PRIMA FOR ALL

GUIDANCE NOTE: RESULTS MONITORING MODULE

MANDATORY PROCESS FOR IOM DEVELOPMENT FUND PROJECTS
Overview:

This Guidance Note acts to clarify the steps to complete the Results Monitoring Module on PRIMA for All. The module is mandatory for all IOM Development Fund projects, and will become mandatory for all projects shortly.

This document includes guidance on:

1. How to complete the ‘Plan’ section of the Results Monitoring module, which is mandatory within the first month of project implementation;
2. How to update activity progress in the MS Project Module, which should be done monthly; and,
3. How to update ‘Indicators Progress’ section of the Results Monitoring Module, which must be done when completing Interim and Final Reports.

It should be read alongside more in-depth Section Guides, linked throughout this guidance note. If you have further questions about any part of the document, please reach out to IOMDevelopmentFund@iom.int.

Part I of this Guidance Note must be completed within the first month of project implementation.

The other steps must be reviewed BEFORE the first Interim Report is created.
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Introduction: Accessing the Results Monitoring Page on PRIMA for All

On PRIMA for All, go to the project Home Page (via search or via the toolbox icon at the top left of the page). It is recommended to access PRIMA for All on MS Edge for fastest speeds.

From the selection of tabs on the left side of the screen, select ‘Results Monitoring’.

The Results Monitoring Page will automatically open to the **Plan** section, which will look similar to the page below. You can also access the **Indicators Progress** and **Direct Beneficiary** sections from here, which can be found next to the blue **Plan** tab. The following sections explain each page.

The **Plan** tab must be completed **within the first month** of project implementation, while the other sections must be updated and double-checked for each Interim and Final Report.
Step I: Complete the ‘Plan’ Section

The Plan must be completed during the first month of implementation, and BEFORE creating any narrative interim reports.

This is the only urgent Results Monitoring task after project activation, and must be completed once.

The Plan will be populated with some information from the Results Matrix created in Project Development. It is only editable by the PM or Designed PMs. In the Plan:

- **Purple Boxes** have no data, and must be completed.
- **Orange boxes** have existing data, but should be checked for comprehensiveness and accuracy (especially ‘Disaggregation’ boxes, which commonly are not fully complete).
- **White** drop-down ‘Select’ menus must be completed.
- Grey ‘Select’ menus are locked and cannot be updated (these depend on Indicator Type).
- Boxes with peach backgrounds, if present, require inputs.

When complete, all small boxes should be orange, with no peach background remaining. Please see the next page for further details on individual columns.

Don’t forget to Save & Close!
Step I: Complete the ‘Plan’ Section

This page discusses the 13 sections of the Plan, and how to complete them. You will note that each row is an individual indicator, while the columns relate to how the indicator will be measured.

<table>
<thead>
<tr>
<th>Column Title</th>
<th>Status at Activation</th>
<th>Section Requirements during ‘Plan’ Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator Type</td>
<td>Completed</td>
<td>Double-check ‘Text’ vs. ‘Numeric’ vs. ‘Percentage’</td>
</tr>
<tr>
<td>Indicator Category</td>
<td>Completed</td>
<td>If Ind. Type is Numeric, check that ‘Item/Others’ vs. ‘Beneficiary’ is correct from Activation.</td>
</tr>
<tr>
<td>Beneficiary Category</td>
<td>Completed</td>
<td>Likely blank. If Ind. Cat. is ‘Beneficiary’, check to make sure this is correct.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Completed</td>
<td>Likely blank. If unlocked, check for correctness.</td>
</tr>
<tr>
<td>Beneficiary Type</td>
<td>Completed</td>
<td>Likely blank. If unlocked, check for correctness.</td>
</tr>
<tr>
<td>Beneficiary Subtype</td>
<td>Completed</td>
<td>Likely blank. If unlocked, check for correctness.</td>
</tr>
<tr>
<td>Multiplier</td>
<td>Completed</td>
<td>Likely blank. If ‘Unit of Measure’ is NOT Individual and is NOT blank, check for correctness.</td>
</tr>
<tr>
<td>Data Source</td>
<td>Completed</td>
<td>Check that data in Orange box is accurate.</td>
</tr>
<tr>
<td>Data Analysis</td>
<td>Incomplete</td>
<td>Add details on how data analysis will occur, and whether Qualitative, Quantitative, or Mixed.</td>
</tr>
<tr>
<td>Disaggregation</td>
<td>Partially Complete</td>
<td>Check, particularly for Sex- and Age-Disaggregation.</td>
</tr>
<tr>
<td>Frequency</td>
<td>Incomplete</td>
<td>Select how often this indicator will be measured.</td>
</tr>
<tr>
<td>Indicator Service Code</td>
<td>Completed</td>
<td>Check for accuracy, should be completed for all ‘Numeric’ Indicators.</td>
</tr>
<tr>
<td>Person Responsible</td>
<td>Incomplete</td>
<td>Fill in name of person who will update progress on that particular indicator on PRIMA (often the PM).</td>
</tr>
</tbody>
</table>

Note: If you have any questions, or if you have complex aspects of the Plan, please see the in-depth Planning the Results Monitoring PDF guidance, or reach out to IOMDevelopmentFund@iom.int.
Step II: Update Activity Progress in MS Project

Activity Progress is not tracked in the Results Monitoring Page in PRIMA for All, but instead in the ‘MS Project’ tab. Please update this monthly, and at minimum once per reporting period.

From the Home page, find the MS Project tab. There, at the top, select ‘Task’. Note that this is at the very top of the page, and is hard to spot at first! Selecting ‘Task’ will reveal the MS Project toolbar.

From the toolbar which drops down, select ‘Edit, (In Browser)’. Now you can update the table.
Step II: Update Activity Progress in MS Project (Continued)

Update the % Completed column for each activity by double-clicking on the box. Sections turn green after being updated. No other column needs to be updated, unless you see existing issues.

Once you have updated the status of each activity’s % Completed box, return to the toolbar at the top. If it has disappeared, select ‘Task’ Again. Find the Save, Close, and Publish buttons (below).

In the following order: Select ‘Save’, then ‘Publish’, then ‘Close’. Do not skip any of these three steps, or the updates will not process. When you select Close, a pop-up menu will appear, as below.

In the pop-up menu, select ‘Check back in’. DO NOT select ‘Keep Checked Out’.

• Metaphor given to us by the PRIMA Team: “MS Project is like a library book - if you do not check it back in when you are done, no one else will be able to ‘check the task out’ to update it later.”

Once you have checked the MS project back in, you have completed updating the activity progress, and will be redirected to the task homepage. You’re done with this step - thank you!
Step III: Complete the ‘Indicators Progress’ Section

Only start this step if you have completed Step I and if it’s time to create an Interim / Final Report. This section should be completed before entering any information in the report template. If you do not know how to create a report on PRIMA for All, please see Creating a Report.

The Indicators Progress section is the main space to enter and track project progress. It MUST BE COMPLETED before submitting each report. Data can be updated here as regularly as the Project Manager desires, so long as it is completed before the drafting of each interim report.

After a report is created, you can access the Results Monitoring Module from the task page (shown below), or in the way listed previously on Page 1. In the module, select ‘Indicators Progress’.

Before entering progress, double-check that ALL Outcomes and Outputs are present in the Indicators Progress table (above). If the Plan is incomplete, some may not appear in this section.

The Action column, on the right of the table, allows you to add, edit, or view the progress of a specific indicator for a certain period. Click the ‘+’ icon to enter progress, and enter the reporting dates and data in the pop-up box. Update progress for ALL indicators, ensuring data and comments are representative of all progress during the reporting period. You can also edit with the Pencil tool.

- Note: You cannot cross the calendar year when entering the reporting period. If your reporting period runs from October 2020 to March 2021, for example, you must enter it in two separate sections: one from October to December 31, 2020, the other from Jan 1 to March, 2021.
- Note 2: Ensure the dates entered cover the full reporting period, and only the reporting period. Dates are not editable after saving.

If you have questions, please see the Updating Indicators Progress PDF for more information on entering progress, particularly for numerical indicators, which have complex rules.
Step IV: Check the ‘Direct Beneficiaries’ Section

The Direct Beneficiary section counts those assisted through the project. It should be reviewed for each report, but is reported just ONCE PER CALENDAR YEAR and in the final report.

To review this section, select the Reporting Year that you wish to report on. The Progress information is derived from the Indicators Progress section and should be accurate, but must be checked.

If the numbers are accurate, you do not need to take any further action at the time of the Interim or Final Report.

If the beneficiary numbers are not correct, review is required. However, do not attempt to edit them on this tab. Edits must instead be made in the Indicators Progress section.

Return to the Indicators Progress section and use the ‘pencil’ tool to correct the numbers there.

- Note: The Indicators Progress and Direct Beneficiary Sections can be completed as often as desired—weekly, monthly, or semi-annually. Users other than the Project Manager can update progress on indicators only if they are delegated in the ‘Person Responsible’ section of the Plan.

Once correct, save the section and click OK on the pop-up that appears. If you have further questions about this section, please consult the Updating Direct Beneficiary PDF attached alongside this guidance note.
Step V: Export Progress to the Narrative Report

When Results Monitoring is complete, go to the task page and select ‘Export monitoring progress to the report’. This populates the Results Matrix in the narrative report document, using the progress data you have input.

If you have already entered progress in the Results Matrix section of the Narrative Report, exporting this data will overwrite it, so it is always best to follow this guide BEFORE working in the template.

This will populate the Results Matrix in the Narrative Report with progress reported in the ‘Indicators Results’ Tab. Check that it has done so, and ensure the information looks clean and complete in the Narrative Report. If it is incomplete or inaccurate, update the data in the module, not the document.

Finally, complete the remainder of the narrative report in the word document, as usual. For guidance, please see Module 5.II.1.a of the IOM Project Handbook (beginning on page 362).