



PEPFAR
20 YEARS OF IMPACT

PEPFAR Human Resources for Health (HRH) Inventory Webinar

USG Only

September 19, 2023



Agenda

1. Overview and Timeline of HRH Reporting
2. Using the Inventory to Guide Programs: HRH Dossier Updates
3. Resources to Support Data Entry
4. Entering Data in the HRH Template
 - NEW fields
5. Validating the Data
6. DATIM Accounts, Data Submission, and Support Resources
7. Q&A

Overview and Timeline of HRH Reporting



Why is the PEPFAR HRH Inventory required?

- Last year, PEPFAR spent over \$1.4B on 364k staff, 238k FTE
- Ambassador Nkengasong's 5x3 strategy for reimagining PEPFAR calls for sustainability and leveraging our health system investments
- Sustainability and optimizing our substantial investment into the health workforce requires understanding:
 - Who are our Health Workers, and what role do they play?
 - Where are they located?
 - How are they engaged, and how much are they compensated?

Who is included in the Inventory?

- HRH are reported on the individual level
 - No personally identifying information (PII) is collected
- Every individual that receives any form of compensation from PEPFAR is required to report:
 - Salary, stipend, contract, fringe, non-monetary support
 - Prime and subrecipient IPs
 - Health workers, program management, TA, HQ-based staff charged directly to the IM
- Not included in the Inventory:
 - Staff charged to NICRA only
 - USG

Who completes the Inventory?

- The Prime IP for each IM is responsible for submitting one (1) template for the IM, consolidating prime and subrecipients' staffing data



- IMs that are closing out this year are required to report as part of their closeout requirements

Timeline: FY23 HRH Data Entry

Date	Upcoming Activities
Prior to 10/1	DATIM users request new accounts or reactivate expired accounts Inventory templates available on SharePoint/DATIM for download and review
10/2	DATIM open for IP upload of HRH templates
11/14	HRH DATIM data entry closes; all templates should have been submitted by IPs and approved by Agency staff
11/30	DATIM open for IP cleaning and re-upload of HRH templates
12/15	HRH reporting data cleaning period closes

HRH Data Flow

(If you are familiar with Expenditure Reporting, this is very similar!)

IP completes HRH Inventory in Excel (Can be offline)

IP logs into DATIM and uploads HRH Inventory document to HRH Processor Application. HRH Inventory is validated.

If validated successfully, IP submits HRH Inventory via DATIM Approvals Application.

HRH Inventory is available for download and review by an Agency approver. OU-level Agency approver logs into DATIM Approvals Application and approves or rejects.

Once approved by OU-level Agency user, Global Agency user logs into DATIM Approvals Application and approves or rejects. The HRH Inventory is then sent to S/GAC Global.

Using the Inventory to Guide Programs: HRH Dossier



Using the PEPFAR HRH Inventory to Guide Programs

- The Inventory allows OUs to understand:
 - The total number of staff supported by PEPFAR within the OU
 - The types of staff that PEPFAR supports, including the cadres of health workers in facilities, at the PSNU level (community or roving staff), and other types of staff at the above-site level, such as technical assistance providers
 - Where staff are located, by SNU, PSNU and Facility
 - The cost of HRH
 - The number and types of staff used to support the various PEPFAR program areas
 - The types of employment mechanisms in use

Using the PEPFAR HRH Inventory to Guide Programs

- This foundational data can be used to inform staffing decisions to support PEPFAR's performance through answering questions such as:
 - Are the number of staff and staffing/cadre mix appropriate to the needs of the facility or community?
 - Does the level of staffing available in each facility or region contribute to specific PEPFAR program indicators? Is PEPFAR supporting the right cadres of staff in sufficient numbers to reach program goals?
 - Are there extreme shortages, or overstaffing, in any facilities?
 - Is there opportunity to redeploy/repurpose existing staff to meet new program needs/strategies?

HRH Dossier

- PEPFAR will be releasing an updated HRH Dossier prior to COP23 Y2 planning to inform decision-making

CONTENTS

- Overview
 - 1.1 Cover Page
 - 1.2 OU Dashboard
 - 1.3 Grid Pivot/Diaggregate Complete...
- Staffing Footprint - Single OU
 - 2.1 HRH by Title Overview
 - 2.2 HRH Title by Partners and Mechanism
 - 2.3 HRH by Program Area
 - 2.4 HRH in Service Delivery/ Non-Serv...
 - 2.5 Community, Facility, Roving, and A...
- HRH Remuneration - Single OU
 - 3.1 Remuneration by Staffing Titles
 - 3.2 Remuneration by Mode of Hire
 - 3.3 Remuneration by Partner and Mec...
 - 3.4 Remuneration by Site/Above Site a...
 - 3.5 Remuneration by Cadre and Emplo...
 - 3.6 Remuneration by Cadres across S...
 - 3.7 Compensation by Cadre
- HRH MER/Analysis - Single OU
 - 4.1a HRH for Testing (Graph)
 - 4.1b HRH Density for Testing
 - 4.2a HRH for Treatment (Grid)
 - 4.2b HRH Density for Treatment
 - 4.3 HRH for Viral Load, TX, P...

Note: This visual is preset to examine Testing Direct Service Delivery Staff (or Expenditure) compared to Testing Targets.

Operating Unit: (All) | SNU 1: (All) | PSNU: (All) | Facility: (All) | Agency: (All) | Prime Partner: (All) | Mechanism: (All)

Fiscal Year: 2021 | HRH Program Area: | HRH Interaction Type: | % Result: | % Target: | % Annual Total Spend: | % of FTEs:

HRH Completeness Check

HRH/ER Alignment - NEW
HRH/ER Value Comparison - NEW
Prime/Sub HRH vs ER Comparison - NEW

HRH Overview

1.1 OU Dashboard - NEW
1.2 Global Dashboard - NEW
1.3 HRH Inventory Grid Pivot

Staffing Footprint - Single OU

2.1 HRH Overview - NEW
2.2 HRH by Staffing Footprint Overview
2.3 HRH Title by Partners and Mechanism
2.4 HRH by Program Area
2.5 HRH in Site/Above Site and Service Delivery...
2.6 Community, Facility, Roving, and Above-Site...
2.7 HRH Footprint Trends - NEW

HRH Remuneration - Single OU

3.1 Remuneration by Staffing
3.2 Remuneration by Mode of Hire
3.3 Remuneration by Partner and Mechanism
3.4 Remuneration by Site/Above Site and Service...
3.5 Remuneration by Employment Category and ...
3.6 Remuneration by Cadres across SNU/PSNUs
3.7 Remuneration across SNU/PSNUs (Map)
3.8 HRH Remuneration Trends - NEW

HRH MER/Analysis - Single OU

4.1a HRH for Testing (Graph)
4.1b HRH Density for Testing
4.2a HRH for Treatment (Grid)
4.2b HRH Density for Treatment
4.3 HRH for Viral Load, TX, P...

Operating Unit

Fiscal Year: 2021

Part-time / Full-time Equivalent: (All)

of Mechanisms Reported
660 of 1248

\$ Reported to ER but not HRH

OU Total FTE
227,658.60

OU Total HRH \$

Employment Category by Operating Unit

Employment Category: Program Management, Other Staff, HCW: Clinical, HCW: Ancillary

FTE by Mode of Hire

FTE by Work Location

FTE by Site Level

Prime vs Sub Hire

FTE by Interaction Type

HRH Expenditures Reported in ER include: Contracted HCW-Ancillary, Actual Salary, Personnel but exclude in Actual FTEs Personnel or in ER

Operating Unit: | Country: | Mechanism: | Actual Salary Expenditure (HRH) | Actual Annual Spend (HRH) | HRH Expenditures Reported in ER*

Mechanism	Actual Salary Expenditure (HRH)	Actual Annual Spend (HRH)	HRH Expenditures Reported in ER*	Difference
Total	\$170,697,804	\$181,945,881	\$354,504,818	\$172,558,937
Jamaica International AIDS Education and Training Center	\$91,541	\$91,541	\$1,474	(\$90,067)
Trinidad and Tobago International AIDS Education and Training Center	\$36,450	\$36,450	\$20	(\$36,430)
Barbados Barbados MOH FOA GH16-1610			\$3,750	

HRH Inventory Reporting Analysis - CONTRACTED

Mechanism	Actual Salary Expenditure (HRH)	Actual Annual Spend (HRH)	HRH Expenditures Reported in ER*	Difference
Total	\$1,050,620,788	\$1,289,097,399	\$1,513,065,261	\$222
Jamaica International AIDS Education and Training Center	\$1,874,736	\$2,072,835	\$327,411	(\$1,745,424)
Trinidad and Tobago International AIDS Education and Training Center	\$114,616	\$117,771	\$17,013	(\$97,758)
Guyana Ministry of Health, Guyana Cong GH001632			\$17,192	

Program: (All) | **Mechanism:** (All) | **Prime Partner:** (All)



HRH Dossier

- Updated dossier and data set will be available in Panorama November 21
 - In addition to the visuals provided last year, the dossier will include new analyses in the following categories:
 - > HRH alignment with Expenditure Reporting for each OU in a Subrecipient analysis
 - > HRH by local vs international partner status
 - > Employment Title analysis by Total Annual FTE, Actual Annual Spend, and Spend per Result
- Data set will be an excel file that will contain all HRH data for all OUs that was submitted during the collection window

Resources to Support Data Entry



Resources on Zendesk- Orientation & Uploading

Title	Audience	Description
Inventory		
HRH Inventory Template - OU Specific	IPs	This is the data collection template that must be completed for each IM
FTE (Full Time Equivalent) Calculator	IPs	Tool for calculating FTE using data available, embedded in the inventory template
Agency and IP Orientation to Template and Uploading		
PEPFAR HRH Inventory Handbook	IP & Agency Field Staff	This document describes the rationale for collecting HRH Inventory data, provides an overview of HRH Inventory data use, and provides detailed definitions of each field, including job aids, where appropriate.
HRH Inventory Webinar Slides	OU Agency POC / HQ Agency / Chairs/PPMs	Webinar slides providing an overview of the template, data collection and data submission to USG staff
HRH FY23 Employment Title/Category/Cadre	IP & Agency Field Staff	Brief definitions of each job title, with various categorizations (service delivery, technical assistance, site level, ER cadre, etc.)
HRH Data Entry and Submission for IP Users	IPs	This document describes will contain Webinar slides related to completing the HRH Inventory template, uploading and submitting the template to DATIM for IP reference.
IP Step by Step Guide	IPs	A step by step guide to help Implementing Partners download, complete, upload, validate, and submit the template.

Resources on Zendesk- Quality Control & DATIM Accounts

Quality Control and Review Process

FY23 HRH DATIM Error Messages and Resolutions	IPs	This document describes how to resolve validation errors the user may encounter and how to resolve them.
DATIM Data Approval Level Statuses and Actions	HQ/OU Agency Reviewers	This page has a chart to describe the data approval levels and associated actions in the DATIM Data Approval app for HRH Inventory.

DATIM Accounts

Instructions for User Administrators: Creating new HRH user accounts	Primary User Administrators & User Administrators	This page describes how to process HRH Inventory account requests and is relevant for Primary User Administrators and User Administrators only.
Password Resets and User Name Recovery Guide	All DATIM Users	Guide for resetting your password or contacting your user administrator to reactivate your account.

Entering HRH Data in the Reporting Template



What's New

- **Cover Sheet: space for the Prime organization's UEI has been added.** Please enter the Prime's UEI. If the User does not know their UEI, the number "111111111111" should be entered, if IP is not required to have one, use "999999999999".
- **Column X, which formerly asked whether the individual had contributed to the COVID Response, has been changed to ask "In the past year, provided support for other public health emergency?"** This question is now designed to capture any support that an individual provides for any public health emergency (e.g. Ebola, COVID, Cholera) that the OU is facing.
- **Columns Y:AA, which capture financial expenditures, have now been changed to say "USD" and to show a "\$" in the columns.** This change was made to reinforce that all reporting should be done using the U.S. Dollar equivalent.
- **Column U:** A new option has been added to **Primary Program Area for Site Level: C&T: HIV/TB**
- **Column C: Employment Titles dropdown list has been modified to include the following new titles:**
 - **IP Program Management: Senior Leadership.** This title will capture the senior leadership within IPs, which previously might have been categorized as "Other Program Management Staff"
 - **IP Program Management Procurement/Grants Management Staff have been split into two.** There is now an option for "IP Prg Mgmt: Procurement", and a separate option for "IP Prg Mgmt: Grants Management."
 - **Other: DREAMS.** This title has been added to capture other types of DREAMS workers not covered by the existing DREAMS title of "DREAMS Mentor"

Orientation to the Inventory Template Structure

- The HRH Inventory Template is customized to each OU with the OU-specific DATIM geographic hierarchy.
- The template contains three tabs:
 - **Cover Sheet Tab:** The first tab contains data fields asking about the IP, mechanism, and other identifying data.
 - **Staff List Tab:** The second tab in the template is where data on each human resource – one human resource per row – is entered.
 - **FTE Tab:** The third tab helps users calculate their average monthly FTE
- Important:
 - The columns in the template should not be modified (do not add/delete columns)
 - > Copying and pasting from one FY23 template to another FY23 template is generally fine, however do not copy from a prior year's template into a FY23 template.
 - > Do not copy free text into cells that have a dropdown.
 - Any editing of columns or incomplete data entry will trigger validation errors when uploading to DATIM.

Cover Sheet Tab Definitions and Elements

Data Element	Definition
Cover Sheet Tab	
Operating Unit/ Country	DATIM-generated field for the Country responsible for executing the Implementing Mechanism. Also known as OU and the Organization Level 3 Name. This field will be pre-filled on your data collection tool. Note: For Regions, this field will be pre-populated to the Region level (i.e. Asia Region).
Funding Agency	The U.S. Government Agency (at Operational Division/Bureau level where applicable) that awards funding for a given Mechanism. Examples include: USAID, DOD, HHS/CDC, HHS/HRSA.
Completion Date	Date that the template was completed prior to submission. Please use the date format of MM/DD/YYYY. For example, December 8, 2023 would be 12/8/2023.
Completed By	Prime IP's Organization Name. Subrecipients may complete this field with their organization's name for clarity when submitting to IPs
Mechanism ID	Please select the Mechanism ID for the implementing mechanism completing this template. Mechanism ID, also known as 'mech_code,' is common to MER, SIMS and ER data streams. This is a four-digit to six-digit numeric value used to uniquely identify each mechanism. These are also common across FACT Info, DATIM and PEPFAR Data Hub (PDH)/Panorama.
Mechanism Name	The Mechanism name will automatically generate based on the Mech ID selected in the field above. If the Mech name is incorrect, please submit a ZenDesk ticket, selecting the "HRH" option.
Prime IP Point of Contact	Please enter the name of the person from the Prime IP who can be contacted for follow-up questions regarding data that was submitted.
Prime IP Contact Info	Please enter the email address of the Prime IP Point of Contact (from the field above) who can be contacted for follow-up questions regarding the data submitted.
(NEW) Prime UEI	The Unique Entity Identifier (UEI) number is a unique twelve-digit identification number provided by SAM.gov.
Count of Subrecipients	Please enter the number of subrecipients supported through the mechanism.
UEI/Sub Partner Name	The Unique Entity Identifier (UEI) number is a unique twelve-digit identification number provided by SAM.gov. If the User does not know their UEI, the number "111111111111" should be entered, if they are not required to have one, use "999999999999"

Data Element and Sources: Staff List Tab

Data Element	Potential Source
Record Number (optional)	IP generated
Employed through Prime or Sub IP?	Employment records
If Sub, Select IP Name	Employment records
Gender	Employment records
Employment Title	Employment records
Mode of hire	Employment records
MOH Staff/Seconded to MOH?	Employment records
Months of Work in Past Year	Payroll
Average FTE per month	Employment records/payroll (FTE calculator tool on 3rd tab)
Primarily support work in the community?	Employment records, Manager
Work in or support multiple facility sites (Roving Staff)?	Employment records, Manager
Provide Technical Assistance?	Employment records
Position based outside of OU?	Employment records
SNU 1/PSNU/Community/Facility	Employment/deployment records, Manager
Primary Program Area?	Job description, Employment records, Manager
Primary Beneficiary?	Job description, Manager
Deliver services DIRECTLY to beneficiaries?	Job description, Manager
(UPDATED) In past year provided support for other public health emergency?	Manager, COVID-related program adaptation records
Sum of annual PEPFAR expenditure, excluding Fringe (in USD)	Payroll, IP financial documents
Annual PEPFAR fringe expenditure (in USD)	Payroll, IP financial documents
Non-Monetary Expenditure (in USD)	Payroll, IP financial documents

Staff List Tab: Record Number

- **Dropdown Options:** Free Text, Alphanumeric
 - This is an optional, alphanumeric field that can be assigned to each human resource for health entered in the reporting template. IPs can use this number to more easily correct and update the inventory during data cleaning.
 - An example of a record number could be 00001 or ABC-0001.
 - **Note:** This field will not be incorporated in DATIM datasets or stored on PEPFAR servers.

Staff List Tab: Employed through Prime or Sub IP

- **Dropdown Options:** Prime, Sub
 - Please indicate whether the Prime or Subrecipient IP hired the PEPFAR-supported worker.
 - If the individual is working for both the Prime and a Subrecipient IP (uncommon), select their PRIMARY employer.

Staff List Tab: If Sub, select IP Name

- **Dropdown Options:** List will be dynamically generated from the list of sub-IPs entered on the cover sheet tab
 - Please indicate the name of the Sub IP that employs the PEPFAR-supported worker.

Staff List Tab: Gender

- **Dropdown Options:** Male, Female, Transgender, Non-binary, Other, Don't Know
 - Please select the recognized gender of the PEPFAR-supported worker.

Staff List Tab: Employment Title

- **Dropdown Options:** Alphabetized, standardized list of job titles
 - Please indicate the employment title of the individual.
 - The dropdown list contains an alphabetized list of standardized job titles.
 - **Please note:** The job titles may not exactly match the official job title of the individual. Please select the job title that best matches the job that the individual was hired to perform.
 - > The employment title selection should reflect the work being performed by the individual, NOT their training or qualification.
 - > If an individual worked with DREAMS, please select one of the DREAMS job titles over other potential options within this dropdown.
 - > Senior IP Management: Senior leaders and managers within the mechanism, including Chief of Party, Chief of Staff or other senior roles.

How to Determine Employment Title

Employment Title:



Employment Titles (1 of 4)

Cadre Group / Category	Employment Title	Definition
Medical	Doctor	Studies, diagnoses, treats, and prevents illnesses, diseases, and injuries. Doctors perform physical exams, order diagnostic tests, prescribe and administer treatments, and monitor treatments and preventive measures.
	Clinical Officer	Provides advisory, diagnostic, curative and preventive medical services in a more limited scope and complexity than those carried out by medical doctors. They work autonomously, or with limited supervision of medical doctors.
	Medical Assistant	Performs basic clinical and administrative tasks to support client care under the direct supervision of a medical practitioner or other health professional. They assist medical doctors and other health professionals to examine and treat clients, including measuring and recording vital signs, administering medications, and performing routine clinical procedures.
Nursing / Midwifery	Nurse	Provides treatment, support, and care. Planning and management of the care of clients, including the supervision of other health care workers, working autonomously or in teams, in collaboration with medical doctors and/or other health workers.
	Auxiliary Nurse	Provides direct personal care and assistance with activities of daily living to clients and residents in a variety of health care settings such as hospitals, clinics, and residential nursing care facilities. They generally work under the direct supervision of medical, nursing, or other health professionals.
	Nursing Assistant	Provides basic nursing and personal care to clients according to care plans established by more skilled, trained, or educated health professionals. They generally provide support for a client's daily cares and needs, which may include assisting with client hygiene, feeding, and daily activities.
	Midwife	Plans, manages, provides, and evaluates midwifery care services before, during and after pregnancy and childbirth. They provide delivery care for reducing health risks to women and newborn children, working autonomously or in teams with other health care providers.
	Auxiliary Midwife	Provides basic health care and advice before, during and after pregnancy and childbirth, according to treatment and referral plans usually established by medical, midwifery and/or other health professionals.
Laboratory	Laboratory Technologist/Technician	Performs clinical tests on specimens of bodily fluids and tissues in order to obtain information about the health of a client.
	Laboratory Assistant/Phlebotomist	Collects blood or samples at a lab and relay the results to a clinician for diagnostic purposes.
Pharmacy	Pharmacy Assistant	Performs a variety of tasks associated with dispensing medication under the guidance of a pharmacist or other health professional. Pharmacy Assistants primarily focus on administrative and supply/stocking duties.
	Pharmacy Technician	Have more specialized roles than Pharmacy Assistants, which could include preparing prescriptions and supervising other Pharmacy Staff. Under pharmacist supervision, pharmacy technicians may: manage dispensaries, provide medicines to clients, and provide information to clients and other healthcare professionals.
	Pharmacist	Stores, preserves, compounds, and dispenses medicinal products and counsels on the proper use and adverse effects of drugs and medicines following prescriptions issued by medical doctors and other health professionals.
Mental Health Staff	Psychologist	Performs activities to support the mental health and psychosocial needs of people at risk for HIV or living with HIV. Psychologists may provide individual, or group counseling tailored to the needs of client populations.
	Psychiatrist	Physicians who specialize in psychiatry, the branch of medicine devoted to the diagnosis, prevention, study, and treatment of mental disorders and/or substance use problems using counseling/therapy, medication, and other interventions. Psychiatrists can generally prescribe medication and often have a more medical or clinical focus than psychologists.
	Psychology Assistant	Responsible for client intake, which includes interviewing and gathering history. May work under supervision of psychologists or other mental health professionals to provide support for client follow up, documentation, etc.

Employment Titles (2 of 4)

Cadre Group / Category	Employment Title	Definition
Other Clinical Provider	Testing and Counseling Provider	Provides HIV testing and counseling services including pretest counseling, testing, and post-test counseling. Assists in the planning, coordination, monitoring, and evaluation of medical services for a client. Case managers develop a comprehensive plan for each client that focuses on both health and other needs and assist clients to develop skills and access resources and services to respond to health needs, life transitions, addictions, and other personal, family, and social problems. May provide tools and tips for adherence to medication, provide support through referrals and follow up, appointment reminders and management, treatment literacy, concerns with stigma, linkage to additional services (both clinical and community-based), and monitoring and reducing barriers to treatment for the client.
	Clinical Case Manager	Provides counseling, therapy and mediation services to individuals, families, groups, and communities in response to social and personal difficulties. They assist clients to develop skills and access resources and support services needed to respond to issues arising from health problems, life transitions, addictions, and other personal, family, and social problems. They liaise with other social service agencies, educational institutions, and health care providers to advocate for client and community needs.
	Clinical Social Worker	Any clinical worker that does not fit any of the other categories.
	Other clinical provider not listed	
Community Staff	Peer Educator	A trained individual from the community who delivers education sessions on various health topics either to targeted groups or to members of the community at large who are their peers. May also contribute to mobilizing community members to receive specific services.
	Peer Navigator	A trained individual from the community who serves as a role model to peers to support them with navigating health care services and medical follow up tailored to individual needs. May provide referrals to supportive services to support entry/continuity of care, appointment reminders, home visits, and accompany peers to appointments.
	Expert Client	A person who is HIV+ and has openly declared their status and provides peer education, ART adherence counseling and psychosocial support to all PLHIV in their catchment area.
	DREAMS Mentor	A trained individual from the community who creates an enabling environment/safe space for AGYW to meet and build their social network, delivers education sessions on various health topics to AGYW, and provides mentorship and support outside of regular meeting times. Duties might also include screening/enrollment and data collection.
	Economic Strengthening Facilitator	A trained individual who provides evidence-based economic strengthening interventions to increase economic stability of individuals and/or households. This may include facilitation of savings and loan groups, financial literacy trainings, support for entrepreneurs and other market-linked economic activities.
	Prevention of HIV and Sexual Abuse Facilitator	A trained individual who provides an evidence-based intervention to reduce violence and/or sexual risk of targeted populations. This may include those providing parenting interventions.
	Community Mobilizer / Facilitator	A trained individual who supports community mobilization or facilitates groups in a community setting.
	Lay Counselor	Interviews clients to obtain information on their health status, provide HIV counseling and testing in certain settings, and provides information on diagnosis or treatment adherence. Some serve as case managers and provide on-going support to clients.
	Linkage Navigator	Links clients living with HIV to medical services (either newly positive clients or those with interruptions in treatment). May provide referrals to supportive services to support entry/continuity of care. May provide warm handoffs to clinical staff or accompany a client to an appointment.
	HIV Diagnostic Assistant	Conduct HIV risk assessments and provide quality HIV-related testing and other testing services. May ensure effective linkage and referrals of clients. Clearly records, reports, and ensures detailed testing documentation related to their work.
	Lay worker providing adherence support	Provides support (individually or in group settings) to clients living with HIV with navigating and managing their medical treatment.
	Community Health Worker	A formally trained community health worker that is recognized by the country government.
	Mother Mentor	Women who act as peer "mentors" for other mothers to encourage them to access and navigate PMTCT services and other family support services.
	Community-based TB Worker	Individuals who exclusively deliver services to clients to assist with TB case identification, linking clients to medical care, and monitoring.
	Other community-based cadre	Any other community-based worker that does not fit any of the other categories.


Employment Titles (3 of 4)

Cadre Group / Category	Employment Title	Definition
Social Work and Case Management	Social Worker	Possess a baccalaureate or advanced degree in social work and comply with local licensing and certification requirements to work. Work with individuals and their families to assess their current health and wellness situation and problems and recommend/refer types of supportive services available to the client to resolve various health and social issues, with focus on ensuring that those vulnerable are safeguarded from harm. This includes investigation of cases of abuse or neglect and refer services to protect affected children and other individuals. This cadre also collaborates within multi-disciplinary teams and provides supportive supervision to other Social Work and Case Management cadres.
	Social Welfare Assistant	Supports clients (typically children and their families) and connects them with supportive services that are available. Typically have less formal training than a social worker but may perform similar duties, under the direction of a social worker or similar supervisor. May also be called a Para-Professional Social Worker or Auxiliary Social Worker.
	Case Manager/ Case Worker	Provides services and referrals to improve a client's access and remove barriers to recommended HIV prevention, testing, counseling, care, and treatment services or social services like economic strengthening, nutritional support, schooling/parenting, violence prevention, etc. Supports regular monitoring of treatment adherence, tracking clients with treatment interruptions to facilitate their return to care to ultimately improve health outcomes and quality of life. May be responsible for assisting clients and their families through evaluating their support system. May assist clients in navigation to access services to meet their needs and may potentially institute action plans for clients to achieve goals.
	Child/Youth Development Worker	Acts to advance the overall wellbeing of children and youth clients. The worker is responsible for developing and monitoring plans for improving the wellbeing of a child, coordinating actors and actions involved in achieving the objectives of the case plans, making or facilitating referrals to appropriate services, and ensuring that decisions related to the case plans are in the best interests of the child.
Implementing Mechanism Program Management Staff	Accounting Staff	Maintains the financial records for a mechanism according to a standard of accounting principles and operates according to internal operational policies and systems. Accountants prepare and certify financial statements, prepare tax returns, prepare financial reports, forecasts, and budgets.
	Administrative Staff	Functions as management and organization analysts and assistants who support the operational management and internal policy compliance for a mechanism. May maintain pertinent records, charts, reports, etc. that are critical to the functions of the mechanism and organization. Chiefs-of-Party are considered high-level administrative staff.
	Finance Staff	Plans, directs and/or coordinates the financial operations of a mechanism, in consultation with senior and executive officers.
	Legal Staff	Lawyers who provide legal advice on a wide variety of subjects pertinent to the compliance requirements of program operations.
	Procurement Staff	Supports procurement related activities for the mechanism.
	Grants Management Staff	Supports grants management related activities for the mechanism.
	Senior Management	Senior leaders and managers within the mechanism, including Chief of Party, Chief of Staff or other senior roles.
	Other Program Management Staff	Any Program Management worker that does not fit any of the other categories.
Support Staff	Cleaner / Janitor	Performs general housekeeping tasks, such as cleaning the rooms, hallways, offices, public areas, emptying trash, changing linens, and making beds.
	Maintenance	Performs repairs and manages maintenance of buildings and equipment.
	Security Guard	Patrols buildings to ensure security is maintained.
	Transportation Staff for Personnel	Staff who drive or manage transportation of passengers.
	Transportation Staff for Commodities and Patient Samples	Staff who are responsible for the transportation and delivery of commodities to warehouses and facilities and patient samples from point-of-care to laboratory sites for analysis.
	Central / Regional Warehouse Worker	Staff who primarily work at central and/or regional warehouses and are responsible for commodity inventory management, including the receipt, inventory tracking, and picking and packing of orders.
	Other supportive staff not listed	Any Supportive Staff worker that does not fit any of the other categories.

Employment Titles (4 of 4)

Cadre Group / Category	Employment Title	Definition
Technical Assistance Staff	Trainer	Designs training and assessment tools and conducts training/courses through a variety of instructional methods or modalities.
	Technical Advisor	Expert in a particular field of knowledge, hired to provide detailed information, advice, and support capacity building of people working in that field. For example, a district health office might hire a technical expert on HIV monitoring and evaluation to address issues in low quality HIV program data. Examples: Technical consultants, TA providers, and Technical Area Experts (SME).
	Logistics Manager	Supervises the movement, distribution, and storage of supplies and materials in a company. They are tasked with planning routes, analyzing budgets, and processing shipments.
	Supply Chain Advisor	Expert in supply chain who may or may not specialize in forecasting and quantification, logistics, commodity procurement, quality assurance, or other technical field related to supply chain management.
	M&E Officer / Advisor	Designs and implements PEPFAR monitoring and evaluation activities and any other internal data monitoring procedures in compliance with guidelines; also includes a focus on quality control and improvement (e.g. Quality officers).
Other Professional Staff	Facility Administrator	Staff who plans, directs, coordinates and evaluates the delivery of clinical and community health care services in hospitals, clinics, and other places of service delivery.
	Laboratory Manager	Staff responsible for the operations and management of one or more laboratories. Duties may include ensuring that tests are being run accurately and according to protocol and managing staff who work in the lab.
	Pharmacy Manager	Responsible for the operations and management of one or more pharmacies. Duties may include overseeing operations of the pharmacy, ensuring sufficient stock of needed medications are available, and managing staff who work in the pharmacy.
	Human Resource Manager	Plans, directs, and coordinates policies concerning personnel records and management, and may advise on occupational health and safety of a facility or place of work.
	Epidemiologists	Staff who collects and/or analyzes HIV epidemiologic data at the above-service delivery level. This may include making national or district-level estimates of PLHIV or key populations, incidence modeling, ANC, or sentinel surveillance.
	Biostatistician	Responsible for the overall management, quality control and reporting of Health Management information System (HMIS) or other data systems at regional, district or facility level to facilitate evidence-based decision making.
	Data Officer	Staff responsible for collecting new and updating client data from clients or records to an information system. Tasks may also include reviewing data for errors or incompatibilities, correcting data, and ensuring that captured data is complete.
	Data Clerk	Staff who files or retrieves documents, assists in audits, and collects information.
	Data Managers	Develops and governs data-oriented systems designed to meet the needs of an organization or research team. Data management includes accessing, validating, and storing data that is needed for research and day-to-day business operations.
	Information Systems Worker	Performs the day-to-day functions of systems administration and management, troubleshooting, technical service delivery, acquiring, developing, and maintaining systems.
	DREAMS	All staff who provide support to the DREAMS program, other than DREAMS Mentors and those performing IP Program Management duties.
	Other Professional Staff	Staff who collects and/or analyzes HIV epidemiologic data at the above-service delivery level. This may include making national or district-level estimates of PLHIV or key populations, incidence modeling, ANC, or sentinel surveillance.

Staff List Tab: Mode of Hire

- **Dropdown Options:** Salary, Contract, Non-Monetary ONLY
- Indicate how the individual is hired by PEPFAR. Select the option that best reflects the primary mode of hire for each staff.
- Salary is defined as PEPFAR-funded compensation for workers who are employed by an IP and receive a salary or wage.
- Contract is defined as PEPFAR-funded compensation through contract(s) for a worker who is not directly employed by an IP, but contracted to perform services. *Note:* This includes PEPFAR-supported workers that receive stipends.
- Non-Monetary ONLY is defined as PEPFAR-funded compensation for workers that is provided in the form of non-monetary compensation. This can include phone cards, travel reimbursement, meals, etc. These workers do not receive any other form of compensation from PEPFAR.
-  If an individual receives both a salary and non-monetary compensation, select Salary as the mode of hire.
-

Staff List Tab: MOH Staff/ seconded to MOH?

- **Dropdown Options:** Yes, No
- Indicate if the individual supported by the IM is officially designated as
 - a government MOH staff, OR
 - seconded by PEPFAR to serve in that capacity

Staff List Tab: Months of work in past year

- **Free Text, 0-12**

- Please indicate the total number of months the PEPFAR-supported worker worked during the last USG fiscal year (October 1 – September 30) in this role.
- If the worker worked for part of a month, count the number of weeks worked in the partial month (no need to count the number of days), and include as a decimal.
- For example, if a doctor worked 3 weeks in one month, that would be counted as 0.75. It is not necessary to subtract regular leave days (count paid leave days as work).

Staff List Tab: Average FTE per month

- **Free Text, 0-1.005**
 - Indicate the average percent of full-time equivalent (FTE) worked by the PEPFAR-supported worker per month.
 - Reported as a decimal, where 0 = no work on average per month, and 1 = full time work per month.
 - Only enter the FTE supported by PEPFAR on the IM being reported. Do not report FTE supported by MOH or other entities.



An FTE Calculator tool is available on the third tab of the Inventory.

Staff List Tab: Work in the community?

- **Dropdown Options:** No, Yes
 - Please indicate if the individual primarily supports work in the community.
 - This should be answered as “YES” if the individual performs their job outside of the facility, in communities. This category can include health workers that are linked to a facility in some way, but perform service delivery in the community rather than in the facility.

Staff List Tab: Work in or support multiple sites (roving staff?)

- **Dropdown Options:** Yes, No
 - Please indicate whether the PEPFAR-supported worker provides services at multiple facility sites on a regular basis. 'YES' should ONLY be selected if the individual is a site-level staff providing services at more than one facility.
 - We understand that some PEPFAR-supported workers may only occasionally provide services to more than one site. If this is the case, then please answer 'no,' as the worker does not provide services to more than one site on a regular basis.
 - If the PEPFAR-supported worker is a community worker, please answer 'no' to this question.

Staff List Tab: Provide Technical Assistance?

- **Dropdown Options:** No, Yes

- Please indicate if the individual primarily routinely provides technical assistance to improve quality of services as part of their job responsibilities.

- Mentor, technical advisor = **YES**
- Health care workers that routinely provide technical assistance as part of their job responsibilities = **YES**
- Anyone providing above site technical assistance = **YES**

- Health worker that mentored a colleague a couple times last year = **NO**

Job Titles that are always TA providers:

- Trainer
- Logistics Manager
- M&E Officer / Advisor
- Supply Chain Advisor
- Technical Advisor

Must
be
routine

Staff List Tab: Based Outside of OU?

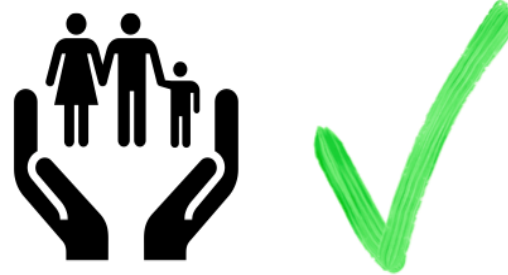
- **Dropdown Options:** No, Yes
 - Please indicate whether this position is primarily based in a location outside of the operating unit.
 - For example, IP staff located in Washington DC or at a Regional office that charge directly to the IM should select "YES"

Staff List Tab: Geography: SNU 1/ PSNU/ Community/ Facility

- **Dropdown Options:** Varies by OU—aligns with DATIM geographic hierarchy
 - Indicate the location of work for the individual.
 - The location of work is defined as where the individual performs their work, rather than the office they report to

How to Determine Location of Work

Location of Work:



Place where work
is performed



Physical place of work

Staff List Tab: Geography: SNU 1/ PSNU/ Community/ Facility

- **Outside of OU workers:** leave all geographic hierarchy columns blank, unless supporting an IM in a PEPFAR Region. In this instance, they should select the country (SNU1) they support (if supporting only one country on the regional IM).
- **Individuals working in multiple SNU1s:** indicate the SNU1 where majority of work was performed. If work is split evenly between SNU1s, please select only one SNU1.
 - For **REGIONS**, the SNU1 level is the country where the worker performs their work.
 - For **MILITARY**, select the military SNU. Leave all other geographic hierarchy columns blank.
 - For **NATIONAL** level workers, select the SNU1 where majority of work is performed (such as the SNU where the government's capital or administrative capital is located), and leave all other geographic hierarchy columns blank. For national level workers in a Region, they should select both SNU1 (country) and the SNU2 where their work is performed.
- **Individuals working in multiple PSNUs:** indicate the PSNU where majority of work is supported. If work is split evenly between PSNUs, please select only one PSNU.
- **Staff assigned to a facility but spend a portion of their time in the community:** (such as facility-based staff that do outreach clinics) enter at the facility to which they are assigned.

Geography: Where to Report

DATIM Geographic Level	Outside OU Workers	National level focused Workers	Military	Roving Staff (including TA to more than one facility)	Community Workers	Above Site Workers	TA providers to one facility	Facility-based Staff
OU (Regional templates only)	✓	✓	✓	✓	✓	✓	✓	✓
SNU1	✗	✓ (office location)	✓	✓	✓	✓	✓	✓
PSNU	✗	✗	✗	✓	✓	✓	✓	✓
Community (in OUs with community separate from PSNU)	✗	✗	✗	✓	✓	✓	✓	✓
Facility	✗	✗	✗	✗	✗	✗	✓	✓

Staff List Tab: Primary Program Area?

- **Dropdown Options:** PEPFAR Program Areas (aligned with Financial Classification system)
 - Select the primary PEPFAR program area that the employee supports.
 - > Above Site, Site Level, or IP Program Management
 - > Please note: Only workers located at the facility, community or providing services as rovers can select a Site Level program area, as per the Financial Classification definition of Site Level.
 - All others must select an Above Site program area.
 - > If the employee supports multiple program areas, please select the one that occupies the majority of their time.
 - If the individual supports two areas equally, please select one to report. The other may be listed in the comments section, if desired

Staff List Tab: Primary Program Area? (cont.)

Above Site	Site Level C&T	Site Level HTS	Site Level PREV	Site Level Socio-economic	Program Management
<ol style="list-style-type: none"> Blood Supply Safety; HMIS, surveillance and research; Human resources for health; Injection Safety; Laboratory Systems Strengthening; Laws, regulation and policy environment; Policy, planning, coordination and management of disease programs; Procurement and supply chain management; Public financial management strengthening; Not disaggregated 	<ol style="list-style-type: none"> HIV Clinical Services; HIV Drugs; HIV Laboratory Services; (NEW) TB/HIV General C&T 	<ol style="list-style-type: none"> Community-based testing; Facility-based testing; General HTS 	<ol style="list-style-type: none"> Comm. Mobilization, behavior & norms change; Condom & lubricant Programing; Medication assisted treatment; PrEP; Primary prevention of HIV and sexual violence; VMMC; General Prevention 	<ol style="list-style-type: none"> Case Management; Economic Strengthening; Education Assistance; Food and nutrition; General Socio-economic; Legal, human rights and protection; Psychosocial support 	<ol style="list-style-type: none"> IP Program Management

Staff List Tab: Primary Beneficiary?

Females	Males	Key Pops	Non-Targeted Pop
Females: Adolescent Girls and Young Women	Males: Adolescent Boys and Young Men	Priority Pops	Non-Targeted Pop: Children
Pregnant and Breastfeeding Women			OVC

Staff List Tab: Deliver services DIRECTLY to beneficiaries?

- **Dropdown Options:** Yes, No
 - Indicate whether the PEPFAR-supported worker provides services directly to beneficiaries.
 - > Only individuals that select a “Site Level” program area in the question above can select “Yes” in answer to this question.
 - > As defined in the PEPFAR Financial Classification guide:
 - » *Program activities involving direct interaction with the beneficiary are defined as **service delivery**.*
 - Interactions may be in person, or through other mediums, such as telehealth.
 - » *Program activities that support, facilitate, or strengthen the facility, site, service providers, or subnational unit or national system are defined as **non-service delivery**.*
 - All above-site programs are, by definition, non-service delivery.
 - There may be instances where staff provide both service-delivery and non-service delivery. For reporting, please select the type of interaction that the worker provides **most often**.

Staff List Tab: In past year provided support for other public health emergency?

- **Dropdown Options:** Yes, No
 - Indicate whether the individual supported delivery of other public health emergency services at any point during the reporting period.
 - > Regardless of the amount of time spent (no threshold)
 - > Includes:
 - Service delivery, such as testing or providing vaccines
 - Administrative support, such as funds disbursement for the emergency response

Staff List Tab: Sum of annual PEPFAR expenditure, excluding Fringe and non-monetary expenditure (in USD)

- **Free Text:** Numeric, USD
 - Indicate the total amount spent on the PEPFAR-supported worker’s remuneration, excluding fringe and non-monetary expenditure, over the past fiscal year.
 - All Salaries, wage, contract fees and other payments made to staff should be entered here.
 - All PEPFAR expenditure data must be reported in United States dollars (USD).

Included Costs	Excluded Costs
<ul style="list-style-type: none">⑩ Regular salaries and wages paid directly to employees⑩ Stipends, cash awards, bonuses or performance-based pay that is paid directly to employees	<ul style="list-style-type: none">⑩ Non-monetary compensation paid to employees, entered as their USD equivalent value⑩ Fringe benefits

Staff List Tab: Annual PEPFAR fringe expenditure (in USD)

- **Free Text:** Numeric, USD
 - Indicate the total amount spent on the PEPFAR-supported individual’s fringe benefits.
 - Fringe should include the cost of employer’s share and should exclude any fringe benefits that are part of an approved indirect cost rate.

Included Costs	Excluded Costs
<ul style="list-style-type: none">• Fringe benefits in the form of regular compensation paid to employees during periods of authorized absences from the job, such as vacation, sick leave, military leave.• Fringe benefits in the form of employer contributions or expenses for social security, employee insurance, workmen's compensation insurance, pension plan costs, etc.• Other allowable costs for fringe benefits (see OMB Circular A-122), such as housing assistance and rural housing allowance.	<ul style="list-style-type: none">• Stipends, cash awards, bonuses or performance-based pay should all be entered in the “Sum of annual PEPFAR Expenditure, excluding fringe.”• PEPFAR funding for the construction or renovation of housing for healthcare workers, even if in place of providing a housing allowance to obtain housing on the market, should not be included in the HRH Inventory.• Costs of fringe benefits that were classified as indirect

Staff List Tab: Non-Monetary Expenditure (in USD)

- Enter the equivalent monetary value of non-monetary compensation that the individual was given over the last year.
- Estimate to the best of your ability for each individual.
- If necessary, an average (i.e. the IP's total cost spent on non-monetary compensation, divided by the number of people who received non-monetary compensation) may be used
- Non-monetary compensation must be reported for ALL individuals that received non-monetary compensation, not just those that are classified as 'non-monetary compensation only'

If a person received non-monetary compensation in exchange for providing a service on behalf of PEPFAR,



They belong in the Inventory!

Examples of Non-Monetary Compensation (for personal use, not to facilitate work):

- Phone card
- Transport
- Meals
- Bikes
- Gumboots
- Personal gifts

FTE Calculator Tab

- The Average FTE per Month Calculator Tool is now integrated into the HRH template.
- To use this calculator:
 1. Enter the # of hours in a standard full time work week, line 4, blue box
 2. Choose which of the 4 options best represents your PEPFAR supported worker.
 1. The PEPFAR worker's hours generally remain constant per week
 2. The PEPFAR worker's hours generally remain constant per month
 3. PEPFAR worker's hours differ per week in a month
 4. PEPFAR worker's hours vary month to month
 3. Enter values in yellow box(es) of the corresponding option to generate Average Monthly FTE (green box).
 4. If your worker has no hours worked for a given week/month, enter 0 in the corresponding box, DO NOT leave the box blank.
 5. Enter Average Monthly FTE into the HRH Inventory Template

Validating the Data



Data Validations in DATIM HRH App

- Data quality validations are logic or value checks processed upon upload to DATIM
- In contrast to past HRH inventory instruments used, many of these checks are not processed in real time as data is entered into the HRH template; instead, the errors are identified in the system
 - Example: If a resource is indicated to be Non-Service Delivery (NSD), their job title must be a NSD-related job title. If that occurs in a row, it will be flagged with an error message when uploaded to DATIM.
- The template can be uploaded as many times as needed to correct errors
- The template must fully pass all validations before the IP is able to successfully submit



Uploading



Submission

Getting to a successfully submitted a template

- We recommend doing a review of the template for data quality prior to submitting to DATIM, and then working through the triggered validations after submitting. It may be helpful to submit an initial template with only a few rows as a way to check your work. To minimize the number of identified errors, perform the following check on the template prior to upload:
 - ✓ **Check for completeness: Incomplete fields will trigger an error message.**
 - Ensure that all required fields in the Cover Sheet and StaffList Tabs are complete, consistent with each other and valid entries.
 - ✓ **Upload to DATIM to see what errors are triggered. These errors will give you the precise cell that the error is located.**
 - Use the DATIM Error Messages and Resolutions job aid to help resolve any errors that are not clear.
 - ✓ **Check for duplicates:**
 - If you are using record numbers, ensure that each one is unique.
 - Ensure that the same staff person is not entered more than once
 - ✓ **Check for extreme values:**
 - Check the compensation ranges in Sum of Annual PEPFAR Expenditure, excluding Fringe; and in Annual PEPFAR Fringe Expenditure and flag those that seem to be extreme values.
 - Ensure values are added in USD
 - ✓ **Check the geography**
 - Check the “Valid OU” column in the template. This column will say “Valid” if a valid hierarchy of locations have been entered. For all that are not Valid, review selections to identify any overwriting of the dropdown fields.
 - If you have inadvertently copied over the formula in this cell, you may be able to copy and paste the formula from another cell and see if it returns “Valid”

Template Tips

Template Validation Tips

- There are validations in the template itself AND **additional validations when uploading to DATIM**, the template must pass all of these validations prior to being able to submit the template.
 - ***We recommend regularly uploading to DATIM to check that your template is passing validations.*** It may be helpful to upload a small number of rows to ensure errors are not found in the template.
 - ***Processing a template after clicking Upload Template can take several minutes.*** Please do not navigate away from the page.
- Ensure that **Valid OU (Column T)** shows **Valid** for all rows. If this is not Valid, then you may need to download a new template as the geography needs to be reset. If this cell is empty after selecting a hierarchy, you may be able to copy and paste the correct formula from the same column into the blank field, which should then show as **Valid**.
- **Always start with a template downloaded from the HRH Processor App in DATIM.** This ensures that you have the latest template, as an old template from a prior year will fail when attempting to upload.
 - If you are not sure, check the **Cover Sheet tab**, and verify that there is a field for **PRIME UEI** in Row 13 (This field is new for FY23).


Copying and Pasting in the Template

- ***DO NOT Copy and Paste from an old template into the new template*** (i.e. FY22 or prior), as this will NOT pass validations when you try to upload the template to DATIM.
- It is usually possible to copy and paste from another HRH FY23 template into another FY23 template
 - **Do NOT include the Comments (Column AH) when copying**, or the template will give you an error when attempting to paste.
- Free text is disabled within dropdown lists, **DO NOT paste free text into a field with a dropdown** or this will fail validations when uploading to DATIM.

DATIM Data Entry, Data Submission, and Support Resources



DATIM Upload: Log in to DATIM— <https://www.datim.org>





You are accessing a U.S. Government information system, which includes (i) this information system; (ii) this information system's network; (iii) all information systems connected to this network; and (iv) all devices and storage media attached to this network or to information systems on this network. This information system is provided for U. S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

- You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, and for any lawful government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
- Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
- Nothing herein consents to the search or seizure of a privately owned information system or other privately owned communications devices, or the contents thereof that is in the system user's home.

USE OF THIS COMPUTER SYSTEM OR NETWORK BY ANY USER, AUTHORIZED OR UNAUTHORIZED, CONSTITUTES EXPRESS CONSENT TO THIS MONITORING. IF YOU DO NOT CONSENT TO THIS MONITORING, OR IF YOU ARE NOT AN AUTHORIZED USER, YOU SHOULD EXIT THIS SYSTEM. IF YOU ARE AN AUTHORIZED USER AND CONSENT, SELECT "I AGREE" TO THE SYSTEM TERMS AND USAGE TO INDICATE YOU AGREE TO ALL THE CONDITIONS STATED HEREIN.



Sign in

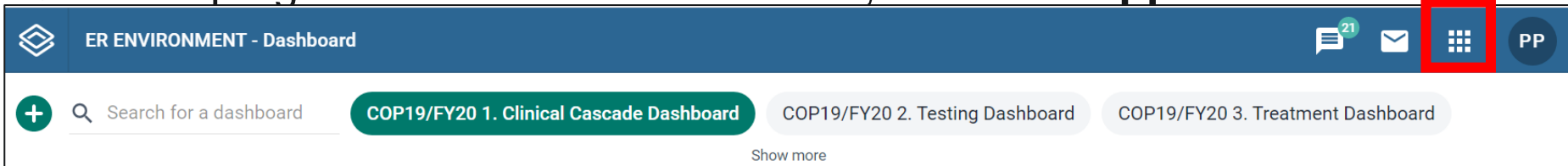
[Forgot password?](#)

DATIM now uses DUNS numbers to identify Implementing Partners to help with data quality and integrity. [Find out if this impacts you.](#)

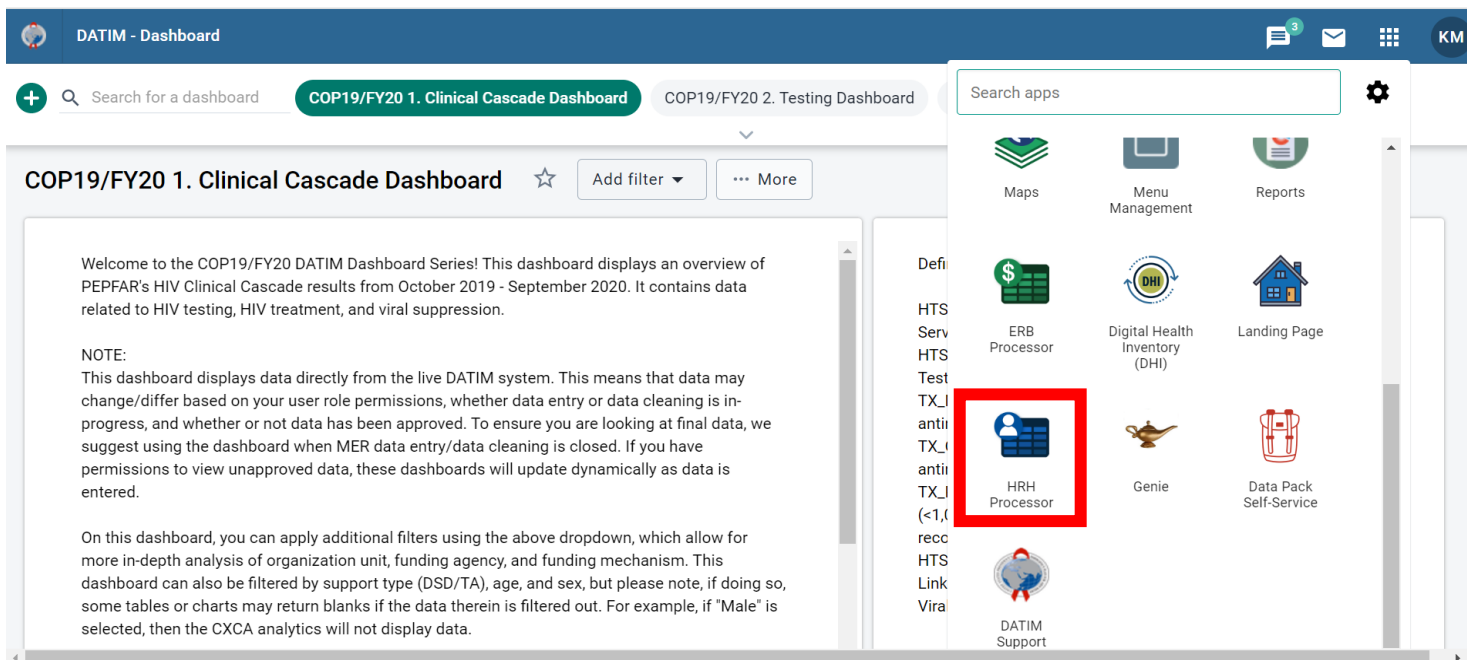
Analytics Runtime: Please note that analytics is currently running at approximately **60 minute** intervals. The analytics refresh process is what allows newly-entered or deduplicated data to be viewed in the pivot tables. Please see the [Analytics Run Time job aid](#) if you have questions.

Navigate to HRH Processor App

On the top right hand corner of the screen, select the **apps** menu



Within the apps menu, select the **HRH Processor** app



Partner Upload of Template

HRH Processor < INSERT PARTNER NAME Partner

Operating Unit
South Africa

COP Year
COP 22 (FY23)

Mechanism

Please select a Funding Mechanism to submit templates

- Use the HRH Processor app to select:
 - OU
 - COP Year (COP22)
 - Funding Mechanism

Partner Request Template

HRH Processor <

Operating Unit

South Africa

COP Year

COP 22 (FY23)

Mechanism

18483 - NU2GGH00...

Insert Partner Name Partner

Mechanism

Mech ID

18483

Award #

NU2GGH001934

Mechanism Name

Wits Health Consortium

Status

Approval Status:

Pending



REQUEST TEMPLATE

Prime Partner

DUNS #

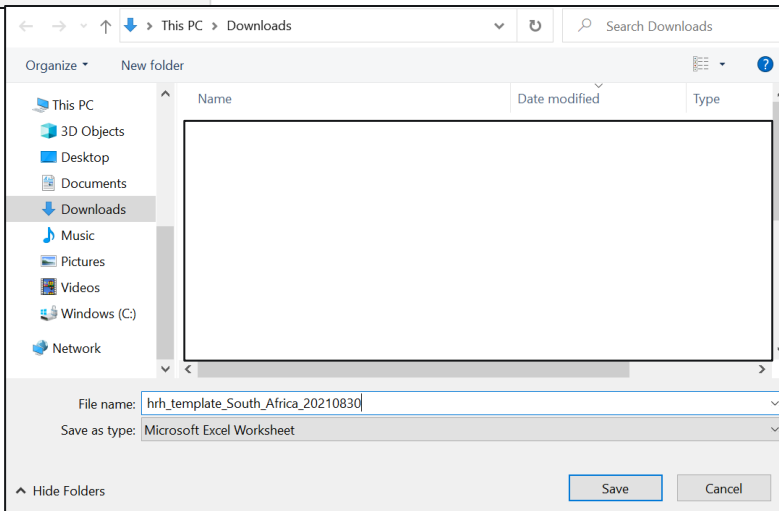
Uploaded Template

Status

Del



UPLOAD TEMPLATE



- Click the **Request Template** icon under the Status field
- Save template to your computer
- This can take up to 30 seconds

Partner Upload of Template

HRH Processor <

Operating Unit

South Africa

COP Year

COP 21 (FY22)

Mechanism

18483 - NU2GGH00...

Insert Partner Name Partner

Mechanism

Mech ID

18483

Award #

NU2GGH001934

Mechanism Name

Wits Health Consortium

Status

Approval Status:

Pending



REQUEST TEMPLATE

Prime Partner

DUNS #

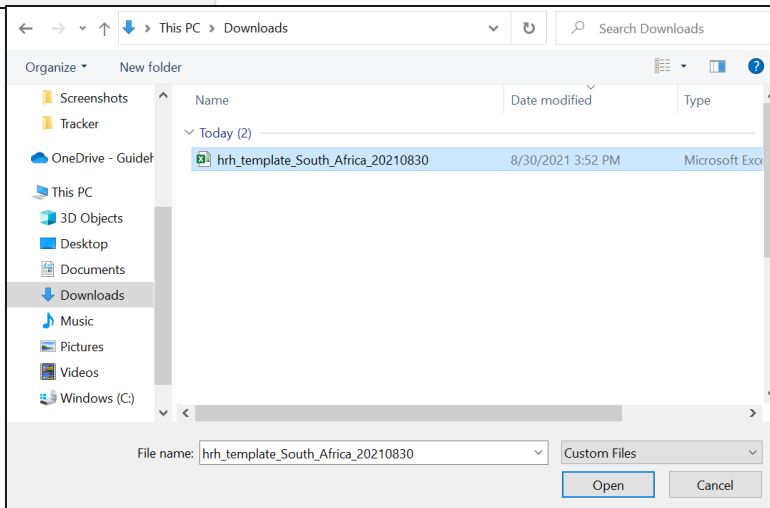
Uploaded Template

Status

Del



UPLOAD TEMPLATE



- Click the **Upload Template** icon in the Prime Partner upload field
- Select the template document and wait for file to upload
- Processing the template can take around 3 minutes

Upload Status Examples

Prime Partner

DUNS #	Uploaded Template	Status	Int	Del
639391218	COP20FY21_HRH_18483.xlsx	✓ success	7	

If there is an error in your uploaded template, you will see the following error status:

Prime Partner

DUNS #	Uploaded Template	Status	Int	Del
639391218	COP20FY21_HRH_18483.xlsx	! 1 error	7	

Partner Submitting Data- Data Approval App

HRH Processor < Insert Partner Name Partner

Operating Unit
South Africa

COP Year
COP 21 (FY22)

Mechanism
18483 - NU2GGH00...

Mechanism

Mech ID	18483
Award #	NU2GGH001934
Mechanism Name	Wits Health Consortium

Prime Partner

DUNS #	Uploaded Template
639391218	COP19FY20_HRH_18483.xlsx

Search apps

- Reports
- Genie
- ERB Processor
- Data Pack Self-Service
- HRH Processor
- Data Approval

- Use the Data Approval app to select:
 - Data Set
 - Period
- Use the “View” tab to see all IMs to which you have access
- Use the “Submit” tab to see which IMs are ready for submission
- Select 1 or several IMs to submit, then Proceed

DATIM Approvals

Workflow: HRH FYOct | Period: October 2021 - September 2022 | Organisation Unit: South Africa

VIEW ¹² | ACCEPT | SUBMIT ¹¹ | RECALL ¹ | RETURN

12 mechanisms

- Mechanism ^
- 17025 - AID674A1200029 - HIV Patient Outcomes for Priority Populations Innovations Research on HIV/AIDS

DATIM Approvals

Workflow: HRH FYOct | Period: October 2021 - September 2022 | Organisation Unit: South Africa

SUBMIT 1 selected mechanism(s)

VIEW ¹² | ACCEPT | SUBMIT ¹¹ | RECALL ¹ | RETURN

1 mechanism(s) selected

Mechanism ^	OU	Agency	Partner	Status
<input checked="" type="checkbox"/> 17025 - AID674A1200029 - HIV Innovations for Improved Patient Outcomes for Priority Populations (INROADS: ...	South Africa	USAID	WITS HEALTH CONSORTIUM (PTY)	pending at partner



Agency Review of Templates

ER ENVIRONMENT - Dashboard

Search for a dashboard

COP19/FY20 1. Clinical Cascade Dashboard

COP19/FY20 2. Testing Dashboard

Show more

COP19/FY20 1. Clinical Cascade Dashboard

Welcome to the COP19/FY20 DATIM Dashboard Series! This dashboard displays an overview of PEPFAR's HIV Clinical Cascade results from October 2019 - September 2020. It contains data related to HIV testing, HIV treatment, and viral suppression.

NOTE:
This dashboard displays data directly from the live DATIM system. This means that data may change/differ based on your user role permissions, whether data entry or data cleaning is in-progress, and whether or not data has been approved. To ensure you are looking at final data, we suggest using the dashboard when MER data entry/data cleaning is closed. If you have permissions to view unapproved data, these dashboards will update dynamically as data is entered.

On this dashboard, you can apply additional filters using the above dropdown, which allow for more in-depth analysis of organization unit, funding agency, and funding mechanism. This dashboard can also be filtered by support type (DSD/TA), age, and sex, but please note, if doing so, some tables or charts may return blanks if the data therein is filtered out. For example, if "Male" is selected, then the CXCA analytics will not display data.

Finally, time/date periods are displayed in different ways in different systems. For example:

Search apps

- Interpretations
- Maps
- Menu Management
- Reports
- Genie
- ERB Processor
- Data Pack Self-Service
- HRH Processor**
- Data Approval
- DATIM Support

- Use the HRH Processing app to verify the HRH template for the IM being reviewed has been successfully uploaded.
- To review the template, download the file by clicking the button in the column labeled "File"

HRH Processor

Operating Unit

South Africa

COP Year

COP 21 (FY22)

Agency Name Agency

Overview

Total Amount Uploaded	\$145,490.00
Total Templates Uploaded	2
Templates with warnings	0
Templates with errors	1

Uploaded Templates

Mech ID	Mechanism	Organization	DUNS	Award Nr	Status	Int.	Expenditures	File
17932	NPHC/UCDC Self-Serve/OT	n/a	n/a	GH002168	1 error	n/a	n/a	Download
18219	NPHC/UCDC Care and Treatment	Ukraine	521024824	GH002062	success	4	\$145,490.00	Download

- Navigate to the HRH Processor app

Submitting/Approving Data for the Agency Reviewer

The screenshot shows the HRH Processor interface. On the left, there are filters for 'Operating Unit' (South Africa) and 'COP Year' (COP 21 (FY22)). The main area is titled 'Insert Agency Name Agency' and contains a search bar and a grid of application icons. The 'Data Approval' icon, which features a green checkmark, is highlighted with a red rectangular box. Other icons include Reports, Genie, ERB Processor, and Data Pack Self-Service.

The screenshot displays the 'DATIM Approvals' page. It includes filters for 'Workflow' (HRH FYOct), 'Period' (October 2021 - September 2022), and 'Organisation Unit' (South Africa). A 'VIEW' button is active, showing '1 selected mechanism(s)'. Below the filters, there are buttons for 'VIEW' (135), 'ACCEPT' (4), 'SUBMIT', 'RECALL', and 'RETURN' (4). A table shows the selected mechanisms:

Mechanism	OU	Agency	Partner	Status
<input checked="" type="checkbox"/> 9464 - PS002001 - Africare	South Africa	HHS/CDC	Africare	pending at partner
<input type="checkbox"/> 9562 - PS001815 - National Alliance of State and Territorial AIDS Directors	South Africa	HHS/CDC	National Alliance of State	pending at partner

- Use the “View” tab to see all IMs to which you have access
- Select 1 or several IMs to submit, then Proceed

Submitting/Approving Data for the Agency Reviewer

DATIM Approvals

Workflow: HRH FYOct | Period: October 2021 - September 2022 | Organisation Unit: South Africa

ACCEPT selected mechanism(s)

VIEW ¹³⁵ | **ACCEPT** ⁴ | SUBMIT | RECALL | RETURN ⁴

1 mechanism(s) selected

Mechanism	OU	Agency	Partner	Status
<input checked="" type="checkbox"/> 70293 - GH001463 - Catholic Relief Services	South Africa	HHS/CDC	Catholic Relief Services - United States Conference Of Catholic Bishops	submitted by partner

- Use the “Accept” tab to accept all IMs that have been submitted by the partner
- Select 1 or several IMs to accept, then Proceed

DATIM Approvals

SUBMIT MECHANISM | RETURN MECHANISM | BACK

pending at partner | submitted by partner | **accepted by agency** | submitted by agency | accepted by agency hq

Workflow: HRH FYOct | Period: October 2021 - September 2022

70293 - GH001463 - CATHOLIC RELIEF SERVICES

Mech: 70293 - GH001463 - Catholic Relief Services

OU: South Africa

- Use the “Submit” tab to accept all IMs that have been submitted by the partner
- Select 1 or several IMs to accept, then Proceed

Submitting in the Data Approval app from the Agency HQ View

DATIM Approvals

Workflow: HRH FYOct | Period: October 2021 - September 2022 | Organisation Unit: Global

ACCEPT

selected mechanism(s)

VIEW ²⁰³² | **ACCEPT ¹⁰** | SUBMIT | RECALL | RETURN ¹⁰

1 mechanism(s) selected

Search

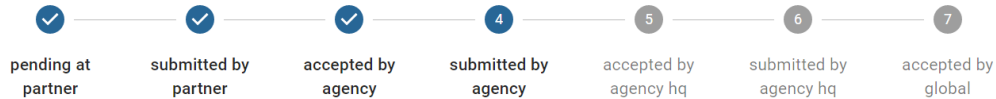
Mechanism	OU	Agency	Partner	Status
<input checked="" type="checkbox"/> 18244 - NU2GGH002008 - Addressing unmet need in HIV Testing Services (HTS) through effective delivery models under PEPFAR	Malawi	HHS/CDC	JHPIEGO CORPORATION	submitted by agency

DATIM Approvals

✓ ACCEPT MECHANISM

RETURN MECHANISM

BACK



Workflow: HRH FYOct
Period: October 2021 - September 2022

18244 - NU2GGH002008 -

- Use the “Accept” tab to accept all IMs that have been submitted by the partner
- Select 1 or several IMs to accept, then Proceed

Submitting Data from the Agency HQ View

DATIM Approvals

SUBMIT MECHANISM **RETURN MECHANISM** BACK

1 2 3 4 5 6 7

pending at partner submitted by partner accepted by agency submitted by agency accepted by agency hq submitted by agency hq accepted by global

Workflow HRH FYOct

Period October 2021 - September 2022

18244 - NU2GGH002008 -

- Use the “Submit” tab to submit all IMs that have been submitted by the partner
- Select 1 or several IMs to accept, then Proceed

DATIM Approvals

RECALL MECHANISM BACK

1 2 3 4 5 6 7

pending at partner submitted by partner accepted by agency submitted by agency accepted by agency hq submitted by agency hq accepted by global

Workflow HRH FYOct

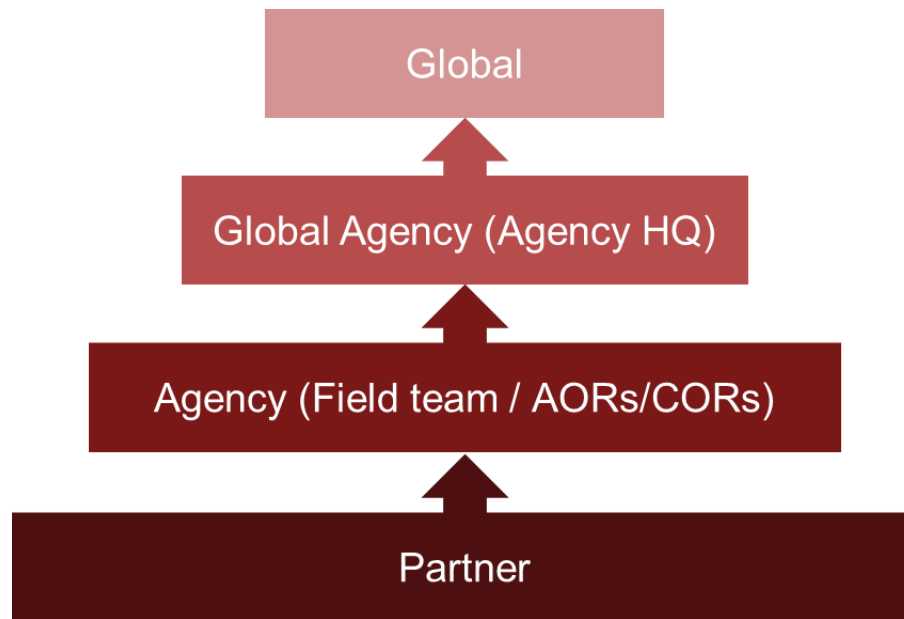
Period October 2021 - September 2022

18244 - NU2GGH002008 -

- Status should change to “submitted by agency hq”, then Proceed

User Accounts in DATIM

- In order to submit data, approve data, or interact with the HRH Inventory App, existing DATIM user accounts will need to be updated or new accounts will need to be created. Users can go to register.datim.org to request an update to their account or request a new account to be created.



Requesting a new account



Sign in

Username

Password

Sign in

[Forgot password?](#)

Analytics Runtime: Please note that analytics is currently running at approximately **60 minute** intervals. The analytics refresh process what allows newly-entered or deduplicated data to be viewed in pivot tables. Please see the [Analytics Run Time job aid](#) if you have any questions.

[Read the release notes for the current version of DATIM.](#)

User accounts are automatically disabled if they are not used for a period of 95 days. To prevent your account from being deactivated, please log in every three months.

By logging in and accessing this system, you agree to abide by the [terms of service](#).

You can request a user account at register.datim.org

[Get Support](#)

Powered by DHIS 2 for PEPFAR - DATIM 1.30.0



What would you like to do?

- Request a user account on DATIM
- Contact my DATIM user administrator about something else

Please enter your details below to request a user account on DATIM

First Name *

Last Name *

Email Address *

User Type *

- USG
- Implementing Partner
- MoH Data Alignment

Operating Unit *

Select Operating Unit

Preferred Language *

English

Are you requesting this account on behalf of someone else?


- Yes
- No

Justification for request *

Submit



Requesting a new account



What would you like to do?

Request a user account on DATIM
 Contact my DATIM user administrator about something else

Please enter your details below to request a user account on DATIM.

First Name *

Last Name *

Email Address *

User Type *

USG ⓘ
 Implementing Partner ⓘ
 MoH Data Alignment ⓘ

Operating Unit *

Preferred Language *

Are you requesting this account on behalf of someone else?




Yes
 No

Justification for request *


- Enter First Name, Last Name, and Email Address into the corresponding boxes
- For User Type:
 - If Agency or Agency HQ, select “USG”
 - If Partner, select “Implementing Partner”

Requesting a new account

User Type *


USG 
 Implementing Partner 
 MoH Data Alignment 

Operating Unit *




Please select an Operating Unit

Participating Organization *




Please select an organization

Preferred Language *



Data stream(s) you need access to: *

ER
 ESOP
 HRH
 MER
 SaSR
 SIMS
 VMMC NAE 

Access Type *

Data Entry ER
 Data Entry HRH Inventory
 Data Entry MER
 Data Entry SaSR
 Data Entry VMMC NAE
 Accept Data
 Submit Data
 Read Data

Are you requesting this account on behalf of someone else?

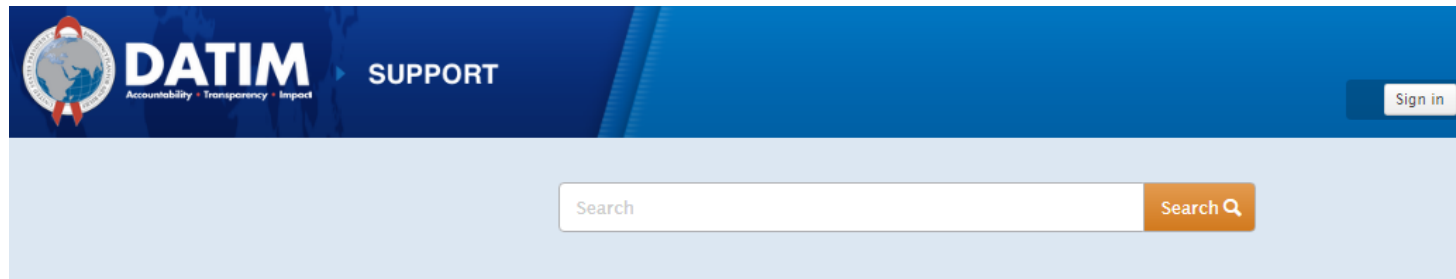
Yes
 No

Justification for request *

- Select Operating Unit, Participating Organization, and Preferred Language dropdowns
- Under Data Streams, select “HRH” and any other data streams with access needed
- Under Access Type, select “Accept Data”
- Make sure to justify your request. Example: “To review and approve HRH data”

Guidance and Instructions

- All guidance and instructions related to submitting HRH in DATIM can be found at <https://datim.zendesk.com>



BROWSER COMPATIBILITY NOTE: Microsoft Internet Explorer (IE) 10 and earlier versions are not supported by DATIM. The DATIM Support Team recommends using the Google Chrome, Mozilla Firefox, or Microsoft IE 11 browsers while using DATIM.

Important Notice: We are making DATIM Support site updates based on your feedback. Learn more about these updates [here](#).

2 key places to find guidance and instructions

Technical support available!

Q&A



PEPFAR
20 YEARS OF IMPACT

Additional HRH Questions

- If you have any additional questions, please:
- Submit a Zendesk ticket for HRH at <https://datim.zendesk.com/>
- Reach out to the appropriate Agency Point of Contacts:
 - GHSD/PEPFAR: Sarah Dominis
 - USAID: Jason Roffenbender
 - CDC: Alicia Warner
 - HRSA: Laura Foradori
 - DOD: Rivers Jones



PEPFAR
20 YEARS OF IMPACT

THANK YOU!

Appendix 1: DATIM Validations



Validations in DATIM

ID	Error
1	Error: Cells must contain fewer than 255 characters
2	Error: Prime UEI [Coversheet]: Cell D13 is missing Prime UEI.
4	Error: Sub UEI [Coversheet]: {Cells} is missing Sub UEI.
5	Error: Same record number cannot be used twice - please check column A of the Staff List.
6	Error: Number of months worked in year (column H) should be a number greater than zero (0) and less than or equal to twelve (12).
7	Error: Average FTE per month should be less than or equal to 1.005
8	Error: A 'Non-Service Delivery' associated employment title (column E) was selected for a position that was indicated as providing 'Direct Service Delivery' (column W). Please review and correct.
9	Error: A 'Service Delivery' associated job title (column E) was selected for a position that was indicated as a 'Non-Service Delivery' (column W). Please review and correct.
10	Error: Dropdown selections may not be populated with free-form text. Please select only options from the dropdown list.
11	Error: If a row has data, the following columns must be populated: <u>Column #s</u>
12	Error: Human resource in <u>Row #</u> has been indicated as Salaried or Contract (column F). Please review resource to ensure that both salary (expenditure) (column Y) and fringe information (column z) is populated.

Validations in DATIM

ID	Error
13	Error: Human resource in Row # has been indicated as Non-Monetary ONLY. Please review resource to ensure that only non-monetary expenditure information is populated.
14	Error: Expenditure (column Y), Fringe (column Z) and Non-Monetary Expenditures (column AA) must be numeric.
15	Error: Expenditure (column Y), Fringe (column Z) and Non-Monetary Expenditures (column AA) must be between \$0M-\$1M.
16	Error: Resource in Row # has been indicated to work at facility level (Facility Geography column). Primary Program Area (column U) should begin with "Site Level: ..." or be IP Program Management
17	Error: Human resource in [ROW #] has been indicated to work at Above-Site Level and providing Direct Service Delivery. Please review and correct either Primary Program Area or Service Delivery
18	Error: Resource is indicated to be employed through a sub-contractor (column B). Please select sub-contractor name in column C.
19	Error: Resource is indicated to be a Prime contractor (column B). Please remove value in column C.
20	Error: Resource is indicated to work in the community (column J). Please complete geographic hierarchy down to at least the PSNU level.
21	Error: Resource is indicated to work in or support multiple sites (roving staff) (column K). Facility geography should be left blank.
22	Error: Position is indicated to be based outside of OU (column M). Geographic information should be left blank.
23	Error: Position is indicated to be based inside the OU (column M). Geographic information must be provided.
24	Error: Position is indicated to be based outside of OU (column M). Program Area must begin with Above Site or IP Program Management (column U).
25	Error: Position is indicated to support work in the community (column J). Employment title (column E) must be a position that can work in the community.


Validations in DATIM

26	Error: Resource is indicated to work in the community (column J). Work in/support multiple facilities (column K) must be “No.”
27	Error: Resource is indicated to be a roving staff (column K). “Primarily support work in the community” (column J) must be “No.”
28	Error: Resource has a technical assistance associated job title (column E). “Delivers services directly to beneficiaries (column W) must be “Non-Service Delivery”
29	Error: Resource has a technical assistance associated job title (column E). Technical Assistance (column L) must be “YES”.
30	Error: If Primary Program Area (column U) is VMMC, Primary Beneficiary (column V) cannot be Non-Targeted.
31	Error: If Primary Program Area (column U) is SE, Primary Beneficiary (column V) cannot be Non-Targeted.
32	Error: "Resource in ROW # has been indicated to work at the above site level. Primary Program Area (column U) should begin with "IP Program Management" or "Above Site."

1. Error: Cells must contain fewer than 255 characters

- Ensure that all cells have less than the maximum amount of characters

error #4: [StaffList!A2] Cells must contain fewer than 255 characters. Cell contains 334 characters.



The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please ensure your cell contains less than 255 characters and is a unique value.

2. Error: * "[Invalid Beneficiary] is not a valid Beneficiary for Implementation Year * "[Invalid Program Area] is not a valid Program Area for Implementation Year

- Please look at the new/modified Beneficiary or Program Areas when entering data
- Some entries from FY22 and FY21 may not be valid

Primary Program Area?	Primary Beneficiary?	
Program Management	PEPFAR	D D b ▼

The above entry will be flagged upon upload and give the above error message in the HRH app. To fix this error, please select a Beneficiary or Program Area from the dropdown that is valid for COP22/FY23:

3. Error: Prime UEI [Coversheet]: Cell D13 is missing Prime UEI.

Mechanism ID	160096
Mechanism Name	JEMBI HQ
PRIME IP Point of Contact	abcdef
PRIME IP Contact Info	abcdef
PRIME UEI	

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please populate the cell with a PRIME UEI

4. Error: Sub UEI [Coversheet]: {Cells} is missing Sub UEI.

	UEI	Sub Partner Name
Sub IP 1	123456781923	xxxxx
Sub IP 2		



The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please populate the cell with a Sub UEI

5. Error: Same record number cannot be used twice - please check column A of the Staff List.

- Column A of the template is an *optional* column for the staff **Record Number**
- However, the IDs in this column, if present, are checked for uniqueness

A	B	C	D	
			Employed through Prime or Sub IP?	Mo
Record Number (optional)	Sex	Employment title		
12335	Female	Auxiliary Nurse	Prime	
12335	Male	Community Health Worker	Prime	

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please ensure your cell is a unique value and contains less than 255 characters.

6. Error: Number of months worked in year (column H) should be a number greater than zero (0) and less than or equal to twelve (12).

- Values entered in Column G of the template, “Months of Work in the Past Year”, must be more than 0 but cannot exceed 12

	D	E	F	G	H
	Employed through Prime or Sub IP?	Mode of Hire	MOH Staff/seconded to MOH?	Months of Work in Past Year	Average FTE per Month
	Prime	Contract	No	12	1
	Prime	Contract	Yes	<input type="text" value="20"/>	1

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, the Number of Months worked should be a whole number greater than zero (0) and less than or equal to twelve (12).

7. Error: Average FTE

- Values entered in Column H of the template, “Average FTE per Month”, cannot exceed 1.005

E	F	G	H	
	MOH Staff/seconded to MOH?	Months of Work in Past Year	Average FTE per Month	Work status
Contract	No	12	1.6257	Staff
Contract	Yes	20	0.5	Staff

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, the Average FTE per month should be greater than zero (0) and less than or equal to 1.005.

8. Error: A 'Non-Service Delivery' associated employment title (column E) was selected for a position that was indicated as providing 'Direct Service Delivery' (column W). Please review and correct.

- If a resource is indicated to be “Non-Service Delivery” in Column R, their job title must be a non-service delivery related job title and cannot be indicated as Providing Direct Service Delivery
- The mappings for Direct Service Delivery and Non-Service Delivery job titles are available at: [ZenDesk HRH Definitions](#)

D	E	F	V	W	X
Gender	Employment Title	Mode of Hire	Primary Beneficiary?	Deliver services DIRECTLY to beneficiaries?	In past year provided support for the COVID response?
Transgender	IP Prg Mgmt: Legal Staff	Contract		Direct Service Delivery	
Male	Other: Security Guard	Non-Monetary	Yes	Non-Service Delivery	Yes
Don't Know	Ancillary: DREAMS Mentor	Salary	Yes	Non-Service Delivery	No
Non-binary	Clinical: Laboratory Assistant/Phlebotomist	Contract	Yes	Direct Service Delivery	No

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please review the mappings for Direct Service Delivery and Non-Service Delivery job titles above.

9. Error: A 'Service Delivery' associated job title (column E) was selected for a position that was indicated as a 'Non-Service Delivery' (column W). Please review and correct.

- If a resource is indicated to have a job title associated with Service Delivery in Column E, their job title must be Listed as "Direct Service Delivery" in column W
- The mappings for Direct Service Delivery and Non-Service Delivery job titles

are available at: [ZenDesk HRH Definitions](#)

			V	W	X
			My Beneficiary?	Deliver services DIRECTLY to beneficiaries?	In past year provided support for the COVID response
Employment Title	Clinical: Doctor	Mode of Hire	No	Non-Service Delivery	
le	Clinical: Doctor	Salary	No	Direct Service Delivery	No
gender	Clinical: Doctor	Contract	No	Direct Service Delivery	No
	Clinical: Doctor	Non-Monetary ONL	No	Direct Service Delivery	No
Know	Clinical: Nurse	Salary	No	Direct Service Delivery	No
inary	Other: Security Guard	Contract	No	Non-Service Delivery	No

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please review the mappings for Direct Service Delivery and Non-Service Delivery job titles above.

10. Error: Dropdown selections may not be populated with free-form text. Please select only options from the dropdown list.

- All fields with dropdown menus must be populated with **only** options from the dropdown
- Free text write-ins are not accepted
- The ability to input free-form text will only be possible by copy and pasting between templates

D	E	Q	R	
Employed through Prime or Sub IP?	Mode of Hire	Area?	Deliver services DIRECTLY to beneficiaries?	In pr su th re
Prime	Contract	Prog. Mgmt/PEPFAR		
ff Prime	Contract	Site Level: Testing (HTS)	Direct Service Delivery	

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please select an option from the dropdown menu and avoid copy and pasting if possible. If pasting, please ensure that the values are valid for the COP year.

11. Error: If a row has data, the following columns must be populated: {cols}

- For any row with data, the following columns are required:
 - Columns B
 - Columns D through M
 - Columns U through X

	B	C	D	E	F	G
	Sex	Employment title	Employed through Prime or Sub IP?	Mode of Hire	MOH Staff/seconded to MOH?	Months of Work in Past Year
35	Female		Prime		No	12
35	Male	Program Management Legal Staff	Prime	Contract	Yes	20

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please ensure that columns B, D through M, and U through X are populated.

12. Error: Human resource in Row # has been indicated as Salaried or Contract (column F). Please review resource to ensure that both salary (expenditure) (column Y) and fringe information (column z) is populated.

- For any resource indicated as “Salary” for Mode of Hire in Column F, both salary **and** fringe must be indicated in Columns Y and Z

	Y	Z	AA
ir	Sum of Annual PEPFAR	Annual PEPFAR	Annual PEPFAR
upport	Expenditure, excluding	Fringe Expenditure,	Non-Monetary
VID	Fringe and Non-	excluding Non-	Expenditure,
	Monetary	Monetary	excluding Fringe
			0
	2000	1300	0
	0	0	3500
	2500	4000	0
	1000	1000	0
	0	0	2,000.00

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please review resource to ensure that both salary (expenditure) (column Y) and fringe information (column z) are populated.”

13. Error: Human resource in Row # has been indicated as Non-Monetary ONLY. Please review resource to ensure that only non-monetary expenditure information is populated

- For any resource indicated as “Non-Monetary Only” for Mode of Hire in **Column F**, both salary **and** fringe must be blank and the only expenditure should be in **Column AA**

	X	Y	Z	AA	
	In past year provided support for the COVID response?	Sum of Annual PEPFAR Expenditure, excluding Fringe and Non-Monetary	Annual PEPFAR Fringe Expenditure, excluding Non-Monetary	Annual PEPFAR Non-Monetary Expenditure, excluding Fringe	Co
y	No				0
ery	No	2000	1300		
ery	No	0	0	3500	
ery	No	2500	4000	0	
y	No	1000	1000	0	cor
y	No	0	0	2,000.00	
ery	No	3000	1200	0	
"		2000	1300		

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please review resource indicated as “Non-Monetary Only” for Mode of Hire in Column F and ensure that both salary and fringe must be blank and the only expenditure should be in Column AA.

14. Error: Expenditure (column Y), Fringe (column Z) and Non-Monetary Expenditures (column AA) must be numeric

- Expenditure and fringe values in Columns Y, Z, and AA must be numeric values between \$0-\$1,000,000

X	Y	Z	AA
In past year provided support for the COVID response?	Sum of Annual PEPFAR Expenditure, excluding Fringe and Non-Monetary	Annual PEPFAR Fringe Expenditure, excluding Non-Monetary	Annual PEI Non-Mone Expenditu excluding I
No	Five Thousand Dollars		
No	2000	1300	
No	0	0	
No	2500	4000	
No	1000	1000	

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please ensure that expenditure and fringe values in Columns Y, Z, and AA are numeric values between \$0-\$1,000,000

15. Error: Expenditure (column Y), Fringe (column Z) and Non-Monetary Expenditures (column AA) must be between \$0M-\$1M.

- Expenditure and fringe in Columns Y, Z and AA must be numeric values between numeric values between \$0-\$1,000,000

	Y	Z	AA
ar	Sum of Annual PEPFAR	Annual PEPFAR	Annual PEPFAR
support	Expenditure, excluding	Fringe Expenditure,	Non-Monetary
VID	Fringe and Non-	excluding Non-	Expenditure,
	Monetary	Monetary	excluding Fringe
	1500000	6000000	0
	2000	1300	
	0	0	3500
	2500	4000	0
	1000	1000	0
	0	0	2,000.00

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please ensure that expenditure and fringe values in Columns Y, Z, and AA are numeric values between \$0-\$1,000,000

16. Error: Resource in **Row #** has been indicated to work at facility level (Facility Geography column). Primary Program Area (column U) should begin with "Site Level: ..." or be IP Program Management

- If a Facility is indicated in Column Q (i.e. Column Q is not blank), the Primary Program Area indicated in Column U must be a "Site Level" program area

P	Q	R	T	U	V
Communi	Facility	SNU5	Valid OU	Primary Program Area?	Primary Bene
tr Kalungu Su	Kabungo HC III		Valid	Above Site: HMIS, surveillance, &	males
t Galiraaya S	Kasokwe Kayung	HC II	Valid	Site level: SE: Food and nutrition	Females: Adoles
t Buvuma To	Buvuma HC IV		Valid	Site Level: C&T: General C&T	Key Pops
ri Kifampa Su	Kisozi HC III		Valid	Site Level: HTS: Facility-based test	Males

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please ensure that if a Facility is indicated in Column Q (i.e. Column Q is not blank), the Primary Program Area indicated in Column U must be a "Site Level" program area



17. Error: Human resource in [ROW #] has been indicated to work at Above-Site Level and providing Direct Service Delivery. Please review and correct either Primary Program Area or Service Delivery.

- If a resource is indicated to work within an Above-Site program area in Column U, Column W must be "Non-Service Delivery"

U	V	W	
		Deliver services DIRECTLY to beneficiaries?	In p: prov for t resp
Primary Program Area?	Primary Beneficiary?		
Site Level: PREV: PrEP	Key Pops	Direct Service Delivery	No
Above Site: Public financial mana	Males	Direct Service Delivery	▼
Site Level: C&T: HIV Laboratory Se	Males: Adolescent Boys and	Direct Service Delivery	No
Above Site: HMIS, surveillance, &	Non-Targeted Pop	Non-Service Delivery	Yes
Site Level: C&T: HIV Drugs	Non-Targeted Pop: Children	Direct Service Delivery	Yes
Site Level: C&T: HIV Drugs	OVC	Direct Service Delivery	No
Site Level: C&T: HIV Drugs	Pregnant & Breastfeeding W	Direct Service Delivery	Yes
Site Level: C&T: HIV Clinical Servic	For males	Direct Service Delivery	No

The above entry will be flagged upon upload and give the above error message in the HRH app. To fix this error, please change the **Primary Program Area to Site Level or IP: Program Management** or change the service delivery to **Non-Service Delivery**.

Error 18: Resource is indicated to be employed through a sub-contractor (column B). Please select sub-contractor name in column C.

- If a resource is indicated to be "Sub" in column B, a sub-contractor name must be selected in Column C.

	B	C	D
a)	Employed through Prime or Sub IP?	If Sub, Select IP Name	Gender
	Prime		Female
	Prime		Transgender
	Sub		Male
	Sub	Sub Name A	Don't Know
	Sub	Sub Name B	Non-binary

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, please select a Sub IP from the dropdown. To populate Sub IPs, make sure the coversheet has the name of your Sub IPs listed.

19. Error: Resource is indicated to be a Prime contractor (column B). Please remove value in column C.

A	B	C	D	E	F	G
Record Number (optional)	Employed through Prime or Sub IP?	If Sub, Select IP Name	Gender	Employment	Mode of	MOH Staff OR Seconded to MOH?
record 789	Prime		Male	Clinical: Doctor	Non-Mone	No
record 1122	Prime		Don't Know	Clinical: Nurse	Salary	No
record 1455	Sub		Non-binar	Other: Security	Contract	No
record 1788	Sub		Other	IP Prg Mgmt: Ac	Non-Mone	No

The above entry will be flagged upon upload if there is information filled out under the shaded section and give above error message in the HRH app.

To fix this error, select the cell in Column C and ensure that there are no characters typed in the field. If there is, click the cell with characters and press the 'delete' key.

20. Error: Resource is indicated to work in the community (column J). Geographic hierarchy can be selected at any level above the facility level."

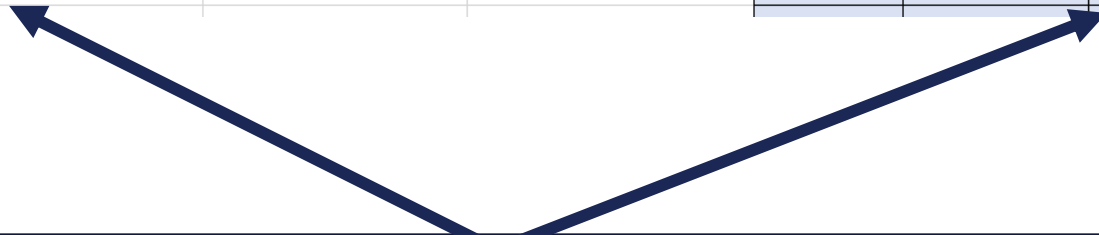
Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?	Provide Technical Assistance?	Position based outside of OU?	SNU1	PSNU/Com Facility	Valid OU	F
Yes	No	No	No	Centre	<input type="text" value=""/>	Valid	A

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, make sure all rows that answer "Yes" to column J have geography selected in the Community.

21. Error: Resource is indicated to work in or support multiple sites (roving staff) (column K). Facility geography should be left blank.

Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?	Provide Technical Assistance?	Position based outside of OU?	SNU1	PSNU/Com	Facility	Valid OU
No	Yes	No	No	Centre	Awae	CMA ELAT	Valid



The above entry will be flagged upon upload and give above error message in the HRH app.

To fix this error, if column K is "Yes", ensure that the Facility column is blank. If there is information entered, click the cell with text and click 'delete'.

22. Error: Position is indicated to be based outside of OU (column M). Geographic information should be left blank.

J	K	L	M	N	O	P	Q
Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?	Provide Technical Assistance?	Position based outside of OU?	SNU1	PSNU	Community	Facility
No	Yes	Yes	Yes				
No	Yes	No	Yes				
Yes	No	No	No	Central	Gomba District	Kyayi Subcounty	

The above entry will be flagged upon upload if geographic information is uploaded under the shaded section and give the above error message in the HRH app.

To fix this error, ensure that there are no characters in the shaded columns. To remove text, select the cell with text and click 'delete'.

23. Error: Position is indicated to be based inside the OU (column M). Geographic information must be provided.

Position based outside of OU?	SNU1	PSNU/Com	Facility	Valid OU	Pri
No				▼	Ar

The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, if yes is selected in column M, ensure that there is text filled in to the geographic hierarchy and 'Valid' is shown under 'Valid OU'.

24. Error: Position is indicated to be based outside of OU (column M). Program Area must begin with Above Site or IP: Program Management (column U).

Position based outside of OU?	SNU1	PSNU/Com	Facility	Valid OU	Primary Program Area?	P B
Yes					Site Level: HTS: Communi	

The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, change the position or the Primary Program Area to Above Site or IP: Program Management.

25. Error: Position is indicated to support work in the community (column J). Employment title (column E) must be a position that can work in the community.

Employment Title	Mode of Hire	MOH Staff OR Seconded to MOH?	Months of Work in Past Year	Average FTE per Month	Primarily support work in the community?
Other: Technical Advisor	Salary	No	12	0.07	Yes



The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, change Employment Title to one that can work in the Community or change column E to 'No'.

26. Error: Resource is indicated to work in the community (column J). Work in/support multiple facilities (column K) must be “No.”

	J	K
	Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?
I.231	Yes	Yes
I.231	Yes	No
I.231	Yes	No
I.231	Yes	No
I.231	No	No

The above entry will be flagged upon upload and give the above error message in the HRH app.

To fix this error, change column K to 'No'.

27. Error: Resource is indicated to be a roving staff (column K). “Primarily support work in the community” (column J) must be “No.”

G	H	I	J	K
MOH Staff OR Seconded to MOH?	Months of Work in Past Year	Average FTE per Month	Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?
No	12	0.231	Yes	Yes
No	1	0.231	Yes	No
No	2	0.231	Yes	No
No	3	0.231	Yes	No
No	4	0.231	No	No



The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, change column J to 'No'.

28. Error: Resource has a technical assistance associated job title (column E). “Delivers services directly to beneficiaries (column W) must be “Non-Service Delivery”.

E		F	V	W	X
Employment Title	Mode of Hire	Primary Beneficiary?	Deliver services DIRECTLY to beneficiaries?	In past year provided for the CC response?	
Other: Technical Advisor	Contract	Males	Direct Service Delivery	No	
Other: Security Guard	Contract	Males: Adolescent Boys and Non-Targeted Pop	Non-Service Delivery	No	
IP Prg Mgmt: Administrative Staff	Non-Monetary	Non-Targeted Pop	Non-Service Delivery	No	
Other: Cleaner / Janitor	Salary	Non-Targeted Pop: Children	Direct Service Delivery	No	
ID Prg Mgmt: Legal Staff	Contract				

The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, either change the Employment Title to one that can be Direct Service Delivery or change the service delivery to Non-Service Delivery

29. Error: Resource has a technical assistance associated job title (column E). Technical Assistance (column L) must be "YES".

E	F	G	H	I	J	K	L
Employment Title	Mode of Hire	MOH Staff OR Secoded to MOH?	Months of Work in Past Year	Average FTE per Month	Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?	Provide Technical Assistance?
Ancillary: Expert Client	Non-Monetary ONLY	No	11	0.25	Yes	No	No
Clinical: Clinical Officer	Salary	No	12	0.25	Yes	No	No
Other: Supply Chain Advisor	Contract	No	1	0.25	No	Yes	Yes
Other: Transportation Staff for Person	Non-Monetary ONLY	No	2	0.924	No	Yes	No
Clinical: Medical Assistant	Salary	No	3	0.924	Yes	No	No
Clinical: Pharmacist	Contract	No	4	0.924	Yes	No	No
Other: Central / Regional Warehouse	Non-Monetary ONLY	No	5	0.924	No	Yes	No
Ancillary: Mother Mentor	Salary	No	6	0.924	Yes	No	No
IP Prg Mgmt: Procurement / Grants	Contract	No	7	0.924	No	Yes	No
Other: Technical Advisor	Non-Monetary ONLY	No	8	0.924	No	Yes	No
IP Prg Mgmt: Accounting Staff	Salary	No	9	0.924	No	Yes	No
Other: Technical Advisor	Contract	Yes-MOH Staff	10	0.924	No	Yes	No

The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, change column L to 'Yes'.

30. Error: If Primary Program Area (column U) is VMMC, Primary Beneficiary (column V) cannot Non-Targeted.

• ”

U	V
Primary Program Area?	Primary Beneficiary?
Site Level: HTS: General HTS	Males
Site Level: PREV: Comm. mobilizati	Males: Adolescent Boys and Y
Above Site: Injection safety	Non-Targeted Pop
Above Site: Human resources for h	Non-Targeted Pop: Children
Site Level: C&T: HIV Drugs	OVC
Site Level: C&T: HIV Clinical Service	Pregnant & Breastfeeding Wo
Above Site: Injection safety	Priority Pops
Site Level: SE: Economic strengthen	Females
Program Management	Females: Adolescent Girls and
Above Site: Policy planning coordi	Key Pops
Site Level: PREV: VMMC	Non-Targeted Pop
Site Level: C&T: HIV Clinical Service	Males: Adolescent Boys and Y

The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, change the Primary Program Area to a non-VMMC area or change the Primary Beneficiary to a targeted group.



31. Error: If Primary Program Area (column U) is SE, Primary Beneficiary (column V) cannot be Non-Targeted.

• ”

U	V
Primary Program Area?	Primary Beneficiary?
Site Level: SE: Case Management	Males
Site Level: SE: Education assistance	OVC
Site Level: PREV: VMMC	Pregnant & Breastfeeding Wk
Above Site: Injection safety	Priority Pops
Site Level: SE: Case Management	Non-Targeted Pop
Site Level: C&T: HIV Laboratory Ser	Females: Adolescent Girls and
Site Level: PREV: PrEP	Key Pops
Above Site: Public financial manage	Males

The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, change the Primary Program Area to a non-SE area or change the Primary Beneficiary to a targeted population.

29. Error: "Resource in ROW # has been indicated to work at the above site level. Primary Program Area (column U) should begin with "IP: Program Management" or "Above Site."

J	K	L	M	N	O	P	Q	R	T	U
Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?	Provide Technical Assistance?	Position based outside of OU?	SNU1	PSNU	Communi	Facility	SNU5	Valid OU	Primary Program Area?
Yes	No	No	No	Central 1	Kalungu Distr	Kalungu Sub	Kabungo HC III		Valid	Site Level: C&T: HIV Clinical Service
Yes	No	No	No	Central 2	Kayunga Distr	Galiraaya Su	Kasokwe Kayunga HC II		Valid	Site Level: SE: Food and nutrition
Yes	No	No	No	Central 2	Buvuma Distr	Buvuma Toy	Buvuma HC IV		Valid	Site Level: C&T: General C&T
Yes	No	No	No	Central 1	Gomba Distr	Kifampa Sub	Kisozi HC III		Valid	Site Level: HTS: Facility-based testi
No	Yes	Yes	No	East Centra	Bugweri District				Valid	Above Site: Laboratory systems str
No	Yes	No	No	Central 2	Buvuma District				Valid	Program Management
No	No	No	No	Central 1	Kalungu Distr	Kalungu Sub	Kabungo HC III		Valid	Site Level: C&T: General C&T
No	Yes	Yes	Yes							Site Level: C&T: General C&T

The above entry will be flagged upon upload and give the above error message in the HRH app.

To correct this error, change the Primary Program Area to 'IP Program Management' or 'Above Site'.

Appendix 2: User Administrator Information



Inviting a HRH Implementing Partner User

1

From the drop-down menus select:

- Country
- User Type: Partner
- Partner Name
- E-mail (enter manually)

2

For HRH in the Data Streams section, select "Enter Data"

Do not alter any other data streams

Invite User

< BACK

User Info

Country

Angola

User Type

Partner

Partner

E-mail address

User Administrator

Data Streams

ER	<input type="checkbox"/>	No Access
ESOP	<input type="checkbox"/>	View Data
HRH	<input checked="" type="checkbox"/>	Enter Data
MCAE	<input type="checkbox"/>	No Access
MER	<input type="checkbox"/>	No Access
MER (DOD)	<input type="checkbox"/>	No Access

Data Actions

Approvals: Submit Data

3

In the Data Actions section, select "Approvals, Submit Data"

4

After you have completed these steps, press "Send invite"

SEND INVITE >

Inviting a HRH Agency Field User

1

From the drop-down menus select:

- Country
- User Type: Agency
- Agency Name
- E-mail (enter manually)

2

For HRH in the Data Streams section, select "View Data"

Do not alter any other data streams

Invite User < BACK

User Info

Country

Angola

User Type

Agency

Agency

E-mail address

User Administrator

Data Streams

ER	<input type="checkbox"/>	No Access
ESOP	<input type="checkbox"/>	View Data
HRH	<input checked="" type="checkbox"/>	View Data
MCAE	<input type="checkbox"/>	No Access
MER	<input type="checkbox"/>	No Access
MOH	<input type="checkbox"/>	No Access
SaSR	<input type="checkbox"/>	No Access
SIMS	<input type="checkbox"/>	No Access

Data Actions

- Approvals: Accept Data
- Approvals: Submit Data
- View Unapproved Data

SEND INVITE >

3

In the Data Actions section, select "Approvals, Accept Data" and "Approvals: Submit Data"

4

After you have completed these steps, press "Send invite"

Inviting a HRH Global Agency (Agency HQ*) User

1

From the drop-down menus select:

- Global
- User Type: Global Agency
- Agency Name
- E-mail (enter manually)

2

For HRH in the Data Streams section, select "View Data"

Do not alter any other data streams

3

In the Data Actions section, select "Approvals, Accept Data" and "Approvals: Submit Data"

4

After you have completed these steps, press "Send invite"

The screenshot shows the 'Invite User' form with the following fields and sections:

- User Info:** Country (dropdown menu), Global Agency (dropdown menu), Agency (dropdown menu), E-mail address (text input), and a checkbox for 'User Administrator'.
- Data Streams:** Three rows with toggle switches: ER (set to 'Enter Data'), ESOP (set to 'View Data'), and HRH (set to 'View Data').
- Data Actions:** Two checked checkboxes: 'Approvals: Accept Data' and 'Approvals: Submit Data'.
- SEND INVITE >** button at the bottom right.

Four red callout boxes with white text and numbers 1-4 provide instructions for each step. Red arrows point from the callouts to the corresponding UI elements: 1 points to the Country dropdown, 2 points to the HRH toggle switch, 3 points to the Data Actions checkboxes, and 4 points to the SEND INVITE button.