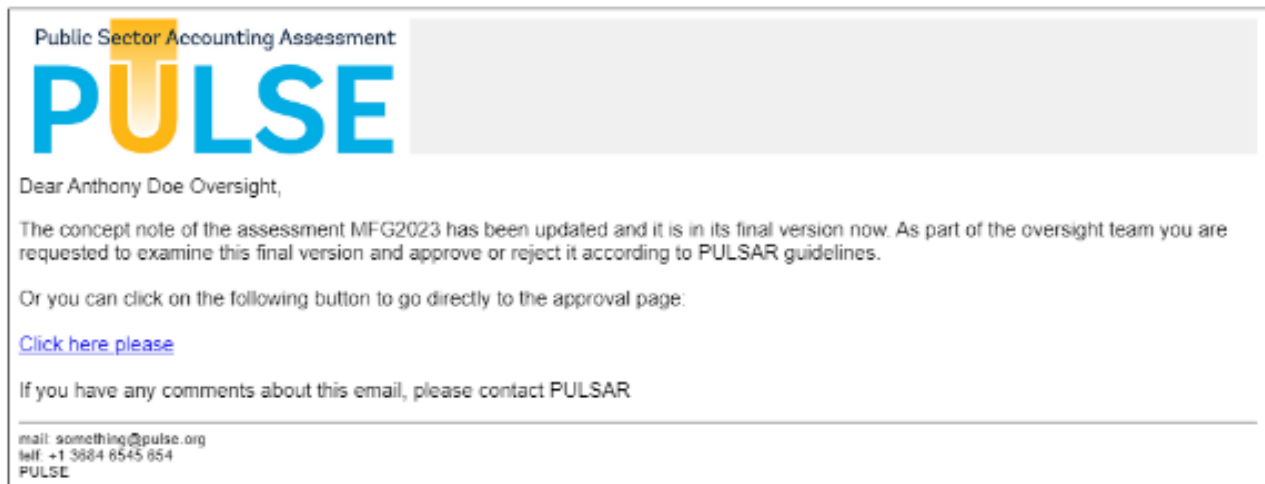
Revise Concept Note

Approve Concept Note

Assessment
This includes scoring all the dimensions, reviewing and revising those scores

Final Report
This includes preparing, reviewing, revising and finally approving the final report

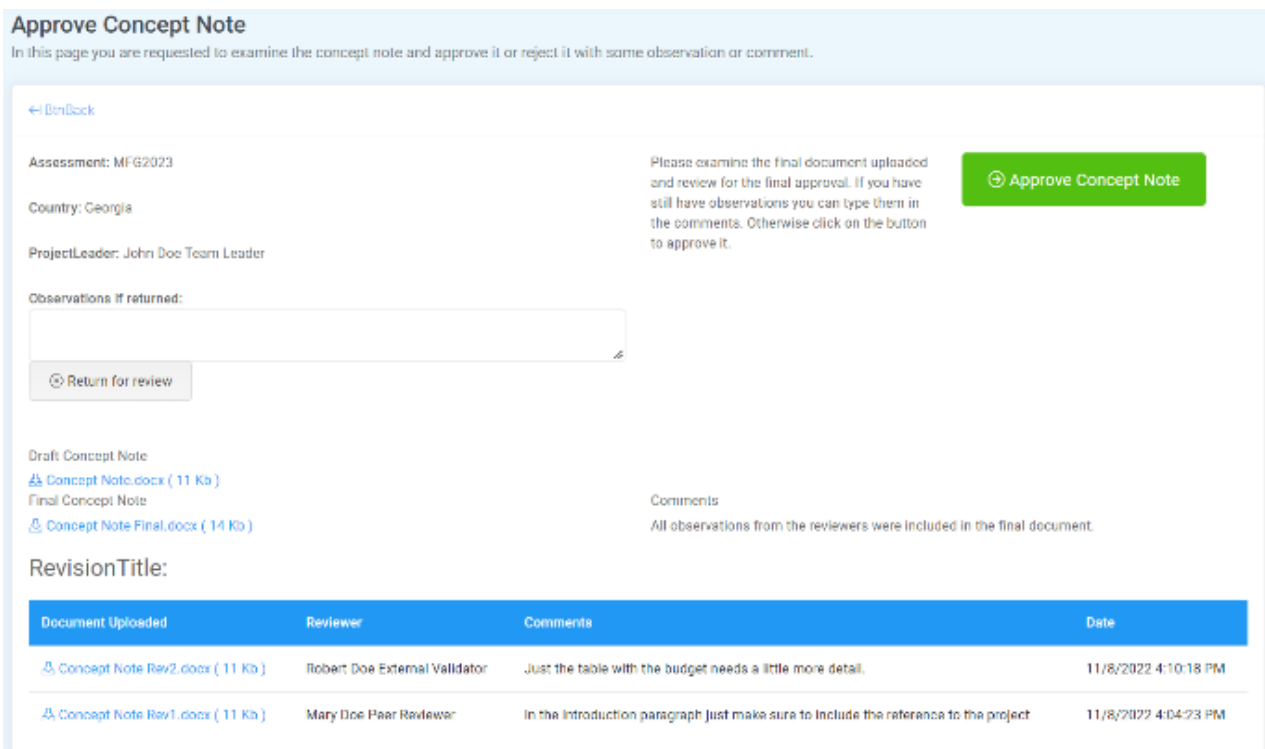
🔔 The concept note has to be approved by Anthony Doe Oversight to start the scoring dimensions phase (Assessment).

Figure 47. Notification to the Designated Approver to Approve the Concept Note

4.4.1. Review All Processes for Approval

In the approval dialog (**Figure 48**), the user can download all the documents related to this CN, for example:

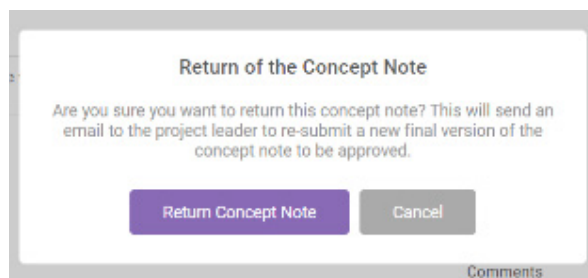
- * The initial draft of the CN, along with the initial comments.
- * The reviews submitted by the Peer Reviewers.
- * The revised version of the CN.
- * The comments/observations for the revised version of the CN.

Figure 48. Approve Concept Note

4.4.2. Return of the Concept Note

The Designated Approver can approve or return the CN. In case of return, the Designated Approver provides comments/explanation about the reasons for the return. Comment/explanation is mandatory. In case of return, the Designated Approver confirms the step by clicking *Return Concept Note* (Figure 49).

Figure 49. Confirmation Dialog



Once returned, the ATL receives a notification with the request to submit a new revised version of the CN (Figure 50). The assessment also goes back to the *Revise Concept Note* step.

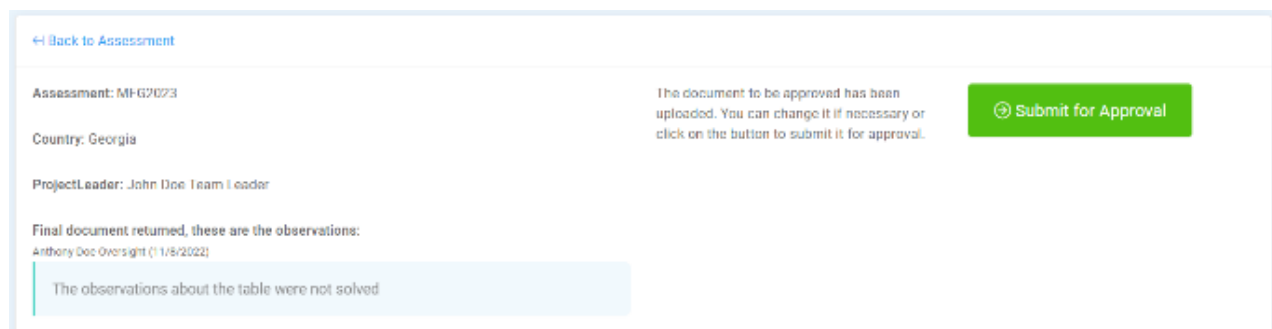
4.4.3. Additional Revision of the Concept Note

The ATL can now submit again a new revised version of the CN. The interface will display the observations submitted by the Designated Approver (Figure 51). After the new revised CN is uploaded, the ATL clicks *Submit for Approval*.

Figure 50. Notification of Returned Concept Note for Revision



Figure 51. Submit for Approval with Observations



4.4.4. Approval of the Concept Note

The Designated Approver can now login to the system and approve the CN (**Figure 52**).

All experts who have been involved in the production of the CN receive a message about the approval (**Figure 53**). Now the system moves the assessment to the next step in the assessment lifecycle.

Figure 52. Confirm Approval of the Concept Note

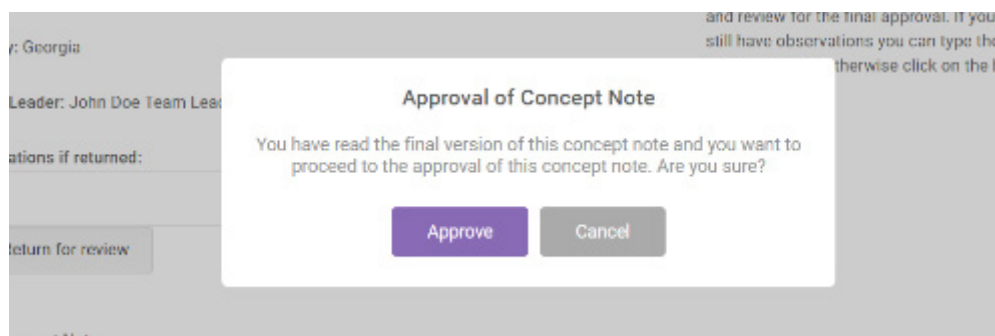
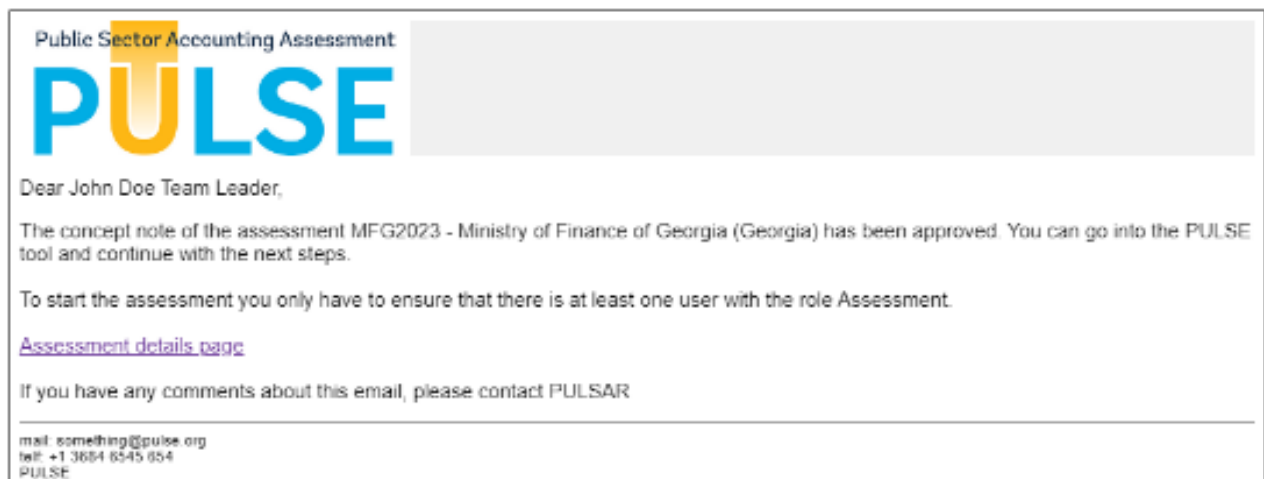


Figure 53. Notification of the Approval of the Concept Note



5

ASSESSMENT – SCORING PHASE

Once the CN is approved, the ATL can proceed to the next steps in the assessment lifecycle.

5.1. Assign Users to the Assessment

To perform the actual assessment, at this stage the system allows the assignment of additional experts (who were not involved earlier with the CN) to the Assessment Team, External Validation Team, and Pulsar Team (**Figure 54**). The ATL should make these assignments now before moving to the next steps.

5.2. Start the Actual Assessment Phase

Once the users have been defined and the CN has been approved, the ATL can start the actual assessment phase.

The phase is started by clicking on the green button **Assessment** (**Figure 55**). All experts assigned to the Assessment role will be notified about their participation.

Figure 54. Assign Users and Roles

User	Project leader	Oversight	External Validation	Peer Reviewer	Assessment	Pulsar Team	Authorized viewer
John Doe Team Leader	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		
Mary Doe Peer Reviewer				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Robert Doe External Validator			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anthony Doe Oversight		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 55. Initiate the Actual Assessment

The screenshot shows a web interface for managing an assessment. At the top, there are navigation links: 'Back to Assessments List', 'Methodology', 'Users', 'QA Steps', 'Document Repository', 'DocumentShare', and 'Auditlog'. The main content area is divided into several sections:

- Assessment:** MFG2023. Description: 'The Pulcar assessment for the MoF of Georgia. This is a 6-month effort as part of the collaboration with the client.'
- Institution:** MFG (Ministry of Finance of Georgia)
- Country:** Georgia
- Project Leader:** John Doe Team Leader
- Status:** ConceptNoteShare (11/8/2022)
- Concept Note:** Draft/Final. Approved by John Doe Team Leader on 11/8/2022 4:32:47 PM
- Assessment Score:** Not yet started
- Report:**
- Date Started:** 11/8/2022
- Elapsed Time:** 12h 51m (Calculated since first start of the assessment)

On the right side, there is a section for 'Assessment Team Leader only' with instructions: 'At least one user is defined for the Assessment Team and concept note has been approved. Please click on button to start assessment.' Below this is a large green 'Assessment' button. At the bottom right, there is a 'Pulse Check Disabled' warning: 'This can be enabled after assessment revision only if assessment is completed.'

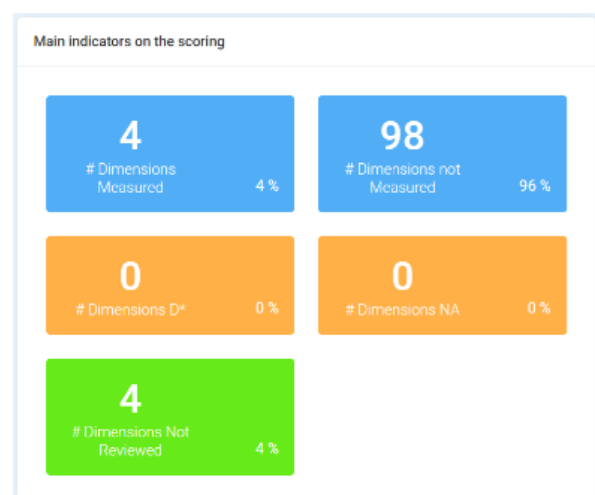
5.3. Follow up the Scoring Dimensions Phase

The Dashboard presents a follow-up window with the number of dimensions scored by the Assessment Team experts (**Figure 56**).

Figure 56. Number of Dimensions Scored by Expert

Follow up on the assessment		
User	Role	# Dimensions Scored
Anthony Doe Oversight	Assessment	0
John Doe Team Leader	ProjectLeader	2
Mary Doe Peer Reviewer	Assessment	2

The system also displays a small visualization with the status of the assessment, including the number and percent of dimensions scored (**Figure 57**).

Figure 57. Dimensions Scoring Overall

5.4. Score Dimensions

The scoring of dimensions is a key feature of the PULSE Tool. Assessment Team members can score the dimensions easily from the Dashboard, as depicted in **Figure 58**. Click on *Score Dimensions* to initiate the process.

During the scoring process, a small display appears that provides a snapshot of the assessment process (**Figure 59**).

In addition, a list of all the dimensions / indicators of the methodology appears in its logical structure (**Figure 60**). The displays show the current scoring for all the dimensions / indicators.

* “NE” means that the dimension is currently Not Evaluated.

* “NA” means a score for this dimension is Not Applicable.

Not Applicable means that in certain cases, an indicator or dimension may not be applicable to the reporting entity being assessed. This situation might arise, for example, if certain laws and regulations prohibit a reporting entity from being in possession of certain assets or liabilities. Note that if the assessment team uses the “NA” option, a clear and rigorous disclosure is required about the reason(s). For more detail about the NA option, please see the Handbook, page 24.

Figure 58. Initiate the Scoring Process

The screenshot shows the PULSE tool interface for assessment MFG2023. The top navigation bar includes links for Back to Assessment's List, Methodology, Users, QA Steps, Document Repository, DocumentShare, and Auditlog. The main content area displays assessment details: Institution (MFG, Ministry of Finance of Georgia), Country (Georgia), Project Leader (John Doe Team Leader), and Status (Assessment, 11/8/2022). It also shows Concept Note status (Draft/Final), Assessment Score (Conceptual: NE, Actual: NE), Report, Date Started (11/8/2022), and Elapsed Time (12h 56m). A prominent blue button labeled 'Score Dimensions' is visible. A note for Assessment Team Leaders states that the assessment needs to be completed for review. A 'Pulse Check Disabled' warning is also present.

Figure 59. Scoring Snapshot

The screenshot shows the 'PULSE Scoring' dashboard. It features a navigation bar with 'Back to Assessment Dashboard' and 'Version 1.1'. The main area displays four scoring metrics in colored boxes: 0 Dimensions Measured (0%), 0 Dimensions NA (0%), 6 Dimensions not Measured (100%), and 0 Dimensions D* (0%). To the right, there are two 'NE' (Not Evaluated) buttons for 'Conceptual Score' and 'Actual Implementation Score'.

Figure 60. Structure of the Methodology

Pillars	Indicators	Dimensions	
	PI-1. Conceptual Framework NE	1.1. Qualitative Characteristics 8 Not Measured	NE
		1.2. Reporting Entity II Not Measured	NE
		1.3. Elements of financial statements 8 Not Measured	NE
	PI-2. Accounting policies, estimations, errors and events after the reporting date NE	2.1. Accounting policies 4 Not Measured	NE
		2.2. Estimations 6 Not Measured	NE
		2.3. Errors II Not Measured	NE
		2.4. Reporting of events after reporting date II Measured	B
I. PSA Framework NE			

To score a dimension, click on the corresponding link. After clicking, the three parts of a dimension open in a new page. The first part (**Figure 61**) is the dimension header (in this case, "2.1 Accounting Policies").

To view the complete description of the dimension, click on the plus sign at right. The system displays all the information regarding that dimension.

The second part of each dimension concerns scoring. For each possible value of a score (A, B, C, etc.) the

methodology has already defined the way a score should be given. The scoring guidelines are already loaded in the system and can be viewed next to the score. Select the appropriate score by clicking on the value (**Figure 62**).

Underneath the scores is an open box into which users should record the observations that support the score.

Figure 61. Description of the Dimension

2.1. Accounting policies	
Indicator: PI-2. Accounting policies, estimations, errors and events after the reporting date	
Description:	
Dimension 2.1 assesses how the accounting policies are determined and applied both on a conceptual and actual level.	

Figure 62. Scoring Display with Scoring Guidelines

Score

Conceptual

A Accounting policies are determined by the respective IPSAS and by applying a specific hierarchy of references. Changes in accounting policies are applied retrospectively, unless impracticable, and only made, when required by an IPSAS or in order to improve relevance and faithful representation

B Accounting policies are determined by the respective IPSAS and by applying a specific hierarchy of references. Changes in accounting policies are only made when required by an IPSAS or in order to improve relevance and faithful representation.

C Accounting policies are determined by the respective IPSAS, but there is no hierarchy defined in the absence of a specific IPSAS.

D Performance is less than required for a C score.

D* Insufficient Information

NA Not Applicable

Observation

There is enough evidence and processes are in place

Save CancelAndScoreAssessment

Figure 63. Upload Support Documents

Supporting Evidence

Documents Hyperlink

Add document from repository

Add Document

Add document from device or desktop

Select files...

Upload

Documents

- Support for the policies.pdf (187 Kb)
 - This document explains where all policies come from.

In the third part of a dimension, Assessment Team members should upload or refer to specific documents that support the observations and justify the score which was given (**Figure 63**). The system allows the addition of documents from the Document Repository or the upload of documents from a local device or desktop.

When selecting a document from the Document Repository, users will see only the categories that have at least one document. When a category is selected, it will display the list of all documents previously

uploaded under this particular category. Click on the corresponding plus sign button to select the specific document to be referenced (**Figure 64**).

Figure 64. Upload Document Dialog

Add document from repository

Select Category

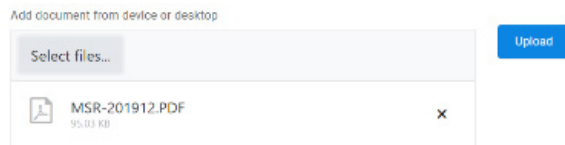
Any laws and bylaws relating to budget and/or a...

+ Policies Budget.pdf (7 Mb)

Close

It is also possible to upload a completely new document from a local device, e.g., user's laptop. This document will only be associated with the dimension, and will not be placed in the Repository. Select the document in the dialog and click on **Upload** (Figure 65).

Figure 65. Upload Document Dialog



After selecting or uploading a document Assessment Team members should state the reference inside the document that supports the score given (Figure 66). **Please be as specific as possible.** Cite page numbers, paragraph numbers, section numbers,

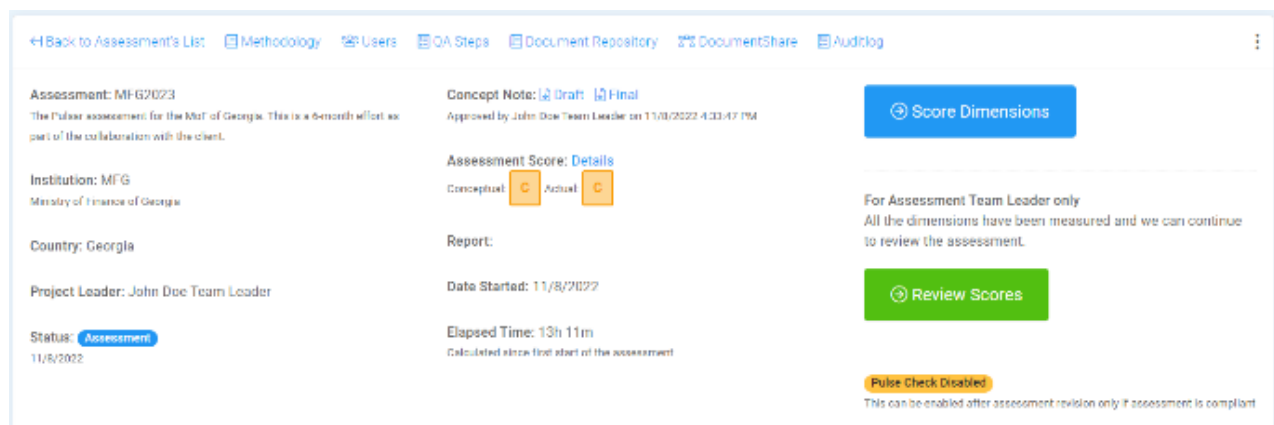
Figure 66. Uploaded Documents with References



Figure 67. Score of a Dimension



Figure 68. Scores Displayed on the Dashboard



etc. This technique will save a lot of time for External Validators later during the assessment data validation process.

5.5. Automatic Score Updates

The higher-level scores (indicator, pillar) that depend on the scoring of a dimension are automatically updated each time the score of a dimension is added or changed. In Figure 67 example the indicator (at left), having only one dimension (at right), gets its score calculated.

The automatic update feature calculates up to the pillar level and can be viewed on the Dashboard (Figure 68).

6

ASSESSMENT – VALIDATING SCORES

6.1. Submit Scores for Validation

Once the Assessment Team members have completed scoring ALL dimensions, the ATL can submit the assessment scores for validation via **Submit**

Assessment for Validation as seen in **Figure 69**. This action can also be performed from the Dashboard.

The system sends an email notification (**Figure 70**) to all External Validators to begin the validation process. The External Validators can start the validation process immediately via the link in the message.

Figure 69. Submitting Scores for Validation

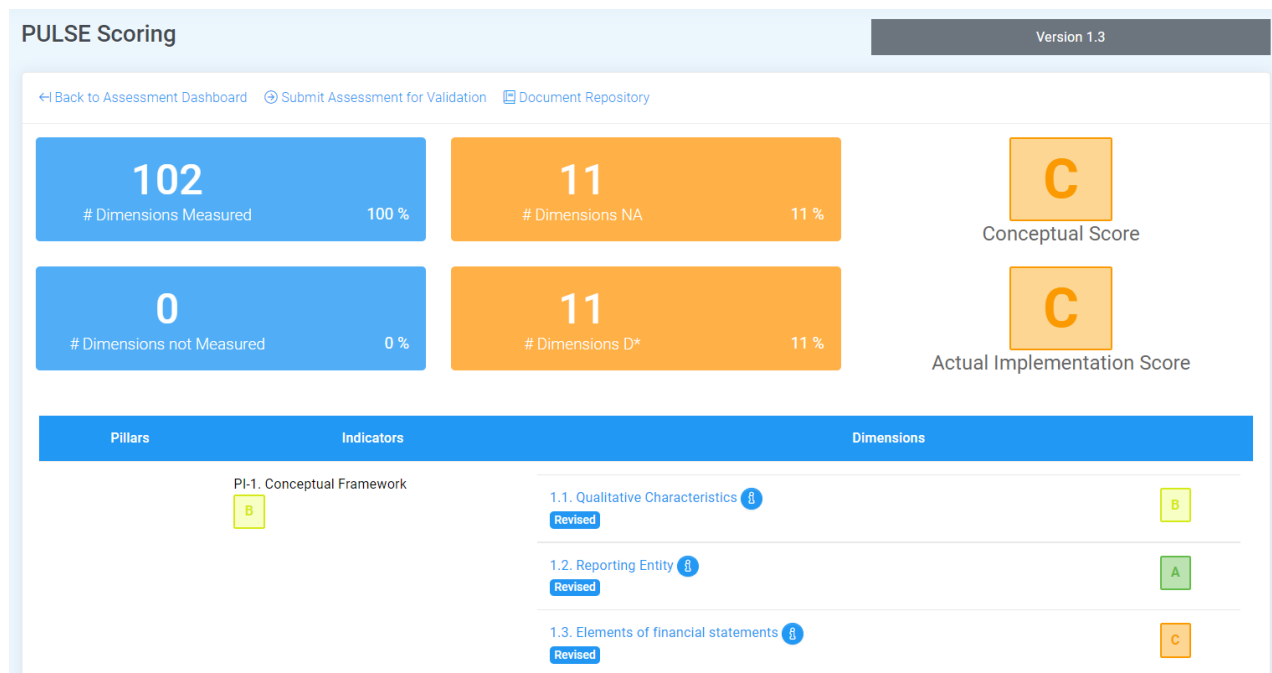
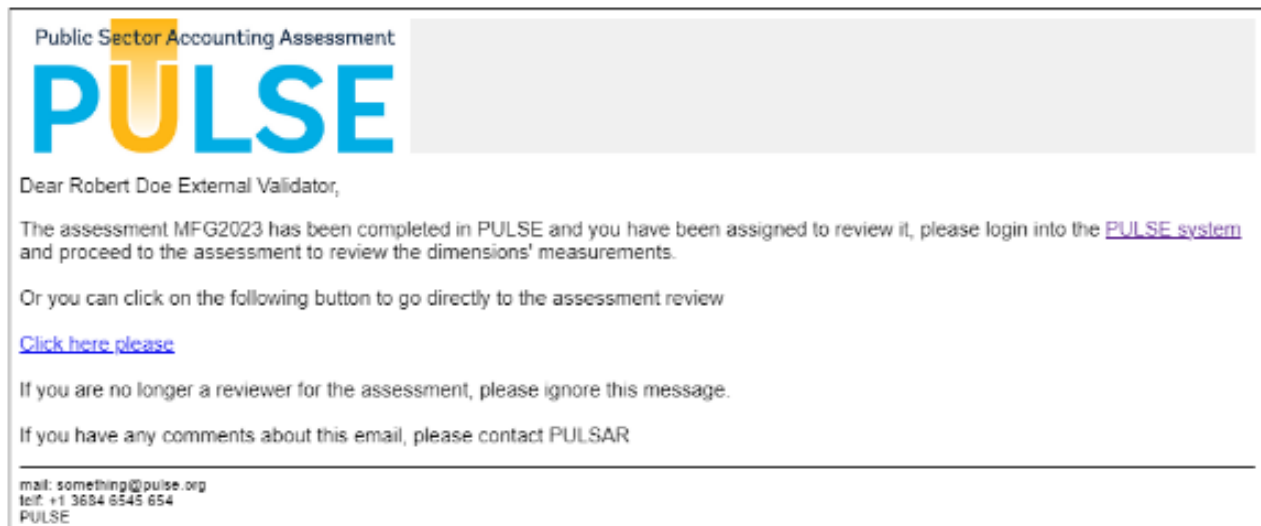


Figure 70. Notification to External Validators

6.2. Manage the Validation Process

The ATL can view the status of the External Validators' work at any point after the assessment phase is initiated. The status is viewed via a window in the Dashboard (**Figure 71**). This window is only available to the ATL.

Figure 71. View the Status of the Validation

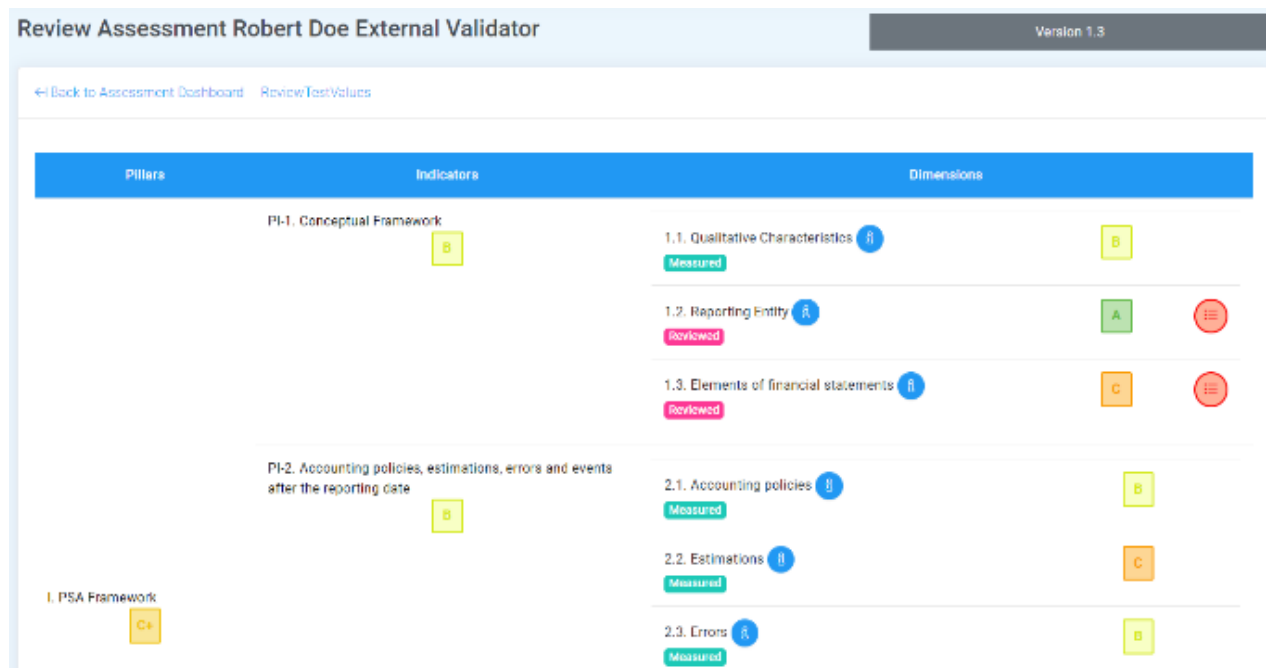
Current review status of the assessment

Rem.	Finish	Reviewer	Status	Start	Finished
		Robert Doe External Validator	ASSIGNED	-	-

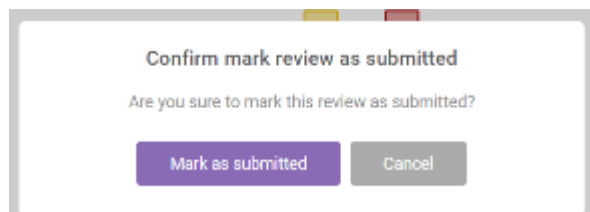
[List of dimensions that have NOT been reviewed yet.](#)

At the bottom of this display, the link *List of dimensions that have NOT been reviewed yet* opens a useful interface (note: not depicted). It is important to note that a dimension can be validated more than once because each validator can have different observations for the same dimension. By clicking on the name of the validator the system displays the list of dimensions and their status (**Figure 72**).

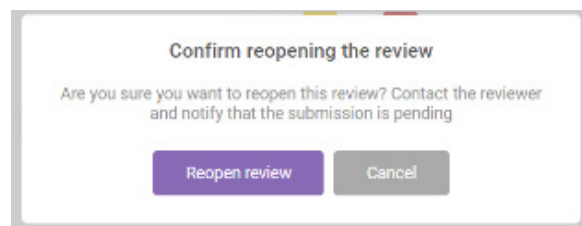
A validator may review all dimensions or just specific ones to which s/he was assigned. But between all validators the dimensions must all be reviewed to proceed to the next step. The External Validators may discuss and agree on who validates which dimensions depending on their professional expertise/ background. Each dimension should be validated by at least one validator, but some dimensions could be validated by more than one validator.

Figure 72. External Validation Overview Display

From the same follow-up window, the ATL can end the validation task by submitting the review (**Figure 73**).

Figure 73. Confirm Submission of Validation

If an External Validator has submitted the results of his/her validation and omitted some dimensions that s/he was expected to perform, the ATL can click on the button to reopen the review process for that specific validator (**Figure 74**).

Figure 74. Reopen the Validation Process Dialog

6.3. Validate Scores

When the External Validator opens the Dashboard the button *Validate Scores* appears (**Figure 75**).

The list will show all the dimensions and their status in a small label below the dimension name (**Figure 76**).

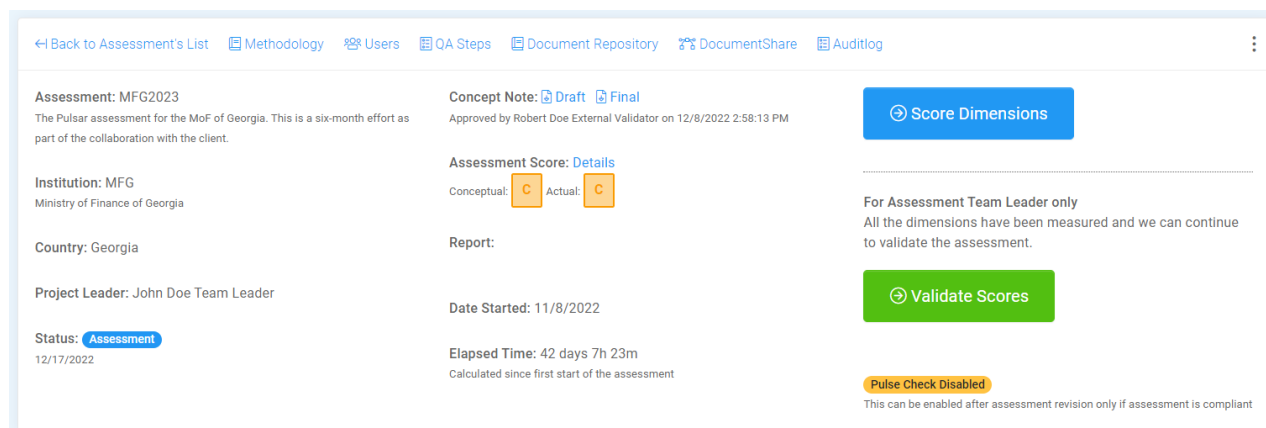
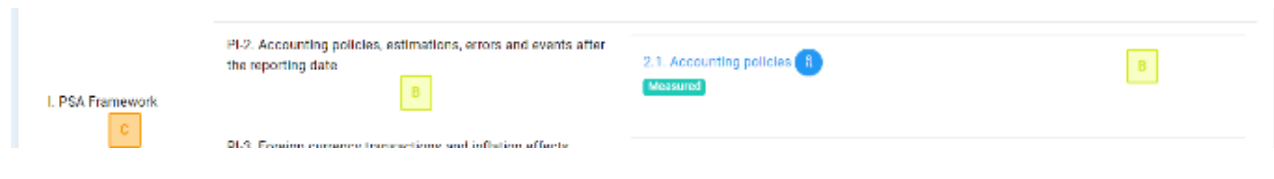
Figure 75. Dashboard with Validate Scores Button

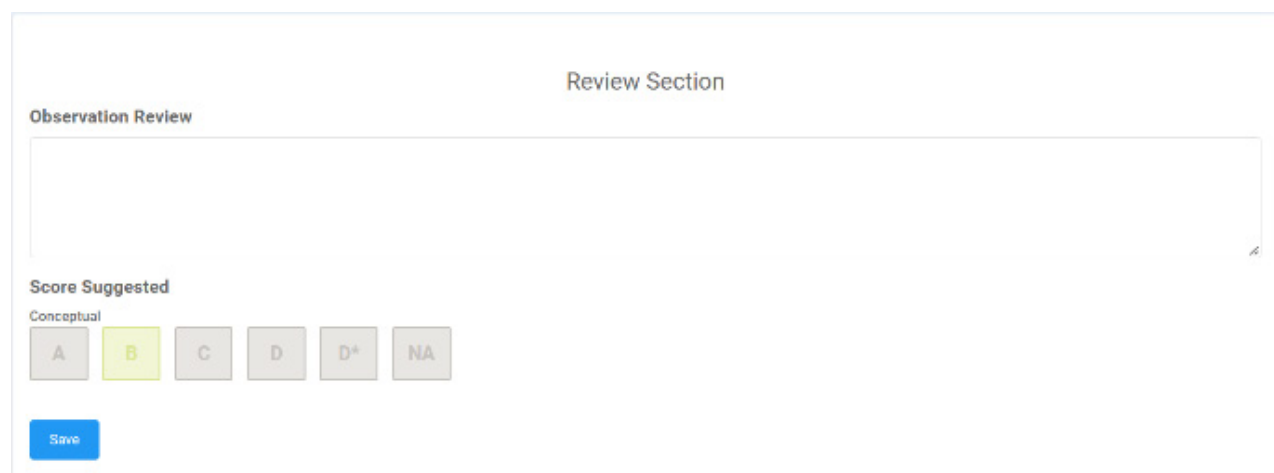
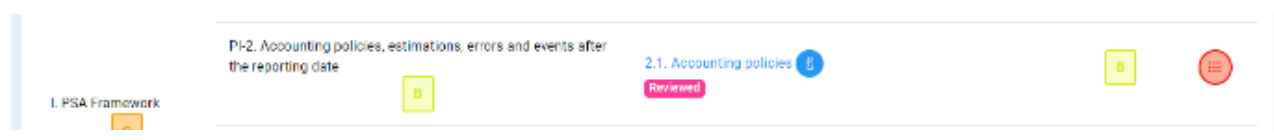
Figure 76. Dimension Showing the Measured Label

- * **Measured:** The dimension has been scored but not yet validated.
- * **Validated:** The dimension has been validated by the External Validator.
- * **Revised:** The dimension has been revised by an Assessment Team member.

In the example, there is a small green label “Measured” which indicates that the dimension has not yet been validated.

By clicking on the name of the dimension, the user will be able to review the dimension scoring. For that, the system will present the same scoring page but also open a window on the bottom for the validator to be able to submit the validation comments and/or suggest new scoring (**Figure 77**). The validator can click on the button to scroll down to the review section.

Once the validation review is finished, the validator clicks on the **Save** button. After that, the list of dimensions is automatically updated, and the dimension is labeled with the **Validated** label (**Figure 78**).

Figure 77. Review Section with Observations Box**Figure 78.** Dimension Showing the Red Validated Label

6.4. Submit Validation

When the validator has finished reviewing all the dimensions that s/he can review, the validator clicks on **Submit Validation** (Figure 79). The system will ask for confirmation of this action. If for some reason the validator needs to review other dimensions after this confirmation, s/he can ask the ATL to restore the review status of the assessment for that specific validator.

6.5. Multiple Reviews of the Same Dimension

It is possible for two or more validators to review the same dimension. Each one of them may have different observations and/or comments on the scoring. Every validator can login to the system and see the status of his/her review without seeing the status of the other reviewers.

Only the ATL can see all the validations. Every validator's comment and suggested score appears in different tabs in the revision interface.

Figure 79. Submit Validation Display

The screenshot shows the 'Review Assessment' interface. At the top, there is a header with 'Review Assessment' on the left and 'Version 1.3' on the right. Below the header, there are navigation links: '← Back to Assessment Dashboard' and 'Submit Review'. The main content area is a table with three columns: 'Pillars', 'Indicators', and 'Dimensions'. The table contains the following data:

Pillars	Indicators	Dimensions
	PI-1. Conceptual Framework	
		1.1. Qualitative Characteristics B
		Measured
		1.2. Reporting Entity B
		Reviewed
		1.3. Elements of financial statements B
		Reviewed

The scores for the dimensions are: 1.1. Qualitative Characteristics (B), 1.2. Reporting Entity (B), and 1.3. Elements of financial statements (B). The review status for 1.2 and 1.3 is 'Reviewed'.

7

ASSESSMENT – REVISING SCORES

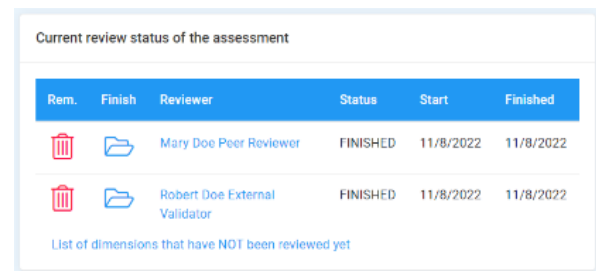
It is only possible to move to the next step if all the dimensions have been reviewed at least once. The ATL can see if there are dimensions that are still to be validated from the status display by clicking on the link at bottom, *List of dimensions that have NOT been reviewed yet* (Figure 80).

A small window opens to display the result (Figure 81).

If all dimensions have been validated, the ATL can proceed to the next step by clicking the green *Revise Scores* button on the Dashboard (Figure 82).

Now the assessment is in the Revise Assessment step. The ATL and Assessment Team members may revise all the observations made to all the dimensions.

Figure 80. Status Display

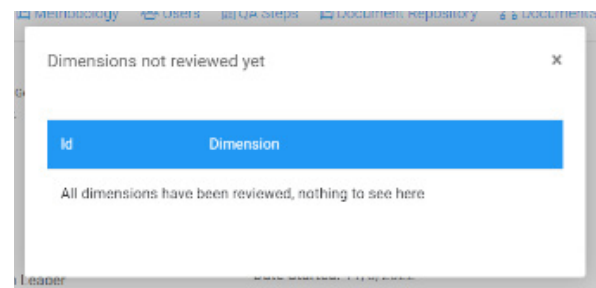


Current review status of the assessment

Rem.	Finish	Reviewer	Status	Start	Finished
		Mary Doe Peer Reviewer	FINISHED	11/8/2022	11/8/2022
		Robert Doe External Validator	FINISHED	11/8/2022	11/8/2022

[List of dimensions that have NOT been reviewed yet](#)

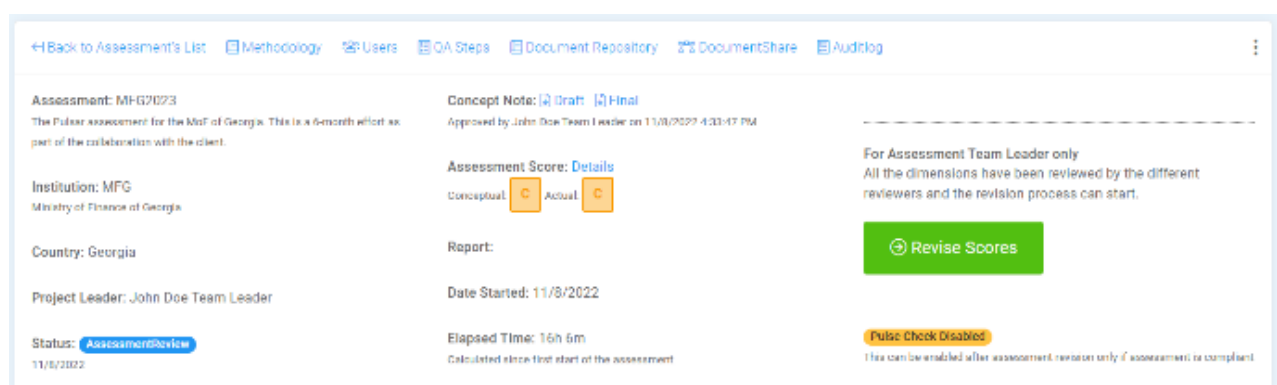
Figure 81. Results Display



Dimensions not reviewed yet

Id	Dimension
All dimensions have been reviewed, nothing to see here	

Figure 82. Dashboard with Revise Scores Button



← Back to Assessment's List | Methodology | Users | QA Steps | Document Repository | DocumentShare | Auditlog

Assessment: MFG/023
The Pulse assessment for the MoF of Georgia. This is a 6-month effort as part of the collaboration with the client.

Institution: MFG
Ministry of Finance of Georgia

Country: Georgia

Project Leader: John Doe Team Leader

Status: Assessment Review
11/8/2022

Concept Note: Draft Final
Approved by: John Doe Team Leader on 11/08/2022 4:00:47 PM

Assessment Score: [Details](#)
Conceptual: C Actual: C

Report:

Date Started: 11/8/2022

Elapsed Time: 16h 6m
Calculated since first start of the assessment

For Assessment Team Leader only
All the dimensions have been reviewed by the different reviewers and the revision process can start.

[Revise Scores](#)

Pulse Check Disabled
This can be enabled after assessment revision only if assessment is compliant

7.1. Revise Dimensions

In the assessment Dashboard the ATL can click on the blue **Revise Scores** button to start the revision (Figure 83).

This action will display the list of dimensions (Figure 84), similar to the scoring and validation processes. Besides each dimension the Assessment Team member and ATL can view the labels Validated / Revised to check the status of each dimension.

Assessment Team members and the ATL may click on each dimension to move to the revisions page.

Figure 83. Dashboard with Blue Revise Scores Button

The screenshot shows a dashboard for an assessment titled 'MFG2023'. It includes navigation links at the top: 'Back to Assessment's List', 'Methodology', 'Users', 'QA Steps', 'EnablePulseCheck', 'Document Repository', 'DocumentShare', and 'Auditlog'. The main content area displays assessment details: 'Assessment: MFG2023' with a description, 'Institution: MFG' (Ministry of Finance of Georgia), 'Country: Georgia', 'Project Leader: John Doe Team Leader', and 'Status: Assessment/Revise' (11/8/2022). It also shows 'Concept Note' (Draft/Final), 'Assessment Score: Details' (Conceptual: C, Actual: C), 'Report:', 'Date Started: 11/8/2022', and 'Elapsed Time: 16h 7m'. A prominent blue 'Revise Scores' button is visible. A note for Assessment Team Leaders states: 'Please proceed to revise the dimensions that have been reviewed. Once all dimensions are revised, you will be able to click to the next step.' A 'Pulse Check Disabled' warning is also present.

Figure 84. List of Dimensions with Status Labels

The screenshot shows the 'Revise Assessment' page for 'Version 1.3'. It features a table with columns for 'Pillars', 'Indicators', and 'Dimensions'. The 'Pillars' column lists 'PI-1. Conceptual Framework', 'PI-2. Accounting policies, estimations, errors and events after the reporting date', and 'I. PSA Framework'. The 'Indicators' column shows status labels 'B', 'B', and 'C+'. The 'Dimensions' column lists specific items with their own status labels and 'Reviewed' buttons: '1.1. Qualitative Characteristics' (B, Reviewed), '1.2. Reporting Entity' (A, Reviewed), '1.3. Elements of financial statements' (C, Reviewed), '2.1. Accounting policies' (B, Reviewed), '2.2. Estimations' (C, Reviewed), and '2.3. Errors' (B, Reviewed).

The link in the header section Scroll to Review Info (**Figure 85**) allows the user to scroll down to the review section (**Figure 86**) to view the actual information to be revised. Note that the review section has tabs – each tab represents the name of the reviewer that reviewed this particular dimension.

If there are any changes to the dimension scoring, the information can be changed just like when the user assessed the dimension the first time.

7.2. Enable Pulse Check

After the revision, the system will show the option to enable the PULSE Check for an assessment. The PULSE Check is very strongly recommended.

The main objective of the PULSE Check consists of ensuring that: (i) the PULSE methodology has been applied correctly; (ii) general scoring is evidenced; (iii) the current overall IPSAS adoption status and financial reporting basis are properly documented; (iv) the report structure and content follow the PULSE Handbook; and (v) the proposed recommendations and action plan are reasonable and feasible for implementation.

Figure 85. Revise a Dimension Display

The screenshot shows a web interface titled "Revise Dimension". At the top, there are two links: "← Back to Assessment Revise" and "↓ Scroll to Review Info". The main heading is "1.2. Reporting Entity". Below this, there is a section for "Indicator: PI-1. Conceptual Framework". Underneath, the "Description:" field contains the text: "Dimension 1.2 assesses whether the regulatory framework states that the reports are used for accountability and decision-making purposes and the entity is raising resources as well as undertaking activities." A green plus icon is visible at the end of the description text.

Figure 86. Review Section with Tabs for Each Reviewer

The screenshot shows a web interface titled "Review Section". At the top, there are two tabs: "Mary Doe Peer Reviewer" (which is active) and "Robert Doe External Validator". Below the tabs, there are three main sections: "Observation Review" with a text input field containing "A small description to fix in the scoring"; "Score Suggested" with a text input field; and "Conceptual" with a dropdown menu showing the letter "A".

Every assessment can comply with the PULSE Check or not. If the assessment complies with the conditions established in the Handbook, the system will enable the PULSE Check from a button on the Dashboard.

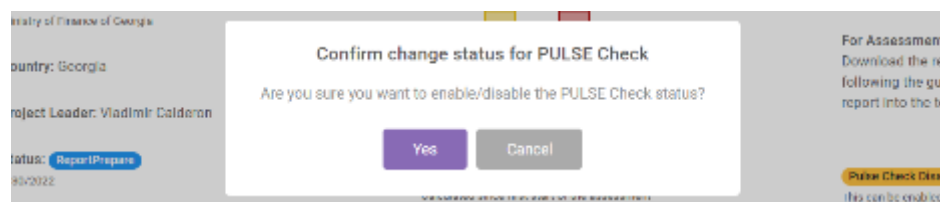
In **Figure 87** the button is visible. This is a toggle button that changes from *DisablePulseCheck* to *EnablePulseCheck* and vice versa.

The system will always ask for confirmation of this action (**Figure 88**).

Figure 87. Dashboard with PulseCheck Option



Figure 88. Confirmation of PulseCheck



8

ASSESSMENT – REPORTING PHASE

8.1. Prepare Draft Report

The ATL now has the possibility to prepare the draft version of the PULSE report. Note that this is only possible when all the dimensions have been revised. The ATL clicks the green **Prepare Draft Report** button to initiate the process (**Figure 89**).

The ATL can now upload a draft report document in a dedicated page (which has the same interface as the preparation and upload of the draft CN). A new Dashboard opens (**Figure 90**).

Figure 89. Dashboard with Prepare Draft Report Button

The dashboard for Figure 89 displays the following information:

- Ministry of Finance of Georgia**
- Country:** Georgia
- Project Leader:** Vladimir Calderon
- Status:** Assessment/Review (5/20/2022)
- Conceptual:** C+ (Actual: D)
- Report:**
- Date Started:** 5/27/2022
- Elapsed Time:** 2 days 22h 52m (Calculated since first start of the assessment)
- Action:** Prepare Draft Report (Green button)
- Note:** For Assessment Team Leader only. The assessment team leader has finished revising all observations made by the reviewers on the assessment. You can proceed to prepare the assessment Report.
- Alert:** Pulse Check Disabled

Figure 90. Dashboard with Review Report Button

The dashboard for Figure 90 displays the following information:

- Assessment:** MHG2023 (The Pulse assessment for the MoF of Georgia. This is a 6-month effort as part of the collaboration with the client.)
- Institution:** MFG (Ministry of Finance of Georgia)
- Country:** Georgia
- Project Leader:** John Doe Team Leader
- Status:** Report/Prepare (11/01/2022)
- Concept Note:** Draft (Final)
- Approved by:** John Doe Team Leader on 11/01/2022 4:33:47 PM
- Assessment Score:** Details
- Conceptual:** C (Actual: C)
- Report:** Draft
- Date Started:** 11/8/2022
- Elapsed Time:** 16h 15m (Calculated since first start of the assessment)
- Action:** Prepare Draft Report (Blue button)
- Action:** Review Report (Green button)
- Note:** For Assessment Team Leader only. The assessment has at least one report in draft mode, the review process can start. The assessment team leader can confirm to go to the next step.
- Alert:** Pulse Check Disabled (This can be enabled after assessment revision only if assessment is compliant)

Similarly to the CN preparation phase, the user can also download a report template to get an idea of the minimum content requirements of the PULSE report (**Figure 91**). To use this feature, click on *Download Report Template*.

Once the draft report has been uploaded, to continue with the process, the ATL submits the report to External Validators for review. External Validators are automatically notified to review the document. The ATL can follow up on this process from the status display (**Figure 92**).

8.2. Review the Draft Final Report

The reviewers are notified by email of the review task (**Figure 93**).

External Validators now start the review process, which consists of uploading a reviewed file and/or entering the general observations / comments (as was the case earlier with the CN). The Assessment Team members and ATL will receive a notification as soon as the review has been uploaded so that they can start working on the revised version of the report.

Figure 91. Download Report Template Link

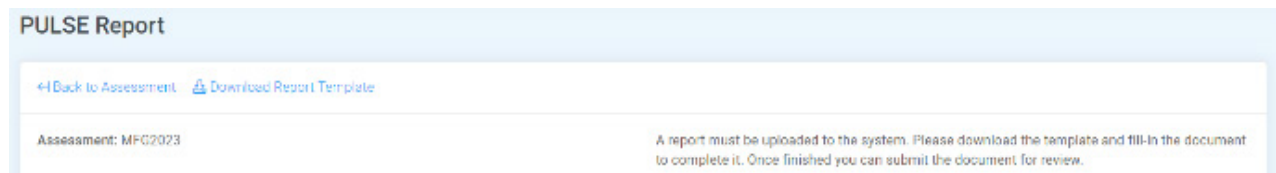
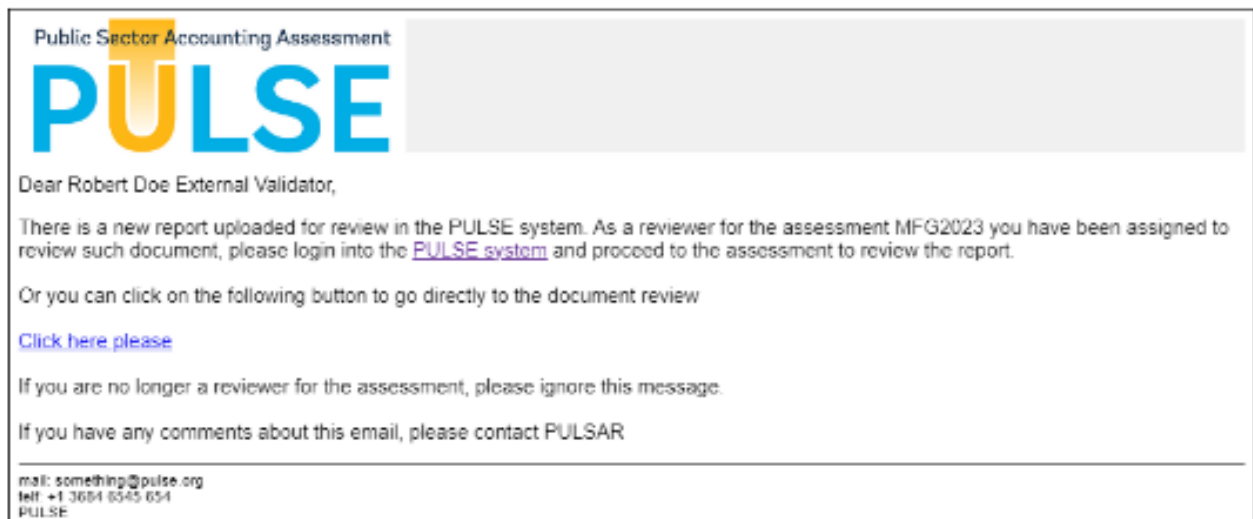


Figure 92. Status Display

Current review status of the report					
Rem.	Finish	Download	Reviewer	Date	Status
	🔍		Robert Doe External Validator	11/8/2022 8:59:53 PM	ASSIGNED

Figure 93. Notification to External Validators



When the External Validators have completed their reviews and uploaded necessary documentation and comments, the validators now proceed with the submission by clicking the **Submit your Review** button (Figure 94).

8.3. PULSE Report - Revision

The ATL and Assessment Team members should now start with the revision of the report. To do that, just

like in the CN, the user will start the revision process, upload a revised report, and submit it to Oversight Team for approval (Figure 95).

This will change the status of the assessment and will inform the Oversight Team which is responsible to approve the final version (Figure 96).

Please note that the approval process for assessments that are NOT Pulse Check is being described. Later in this document the process for PULSE Check will be described.

Figure 94. Submit a Review Display

Review Assessment Report

← Back to Assessment | Download template

Assessment: MFG2023 | You have already uploaded a reviewed report. Please submit your review. **Submit your Review**

Country: Georgia

Project Leader: John Doe Team Leader

Current Report: [Report \(1\).docx](#)

Comments: The version 1 of the draft report including the observations from the meeting on October 10th.

File Name	Date Uploaded	Main Comments (Optional)	Status
Report (1) - Rev.docx (5 Kb)	11/8/2022	Check mainly the comments on the final observations in the report.	STARTED

Figure 95. Submit for Approval Display

← Back to Assessment

Assessment: MFG2023 | The document to be approved has been uploaded. You can change it if necessary or click on the button to submit it for approval. **Submit for Approval**

Country: Georgia

Figure 96. Dashboard with Awaiting Approval Message

← Back to Assessment's List | Methodology | Users | QA Steps | Document Repository | Document Share | Auditlog

Assessment: MFG2023 | The Pulse assessment for the MoF of Georgia. This is a 6-month effort as part of the collaboration with the client.

Institution: MFG | Ministry of Finance of Georgia

Country: Georgia

Project Leader: John Doe Team Leader

Status: [Report Share](#) | 11/8/2022

Concept Note: [Draft](#) | [Final](#) | Approved by John Doe Team Leader on 11/8/2022 4:33:47 PM

Assessment Score: [Details](#) | Conceptual: C | Actual: C

Report: [Draft](#) | [Final](#) | **Waiting approval by Anthony Doe Oversight**

Date Started: 11/8/2022

Elapsed Time: 16h 21m | Calculated since first start of the assessment

For Assessment Team Leader only | The final report has to be approved before the assessment can be finalized.

Pulse Check Disabled | This can be enabled after assessment revision only if assessment is compliant

8.4. Approve Final Report

The Designated Approver views the Dashboard which now displays a button to start the approval process (**Figure 97**).

The system will provide the Designated Approver from the Oversight Team with all the information to be able to perform the approval. This includes the draft report, all the reviews, and the final version of the PULSE Report.

After the Oversight Team conducts its review process and is satisfied with the quality of the final PULSE report, the Designated Approver clicks the green **Approve Report** button. The ATL will receive a notification of this approval and can then proceed to the next step (**Figure 98**).

The next step is the final step and it is only available when the PULSE Report has been approved. The ATL can now close the assessment when ready (**Figure 99**).

Figure 97. Dashboard with Approve Report Button

The screenshot shows a dashboard for assessment MFG2023. The top navigation bar includes links for 'Back to Assessment's List', 'Methodology', 'Users', 'QA Steps', 'Document Repository', and 'DocumentShare'. The main content area is divided into several sections:

- Assessment: MFG2023**: The PULSAR assessment for the MoF of Georgia. This is a 6-month effort as part of the collaboration with the client.
- Institution: MFG**: Ministry of Finance of Georgia.
- Country: Georgia**
- Project Leader: John Doe Team Leader**
- Status: ReportsShare** (11/8/2022)
- Concept Note: Draft Final**: Approved by John Doe Team Leader on 11/8/2022 4:23:47 PM
- Assessment Score: Details**: Conceptual C, Actual C
- Report: Draft Final**: Waiting approval by Anthony Doe Oversight
- Date Started: 11/8/2022**
- Elapsed Time: 16h 23m**: Calculated since first start of the assessment
- Approve Report**: A prominent blue button with a checkmark icon.
- For Assessment Team Leader only**: The final report has to be approved before the assessment can be finalized.
- Pulse Check Disabled**: This can be enabled after assessment, revision only if assessment is compliant.

Figure 98. Notification of Approval

The screenshot shows an email notification from the Public Sector Accounting Assessment (PULSE). The header includes the PULSE logo and the text 'Public Sector Accounting Assessment'. The body of the email reads:

Dear Anthony Doe Oversight,

The report of the assessment MFG2023 - Ministry of Finance of Georgia (Georgia) has been approved. You can go into the PULSE tool and continue with the final step and finalize the assessment.

[Assessment details page](#)

If you have any comments about this email, please contact PULSAR

mail: something@pulse.org
tel: +1 3684 6545 654
PULSE

Figure 99. Dashboard with Final Closure Button

← Back to Assessment's List | Methodology | Users | QA Steps | Document Repository | DocumentShare | Auditlog

Assessment: MFG2023
The PULSAR assessment for the MoF of Georgia. This is a 6 month effort as part of the collaboration with the client.

Institution: MFG
Ministry of Finance of Georgia

Country: Georgia

Project Leader: John Doe Team Leader

Status: ReportShare
11/8/2022

Concept Note: Draft Final
Approved by John Doe Team Leader on 11/8/2022 4:38:47 PM

Assessment Score: Details
Conceptual **C** Actual **C**

Report: Draft Final
Approved by Anthony Doe Oversight on 11/8/2022 9:10:48 PM

Date Started: 11/8/2022

Elapsed Time: 16h 28m
Calculated since first start of the assessment

For Assessment Team Leader only
The concept note has been approved, the assessment has been conducted and reviewed, and finally the report has been reviewed, revised and approved. The assessment can finalize now.

Finish and Close Assessment

Pulse Check Disabled
This can be enabled after assessment revision only if assessment is compliant

Figure 100. Final Dashboard Summary

PULSE Dashboard for Assessment MFG2023

In this page you can view a detailed summary of the status of an assessment. Please use this page to interact with the assessment and continue with every step.

- 1 Concept Note**
This includes preparing, reviewing, revising and finally approving the concept note.
- 2 Assessment**
This includes scoring all the dimensions, reviewing and entering these scores.
- 3 Final Report**
This includes preparing, reviewing, revising and finally approving the final report.

🔗 This assessment has been finished. The whole process complies with the PULSAR methodology.

← Back to Assessment's List | Methodology | Users | QA Steps | Document Repository | DocumentShare | Auditlog

Assessment: MFG2023
The PULSAR assessment for the MoF of Georgia. This is a 6-month effort as part of the collaboration with the client.

Institution: MFG
Ministry of Finance of Georgia

Country: Georgia

Project Leader: John Doe Team Leader

Status: Finished
11/8/2022

Concept Note: Draft Final
Approved by John Doe Team Leader on 11/8/2022 4:38:47 PM

Assessment Score: Details
Conceptual **C** Actual **C**

Report: Draft Final
Approved by Anthony Doe Oversight on 11/8/2022 9:10:48 PM

Date Started: 11/8/2022

Elapsed Time: 16h 29m
Calculated since first start of the assessment

For Assessment Team Leader only
The assessment has been finished, nothing to do here.

Pulse Check Disabled
This can be enabled after assessment revision only if assessment is compliant

Once clicked, the assessment is finished, and no more actions can be performed by any user / role (Figure 100).

8.5. PULSE Check Cycle – Revised Report

When the PULSE report is being revised, the system starts displaying information about the fact that the process will follow a PULSE Check (Figure 101).

Figure 101. Submit for PulseCheck Display

After the ATL uploads the revised version of the PULSE report, and prior to the approval phase, the system will ask for confirmation to start the PULSE Check (Figure 102).

Figure 102. Confirmation of PulseCheck Dialog

The status of the assessment will be changed to PULSE Check (Figure 103).

Figure 103. Change of Status

Figure 104. Initiating the PulseCheck Review

Additionally, just like the CN and the first review of the report, the ATL has a window to follow up the PULSE Check review process. All PULSAR team members have been notified to perform the review.

8.6. Review the Final Report for Compliance with PULSE Check

To start performing the PULSE Check review the PULSE team member(s) login to the system and start the PULSE Check with the *PULSE Check Review* button on the Dashboard (Figure 104).

The PULSE Team member can submit the review without any observations but typically s/he will download the report and start working on the PULSE Check (**Figure 105**).

Once this review is uploaded, the system will display the button to submit the review (**Figure 106**).

The ATL will be notified of the new reviewed document and can start preparing the final version of the report. Once all PULSAR Team members have finished submitting their feedback, the system will display the button to continue with the next step to start the revision of the document (**Figure 107**).

Figure 105. Submit Review with No Observations

The screenshot shows the 'PULSE Check Review' dashboard. At the top, there are links for 'Back to Assessment' and 'Download template'. Below this, the assessment details are listed: 'Assessment: MFG2023', 'Country: Georgia', and 'Project Leader: Vladimir Calderon'. A central message states: 'The report that needs to be reviewed has already been submitted and is the revised draft of the final report. Please download it and perform the PULSE Check review on it to ensure its compliance.' To the right of this message is a grey button labeled 'Submit review with no observations'.

Figure 106. Dashboard with Submit Review Button

The screenshot shows the 'PULSE Check Review' dashboard. It includes the same assessment details as Figure 105. A central message says: 'You have already uploaded a reviewed concept note. Please submit your review.' To the right is a green button labeled 'Submit your Review'. Below the message is a table with the following data:

File Name	Date Uploaded	Main Comments (Optional)	Status
Report Pulse Review Hingo.docx (5 Kb)	5/30/2022	This is the review performed by Hingo when the assessment is Pulse check	STARTED

Figure 107. Dashboard with PulseCheck Revision Button

The screenshot shows the 'PULSE Dashboard for Assessment MFG2023'. It features a navigation bar with links: 'Back to Assessment's List', 'Methodology', 'Users', 'QA Steps', 'Document Repository', and 'DocumentShare'. The dashboard displays the following information:

- Assessment:** MFG2023 (This assessment is a test for the manual)
- Institution:** MFG (Ministry of Finance of Georgia)
- Country:** Georgia
- Project Leader:** Vladimir Calderon
- Status:** ReportPulseReview (5/30/2022)
- Concept Note:** Draft (Final) (Approved by George Harrison on 5/27/2022 10:24:29 AM)
- Assessment Score:** Details (Conceptual: C+, Actual: D)
- Final Report (PULSE):** Draft (Final)
- Date Started:** 5/27/2022
- Elapsed Time:** 3 days 7h 25m (Calculated since first start of the assessment)

On the right side, there is a green button labeled 'PULSE Check Revision' and a message: 'For Assessment Team Leader only: The PULSE Check review has been submitted and the assessment can continue to the next step.' Below this is a 'Pulse Check Enabled' indicator.

This will enable the Revise Report button in the Dashboard to start the revision process (**Figure 108**).

Just like the other documents, the PULSE Check revision process needs a revised (PULSE Checked) version of the document to be uploaded. Once it is uploaded, the user can submit it for approval (**Figure 109**).

The system will now automatically detect that the assessment is in the final stages of a PULSE Check process and will enable three links besides the report (**Figure 110**):

- * Draft of the PULSE report
- * Final (revised) version after the first review process
- * PULSE Check version after the PULSE Check

Figure 108. Dashboard with Revise Report Button

The screenshot shows a dashboard for assessment MFG2023. At the top, there are navigation links: 'Back to Assessment's List', 'Methodology', 'Users', 'QA Steps', 'Document Repository', and 'DocumentShare'. The main content area includes:

- Assessment:** MFG2023. Subtext: 'This assessment is a test for the manual'.
- Concept Note:** Draft (selected) and Final. Approved by George Harrison on 5/27/2022 10:24:29 AM.
- Assessment Score:** Details. Conceptual: C+ (yellow), Actual: D (red).
- Institution:** MFG, Ministry of Finance of Georgia.
- Country:** Georgia.
- Project Leader:** Vladimir Calderon.
- Buttons:** A blue 'Revise Report' button is visible on the right.
- Footer:** A section for 'Assessment Team Leader only' with a note: 'Please enter the text report which contains the observations'.

Figure 109. Submit for Approval

The screenshot shows the 'Revise Report after PULSE Check' page. It includes:

- Header:** 'Revise Report after PULSE Check' and a sub-header: 'In this page you are able to revise all Report observations that appeared on the PULSE Check and Upload a Final Report'.
- Navigation:** 'Back to Assessment' link.
- Assessment Info:** MFG2023, Country: Georgia.
- Message:** 'The document to be approved has been uploaded. You can change it if necessary or click on the button to submit it for approval.'
- Buttons:** A green 'Submit for Approval' button is visible on the right.

Figure 110. Dashboard with Draft, Final, and PulseCheck Links

The screenshot shows the 'PULSE Dashboard for Assessment MFG2023'. It includes:

- Navigation:** 'Back to Assessment's List', 'Methodology', 'Users', 'QA Steps', 'Document Repository', and 'DocumentShare'.
- Assessment Info:** MFG2023, 'This assessment is a test for the manual', Institution: MFG, Ministry of Finance of Georgia, Country: Georgia, Project Leader: Vladimir Calderon.
- Concept Note:** Draft (selected) and Final. Approved by George Harrison on 5/27/2022 10:24:29 AM.
- Assessment Score:** Details. Conceptual: C+ (yellow), Actual: D (red).
- Final Report (PULSE):** Draft (selected), Final, and Pular (new) links.
- Footer:** 'Waiting approval by George Harrison' and a green 'Pulse Check Enabled' button.
- Assessment Team Leader only:** 'The final report has to be approved before the assessment can be finalized.'

The approver can now login into the system and start the approval process (**Figure 111**).

This process is exactly the same as previous documents and the user has all the previous information to analyze it and approve the report (**Figure 112**).

Once it is approved the system will recognize the action and will display the corresponding message below the label of the final report (**Figure 113**).

Figure 111. Dashboard with Approve PULSE Check Button

The screenshot shows a dashboard for Assessment MFG2023. At the top, there are navigation links: Back to Assessments List, Methodology, Users, QA Steps, Document Repository, and DocumentShare. The main content area is divided into three columns. The left column contains assessment details: Assessment: MFG2023 (This assessment is a test for the manual), Institution: MFG (Ministry of Finance of Georgia), and Country: Georgia. The middle column shows the Concept Note status (Draft/Final), approved by George Harrison on 5/27/2022 10:24:29 AM, and the Assessment Score: Details (Conceptual: C+, Actual: D). The right column features a prominent blue button labeled 'Approve PULSE Check'. Below this button, a message states: 'For Assessment Team Leader only. The final report has to be approved before the assessment can be finalized.'

Figure 112. Dashboard with Approve Report Button

The screenshot shows a dashboard titled 'Approve Final Report'. Below the title, it says: 'In this page you are requested to examine the final report and approve it or reject it with some observation or comment.' There is a 'Back' link. The main content area is divided into three columns. The left column contains assessment details: Assessment: MFG2023, Country: Georgia, and Project Leader: Vladimir Calderon. The middle column contains a text prompt: 'Please examine the final document uploaded and review for the final approval. If you have still have observations you can type them in the comments. Otherwise click on the button to approve it.' The right column features a prominent green button labeled 'Approve Report'.

Figure 113. Dashboard with Approved by Message

The screenshot shows a dashboard titled 'PULSE Dashboard for Assessment MFG2023'. At the top, there are navigation links: Back to Assessment's List, Methodology, Users, QA Steps, Document Repository, and DocumentShare. The main content area is divided into three columns. The left column contains assessment details: Assessment: MFG2023 (This assessment is a test for the manual), Institution: MFG (Ministry of Finance of Georgia), Country: Georgia, and Project Leader: Vladimir Calderon. The middle column shows the Concept Note status (Draft/Final), approved by George Harrison on 5/27/2022 10:24:29 AM, and the Assessment Score: Details (Conceptual: C+, Actual: D). The right column features a message: 'For Assessment Team Leader only. The concept note has been approved, the assessment has been conducted and reviewed; and finally the report has been reviewed, revised and approved. The assessment can finalize now.' Below this message, there is a green button labeled 'Pulse Check Finished'. At the bottom left, there is a 'Status: ReportShare' button. At the bottom right, there is a 'Date Started: 5/27/2022' label.

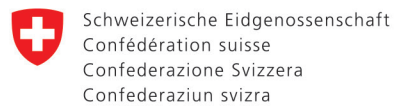


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