

## Appraisal / Approval

### Document: Technical Assistance Report (also called “TA Paper”)

#### PCP Disclosure Requirements:

1. TA Reports are posted on ADB’s website no later 14 calendar days after approval by the relevant authority (Board, President or Vice-President).
2. The draft TA Report may be given to in-country stakeholders or posted on the web if ADB and the government/project sponsor determine it appropriate.

#### Guide to Staff:

1. While preparing the TA Report, staff should inform the government of the disclosure requirements regarding TA Reports and explain the list of exceptions to presumed disclosure.
2. If ADB and the government/project sponsor decide to disclose the draft TA reports for consultation purposes, it should indicate “DRAFT” and the date at the header of all the pages of the document. These will have to be removed when the document is finalized.
3. Staff should use the document template for TA Reports found in the [Board Documents and References](#) in the eBoard.
4. Once the document is edited, finalized, and ready to be circulated to the Board, the Director General of the regional department will send a memo to OSEC requesting the document's circulation. Include copies of the signed memo from Management approving circulation, the draft Board cover memo (get templates [here](#)) and final document. If information will be removed from the document, the draft Board cover memo should include one of the disclaimers in step 6 below. Also, submit a printing request form to OAS printing unit, together with the final document, and copy of approval to circulate.
5. Submit the document (in pdf and Word format) to the [Disclosure Management System](#) (DMS). Note that this replaces the current process of submitting Board documents to OSEC using the BDS transmission form. The DMS tracks the document from the time it is submitted to the BDS, circulated to the Board, and posted on the web.

#### Procedure for Removing Confidential Information:

6. If certain information must be removed from a TA Report, in accordance with PCP paragraph 126, include one of the following disclaimers on the draft circulation memo to the Board:
  - a. “This document has a restricted distribution until it has been approved. Following such approval, the document will be available to the public. However, paragraphs xx-xx will be removed prior to public disclosure, in accordance with paragraph 126 of ADB's Public Communications Policy.”
  - b. “This document has a restricted distribution until it has been approved. Following such approval, the document will be available to the public. The document will be further reviewed before being disclosed to the public and any exception that meets paragraph 126 of ADB's Public Communications Policy will be removed prior to public disclosure.”

#### Public Communications Policy: Disclosure and Exchange of Information

For inquiries, call the InfoUnit at ext. number 5316 or send an e-mail to [disclosure@adb.org](mailto:disclosure@adb.org)

7. For those TA Reports with information removed, staff should remove the information from the e-file during the 21-day circulation period. Remove only the confidential text, not the headings. In place of the confidential text, insert the following, in brackets: "This information was deemed confidential according to exception # [cite number] of ADB's Public Communications Policy." Submit the pdf file of the redacted version to DMS immediately following approval.

**Procedure for Withholding the Entire Document from Public Disclosure:**

8. If the entire document must be withheld from disclosure because all of its contents meet the exception criteria in PCP paragraph 126, staff must indicate so in the memo to the President seeking approval to circulate the document to the Board. OSEC will then know that Management has approved keeping the document confidential. Please copy DER on the memo to OSEC requesting circulation.
9. Staff will still submit the document for Board circulation through DMS as in step 5, but DER will not make the document publicly available.
10. In accordance with PCP paragraph 123, staff must still make reference to the document on the web site. Submit the document title to DER at [docs4web@adb.org](mailto:docs4web@adb.org) immediately following the Board meeting, indicating that the document itself will not be made publicly available.

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