EAO ADMINISTRATIVE AND CONTROL FORMS SPECIALIZED TRAINING MANUAL

East Action Organization

Action for Betterment

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EAO Administrative and Control Forms Specialized Training Manual

Detailed Training Contents

Prepared for: East Action Organization (EAO)
Target users: EAO leadership, management, finance department, procurement department, HR department, logistics department, store/unit staff, program and project teams, MEAL team, safeguarding and PSEA focal persons, field officers, supervisors, volunteers, and relevant partners.

Session 1: Introduction to Administrative and Control Forms

1.1 Meaning of Administrative and Control Forms

Administrative and control forms are official documents used by EAO staff, departments, and leadership to record requests, approvals, decisions, transactions, responsibilities, field activities, complaints, and reports.

They are used to prove that work was done properly, resources were used correctly, and decisions were reviewed and approved by the right person or department.

1.2 Purpose of Administrative and Control Forms

The purpose of these forms is to create clear evidence for every important action. They help responsible departments show who requested an action, who checked it, who approved it, what was received, what was issued, what was paid, what was reported, and what follow-up action was taken.

1.3 Why Forms Are Needed

Forms are needed because EAO works with donor funds, community resources, public trust, staff responsibilities, and legal/accountability obligations. Without proper forms, it becomes difficult

for EAO leadership, finance, procurement, HR, logistics, program, MEAL, safeguarding, and PSEA teams to prove that resources were used properly and decisions were made fairly.

1.4 Advantages

Administrative and control forms help EAO staff and leadership to improve accountability, reduce confusion, prevent misuse of resources, support audits, protect staff and communities, strengthen donor confidence, and make office and field operations more professional.

1.5 Key Learning Point

Every form should clearly answer:

What happened?
Why did it happen?
Who requested it?
Who checked it?
Who approved it?
Where is the evidence filed?

Session 2: Logistics and Transport Forms

2.1 Vehicle Request Form

Definition:
A Vehicle Request Form is used by staff, project teams, or departments to request the use of an EAO vehicle or rented vehicle.

Purpose:
The purpose is to ensure that vehicle use is officially requested, reviewed, approved, and scheduled before travel takes place.

Why it is needed:
The logistics department, supervisors, and approving managers need this form to prevent unauthorized vehicle use, avoid transport conflicts, plan routes, control fuel use, and ensure staff safety during official travel.

Used for:
Field visits, project activities, meetings, delivery of materials, airport pick-up, donor visits, supervision trips, and official staff movement.

Advantage:
It improves vehicle planning, reduces misuse, controls transport costs, supports staff safety, and provides evidence for logistics and audit records.

Responsible persons/departments:
Requesting staff or department, project officer, logistics officer, supervisor, driver, and approving manager.

Filing location:
Logistics file, project activity file where applicable, and travel documentation file.

2.2 Vehicle Logbook

Definition:
A Vehicle Logbook is a daily record used by the driver and logistics department to record vehicle movement, mileage, fuel use, destination, passengers, and purpose of travel.

Purpose:
The purpose is to track how each vehicle is used and to verify mileage, fuel consumption, and official movement.

Why it is needed:
The logistics department and finance department need the logbook to compare vehicle use with fuel requests, maintenance needs, and field movement approvals.

Used for:
Daily vehicle movement, field travel, office errands, project transport, donor visits, and logistics movement.

Advantage:
It supports fuel control, maintenance planning, audit verification, driver accountability, and vehicle cost monitoring.

Responsible persons/departments:
Driver, logistics officer, transport supervisor, finance department where fuel costs are reviewed, and approving manager.

Filing location:
Logistics vehicle file and monthly transport records.

2.3 Fuel Request Form

Definition:
A Fuel Request Form is used to request fuel for vehicles, generators, or approved field activities.

Purpose:
The purpose is to control fuel issuance and ensure that fuel is only provided for approved official use.

Why it is needed:
The logistics and finance departments need this form because fuel is a high-risk consumable that can easily be misused if not properly approved, recorded, and reconciled.

Used for:
Vehicle travel, generator use, field missions, project activities, emergency response, and approved logistics operations.

Advantage:
It reduces fuel misuse, supports cost control, links fuel use with vehicle logbooks, and provides clear evidence for finance and audit review.

Responsible persons/departments:
Driver or requesting staff, logistics officer, project officer where applicable, finance officer, and approving manager.

Filing location:
Fuel file, vehicle file, logistics file, and finance supporting document file.

2.4 Vehicle Maintenance Request Form

Definition:
A Vehicle Maintenance Request Form is used by drivers or logistics staff to request vehicle repair, service, spare parts, or maintenance.

Purpose:
The purpose is to document vehicle problems, maintenance needs, estimated costs, and approval before repair is done.

Why it is needed:
The logistics department, procurement department, and finance department need this form to avoid informal repairs, unnecessary costs, and undocumented maintenance.

Used for:
Vehicle servicing, tire replacement, spare parts, emergency repair, mechanical problems, and routine maintenance.

Advantage:
It keeps vehicles safe, reduces breakdowns, supports maintenance history, controls repair costs, and protects EAO assets.

Responsible persons/departments:
Driver, logistics officer, procurement department, finance department, transport supervisor, and approving manager.

Filing location:

Vehicle maintenance file, procurement file where applicable, and finance payment file.

2.5 Trip Authorization Form

Definition:
A Trip Authorization Form is used to approve official travel before departure.

Purpose:
The purpose is to confirm travel destination, purpose, dates, travelers, vehicle or transport method, budget, and approval.

Why it is needed:
Supervisors, logistics staff, finance staff, and leadership need this form to ensure travel is official, necessary, safe, budgeted, and authorized.

Used for:
Field missions, inter-city travel, donor visits, supervision visits, project monitoring, training travel, and official trips.

Advantage:
It supports staff safety, financial control, transport planning, travel accountability, and audit evidence.

Responsible persons/departments:
Traveller, supervisor, project manager, logistics officer, finance department, security focal person where needed, and approving manager.

Filing location:
Travel file, logistics file, project file, and finance file if travel costs are involved.

2.6 Driver Daily Checklist

Definition:
A Driver Daily Checklist is used by the driver to inspect the condition of the vehicle before movement.

Purpose:
The purpose is to confirm that the vehicle is safe, functional, and ready for official use.

Why it is needed:
Drivers and logistics staff need this checklist to reduce accidents, prevent breakdowns, and identify mechanical problems early.

Used for:
Checking fuel, oil, water, tires, brakes, lights, horn, first aid kit, fire extinguisher, cleanliness, and general vehicle condition.

Advantage:
It improves road safety, reduces emergency repair costs, protects passengers, and strengthens driver accountability.

Responsible persons/departments:
Driver, logistics officer, transport supervisor, and safety/security focal person where relevant.

Filing location:
Vehicle daily checklist file or vehicle logbook file.

2.7 Security Movement Plan

Definition:
A Security Movement Plan records travel route, travelers, vehicle, communication points, check-in times, emergency contacts, and risk mitigation measures.

Purpose:
The purpose is to manage staff safety during field movement, especially in remote or higher-risk areas.

Why it is needed:
The security focal person, logistics department, project team, and leadership need this plan to monitor staff movement and respond quickly if there is an emergency.

Used for:
Remote travel, high-risk areas, humanitarian response, field supervision, distributions, and cross-location movement.

Advantage:
It improves staff safety, supports emergency response, strengthens duty of care, and reduces travel-related risks.

Responsible persons/departments:
Traveller, project manager, logistics officer, security focal person, driver, field coordinator, and approving manager.

Filing location:
Security file, logistics file, and project field movement file.

2.8 Emergency Contact Form

Definition:

An Emergency Contact Form records the contact details of persons to be contacted if a staff member, volunteer, or traveler faces an emergency.

Purpose:
The purpose is to support quick communication during accidents, illness, security incidents, or other emergencies.

Why it is needed:
The HR department, logistics department, field supervisors, and leadership need this form to fulfill duty of care responsibilities.

Used for:
Staff HR files, travel files, field mission records, volunteer records, and emergency preparedness.

Advantage:
It improves emergency response, protects staff welfare, and helps responsible departments act quickly during crisis situations.

Responsible persons/departments:
Staff member, HR department, logistics officer, supervisor, field coordinator, and security focal person.

Filing location:
HR staff file, travel file, and emergency contact file.

Session 3: Store, Inventory, and Asset Forms

3.1 Goods Received Note

Definition:
A Goods Received Note is an official store document used to record goods received into EAO store or office.

Purpose:
The purpose is to confirm that items were received, checked, counted, inspected, and accepted.

Why it is needed:
The storekeeper, procurement department, finance department, and project team need this form to prove that goods were actually received before stock entry or payment is processed.

Used for:
Materials, equipment, supplies, donations, project items, assets, stationery, training materials, and field supplies received.

Advantage:
It supports stock records, procurement files, payment verification, asset tracking, donor reporting, and audit evidence.

Responsible persons/departments:
Storekeeper, procurement officer, requesting department, technical checker where needed, finance department, and approving manager.

Filing location:
Store file, procurement file, inventory file, and finance payment file.

3.2 Store Requisition Form

Definition:
A Store Requisition Form is an internal request form used by staff, departments, or project teams to request items from the store.

Purpose:
The purpose is to ensure that store items are requested formally and approved before they are issued.

Why it is needed:
The storekeeper and supervisors need this form to prevent informal or unauthorized withdrawal of store items.

Used for:
Staff, departments, field teams, project activities, trainings, workshops, distributions, and office supply requests.

Advantage:
It links need, approval, and store issue, and helps prevent misuse or uncontrolled stock movement.

Responsible persons/departments:
Requesting staff, project officer, department head, storekeeper, and approving supervisor.

Filing location:
Store requisition file and project activity file where applicable.

3.3 Store Issue Voucher

Definition:
A Store Issue Voucher records goods issued out from the store to staff, departments, projects, or field teams.

Purpose:
The purpose is to confirm that items were released with proper authorization and received by the correct person.

Why it is needed:
The storekeeper, project team, and finance/asset team need this form to prove what was issued, to whom, when, and for what purpose.

Used for:
Materials issued for activities, office supplies, project supplies, field materials, tools, equipment, and training materials.

Advantage:
It controls stock movement, prevents misuse, updates inventory balances, and supports audit trail.

Responsible persons/departments:
Storekeeper, requesting staff, receiving staff, project officer, department head, and approving supervisor.

Filing location:
Store issue file, stock card file, and project activity file where applicable.

3.4 Stock Card / Bin Card

Definition:
A Stock Card or Bin Card is used to record the quantity of each item received, issued, and remaining in balance.

Purpose:
The purpose is to track the movement of each store item.

Why it is needed:
The storekeeper and logistics/store supervisor need this card to compare recorded stock with physical stock.

Used for:
Daily stock control for individual items.

Advantage:
It prevents shortages, overuse, stock errors, unrecorded issues, and weak inventory control.

Responsible persons/departments:
Storekeeper, logistics officer, inventory officer, and finance or audit reviewer where required.

Filing location:
Store stock card file or attached to stock control records.

3.5 Inventory Register

Definition:
An Inventory Register is a master list of all supplies, materials, equipment, and consumable items held by EAO.

Purpose:
The purpose is to maintain a complete record of items available, used, issued, and stored.

Why it is needed:
The store unit, logistics department, finance department, and program teams need it to know what is available and what needs replenishment.

Used for:
Store items, office supplies, project materials, consumables, and non-fixed inventory.

Advantage:
It supports planning, reporting, stock control, procurement decisions, and audit verification.

Responsible persons/departments:
Storekeeper, logistics department, finance department, project team, and management reviewer.

Filing location:
Store inventory file and logistics records.

3.6 Fixed Asset Register

Definition:
A Fixed Asset Register records long-term and high-value assets owned or controlled by EAO.

Purpose:
The purpose is to track asset code, description, serial number, purchase date, value, condition, location, donor, and responsible person.

Why it is needed:
The finance department, logistics department, and leadership need this register to protect organizational assets and meet donor/audit requirements.

Used for:
Laptops, printers, cameras, furniture, vehicles, generators, tablets, office equipment, and durable items.

Advantage:
It protects organizational property, reduces asset loss, supports depreciation or valuation, and strengthens asset accountability.

Responsible persons/departments:
Finance department, logistics department, asset custodian, staff using the asset, and approving manager.

Filing location:
Fixed asset register file, finance file, and logistics/asset file.

3.7 Asset Handover Form

Definition:
An Asset Handover Form records the transfer or assignment of an asset to a staff member, department, office, project, or field team.

Purpose:
The purpose is to document who is responsible for the asset.

Why it is needed:
The logistics and finance departments need it to prevent disputes and track who has custody of each asset.

Used for:
Laptops, phones, cameras, vehicles, office equipment, furniture, tools, tablets, and field equipment.

Advantage:
It identifies responsible persons, reduces asset loss, and supports staff clearance.

Responsible persons/departments:
Asset custodian, logistics officer, finance/asset officer, receiving staff, supervisor, and approving manager.

Filing location:
Asset file, HR file where staff responsibility is involved, and logistics file.

3.8 Asset Return Form

Definition:

An Asset Return Form records the return of an asset to EAO after use, transfer, project closure, or staff exit.

Purpose:
The purpose is to confirm that the asset was returned and to document its condition.

Why it is needed:
The HR department, logistics department, and finance department need this form to complete staff clearance and protect assets.

Used for:
Staff exit, project closure, transfer, end of assignment, or completion of equipment use.

Advantage:
It supports clearance, prevents asset loss, records damage, and updates asset custody records.

Responsible persons/departments:
Returning staff, asset custodian, logistics officer, HR department, finance/asset officer, and supervisor.

Filing location:
Asset file, staff exit file, and logistics file.

3.9 Asset Disposal Form

Definition:
An Asset Disposal Form documents the disposal of damaged, obsolete, expired, or unusable assets.

Purpose:
The purpose is to ensure that asset disposal is reviewed, approved, recorded, and transparent.

Why it is needed:
The finance department, logistics department, leadership, and disposal committee need this form to prevent unauthorized sale, loss, or removal of assets.

Used for:
Broken equipment, old furniture, expired supplies, damaged items, obsolete assets, and unusable electronics.

Advantage:
It strengthens transparency, supports audit compliance, and protects EAO from asset misuse.

Responsible persons/departments:
Logistics department, finance department, asset committee/disposal committee, management, and leadership where required.

Filing location:
Asset disposal file, finance file, logistics file, and board/management approval file where applicable.

3.10 Store Return Form

Definition:
A Store Return Form records unused or excess items returned to the store after activity or staff use.

Purpose:
The purpose is to record returned items and update stock balance.

Why it is needed:
The storekeeper and project team need it to prevent waste, loss, or unrecorded unused materials.

Used for:
Unused stationery, supplies, tools, materials, equipment, workshop items, or field activity materials.

Advantage:
It supports reuse, reduces waste, updates stock records, and improves cost control.

Responsible persons/departments:
Returning staff, project officer, storekeeper, logistics officer, and supervisor.

Filing location:
Store return file, stock card file, and project activity file where applicable.

3.11 Physical Stock Count Sheet

Definition:
A Physical Stock Count Sheet is used to physically verify available stock and compare it with recorded stock balances.

Purpose:
The purpose is to identify differences between actual stock and store records.

Why it is needed:
The storekeeper, finance department, logistics department, and management need this form to detect errors, loss, damage, expiry, or unrecorded issues.

Used for:
Monthly, quarterly, annual, donor, project-end, or surprise stock counts.

Advantage:
It identifies shortages, damages, expired items, losses, and record errors.

Responsible persons/departments:
Storekeeper, logistics officer, finance officer, stock count committee, project representative, and approving manager.

Filing location:
Stock count file, store file, finance/audit file, and project file where donor-funded stock is involved.

Session 4: Procurement Forms

4.1 Purchase Request / Purchase Requisition Form

Definition:
A Purchase Request Form is used by staff, project teams, or departments to request the purchase of goods, works, or services.

Purpose:
The purpose is to formally start the procurement process based on an approved need.

Why it is needed:
The procurement department, finance department, and approving manager need it to confirm that the purchase is necessary, budgeted, and authorized.

Used for:
Office supplies, project materials, equipment, services, consultancy, construction, maintenance, and activity needs.

Advantage:
It ensures purchases are planned, needed, budgeted, approved, and linked to project or operational needs.

Responsible persons/departments:
Requesting staff, project officer, department head, procurement officer, finance officer, and approving manager.

Filing location:
Procurement file, project file, and finance supporting document file.

4.2 Request for Quotation

Definition:
A Request for Quotation is a procurement document sent to suppliers to request price offers.

Purpose:
The purpose is to collect competitive quotations from suppliers.

Why it is needed:
The procurement department and procurement committee need RFQs to compare prices, delivery conditions, quality, and supplier responsiveness.

Used for:
Small and medium purchases requiring supplier comparison.

Advantage:
It promotes fairness, competition, transparency, and value for money.

Responsible persons/departments:
Procurement officer, procurement committee, requesting department, and suppliers.

Filing location:
Procurement file.

4.3 Bid Opening Form

Definition:
A Bid Opening Form records quotations or bids received and opened during procurement.

Purpose:
The purpose is to document the bid opening process transparently.

Why it is needed:
The procurement committee and management need it to prevent manipulation after bids are submitted.

Used for:
Procurement involving multiple suppliers, sealed quotations, tenders, or competitive selection.

Advantage:
It ensures transparency, fairness, and procurement integrity.

Responsible persons/departments:
Procurement officer, procurement committee, witnesses where required, and approving manager.

Filing location:
Procurement file.

4.4 Bid Evaluation / Quotation Analysis Form

Definition:
A Bid Evaluation or Quotation Analysis Form compares supplier offers using agreed criteria.

Purpose:
The purpose is to evaluate price, quality, delivery time, compliance, and supplier capacity.

Why it is needed:
The procurement committee and requesting department need it to ensure selection is based on evidence, not personal preference.

Used for:
Selecting the best responsive supplier.

Advantage:
It supports fair, competitive, and auditable supplier selection.

Responsible persons/departments:
Procurement committee, procurement officer, technical evaluator, requesting department, finance reviewer where needed, and approving manager.

Filing location:
Procurement file.

4.5 Supplier Selection and Approval Form

Definition:
A Supplier Selection and Approval Form documents the selected supplier and the reason for selection.

Purpose:
The purpose is to approve and record the final procurement decision.

Why it is needed:
The procurement committee, finance department, and management need it to show why a supplier was chosen.

Used for:
Procurement approval, procurement file documentation, and audit review.

Advantage:
It reduces favoritism, strengthens accountability, and supports donor compliance.

Responsible persons/departments:
Procurement officer, procurement committee, requesting department, finance department where needed, and approving manager.

Filing location:
Procurement file.

4.6 Purchase Order

Definition:
A Purchase Order is an official document issued to a selected supplier confirming what EAO is ordering.

Purpose:
The purpose is to confirm item description, quantity, price, delivery terms, payment terms, and conditions.

Why it is needed:
The procurement department, supplier, storekeeper, and finance department need it as a formal instruction before delivery and payment.

Used for:
Approved purchases before delivery or payment.

Advantage:
It reduces misunderstanding, supports procurement control, and links procurement to delivery and payment.

Responsible persons/departments:
Procurement officer, supplier, finance department, requesting department, storekeeper, and approving manager.

Filing location:
Procurement file and finance payment file.

4.7 Supplier Registration Form

Definition:
A Supplier Registration Form collects supplier profile, legal, tax, contact, and banking information.

Purpose:
The purpose is to create and maintain a verified supplier database.

Why it is needed:
The procurement department and finance department need it to ensure suppliers are legitimate, traceable, and properly documented.

Used for:
Vendor registration, prequalification, supplier database creation, and supplier management.

Advantage:
It helps EAO staff work with reliable suppliers and reduces procurement risk.

Responsible persons/departments:
Procurement officer, supplier, finance department, and procurement committee where required.

Filing location:
Supplier registration file and procurement database.

4.8 Supplier Performance Evaluation Form

Definition:
A Supplier Performance Evaluation Form assesses supplier performance after delivery of goods or services.

Purpose:
The purpose is to review quality, timeliness, price reasonableness, communication, and compliance with terms.

Why it is needed:
The procurement department, requesting department, and management need it to decide whether to continue using a supplier.

Used for:
Supplier review and future procurement decisions.

Advantage:
It helps identify good suppliers, avoid poor performers, and improve procurement quality.

Responsible persons/departments:
Procurement officer, requesting department, storekeeper, logistics officer, finance department where applicable, and approving manager.

Filing location:
Supplier performance file and procurement file.

4.9 Contract Agreement Form

Definition:
A Contract Agreement Form is a formal agreement between EAO and a supplier, consultant, contractor, or service provider.

Purpose:
The purpose is to define responsibilities, deliverables, payment terms, timelines, conditions, and obligations.

Why it is needed:
The procurement department, finance department, requesting department, and leadership need contracts for services or purchases that require clear legal and operational terms.

Used for:
Services, consultancy, construction, rental, supply, maintenance, and framework arrangements.

Advantage:
It protects EAO legally, reduces misunderstanding, and strengthens performance management.

Responsible persons/departments:
Procurement officer, requesting department, finance department, legal reviewer where available, management, and supplier/service provider.

Filing location:
Contract file, procurement file, finance file, and project file where applicable.

4.10 Delivery Note

Definition:
A Delivery Note is a supplier document confirming that goods were delivered.

Purpose:
The purpose is to show that the supplier delivered items to EAO.

Why it is needed:
The storekeeper, procurement officer, and finance department need it before confirming receipt and processing payment.

Used for:
Supplier deliveries before preparing the Goods Received Note.

Advantage:
It supports receipt verification, procurement documentation, and payment processing.

Responsible persons/departments:
Supplier, storekeeper, procurement officer, requesting department, and finance department.

Filing location:
Procurement file, store file, and finance payment file.

4.11 Sole Source Justification Form

Definition:
A Sole Source Justification Form is used when only one supplier is selected without competition.

Purpose:
The purpose is to justify why competitive procurement was not used.

Why it is needed:
The procurement committee, finance department, and management need it because non-competitive procurement carries higher risk and must be clearly justified.

Used for:
Emergency purchases, specialized services, unique suppliers, spare parts, donor-required suppliers, or urgent needs.

Advantage:
It provides transparency, reduces procurement risk, and supports audit review.

Responsible persons/departments:
Requesting department, procurement officer, procurement committee, finance reviewer, and approving manager.

Filing location:
Procurement file.

4.12 Procurement Tracking Sheet

Definition:
A Procurement Tracking Sheet monitors procurement progress from request to delivery and payment.

Purpose:
The purpose is to track procurement status and avoid delays.

Why it is needed:
The procurement department, project teams, finance department, and management need it to follow procurement progress.

Used for:
Tracking purchase requests, RFQs, evaluations, approvals, purchase orders, contracts, delivery, GRN, and payment status.

Advantage:
It improves follow-up, reduces delays, supports planning, and strengthens procurement reporting.

Responsible persons/departments:
Procurement officer, procurement manager, project team, finance department, and management.

Filing location:
Procurement tracking file and project procurement file.

4.13 Framework Agreement Form

Definition:
A Framework Agreement is a long-term agreement with a supplier for repeated goods or services.

Purpose:
The purpose is to set agreed prices, terms, conditions, and delivery arrangements for future purchases.

Why it is needed:
The procurement department and leadership need it to simplify repeated procurement and improve price control.

Used for:
Stationery, printing, hotels, vehicle rental, transport, internet, maintenance, fuel services, and regular supplies.

Advantage:
It saves time, improves price control, simplifies repeated procurement, and supports consistent supplier management.

Responsible persons/departments:
Procurement department, finance department, management, requesting departments, and supplier.

Filing location:
Framework agreement file and procurement file.

4.14 Conflict of Interest Declaration Form

Definition:
A Conflict of Interest Declaration Form records any personal, family, financial, or other interest that may affect a decision.

Purpose:
The purpose is to prevent biased decisions and protect integrity.

Why it is needed:
The procurement committee, HR panel, board members, and leadership need it to ensure decisions are fair and transparent.

Used for:
Procurement committees, evaluation panels, recruitment panels, partnership decisions, and approval processes.

Advantage:
It reduces corruption risk, favoritism, reputational damage, and audit findings.

Responsible persons/departments:
Procurement committee members, HR panel members, board members, staff involved in decisions, supervisors, and leadership.

Filing location:
Relevant procurement, HR, governance, or committee file.

Session 5: Finance Forms

5.1 Payment Request Form

Definition:
A Payment Request Form is used by staff, departments, or project teams to request payment for approved goods, services, activities, or obligations.

Purpose:
The purpose is to formally initiate payment approval before money is released.

Why it is needed:
The finance department, requesting department, and approving manager need this form to confirm that the payment is valid, budgeted, supported, and approved before processing.

Used for:
Supplier payments, service fees, project expenses, operational costs, reimbursements, activity costs, consultant payments, and approved obligations.

Advantage:
It ensures payments are reviewed, budgeted, approved, properly documented, and supported by evidence.

Responsible persons/departments:
Requesting staff, project officer, department head, finance officer, accountant, budget holder, and approving manager.

Filing location:
Finance payment file, project finance file, and donor file where applicable.

5.2 Payment Voucher

Definition:
A Payment Voucher is a finance document used to record an approved payment made by cash, bank transfer, cheque, or other approved payment method.

Purpose:
The purpose is to provide official evidence that payment was made.

Why it is needed:
The finance department and management need this voucher to document payment details, account codes, payee information, supporting documents, and approval signatures.

Used for:
Cash payments, bank payments, cheque payments, mobile money payments, supplier payments, staff reimbursements, activity payments, and operational expenses.

Advantage:
It supports accounting, audit review, donor compliance, financial reporting, and payment accountability.

Responsible persons/departments:
Finance officer, accountant, cashier where applicable, requester, reviewer, and approving manager.

Filing location:
Finance voucher file, bank/cash file, project file, and audit file.

5.3 Receipt Voucher

Definition:
A Receipt Voucher is a finance document used to record money received by EAO through cash, bank, transfer, refund, reimbursement, or other income source.

Purpose:
The purpose is to confirm that money has been received and recorded.

Why it is needed:
The finance department needs this voucher to ensure that all income, refunds, and receipts are properly recorded and traceable.

Used for:
Donor transfers, partner reimbursements, staff refunds, cash returns, contributions, income, and returned advance balances.

Advantage:
It prevents unrecorded income, supports bank reconciliation, improves transparency, and strengthens financial control.

Responsible persons/departments:
Finance officer, accountant, cashier where applicable, payer, and finance manager.

Filing location:
Finance receipt file, bank/cash file, donor file where applicable, and advance liquidation file where relevant.

5.4 Petty Cash Request Form

Definition:
A Petty Cash Request Form is used by staff or departments to request small cash for minor approved expenses.

Purpose:
The purpose is to approve petty cash before spending takes place.

Why it is needed:
The finance department and supervisors need this form to control small expenses and prevent informal cash use.

Used for:
Stationery, local transport, refreshments, photocopying, small repairs, minor office purchases, and urgent low-value expenses.

Advantage:
It controls small payments, reduces unsupported expenses, and supports petty cash accountability.

Responsible persons/departments:
Requesting staff, supervisor, petty cash custodian, finance officer, and approving manager.

Filing location:
Petty cash file and finance supporting document file.

5.5 Petty Cash Voucher

Definition:
A Petty Cash Voucher is used to record payment made from petty cash.

Purpose:
The purpose is to document how petty cash was spent and who received the cash.

Why it is needed:
The petty cash custodian and finance department need this voucher to support every petty cash transaction with evidence.

Used for:
Small approved expenses paid from petty cash.

Advantage:
It supports accountability, replenishment, reconciliation, and audit verification.

Responsible persons/departments:
Petty cash custodian, requester, finance officer, receiver of cash, and approving supervisor.

Filing location:
Petty cash voucher file and petty cash reconciliation file.

5.6 Petty Cash Reconciliation Form

Definition:
A Petty Cash Reconciliation Form is used to compare petty cash records, receipts, payments, and cash on hand.

Purpose:
The purpose is to verify that petty cash balance is accurate.

Why it is needed:
The finance department and management need this form to detect errors, unsupported expenses, missing receipts, or shortages.

Used for:
Weekly, monthly, or replenishment review of petty cash.

Advantage:
It improves cash control, identifies differences early, and supports audit readiness.

Responsible persons/departments:
Petty cash custodian, finance officer, accountant, finance manager, and reviewer.

Filing location:
Petty cash reconciliation file and finance audit file.

5.7 Advance Request Form

Definition:
An Advance Request Form is used by staff or project teams to request funds before an approved activity or travel.

Purpose:
The purpose is to provide funds in advance for planned and approved activities.

Why it is needed:
The finance department and approving manager need this form to ensure advances are linked to approved activities, budgets, and timelines.

Used for:
Trainings, workshops, field missions, travel, community meetings, distributions, and project implementation activities.

Advantage:
It ensures advances are approved, budgeted, documented, and traceable.

Responsible persons/departments:
Requesting staff, project officer, supervisor, finance officer, budget holder, and approving manager.

Filing location:
Advance file, finance file, and project activity file.

5.8 Advance Settlement / Liquidation Form

Definition:
An Advance Settlement or Liquidation Form is used by staff to report how an advance was spent and to clear the advance balance.

Purpose:
The purpose is to settle advances using receipts, attendance sheets, reports, and other supporting documents.

Why it is needed:
The finance department and management need this form to prevent long outstanding advances and ensure donor-compliant use of funds.

Used for:
Staff advances, activity advances, travel advances, workshop advances, field advances, and project implementation advances.

Advantage:
It improves accountability, clears balances, reduces financial risk, and supports donor reporting.

Responsible persons/departments:
Staff who received the advance, project officer, finance officer, accountant, supervisor, and approving manager.

Filing location:
Advance liquidation file, finance voucher file, and project activity file.

5.9 Travel Advance Request Form

Definition:
A Travel Advance Request Form is used to request travel-related funds before official travel.

Purpose:
The purpose is to support approved travel with funds for transport, accommodation, per diem, fuel, and related costs.

Why it is needed:
The finance department, logistics department, and supervisor need this form to ensure travel is planned, approved, budgeted, and linked to official duty.

Used for:
Field missions, supervision visits, donor visits, trainings, workshops, inter-city travel, and official trips.

Advantage:
It supports travel planning, financial control, accountability, and staff preparedness.

Responsible persons/departments:
Traveller, supervisor, project manager, finance officer, logistics officer where applicable, and approving manager.

Filing location:
Travel advance file, finance file, and project travel file.

5.10 Travel Expense Claim Form

Definition:
A Travel Expense Claim Form is used after travel to claim or settle actual travel costs.

Purpose:
The purpose is to report actual travel expenses with receipts and supporting evidence.

Why it is needed:
The finance department and supervisor need this form to verify whether travel expenses were reasonable, approved, and properly supported.

Used for:
Transport, accommodation, meals, fuel, per diem adjustments, field mission expenses, and official travel expenses.

Advantage:
It ensures travel costs are accurate, justified, auditable, and linked to official duty.

Responsible persons/departments:
Traveller, supervisor, finance officer, project manager, and approving manager.

Filing location:
Travel claim file, finance file, and project activity file.

5.11 Per Diem Payment Form

Definition:
A Per Diem Payment Form records daily allowance payments made to staff, participants, facilitators, or other approved persons.

Purpose:
The purpose is to document allowance payment clearly and obtain signatures from recipients.

Why it is needed:
The finance department and project team need this form to prove that per diem payments were made to the right persons.

Used for:
Trainings, workshops, meetings, field visits, official travel, community activities, and project events.

Advantage:
It provides clear evidence of allowance payments and reduces disputes or unsupported payments.

Responsible persons/departments:
Finance officer, cashier/accountant, project officer, participants or recipients, and approving manager.

Filing location:
Finance file, activity file, training/workshop file, and donor supporting document file.

5.12 Payroll Payment Sheet

Definition:
A Payroll Payment Sheet is a monthly record of staff salary payments, deductions, taxes, pension, and net pay.

Purpose:
The purpose is to summarize and approve monthly payroll.

Why it is needed:
The HR department and finance department need this form to ensure salaries are accurate, authorized, confidential, and compliant with tax and employment requirements.

Used for:
Monthly salary processing, staff payroll, tax calculation, pension records, and salary transfer support.

Advantage:
It supports salary control, tax compliance, payroll accuracy, and audit evidence.

Responsible persons/departments:
HR department, finance department, accountant, finance manager, executive leadership, and authorized bank signatories.

Filing location:
Payroll file, HR confidential staff file where applicable, finance file, and tax/pension file.

5.13 Budget Request Form

Definition:
A Budget Request Form is used by staff, departments, or project teams to request budget allocation for a planned activity or cost.

Purpose:
The purpose is to confirm that funds are available and approved before spending.

Why it is needed:
The finance department, project manager, and leadership need this form to prevent spending outside approved budgets.

Used for:
Project activities, trainings, field work, operational expenses, departmental needs, and management-approved activities.

Advantage:
It prevents overspending, improves budget discipline, and links activities with approved budgets.

Responsible persons/departments:
Requesting department, project officer, budget holder, finance officer, project manager, and approving manager.

Filing location:
Budget file, finance file, and project activity file.

5.14 Budget Utilization Tracking Sheet

Definition:
A Budget Utilization Tracking Sheet compares approved budget, actual expenditure, current request, total spent, and remaining balance.

Purpose:
The purpose is to monitor budget performance and spending status.

Why it is needed:
The finance department, project team, and leadership need this sheet to know whether spending is within budget and whether corrective action is needed.

Used for:
Donor projects, annual budgets, activity budgets, department budgets, and management review.

Advantage:
It helps prevent budget overrun, improves planning, and supports donor reporting.

Responsible persons/departments:
Finance department, project manager, budget holder, MEAL team where results are linked, and senior management.

Filing location:
Budget monitoring file, finance file, donor project file, and management reporting file.

5.15 Bank Reconciliation Statement

Definition:
A Bank Reconciliation Statement compares accounting records with the bank statement balance.

Purpose:
The purpose is to identify and explain differences between book balance and bank balance.

Why it is needed:
The finance department and leadership need this statement to ensure that bank transactions are complete, accurate, and properly recorded.

Used for:
Monthly financial review, audit preparation, donor reporting support, and internal financial control.

Advantage:
It detects errors, bank charges, omissions, duplicate payments, unrecorded deposits, and irregular transactions.

Responsible persons/departments:
Accountant, finance officer, finance manager, reviewer, and authorized leadership.

Filing location:
Bank reconciliation file, finance file, and audit file.

5.16 Financial Report Template

Definition:
A Financial Report Template is a standard format used to report income, expenditure, and balances.

Purpose:
The purpose is to summarize financial performance for internal and external users.

Why it is needed:
Finance staff, project managers, donors, leadership, and board members need clear financial information for decision-making and compliance.

Used for:
Monthly reports, quarterly reports, annual reports, donor reports, project reports, and management reports.

Advantage:
It improves transparency, supports decision-making, and strengthens donor confidence.

Responsible persons/departments:
Finance department, project manager, budget holder, senior management, and board/leadership where applicable.

Filing location:
Financial report file, donor report file, project file, and management report file.

5.17 Donor Fund Utilization Report

Definition:
A Donor Fund Utilization Report shows how donor funds were received, allocated, spent, and balanced.

Purpose:
The purpose is to demonstrate compliance with donor budget, grant conditions, and approved activities.

Why it is needed:
Donors, finance staff, project managers, and leadership need this report to confirm that funds were used for the intended purpose.

Used for:
Donor reporting, project closure, audit, budget review, and grant accountability.

Advantage:
It builds donor trust, supports future funding, and strengthens transparency.

Responsible persons/departments:
Finance department, project manager, MEAL team where results are linked, senior management, and donor focal person.

Filing location:
Donor report file, finance file, project file, and audit file.

Session 6: Human Resource Forms

6.1 Job Requisition Form

Definition:
A Job Requisition Form is used by a department, project team, or supervisor to request recruitment of a staff member.

Purpose:
The purpose is to justify the need for a position before recruitment begins.

Why it is needed:
The HR department, finance department, and leadership need this form to confirm that the position is necessary, budgeted, and approved.

Used for:
New positions, replacement staff, temporary staff, project staff, consultants, and interns where applicable.

Advantage:
It ensures recruitment is planned, approved, budgeted, and linked to organizational or project needs.

Responsible persons/departments:
Requesting department, supervisor, HR department, finance department, project manager, and approving leadership.

Filing location:
Recruitment file, HR file, and project staffing file.

6.2 Job Description Template

Definition:
A Job Description Template describes the duties, responsibilities, qualifications, experience, skills, reporting line, and safeguarding responsibilities of a position.

Purpose:
The purpose is to clarify what the role requires and what the staff member is expected to do.

Why it is needed:
The HR department, supervisors, and staff need clear job descriptions to avoid confusion and support performance management.

Used for:
Recruitment, supervision, induction, performance appraisal, contract preparation, and staff development.

Advantage:
It reduces role confusion, supports accountability, and improves staff performance.

Responsible persons/departments:
HR department, requesting department, supervisor, project manager, and approving leadership.

Filing location:
HR job description file, recruitment file, and staff personnel file.

6.3 Vacancy Announcement Template

Definition:
A Vacancy Announcement Template is used to advertise an approved job opportunity.

Purpose:
The purpose is to communicate open positions fairly and transparently.

Why it is needed:
The HR department and leadership need this template to ensure recruitment information is clear, consistent, and inclusive.

Used for:
Recruitment of staff, consultants, interns, volunteers, and temporary workers.

Advantage:
It promotes fair recruitment, equal opportunity, transparency, and professional communication.

Responsible persons/departments:
HR department, requesting department, communications team where needed, and approving leadership.

Filing location:
Recruitment file and HR vacancy file.

6.4 Job Application Form

Definition:
A Job Application Form is completed by candidates applying for a position.

Purpose:
The purpose is to collect applicant information in a standard format.

Why it is needed:
The HR department and recruitment panel need comparable applicant information for fair shortlisting.

Used for:
Recruitment, shortlisting, candidate screening, and HR records.

Advantage:
It makes applicant comparison easier, fairer, and more organized.

Responsible persons/departments:
Applicant, HR department, recruitment panel, and hiring supervisor.

Filing location:
Recruitment file and candidate application file.

6.5 Shortlisting Form

Definition:
A Shortlisting Form is used to screen applicants against required criteria.

Purpose:
The purpose is to identify candidates eligible for interview.

Why it is needed:
The HR department and recruitment panel need this form to show that candidates were selected fairly and based on criteria.

Used for:
Recruitment selection and interview preparation.

Advantage:
It reduces bias, supports fairness, and provides evidence for recruitment decisions.

Responsible persons/departments:
HR department, shortlisting committee, hiring supervisor, and approving manager.

Filing location:
Recruitment file and HR selection file.

6.6 Interview Assessment Form

Definition:
An Interview Assessment Form is used to score candidates during interviews.

Purpose:
The purpose is to assess knowledge, skills, experience, behavior, safeguarding awareness, and suitability.

Why it is needed:
The interview panel and HR department need this form to document selection decisions based on merit.

Used for:
Staff, consultant, intern, and volunteer interviews.

Advantage:
It supports merit-based selection, transparency, and recruitment accountability.

Responsible persons/departments:
Interview panel, HR department, hiring supervisor, technical evaluator where applicable, and approving manager.

Filing location:
Recruitment file and candidate assessment file.

6.7 Reference Check Form

Definition:
A Reference Check Form verifies a candidate's past work experience, conduct, performance, and integrity.

Purpose:
The purpose is to confirm information provided by the candidate before final hiring.

Why it is needed:
The HR department and leadership need this form to reduce hiring risk and support safe recruitment.

Used for:
Final recruitment stage before employment or engagement.

Advantage:
It supports safer hiring, confirms candidate credibility, and reduces misconduct risk.

Responsible persons/departments:
HR department, referee, hiring supervisor, safeguarding focal person where needed, and approving manager.

Filing location:
Recruitment file and staff personnel file after hiring.

6.8 Employment Contract Checklist

Definition:
An Employment Contract Checklist confirms that all required employment documents are completed before staff start work.

Purpose:
The purpose is to ensure the hiring file is complete.

Why it is needed:
The HR department, finance department, and leadership need this checklist to prevent missing documents and compliance gaps.

Used for:
New staff, consultants, temporary workers, project staff, and interns where applicable.

Advantage:
It prevents missing HR records and supports legal and donor compliance.

Responsible persons/departments:
HR department, finance department, supervisor, new staff member, and approving manager.

Filing location:
Staff personnel file and HR contract file.

6.9 Staff Personal Information Form

Definition:
A Staff Personal Information Form collects employee personal, employment, emergency, payroll, and contact details.

Purpose:
The purpose is to maintain accurate staff records.

Why it is needed:
The HR department and finance department need correct information for payroll, emergency contact, tax records, and staff administration.

Used for:
HR files, payroll records, emergency contact, staff administration, and employment documentation.

Advantage:
It supports proper HR management, emergency response, payroll accuracy, and compliance.

Responsible persons/departments:
Staff member, HR department, finance department where payroll data is needed, and supervisor.

Filing location:
Confidential staff personnel file and payroll file where applicable.

6.10 Staff Induction Checklist

Definition:
A Staff Induction Checklist is used to guide orientation of new staff, volunteers, interns, or consultants.

Purpose:
The purpose is to ensure new personnel understand EAO policies, procedures, duties, reporting lines, safeguarding, and PSEA responsibilities.

Why it is needed:
The HR department and supervisors need this checklist to ensure no important orientation topic is missed.

Used for:
New employees, interns, volunteers, consultants, and transferred staff.

Advantage:
It helps staff start work properly, reduces mistakes, and strengthens compliance from the beginning.

Responsible persons/departments:
HR department, supervisor, department head, safeguarding/PSEA focal person, finance/procurement/logistics representatives where needed, and new staff member.

Filing location:
Staff personnel file and induction file.

6.11 Attendance Sheet

Definition:
An Attendance Sheet records people present at work, meetings, trainings, workshops, or activities.

Purpose:
The purpose is to confirm attendance and participation.

Why it is needed:
HR, program, MEAL, finance, and project teams need attendance sheets as evidence for reporting, payments, and activity verification.

Used for:
Staff attendance, participant attendance, trainings, workshops, community meetings, distributions, and project events.

Advantage:
It supports payroll, donor reporting, activity verification, and accountability.

Responsible persons/departments:
HR department, project officer, training facilitator, MEAL team, finance department where payment is linked, and participants.

Filing location:
HR attendance file, training/activity file, finance supporting file where payments are made, and donor file.

6.12 Timesheet

Definition:
A Timesheet records working hours, days, or time spent on specific projects or tasks.

Purpose:
The purpose is to track staff or consultant time and support payroll or project cost allocation.

Why it is needed:
The HR department, finance department, and project managers need timesheets when staff time is charged to donor-funded projects.

Used for:
Project staff, consultants, part-time workers, technical staff, and donor-funded activities.

Advantage:
It supports payroll, cost allocation, project reporting, and donor compliance.

Responsible persons/departments:
Staff member or consultant, supervisor, HR department, finance department, and project manager.

Filing location:
HR file, payroll file, project finance file, and donor support file.

6.13 Leave Request Form

Definition:
A Leave Request Form is used by staff to request leave from work.

Purpose:
The purpose is to formally approve and document staff absence.

Why it is needed:
The HR department and supervisors need this form to manage staff availability and leave balances.

Used for:
Annual leave, sick leave, maternity leave, paternity leave, compassionate leave, unpaid leave, and other approved leave.

Advantage:
It helps manage staffing, avoids absence confusion, and supports fair leave administration.

Responsible persons/departments:
Staff member, supervisor, HR department, department head, and approving manager.

Filing location:
Staff leave file and HR personnel file.

6.14 Leave Tracking Sheet

Definition:
A Leave Tracking Sheet records leave taken, leave balance, and remaining entitlement for each staff member.

Purpose:
The purpose is to maintain accurate leave records.

Why it is needed:
The HR department and management need this sheet to ensure fair and accurate leave management.

Used for:
Annual leave tracking, sick leave tracking, maternity/paternity leave tracking, and HR reporting.

Advantage:
It prevents leave disputes and supports staff planning.

Responsible persons/departments:
HR department, supervisor, staff member where confirmation is needed, and management reviewer.

Filing location:
HR leave tracking file and staff personnel file.

6.15 Performance Appraisal Form

Definition:
A Performance Appraisal Form is used to assess staff performance against responsibilities, targets, behavior, and competencies.

Purpose:
The purpose is to review achievements, challenges, strengths, gaps, and development needs.

Why it is needed:
Supervisors, HR department, and leadership need this form to support fair performance management and contract decisions.

Used for:
Annual appraisal, probation review, contract renewal, promotion, performance improvement, and staff development planning.

Advantage:
It improves staff performance, supports fair decisions, and identifies training needs.

Responsible persons/departments:
Staff member, supervisor, HR department, department head, and approving manager.

Filing location:
Confidential staff personnel file and HR performance file.

6.16 Training Request Form

Definition:
A Training Request Form is used by staff or supervisors to request capacity building.

Purpose:
The purpose is to justify and approve training needs.

Why it is needed:
The HR department, supervisors, and leadership need this form to ensure training is relevant, budgeted, and linked to organizational needs.

Used for:
Workshops, short courses, professional development, coaching, online training, and technical capacity building.

Advantage:
It ensures training is planned, relevant, approved, and useful for EAO work.

Responsible persons/departments:
Staff member, supervisor, HR department, finance department where cost is involved, and approving manager.

Filing location:
HR training file, staff development file, and finance file where payment is made.

6.17 Training Attendance Sheet

Definition:
A Training Attendance Sheet records participants attending a training.

Purpose:
The purpose is to verify who participated.

Why it is needed:
The HR department, program team, MEAL team, and finance department need this sheet for reporting, evidence, and payment support where applicable.

Used for:
Staff training, community training, workshops, orientation sessions, and capacity-building activities.

Advantage:
It supports reporting, donor verification, participant follow-up, and training records.

Responsible persons/departments:
Trainer/facilitator, HR department, project officer, MEAL team, finance department where payment is linked, and participants.

Filing location:
Training file, HR file, activity file, finance support file where applicable, and donor file.

6.18 Staff Exit Clearance Form

Definition:
A Staff Exit Clearance Form is used when a staff member leaves EAO.

Purpose:
The purpose is to confirm return of assets, documents, advances, ID cards, files, and responsibilities.

Why it is needed:
The HR department, finance department, logistics department, and supervisor need this form to ensure the staff member leaves with no unresolved obligations.

Used for:
Resignation, termination, contract end, retirement, transfer, or end of assignment.

Advantage:
It protects EAO from asset loss, unsettled advances, missing documents, and incomplete handover.

Responsible persons/departments:
Departing staff, HR department, finance department, logistics/asset unit, supervisor, IT/admin where applicable, and approving manager.

Filing location:
Staff exit file, HR personnel file, finance clearance file, and asset file.

6.19 Staff Handover Form

Definition:
A Staff Handover Form is used to transfer duties, files, contacts, assets, pending tasks, and responsibilities from one staff member to another.

Purpose:
The purpose is to ensure continuity of work.

Why it is needed:
Supervisors, HR, and project teams need this form to prevent work interruption when staff leave, transfer, or go on long leave.

Used for:
Staff resignation, leave, transfer, promotion, role change, project closure, and emergency replacement.

Advantage:
It protects institutional memory and ensures pending work continues smoothly.

Responsible persons/departments:
Outgoing staff, incoming staff, supervisor, HR department, project manager, and department head.

Filing location:
HR handover file, staff exit file, and project/department file.

6.20 Volunteer Registration Form

Definition:
A Volunteer Registration Form records information about volunteers supporting EAO work.

Purpose:
The purpose is to document volunteer identity, skills, role, emergency contact, and agreement to follow EAO policies.

Why it is needed:
The HR department, program team, and safeguarding/PSEA focal persons need this form because volunteers represent EAO and may work with communities.

Used for:
Community volunteers, youth volunteers, event volunteers, field volunteers, and project volunteers.

Advantage:
It improves volunteer management, safety, accountability, and safeguarding compliance.

Responsible persons/departments:
Volunteer, HR department, project officer, volunteer supervisor, safeguarding/PSEA focal person, and approving manager.

Filing location:
Volunteer file, HR file, project file, and safeguarding compliance file where applicable.

Session 7: PSEA and Safeguarding Forms

7.1 Safeguarding Incident Report Form

Definition:
A Safeguarding Incident Report Form records concerns or incidents involving harm, abuse, neglect, exploitation, harassment, or misconduct affecting children, women, persons with disabilities, vulnerable adults, staff, volunteers, or community members.

Purpose:
The purpose is to document safeguarding concerns and support safe response.

Why it is needed:
Safeguarding focal persons, PSEA focal persons, HR, and senior leadership need this form to ensure concerns are recorded confidentially and responded to properly.

Used for:
Suspected or confirmed safeguarding concerns, abuse, neglect, harassment, exploitation, violence, misconduct, and safety risks.

Advantage:
It protects affected persons, supports accountability, improves response, and strengthens safeguarding compliance.

Responsible persons/departments:
Any staff member receiving the concern, safeguarding focal person, PSEA focal person where relevant, HR department where staff are involved, and senior leadership.

Filing location:
Restricted safeguarding confidential file only.

7.2 PSEA Complaint Intake Form

Definition:
A PSEA Complaint Intake Form records complaints related to sexual exploitation and abuse.

Purpose:
The purpose is to provide a safe, confidential, and survivor-centered reporting channel.

Why it is needed:
The PSEA focal person, safeguarding focal person, and senior leadership need this form because SEA complaints are highly sensitive and require safe handling.

Used for:
Sexual exploitation, sexual abuse, sexual harassment linked to aid or work, abuse of power, requests for sexual favors, or misconduct involving beneficiaries or community members.

Advantage:
It supports survivor protection, accountability, safe referral, and humanitarian compliance.

Responsible persons/departments:
Trained complaint receiver, PSEA focal person, safeguarding focal person, authorized senior leadership, and referral service provider where consent is given.

Filing location:
Strictly confidential PSEA file with restricted access.

7.3 Safeguarding Referral Form

Definition:
A Safeguarding Referral Form is used to refer an affected person to appropriate support services.

Purpose:
The purpose is to connect affected persons to health, psychosocial, legal, protection, GBV, child protection, disability, or other services.

Why it is needed:
The safeguarding focal person and PSEA focal person may not provide all services directly, so safe referral is required.

Used for:
Safeguarding, GBV, child protection, PSEA, psychosocial support, medical care, legal aid, rehabilitation, and disability support.

Advantage:
It helps affected persons receive timely and appropriate support.

Responsible persons/departments:
Safeguarding focal person, PSEA focal person, protection officer, case worker, trained staff, and external service provider.

Filing location:
Restricted safeguarding/PSEA case file.

7.4 Informed Consent Form

Definition:
An Informed Consent Form records voluntary agreement before information is collected, shared, referred, photographed, interviewed, or used.

Purpose:
The purpose is to protect the rights, privacy, dignity, and decision-making power of the person.

Why it is needed:
Program staff, MEAL staff, communications staff, safeguarding focal persons, and PSEA focal persons need consent before using personal or sensitive information.

Used for:
Case management, referrals, interviews, data collection, photos, videos, stories, success stories, and service access.

Advantage:
It promotes ethical practice, prevents harm, and protects personal information.

Responsible persons/departments:
Project staff, MEAL team, communications officer, safeguarding/PSEA focal person, participant, guardian where applicable, and witness where needed.

Filing location:
Project file, MEAL file, media file, or restricted safeguarding/PSEA file depending on the purpose.

7.5 Child Safeguarding Consent Form

Definition:
A Child Safeguarding Consent Form records consent related to a child’s participation, interview, photo, referral, or support.

Purpose:
The purpose is to protect the child’s best interests, safety, dignity, and privacy.

Why it is needed:
Program staff, communications staff, MEAL staff, safeguarding focal persons, and leadership need this form when children are involved in project activities or documentation.

Used for:
Child participation, child interviews, child photos, education support, child protection activities, and referrals.

Advantage:
It reduces child safeguarding risks and protects EAO staff from unsafe documentation practices.

Responsible persons/departments:
Parent/guardian, child where appropriate, project officer, safeguarding focal person, MEAL team, communications officer, and supervisor.

Filing location:
Child safeguarding file, project file, media consent file, or restricted protection file.

7.6 Code of Conduct Declaration Form

Definition:
A Code of Conduct Declaration Form confirms that staff, volunteers, consultants, partners, contractors, and board members agree to follow EAO ethical standards.

Purpose:
The purpose is to set clear behavior expectations and responsibilities.

Why it is needed:
HR, safeguarding/PSEA focal persons, supervisors, and leadership need this form to ensure everyone representing EAO understands acceptable and unacceptable conduct.

Used for:
Staff onboarding, volunteer registration, consultant contracts, partner engagement, contractor files, and board/leadership compliance.

Advantage:
It strengthens professional conduct, safeguarding compliance, and organizational accountability.

Responsible persons/departments:
HR department, staff, volunteers, consultants, partners, contractors, safeguarding/PSEA focal persons, and leadership.

Filing location:
Staff personnel file, volunteer file, consultant/contractor file, partner file, and safeguarding compliance file.

7.7 PSEA Commitment Form

Definition:
A PSEA Commitment Form confirms that staff, volunteers, consultants, contractors, partners, and representatives commit to preventing sexual exploitation and abuse.

Purpose:
The purpose is to create personal responsibility for PSEA.

Why it is needed:
The HR department, PSEA focal person, safeguarding focal person, and leadership need this form to reinforce zero tolerance for SEA.

Used for:
Staff onboarding, volunteer registration, consultant engagement, contractor files, partner agreements, and training records.

Advantage:
It reinforces zero tolerance, improves awareness, and supports accountability.

Responsible persons/departments:
HR department, PSEA focal person, safeguarding focal person, staff, volunteers, consultants, partners, contractors, and supervisors.

Filing location:
Staff personnel file, volunteer file, consultant/contractor file, partner file, and PSEA compliance file.

7.8 Safeguarding Risk Assessment Form

Definition:
A Safeguarding Risk Assessment Form identifies possible safeguarding risks before activities are implemented.

Purpose:
The purpose is to prevent harm before it happens.

Why it is needed:
Program teams, safeguarding focal persons, MEAL staff, and leadership need this form when activities involve children, youth, women, persons with disabilities, or vulnerable groups.

Used for:
Trainings, distributions, child/youth activities, field visits, media work, community events, beneficiary registration, and service delivery.

Advantage:
It reduces risk to vulnerable groups and strengthens safe programming.

Responsible persons/departments:
Project officer, safeguarding focal person, PSEA focal person where needed, MEAL team, field officer, and approving supervisor.

Filing location:
Project activity file and safeguarding risk file.

7.9 Safe Recruitment Screening Form

Definition:
A Safe Recruitment Screening Form assesses whether a person is suitable to work with communities and vulnerable groups.

Purpose:
The purpose is to reduce the risk of recruiting individuals who may harm beneficiaries, staff, or communities.

Why it is needed:
HR, safeguarding/PSEA focal persons, and recruitment panels need this form because recruitment is one of the first safeguarding controls.

Used for:
Staff recruitment, volunteer selection, consultant hiring, contractor engagement, and partner staffing roles where relevant.

Advantage:
It strengthens safe recruitment and protects communities.

Responsible persons/departments:
HR department, recruitment panel, safeguarding focal person, PSEA focal person, hiring supervisor, and leadership.

Filing location:
Recruitment file, staff/volunteer file, and safeguarding compliance file.

7.10 Confidential Case Note Form

Definition:
A Confidential Case Note Form records factual notes about safeguarding, PSEA, GBV, child protection, or protection cases.

Purpose:
The purpose is to support safe case follow-up while protecting sensitive information.

Why it is needed:
Safeguarding focal persons, PSEA focal persons, and authorized case handlers need this form to keep accurate but restricted records.

Used for:
Safeguarding cases, PSEA cases, GBV referrals, child protection concerns, protection follow-up, and survivor support documentation.

Advantage:
It protects confidentiality, supports case continuity, and reduces information loss.

Responsible persons/departments:
Safeguarding focal person, PSEA focal person, protection officer, trained case worker, and authorized supervisor only.

Filing location:
Restricted confidential case file only.

7.11 Survivor Assistance Tracking Form

Definition:
A Survivor Assistance Tracking Form monitors support, referrals, and follow-up provided to a survivor or affected person.

Purpose:
The purpose is to ensure agreed support and referrals are followed up safely.

Why it is needed:
The safeguarding/PSEA focal persons and authorized case handlers need this form to ensure survivors are not abandoned after reporting.

Used for:
PSEA, GBV, safeguarding, protection, psychosocial support, legal support, medical referrals, and other survivor assistance.

Advantage:
It supports survivor-centered care, follow-up, and accountability.

Responsible persons/departments:
Safeguarding focal person, PSEA focal person, protection officer, trained case worker, authorized supervisor, and referral service provider.

Filing location:
Restricted survivor assistance file only.

7.12 Whistleblowing Report Form

Definition:
A Whistleblowing Report Form is used to report serious wrongdoing confidentially.

Purpose:
The purpose is to provide a safe channel for reporting fraud, corruption, abuse, exploitation, conflict of interest, misconduct, or serious policy violations.

Why it is needed:
Leadership, HR, safeguarding/PSEA focal persons, finance, procurement, and governance bodies need this form to identify hidden risks and respond appropriately.

Used for:
Fraud, corruption, financial misconduct, procurement misconduct, SEA, abuse of power, conflict of interest, safeguarding concerns, and serious violations.

Advantage:
It encourages accountability, protects whistleblowers, and helps leadership address risks early.

Responsible persons/departments:
Whistleblower, designated complaint receiver, HR, safeguarding/PSEA focal person, finance/procurement reviewer where relevant, senior leadership, and board committee where needed.

Filing location:
Restricted whistleblowing file with authorized access only.

Session 8: Form Completion Standards

8.1 Definition

Form completion standards are the basic rules that all EAO staff, departments, and leadership should follow when filling, checking, approving, and filing forms.

8.2 Purpose

The purpose is to ensure that each form is complete, accurate, clear, approved, supported, and filed in the correct location.

8.3 Why It Is Needed

Incomplete or unclear forms can cause payment delays, audit findings, donor compliance risks, procurement disputes, stock errors, HR problems, safeguarding risks, and accountability gaps.

8.4 Key Standards

All responsible staff and departments should ensure that each form includes:

Form title
Reference number
Date
Department/project name
Purpose
Description of item, service, activity, or issue
Quantity or amount where relevant
Name and signature of requester
Name and signature of checker/reviewer
Name and signature of approver
Supporting documents
Filing reference where applicable

8.5 Correction Standards

If an error is made, the responsible staff member should correct it clearly, initial the correction, and date it. Correction fluid should not be used on official forms. Signed forms should not be changed without explanation and approval.

8.6 Confidentiality Standards

The safeguarding focal person, PSEA focal person, HR department, MEAL team, and senior leadership should ensure that confidential information is protected. Sensitive forms should not be shared in public groups, open email lists, or unsecured files.

8.7 Advantage

Good form completion improves professionalism, reduces mistakes, speeds up review, supports audit readiness, and protects staff, departments, leadership, beneficiaries, and EAO as an organization.

Session 9: Filing and Documentation System

9.1 Definition

A filing and documentation system is the organized storage of completed forms, approvals, and supporting documents by responsible departments.

9.2 Purpose

The purpose is to make sure every completed document can be found easily when requested by leadership, donors, auditors, government authorities, supervisors, or project managers.

9.3 Why It Is Needed

Good work can look unsupported if documents are missing or poorly filed. Each responsible department should keep complete and organized files to prove that activities, payments, procurement, stock movement, staff actions, and safeguarding responses were properly documented.

9.4 Finance Files

The finance department should keep payment requests, payment vouchers, receipt vouchers, bank statements, bank reconciliations, payroll records, petty cash records, advance requests, liquidation forms, budget tracking sheets, financial reports, and donor fund utilization reports.

9.5 Procurement Files

The procurement department should keep purchase requests, RFQs, quotations, bid opening forms, evaluation forms, supplier selection approvals, purchase orders, contracts, delivery notes, GRNs, sole source justifications, supplier registration forms, supplier evaluations, and procurement tracking sheets.

9.6 Store and Asset Files

The storekeeper, logistics department, and asset custodian should keep GRNs, SRFs, SIVs, stock cards, inventory registers, fixed asset registers, asset handover forms, asset return forms, asset disposal forms, store return forms, and physical stock count sheets.

9.7 HR Files

The HR department should keep recruitment files, job descriptions, contracts, staff information forms, induction checklists, attendance records, timesheets, leave records, performance appraisals, training records, exit clearance forms, staff handover forms, and volunteer files.

9.8 Logistics Files

The logistics department should keep vehicle request forms, vehicle logbooks, fuel request forms, maintenance request forms, trip authorization forms, driver daily checklists, security movement plans, emergency contact copies where relevant, and transport-related approvals.

9.9 Program and MEAL Files

The program team and MEAL team should keep concept notes, proposal checklists, workplans, activity plans, activity reports, field visit reports, meeting minutes, participant lists, beneficiary records, verification forms, distribution sheets, monitoring checklists, complaint records, lessons learned forms, indicator tracking tables, and evaluation reports.

9.10 Safeguarding and PSEA Confidential Files

The safeguarding focal person, PSEA focal person, and authorized senior leadership should keep safeguarding incident reports, PSEA complaint forms, consent forms, referral forms, confidential case notes, survivor assistance tracking forms, safeguarding risk assessments, safe recruitment screening forms, whistleblowing reports, and investigation-related records.

These files must be stored separately with restricted access.

9.11 Advantage

A good filing system improves audit readiness, donor compliance, transparency, institutional memory, management decision-making, staff accountability, and protection of confidential information.

Session 10: Practical Exercises

10.1 Store Process Exercise

Scenario:
EAO receives training materials from a supplier and later issues them to a project team.

Purpose:
To help storekeepers, logistics staff, procurement staff, finance staff, and project teams understand the link between receiving, recording, requesting, issuing, and filing store documents.

Forms used:
Goods Received Note
Stock Card / Bin Card
Inventory Register

Store Requisition Form
Store Issue Voucher

Expected learning:
Participants can explain and complete the basic store document flow from goods received to goods issued.

Responsible participants:
Storekeeper, logistics officer, project officer, procurement officer, finance officer, and supervisor.

10.2 Procurement Process Exercise

Scenario:
A project team needs to purchase training stationery.

Purpose:
To help procurement staff, project teams, finance staff, and managers understand the procurement process from request to payment.

Forms used:
Purchase Request Form
Request for Quotation
Bid Evaluation / Quotation Analysis Form
Supplier Selection and Approval Form
Purchase Order
Delivery Note
Goods Received Note
Payment Request Form

Expected learning:
Participants understand fair procurement, supplier comparison, supplier selection, documentation, delivery verification, and procurement-to-finance linkage.

Responsible participants:
Project officer, procurement officer, procurement committee, finance officer, storekeeper, and approving manager.

10.3 Finance Process Exercise

Scenario:

A staff member requests an advance for a field activity and later settles it.

Purpose:
To help finance staff, project officers, supervisors, and field staff understand advance management and liquidation.

Forms used:
Advance Request Form
Payment Voucher
Attendance Sheet
Activity Report
Receipts
Advance Settlement / Liquidation Form

Expected learning:
Participants understand how to request, receive, spend, document, and settle advances properly.

Responsible participants:
Requesting staff, project officer, finance officer, accountant, supervisor, and approving manager.

10.4 HR Process Exercise

Scenario:
EAO recruits a project officer.

Purpose:
To help HR staff, supervisors, and recruitment panels understand fair, transparent, and safe recruitment documentation.

Forms used:
Job Requisition Form
Job Description Template
Vacancy Announcement Template
Job Application Form
Shortlisting Form
Interview Assessment Form
Reference Check Form
Staff Personal Information Form
Staff Induction Checklist

Expected learning:
Participants understand how HR forms support fair recruitment, safe recruitment, staff documentation, and onboarding.

Responsible participants:
HR department, hiring supervisor, recruitment panel, finance department where budget confirmation is needed, safeguarding/PSEA focal person where safe recruitment is involved, and approving leadership.

10.5 PSEA/Safeguarding Process Exercise

Scenario:
A community member reports misconduct by a project representative.

Purpose:
To help staff, supervisors, safeguarding focal persons, PSEA focal persons, and leadership understand safe, confidential, and survivor-centered reporting.

Forms used:
PSEA Complaint Intake Form
Safeguarding Incident Report Form
Informed Consent Form
Safeguarding Referral Form
Confidential Case Note Form
Survivor Assistance Tracking Form, if follow-up support is required

Expected learning:
Participants understand confidentiality, safe referral, consent, survivor-centered response, and the importance of not investigating sensitive cases without authorization.

Responsible participants:
Trained complaint receiver, safeguarding focal person, PSEA focal person, authorized senior leadership, referral service provider, and HR department if staff misconduct is involved.

Expected Training Outputs

By the end of the training:

1. EAO staff, leadership, and departments understand the main administrative and control forms.
2. Responsible departments know which form to use for each process.
3. Staff understand the definition, purpose, need, use, advantage, responsible person, and filing location of each priority form.
4. Logistics, store, procurement, finance, HR, and PSEA documentation becomes stronger and more consistent.
5. Forms are completed more accurately before action is taken.
6. Supervisors and department heads improve review and approval practices.
7. Finance, procurement, HR, logistics, store, program, MEAL, safeguarding, and PSEA files become easier to audit.
8. Confidentiality and safeguarding standards are better protected.
9. Donor compliance, audit readiness, and internal accountability improve.
10. EAO’s administrative and control system becomes more professional and reliable.

Annexed Standard NGO Forms for Administration, Finance, Procurement, HR, Store, Programs, MEAL, Safeguarding, PSEA, Governance, Logistics, Security, Communication, and Data Protection

Skeletal Format Samples Only

Prepared for East Action Organization (EAO)

Annex 1: Board Meeting Minutes Template

Meeting Title: _____ Date: _____ Venue: _____

Chairperson: _____ Secretary/Minute Taker: _____

No.	Agenda Item	Discussion Summary	Decision/Resolution	Responsible Person	Deadline

No.	Name	Position	Signature

Prepared by: _____ Signature: _____ Date: _____ Approved by: _____ Signature: _____ Date: _____

Annex 2: Board Resolution Form

Resolution No.: _____ Date: _____ Meeting Reference: _____

Subject of Resolution: _____

Resolution Statement: _____

Approved Decision: _____

No.	Board Member Name	Position	Signature

Board Chairperson: _____ Signature: _____ Board Secretary: _____ Signature: _____ Organization Stamp: _____

Annex 3: Conflict of Interest Declaration Form

Name: _____ Position/Role: _____ Department/Committee: _____ Date: _____

Decision/Process Involved: _____

Conflict Declared: Yes ☐ No ☐

If yes, describe: _____

Recommended Action: ☐ Full participation ☐ Limited participation ☐ Excluded from decision ☐ Other: _____

Declared by: _____ Signature: _____ Date: _____ Reviewed by: _____ Signature: _____ Date: _____

East Action Organization
Action for Betterment

Annex 4: Delegation of Authority Form

Delegating Officer: _____ Position: _____ Delegated Officer: _____ Position: _____
Delegation Period: From _____ To _____
Authority Delegated: ☐ Finance ☐ Procurement ☐ HR ☐ Program ☐ Store ☐ Logistics ☐ Representation ☐ Signature Authority ☐ Other: _____
Limit of Authority: _____
Reason for Delegation: _____
Delegating Officer: _____ Signature: _____ Delegated Officer: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 5: Payment Request Form

Payment Request No.: _____ Date: _____ Requested by: _____
Department/Project: _____ Payee Name: _____ Payment Method: _____ Budget Line: _____

No.	Description	Quantity	Unit Cost	Total Amount	Remarks

Total Amount Requested: _____ Amount in Words: _____
Supporting Documents: ☐ Invoice ☐ Contract ☐ GRN ☐ Attendance ☐ Other: _____
Requested by: _____ Signature: _____ Checked by Finance: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 6: Payment Voucher

Voucher No.: _____ Date: _____ Paid to: _____ Payment Method: _____
Project/Department: _____ Budget Line: _____

No.	Description	Account Code	Amount

Total Paid: _____ Amount in Words: _____
Prepared by: _____ Signature: _____ Checked by: _____ Signature: _____ Approved by: _____ Signature: _____ Received by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 7: Receipt Voucher

Receipt Voucher No.: _____ Date: _____ Received From: _____ Received By: _____
Receipt Method: _____ Purpose/Description: _____

Amount Received: _____ Amount in Words: _____
Project/Account Code: _____
Prepared by: _____ Signature: _____ Checked by: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
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Annex 8: Petty Cash Request/Voucher

Petty Cash No.: _____ Date: _____ Requested by: _____ Department/Project: _____
Purpose: _____

No.	Expense Description	Amount	Remarks

Total Amount: _____ Receipts Attached: Yes ☐ No ☐
Requested by: _____ Signature: _____ Approved by: _____ Signature: _____ Paid by: _____ Signature: _____ Received by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 9: Advance Request Form

Advance Request No.: _____ Date: _____ Requested by: _____ Position: _____
Project/Department: _____ Activity: _____ Purpose: _____
Expected Liquidation Date: _____

No.	Description	Estimated Amount

Total Advance Requested: _____
Requested by: _____ Signature: _____ Reviewed by Finance: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 10: Advance Settlement/Liquidation Form

Liquidation No.: _____ Date: _____ Staff Name: _____ Advance No.: _____
Amount Advanced: _____ Amount Spent: _____ Balance Returned/Claimed: _____

No.	Description	Receipt No.	Amount	Remarks

Submitted by: _____ Signature: _____ Checked by Finance: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 11: Purchase Request/Purchase Requisition Form

Purchase Request No.: _____ Date: _____ Requested by: _____ Department/Project: _____

Budget Line: _____ Required Date: _____

No.	Item/Service Description	Specification	Quantity	Estimated Unit Cost	Estimated Total	Purpose

Requested by: _____ Signature: _____ Checked by: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 12: Request for Quotation Form

RFQ No.: _____ Date: _____ Supplier Name: _____ Address: _____
Submission Deadline: _____

No.	Item/Service	Specification	Quantity	Unit Price	Total Price	Delivery Time

Prepared by Procurement: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 13: Bid Opening Form

Procurement Reference No.: _____ Date: _____ Item/Service: _____

No.	Supplier Name	Bid Received	Amount Quoted	Documents Complete	Remarks

No.	Committee Member Name	Position	Signature

East Action Organization
Action for Betterment

Annex 14: Quotation Analysis/Bid Evaluation Form

Procurement Reference No.: _____ Date: _____ Item/Service: _____

Criteria	Supplier 1	Supplier 2	Supplier 3

Recommended Supplier: _____ Reason: _____
Prepared by: _____ Signature: _____ Approved by: _____ Signature: _____

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Annex 15: Purchase Order

Purchase Order No.: _____ Date: _____ Supplier Name: _____

Delivery Location: _____ Delivery Date: _____

No.	Item/Service	Specification	Quantity	Unit Price	Total Price

Total Amount: _____ Payment Terms: _____

Prepared by: _____ Signature: _____ Approved by: _____ Signature: _____ Supplier Acceptance: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 16: Goods Received Note

GRN No.: _____ Date Received: _____ Supplier/Source: _____

Delivery Note No.: _____ Purchase Order/Reference No.: _____ Project/Department: _____

No.	Item Description	Specification	Unit	Quantity Ordered	Quantity Received	Condition	Remarks

Received by Storekeeper: _____ Signature: _____ Checked by: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 17: Store Requisition Form

SRF No.: _____ Date: _____ Requested by: _____ Department/Project: _____

Purpose/Activity: _____

No.	Item Description	Unit	Quantity Requested	Approved Quantity	Remarks

Requested by: _____ Signature: _____ Approved by: _____ Signature: _____ Checked by Storekeeper: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 18: Store Issue Voucher

SIV No.: _____ Date: _____ Issued to: _____ Department/Project: _____

Purpose/Activity: _____ SRF No.: _____

No.	Item Description	Unit	Quantity Issued	Stock Balance	Remarks

Issued by Storekeeper: _____ Signature: _____ Received by: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 19: Stock Card/Bin Card

Item Name: _____ Item Code: _____ Unit: _____

Store Location: _____ Minimum Stock Level: _____

Date	Reference No.	Received	Issued	Balance	Received/Issued To	Signature

Storekeeper: _____

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Action for Betterment

Annex 20: Inventory Register

Store/Office: _____ Period: _____

No.	Item Code	Item Description	Unit	Quantity	Location	Condition	Remarks

Prepared by: _____ Signature: _____ Verified by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 21: Fixed Asset Register

No.	Asset Code	Asset Description	Serial No.	Purchase Date	Cost/Value	Donor/ Project	Location	Custodian	Condition

Prepared by: _____ Date: _____ Reviewed by: _____ Date: _____

East Action Organization
Action for Betterment

Annex 22: Asset Handover/Return Form

Form Type: Handover ☐ Return ☐ Date: _____

Asset Code: _____ Asset Description: _____ Serial No.: _____ Condition: _____

Handed Over From: _____ Handed Over To: _____

Purpose/Location: _____

Handed Over by: _____ Signature: _____ Received by: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 23: Job Requisition Form

Department/Project: _____ Date: _____ Requested Position: _____ Number Required: _____

Employment Type: _____ Reason for Recruitment: _____

Budget Available: Yes ☐ No ☐ Budget Line: _____ Expected Start Date: _____

Requested by: _____ Signature: _____ Reviewed by HR: _____ Signature: _____ Reviewed by Finance: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 24: Job Description Template

Position Title: _____ Department/Project: _____ Duty Station: _____ Reports to: _____

Contract Type: _____ Duration: _____

Job Purpose: _____

Key Duties and Responsibilities: 1. _____ 2. _____ 3. _____

Required Qualifications: _____

Required Experience and Skills: _____

Prepared by: _____ Approved by: _____ Date: _____

East Action Organization
Action for Betterment

Annex 25: Attendance Sheet

Activity/Meeting/Training: _____ Date: _____ Location: _____ Project: _____

No.	Name	Organization/ Department	Gender	Phone	Signature

Prepared by: _____ Signature: _____ Date: _____

East Action Organization
Action for Betterment

Annex 26: Leave Request Form

Staff Name: _____ Position: _____ Department: _____ Type of Leave: _____

Leave From: _____ To: _____ Total Days: _____

Reason: _____ Work Handover To: _____

Requested by: _____ Signature: _____ Recommended by Supervisor: _____ Signature: _____

Approved by HR/Management: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 27: Staff Exit Clearance Form

Staff Name: _____ Position: _____ Last Working Day: _____ Reason for Exit: _____

Clearance Item	Cleared	Remarks	Responsible Signature

Clearance Item	Cleared	Remarks	Responsible Signature

HR Clearance: _____ Signature: _____ Final Approval: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 28: Activity Plan Form

Activity Title: _____ Project: _____ Date: _____ Location: _____
Objective: _____ Target Participants: _____ Number Expected: _____

Required Item/Task	Quantity/Detail	Responsible Person	Deadline

Budget Required: _____ Prepared by: _____ Signature: _____ Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 29: Activity Report Form

Activity Title: _____ Project: _____ Date/Location: _____ Prepared by: _____
Objective: _____
Participants Reached: Male ____ Female ____ Total ____
Key Activities Conducted: _____
Key Achievements: _____
Challenges: _____
Recommendations/Follow-up: _____
Attachments: ☐ Attendance ☐ Photos ☐ Agenda ☐ Materials ☐ Other
Prepared by: _____ Signature: _____ Reviewed by: _____ Signature: _____

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Annex 30: Field Visit Report Form

Visit Date: _____ Location: _____ Purpose of Visit: _____
Team Members: _____
Findings/Observations: _____
Issues Identified: _____

Action Point	Responsible Person	Deadline

Prepared by: _____ Signature: _____ Date: _____

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Annex 31: Beneficiary Registration Form

Project: _____ Location: _____ Date: _____

No.	Beneficiary Name/Code	Sex	Age	ID/Phone	Vulnerability Criteria	Support Type	Signature/ Thumbprint

Registered by: _____ Verified by: _____ Approved by: _____

East Action Organization
Action for Betterment

Annex 32: Distribution Sheet

Project: _____ Activity: _____ Location: _____ Date: _____

Item/Cash/Service Distributed: _____

No.	Beneficiary Name/Code	Sex	Item/Amount	Quantity	ID/Phone	Signature/ Thumbprint

Distributed by: _____ Verified by MEAL: _____ Approved by: _____

East Action Organization
Action for Betterment

Annex 33: Monitoring Checklist

Project: _____ Activity/Site: _____ Date: _____ Monitored by: _____

Monitoring Area	Yes/No/NA	Findings	Action Required

Summary and Recommendations: _____

Signature: _____ Date: _____

East Action Organization
Action for Betterment

Annex 34: Feedback and Complaint Form

Complaint/Feedback No.: _____ Date: _____ Received by: _____ Channel: _____

Complainant Name/Code: _____ Contact: _____ Confidential: Yes ☐ No ☐ Anonymous: Yes ☐ No ☐

Category: _____

Description: _____

Immediate Action Taken: _____

Referral Required: Yes ☐ No ☐ Referred To: _____

Received by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 35: Complaint Logbook

No.	Date Received	Complaint Code	Category	Location	Action Taken	Responsible Person	Status	Closure Date

Managed by: _____ Period: _____

East Action Organization
Action for Betterment

Annex 36: Indicator Tracking Table

Project: _____ Reporting Period: _____

Indicator	Baseline	Target	Achievement This Period	Cumulative Achievement	Means of Verification	Remarks

Prepared by MEAL: _____ Date: _____ Reviewed by Project Manager: _____ Date: _____

East Action Organization
Action for Betterment

Annex 37: Safeguarding Incident Report Form

Confidential Case/Incident Code: _____ Date Reported: _____ Reported by: _____
Affected Person Code: _____ Age/Sex: _____ Location: _____ Type of Concern: _____
Brief Factual Description: _____
Immediate Safety Risk: Yes ☐ No ☐ Immediate Action Taken: _____
Referral Required: Yes ☐ No ☐ Consent Obtained: Yes ☐ No ☐
Received by Safeguarding Focal Person: _____ Signature: _____
Restricted Access Only

East Action Organization
Action for Betterment

Annex 38: PSEA Complaint Intake Form

Strictly Confidential Complaint Code: _____ Date Received: _____ Complaint Receiver: _____
Complainant Name/Code: _____ Anonymous: Yes ☐ No ☐ Affected Person Code: _____ Age/Sex: _____
Alleged Perpetrator Role: _____ Nature of Complaint: _____
Brief Factual Description: _____
Immediate Safety/Medical Need: Yes ☐ No ☐ Consent for Referral: Yes ☐ No ☐
Action Taken/Referral: _____
Received by: _____ Signature: _____ Referred to Authorized Focal Person: _____ Date: _____
Restricted Access Only

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Action for Betterment

Annex 39: Consent Form

Name/Code: _____ Date: _____ Location: _____
Purpose of Consent: _____ Consent Given: Yes ☐ No ☐

Participant/Guardian Name: _____ Signature/Thumbprint: _____ Staff/Witness Name: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 40: Code of Conduct Declaration Form

Name: _____ Role: _____ Department/Organization: _____

Declaration: I confirm that I have read, understood, and agree to comply with East Action Organization's Code of Conduct.

Name: _____ Signature: _____ Date: _____ Witness/HR: _____ Signature: _____ Date: _____

East Action Organization
Action for Betterment

Annex 41: Vehicle Request Form

Vehicle Request No.: _____ Date: _____ Requested by: _____ Department/Project: _____

Destination: _____ Purpose of Trip: _____ Travel Date: _____ Return Date: _____

Number of Passengers: _____

Requested by: _____ Signature: _____ Approved by: _____ Signature: _____ Assigned Vehicle/Driver: _____

East Action Organization
Action for Betterment

Annex 42: Vehicle Logbook

Vehicle Plate No.: _____ Driver Name: _____ Month: _____

Date	Destination	Purpose	Opening KM	Closing KM	Total KM	Fuel Issued	Driver Signature

Checked by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 43: Fuel Request Form

Fuel Request No.: _____ Date: _____ Requested by: _____ Vehicle/Generator No.: _____

Purpose: _____ Destination/Activity: _____ Fuel Quantity Requested: _____

Requested by: _____ Signature: _____ Approved by: _____ Signature: _____ Issued by: _____ Signature: _____ Received by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 44: Security Risk Assessment Form

Activity/Travel: _____ Location: _____ Date: _____ Prepared by: _____

Risk Area	Risk Level	Mitigation Measure	Responsible Person

Risk Area	Risk Level	Mitigation Measure	Responsible Person

Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 45: Communication Request Form

Request No.: _____ Date: _____ Requested by: _____ Department/Project: _____
Activity/Event: _____ Location: _____ Date of Activity: _____
Support Requested: ☐ Photos ☐ Video ☐ Story ☐ Social Media ☐ Banner ☐ Report Design ☐ Other: _____
Approved by: _____ Signature: _____

East Action Organization
Action for Betterment

Annex 46: Media Consent Form

Name/Code: _____ Date: _____ Location: _____ Purpose: _____
Consent Type: ☐ Photo ☐ Video ☐ Voice ☐ Story ☐ Name ☐ Other: _____
Consent Given: Yes ☐ No ☐
Participant/Guardian Signature: _____ Staff/Witness Signature: _____

East Action Organization
Action for Betterment

Annex 47: Data Collection Consent Form

Name/Code: _____ Date: _____ Location: _____
Purpose of Data Collection: _____ Type of Data Collected: _____ Data Use: _____
Consent Given: Yes ☐ No ☐
Participant/Guardian Signature: _____ Enumerator/Staff Signature: _____

East Action Organization
Action for Betterment

Annex 48: Confidentiality Agreement Form

Name: _____ Role: _____ Department/Organization: _____ Date: _____
Confidential Information Accessed: _____
Agreement Confirmed: Yes ☐ No ☐
Name: _____ Signature: _____ Date: _____ Witness/Responsible Officer: _____ Signature: _____ Date: _____

East Action Organization
Action for Betterment

Annex 49: Document Control Register

No.	Document/Form Title	Version No.	Date Approved	Responsible Department	Location/File Reference	Remarks

No.	Document/Form Title	Version No.	Date Approved	Responsible Department	Location/File Reference	Remarks

Prepared by: _____ Reviewed by: _____ Date: _____