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Human Resources for Health (HRH) Data Entry and Submission for IP Users

USG Only

September 18, 2024

Agenda

1. Overview and Timeline of HRH Reporting
2. Resources to Support Data Entry
3. Entering Data in the HRH Template
   - Changes and new options
4. Validating the Data
5. DATIM Accounts, Data Submission, and Support Resources
6. Q&A

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Overview and Timeline of HRH Reporting

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Timeline: FY24 HRH Data Entry

Date	Upcoming Activities
NOW	Template available for download in DATIM
Prior to 9/30	DATIM users request new accounts or reactivate expired accounts Inventory templates available on SharePoint/DATIM for download and review
10/1	DATIM open for IP upload of HRH templates
11/15	HRH DATIM data entry closes; all templates should have been submitted by IPs and approved by Agency staff
12/2	DATIM open for IP cleaning and re-upload of HRH templates
12/13	HRH reporting data cleaning period closes

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HRH Data Flow

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

IP logs into **DATIM** and downloads HRH Inventory template and completes HRH Inventory in the offline template

IP logs into **DATIM** and uploads HRH Inventory document to HRH Processor Application. HRH Inventory is checked for errors after uploading.

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 GHSD/PEPFAR HQ.

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Resources to Support Data Entry

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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 FY24 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 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.

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Resources on Zendesk- Quality Control & DATIM Accounts

Quality Control and Review Process		
FY24 HRH DATIM Error Messages and Resolutions	IPs	This document describes how to resolve validation errors the user may encounter.
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.
Logging into DATIM using Okta	All DATIM Users	Guide for using Okta to log into DATIM and who to contact for additional support including resetting your password or contacting your user administrator to reactivate your account.

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Entering HRH Data in the Reporting Template

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What's New

General Template Updates

- **Column Order:** The order of columns have been changed to improve data entry accuracy by using dynamic dropdowns
- **Dynamically Updated Dropdowns**: Employment title now updates based on selection for Direct Service Delivery; If "Primarily support work in the community?" = YES, then Column O, "Work in multiple facilities (roving)" will only have 'No' has an option
- **Column Header Comments:** Comments have been added to column headers to inform validations on data entry

New Columns

- **Column G: Primarily supports DREAMS programming** was added with 'Yes' or 'No' response options

Updated Options

- **Column K:** Was formally titled 'MOH Staff or Seconded to MoH' and is now **Govt Staff or Seconded to MoH**. A new option has been added: **Yes-Other Non-MOH Govt Staff**
- **Column P:** Was formally titled "Position Based Outside of OU' and is now **Where is this Position Based?** The following options are available: **Outside the OU**; **National Level**; **Sub National**
- **Column F (Employment Title):** The dropdown option **Other: DREAMS** has been removed from the "Employment Title" field as a separate column has been added for this.
  - The following options have been added: **Other: Program Coordinator/Assistant**; **Other: Program Manager/Officer**; **Other: Provincial/District Coordinator**
- **Column X (Primary Beneficiary):** The "Primary Beneficiary" column has been updated to match the Expenditure Reporting Targeted Beneficiary List: Non-targeted populations; Children; Adolescent Girls and Young Women (AGYW); Key Populations; Orphans and Vulnerable Children (OVC); Pregnant & Breastfeeding Women (PBFW); Military

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What's New – Order of the Columns

A	B	C	D	E	F	G	H	I	J	K	L	M
Record Number (optional)	Employed through Prime or Sub IP?	If Sub, Select IP Name	Gender	Deliver services DIRECTLY to beneficiaries?	Employment Title	Primarily supports DREAMS programming	Primary Program Area?	Provide Technical Assistance?	Mode of Hire	Govt Staff or Seconded to MoH	Months of Work in Past Year	Average FTE per Month

N	O	P	Q	R	S	W	X	Y	Z	AA	AB	AI
Primarily support work in the community?	Work in or support multiple facility sites (Roving Staff)?	Where is this Position Based?	PSNU	Community	Facility	Valid OU	Primary Beneficiary?	In the past year, provided support for other public health emergency?	Sum of Annual PEPFAR Expenditure, excluding Fringe and Non-Monetary (in USD)	Annual PEPFAR Fringe Expenditure, excluding Non-Monetary (in USD)	Annual PEPFAR Non-Monetary Expenditure, excluding Fringe (in USD)	Comments

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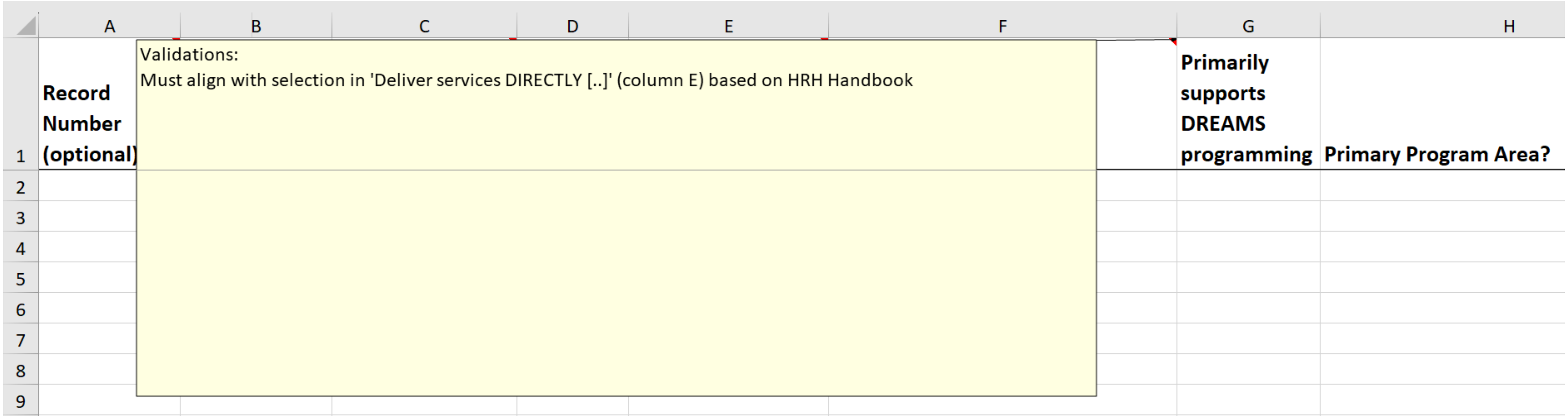
Column Header Notes

- **Once you hover over a column header, guidance will be shown in an enlarged text box as seen below:**



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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 Calculator 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 FY24 template to another FY24 template is generally fine, however do not copy from a prior year's template into a FY24 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.

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Cover Sheet Tab Definitions and Elements

Data Element	Definition
Cover Sheet Tab	
Operating Unit/ Country	**Pre-filled.** 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, 2024 would be 12/8/2024.
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	**Pre-filled**. 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	**Pre-filled**. 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.
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"

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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
Deliver services DIRECTLY to beneficiaries?	Job description, Manager
Employment Title	Employment records
Primarily supports DREAMS programming	Employment records
Primary Program Area?	Job description, Employment records, Manager
Provide Technical Assistance?	Employment records
Mode of hire	Employment records
Govt Staff or 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
Where is this Position Based?	Employment records
SNU1/PSNU/Community/Facility/Valid OU	Employment/deployment records, Manager
Primary Beneficiary?	Job description, Manager
In past year provided support for other public health emergency?	Manager, COVID-related program adaptation records
Sum of annual PEPFAR expenditure, excluding Fringe and Non-Monetary (in USD)	Payroll, IP financial documents
Annual PEPFAR fringe expenditure, excluding Non-Monetary (in USD)	Payroll, IP financial documents
Annual PEPFAR Non-Monetary Expenditure, excluding Fringe (in USD)	Payroll, IP financial documents

Staff List Tab: Record Number

- **No change to this field**
- **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**: The same record number cannot be used twice. This field will not be incorporated in DATIM datasets or stored on PEPFAR servers.

Staff List Tab: Employed through Prime or Sub IP

- **No change to this field**
- **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

- **No change to this field**
- **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

- **No change to this field**
- **Dropdown Options:** Male, Female, Transgender, Non-binary, Other, Don't Know
  - Please select the recognized gender of the PEPFAR-supported worker.

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Staff List Tab: Deliver services DIRECTLY to beneficiaries?

- **No change to this field**
- **Dropdown Options:** Direct Service Delivery, Non-Service Delivery
  - 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: Employment Title

- **Three new options added to this field; One Option Removed from this field (Other: DREAMS)**
- **This field will update based on the selection of Direct Service Delivery or Non-Service Delivery**
- **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.

New Employment Titles

- **Three new options added to the Employment Title field**

Other Professional Staff	Provincial/District Coordinator	Oversees and coordinates program activities within a specific geographic region (province or district). This role involves strategic planning, implementation, monitoring, and evaluation of HIV prevention, care, and treatment programs. The manager ensures that program goals are met, compliance with policies and regulations is maintained, and resources are effectively utilized. They may also be seconded staff who are working as government or MoH staff, as well as staff who liaise with government officials, community leaders, and other stakeholders to facilitate collaboration and support for the program.
	Program Manager/Officer	Responsible for the design, execution, and oversight of specific HIV-related projects or components within the program. This role includes developing work plans, managing budgets, monitoring progress, and reporting on outcomes. Ensures that activities align with PEPFAR objectives and standards, provides technical assistance, and coordinates with partners and beneficiaries.
	Program Coordinator/Assistant	Supports the administrative and logistical aspects of program implementation. This role may involve organizing meetings, maintaining records, preparing reports, and coordinating communication among team members and stakeholders. May also assist in the development and dissemination of program materials, monitoring timelines, and ensuring that project activities are on track.

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Staff List Tab: Primarily supports DREAMS programming?

- **New Field**
- **Dropdown Options:** Yes, No
- Please indicate if the individual primarily supports DREAMS Programming.

Staff List Tab: Primary Program Area?

- **No change to this field**
- **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
1. Blood Supply Safety 2. General Above Site 3. HMIS, surveillance & research 4. Human resources for health 5. Injection Safety 6. Institutional prevention 7. Laboratory Systems Strengthening 8. Laws, regulation & policy environment 9. Policy, planning, coordination & management of disease programs 10. Procurement & supply chain management 11. Public financial management strengthening	1. General C&T 2. HIV Clinical Services 3. HIV Drugs 4. HIV Laboratory Services 5. HIV/TB	1. Community-based testing 2. Facility-based testing 3. General HTS	1. Comm. Mobilization, behavior & norms change 2. Condom & lubricant Programing 3. Genral Prevention 4. Medication assisted treatment 5. PrEP 6. Primary prevention of HIV and sexual violence 7. VMMC	1. Case Management 2. Economic Strengthening 3. Education Assistance 4. Food and nutrition 5. General Socio-economic 6. Legal, human rights and protection 7. Psychosocial support	1. IP Program Management

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Staff List Tab: Provide Technical Assistance?

- **No change to this field**
- **Dropdown Options:** Yes, No
  - – 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**

Must be routine

Job Titles that are always TA providers:

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

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Staff List Tab: Mode of Hire

- **No change to this field**
- **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.

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Staff List Tab: Govt Staff or Seconded to MoH

- **Updated options**
- **Dropdown Options:**
  - No
  - Yes – MOH Staff
  - Yes – Seconded to MOH
  - Yes – Other Non-MoH Govt Staff **(new option)**

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Staff List Tab: Months of Work in Past Year

- **No change to this field**
- **Free Text**, Greater than 0 – Up to 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).

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Staff List Tab: Average FTE per month

- **No change to this field**
- **Free Text**, Greater than 0 – Up to 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.

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Staff List Tab: Primarily supports work in the community?

- **No change to this field**
- **Dropdown Options:** Yes, No
  - 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.
  - ***Beginning in FY24, individuals who primarily support work in the community who are attached to a facility may be reported as linked to the facility.***

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

- **No change to this field**
- **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.

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Staff List Tab: Where is this Position Based?

- **Updated field, replacing "Is this Position based outside the OU?"**
- **Dropdown Options:** Outside the OU, National Level, Sub National
  - Please indicate whether this position is primarily based in a location outside of the operating unit.
    - **Outside the OU:** Staff primarily based in a location outside of the operating unit. These INTERNATIONAL WORKERS, such as U.S. based staff that spend a portion of their time supporting the IM, should leave all geographic hierarchy columns blank . Because International Workers are not based in the country, they cannot be considered ‘Site Level’ staff. All workers that answer “Outside the OU” to this question must select Above Site or Program Management as their program area.
    - **National Level:** Staff working at the national or SNU-level supporting national level activities. For these workers, select the SNU1 where the 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 the majority of their work is performed. National level workers cannot be considered ‘Site level” staff.
    - **Sub National Level**: Staff who are primarily based at a sub-regional or subnational level, including community and facility-level staff. Staff who answer “Sub-National Level” should enter sub-regional and subnational geographic information. Sub-National level workers can be ‘Above-Site’ or ‘Site Level.”

Staff List Tab: Geography: PSNU / Community / Facility / Valid OU

- **No change to this field**
- **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

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

- **No change to these fields**
- **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
Country/SNU1 (Regional templates only)	✓	✓	✓	✓	✓	✓	✓	✓
SNU1	ⓧ	✓ (office location)	✓	✓	✓	✓	✓	✓
PSNU	ⓧ	ⓧ	ⓧ	✓	✓	✓	✓	✓
Community (in OUs with community separate from PSNU)	ⓧ	ⓧ	ⓧ	✓	✓	✓	✓	✓
Facility	ⓧ	ⓧ	ⓧ	ⓧ	ⓧ/ ✓	ⓧ	✓	✓

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Staff List Tab: Primary Beneficiary?

- **Options updated based on new Targeted Beneficiary designations**

#	Targeted Beneficiaries
1	Adolescent Girls and Young Women (AGYW)
2	Key Populations
3	Orphans and Vulnerable Children (OVC)
4	Pregnant & Breastfeeding Women
5	Children
6	Military
7	Non-Targeted Populations

Dropdown Options: Subset of financial classification system's beneficiaries

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

- **No change to this field**
- **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

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

- **No change to this field**
- **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
❿ Regular salaries and wages paid directly to employees ❿ Stipends, cash awards, bonuses or performance-based pay that is paid directly to employees	❿ Non-monetary compensation paid to employees, entered as their USD equivalent value ❿ Fringe benefits

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Staff List Tab: Annual PEPFAR fringe expenditure, excluding Non-Monetary (in USD)

- **No change to this field**
- **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
• 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.	• 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: Annual PEPFAR Non-Monetary Expenditure, excluding Fringe (in USD)

- **No change to this field**
- 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

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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

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Data Validations in DATIM HRH App

- Data quality validations are logic or value checks processed upon upload to DATIM
- 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, not when entering the data.
- 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”

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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 FY24).

Copying and Pasting in the Template

- ***DO NOT Copy and Paste from an old template into the new template*** (i.e. FY23 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 FY24 template into another FY24 template
  - **Do NOT include the Comments (Column AI) 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

20TH ANNIVERSARY

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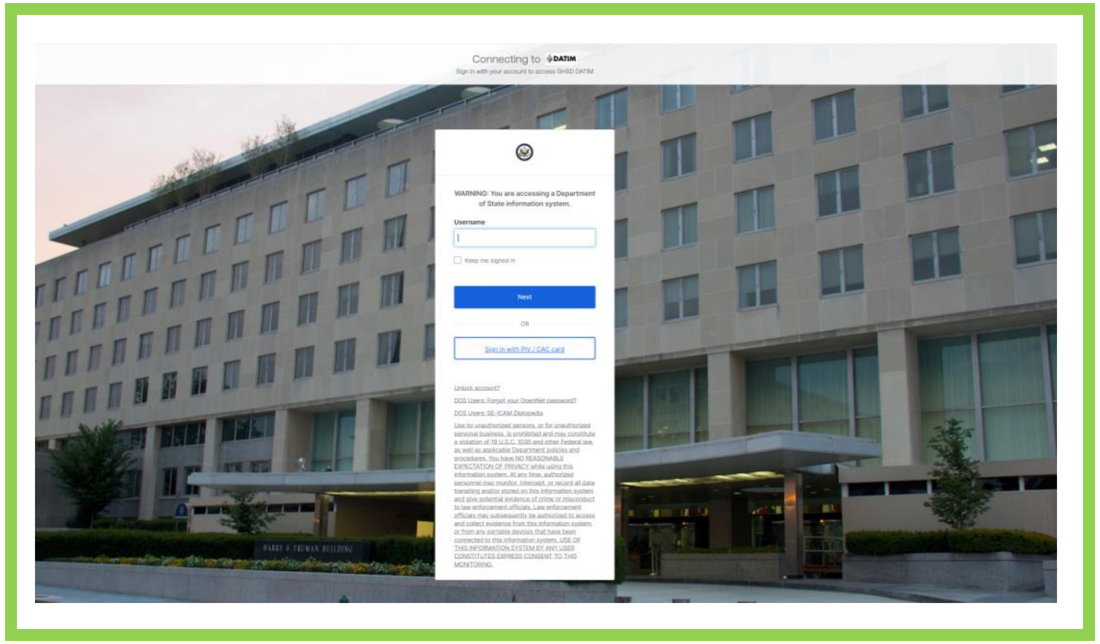
Logging into DATIM

You will no longer log in directly to DATIM



Instead, you will create a **State Department Okta account** and use that to log into all PEPFAR systems, utilizing Single Sign On (SSO) and Multi-factor authentication (MFA) through Okta Verify. You can access DATIM through **datim.org** OR **state.okta.com**.

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Logging into DATIM

- If you had an active DATIM account as of two months ago, you should have received an activation email from noreply@seicam.state.gov with instructions to activate your Okta account and Okta Verify

- If your DATIM account was inactive over the past few months, you will need your user administrator to reactivate your account, and click the **CREATE ACCOUNT** link on your user profile to create your Okta acount
  - You will receive an email to create an Okta account and setup Okta Verify

- If you have multiple accounts in DATIM, there is now a **Switch Accounts** application that will allow you to switch between your multiple DATIM accounts.

- **Okta Verify** is an application on your phone that provides one-time codes required to log into your Okta account. There is a desktop version available for those who do not have a mobile device.

- There will be DATIM office hours to support Okta login issues during the following times:
  - **Tuesday, October 1, 2024, 7:30-8:30 AM ET**
  - **Wednesday, October 2, 2024, 10-11 PM ET**
  - **Friday, October 4, 2024, 7-8 AM ET**

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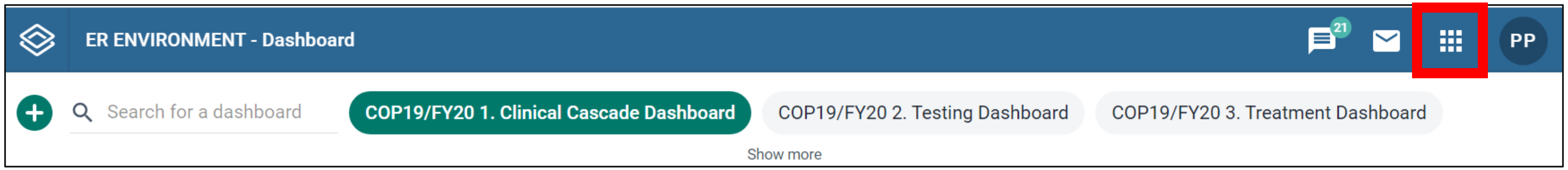
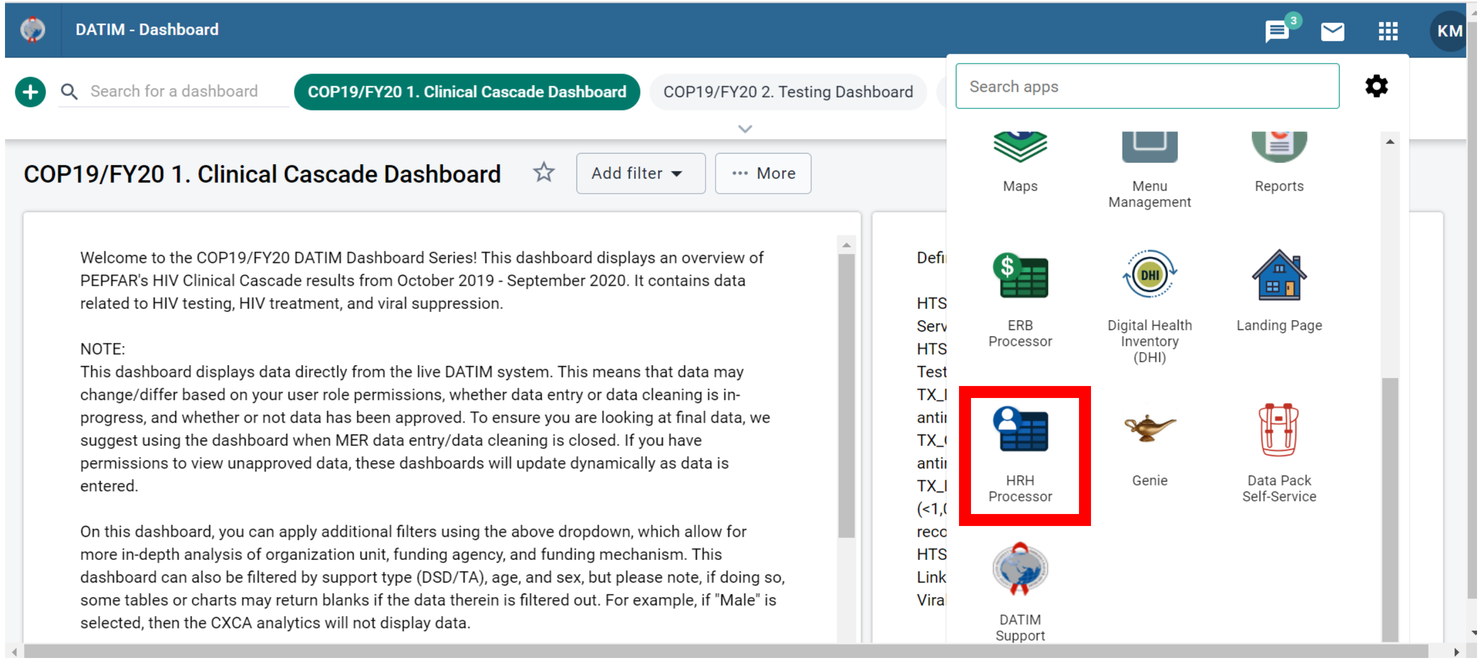
Navigate to HRH Processor App

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



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



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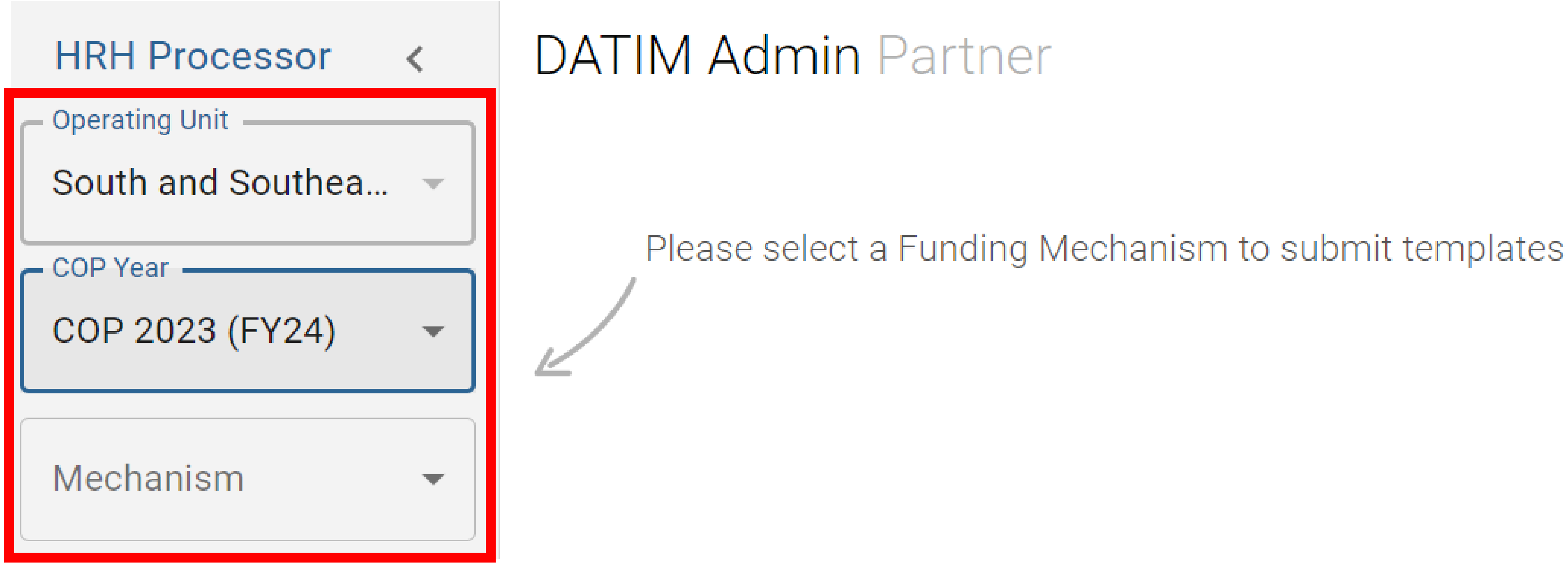
Partner Upload of Template



- Use the HRH Processor app to select:
  - OU
  - COP Year (COP23)
  - Funding Mechanism

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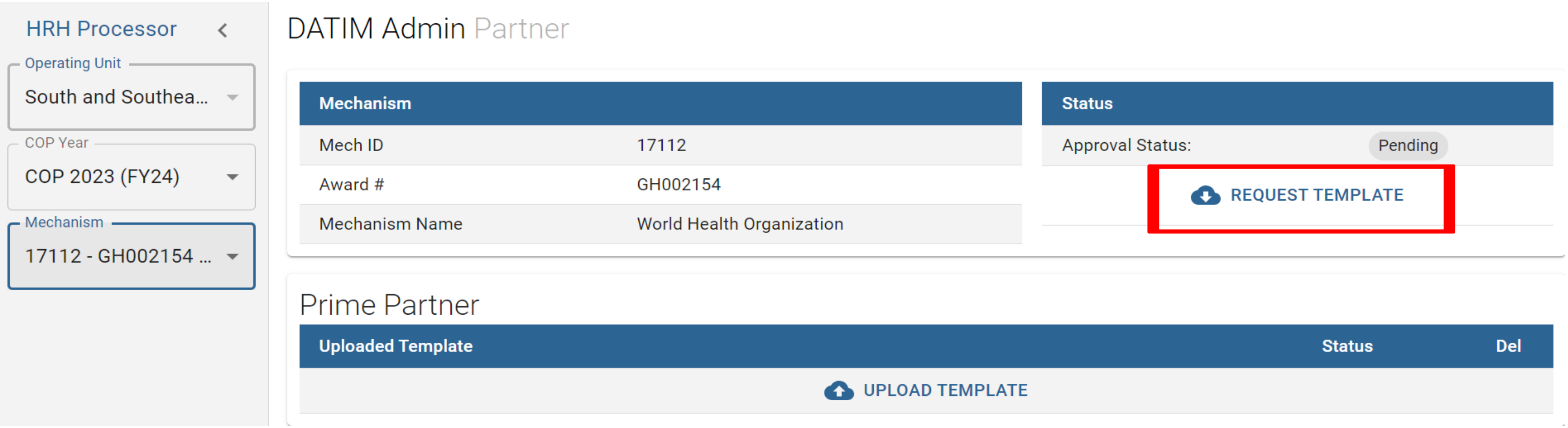
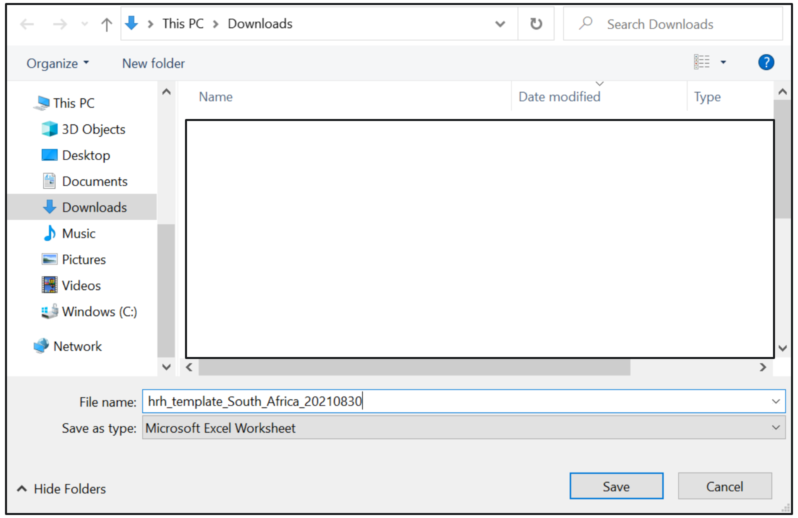
Partner Request Template





- Click the **Request Template** icon under the Status field
- The template will save to your browser
- This can take up to 20 seconds

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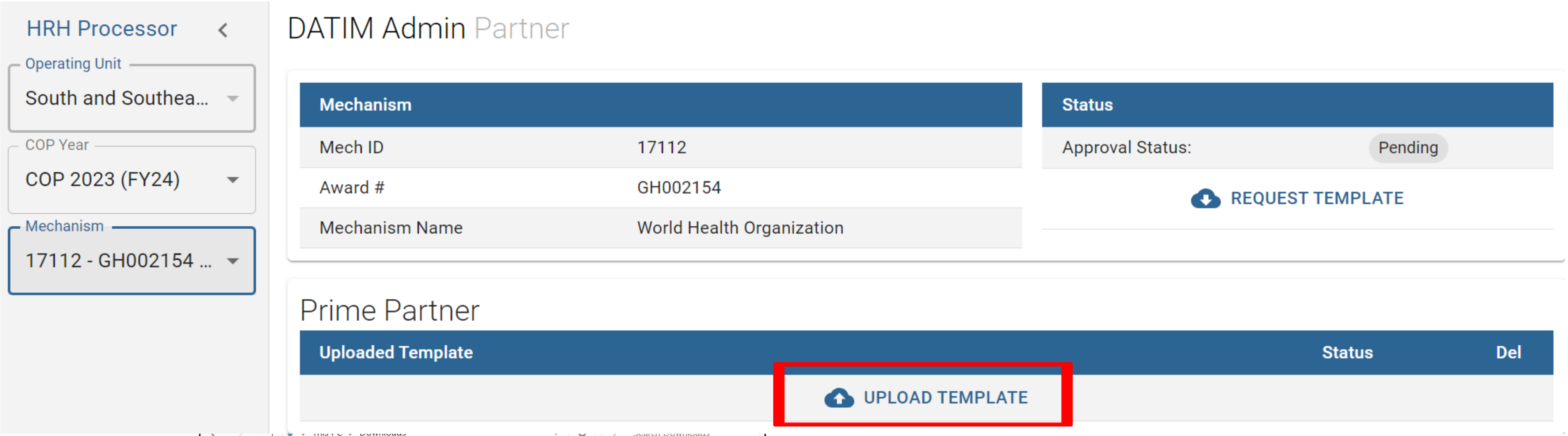
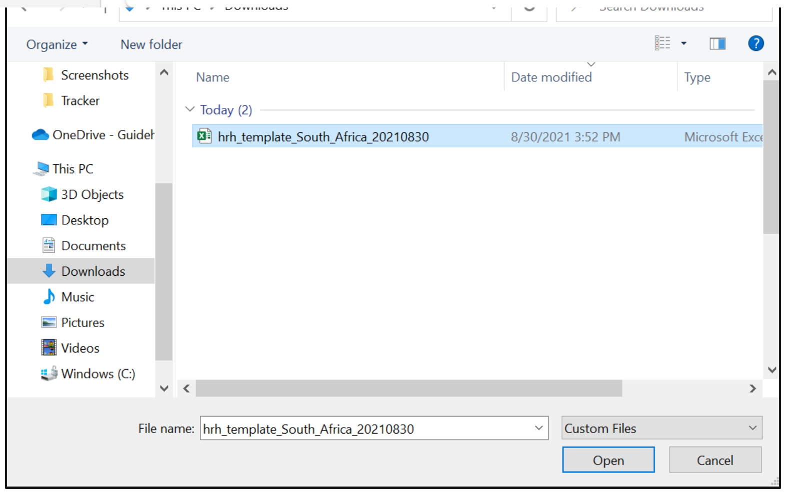
Partner Upload of Template





- 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 3-5 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	

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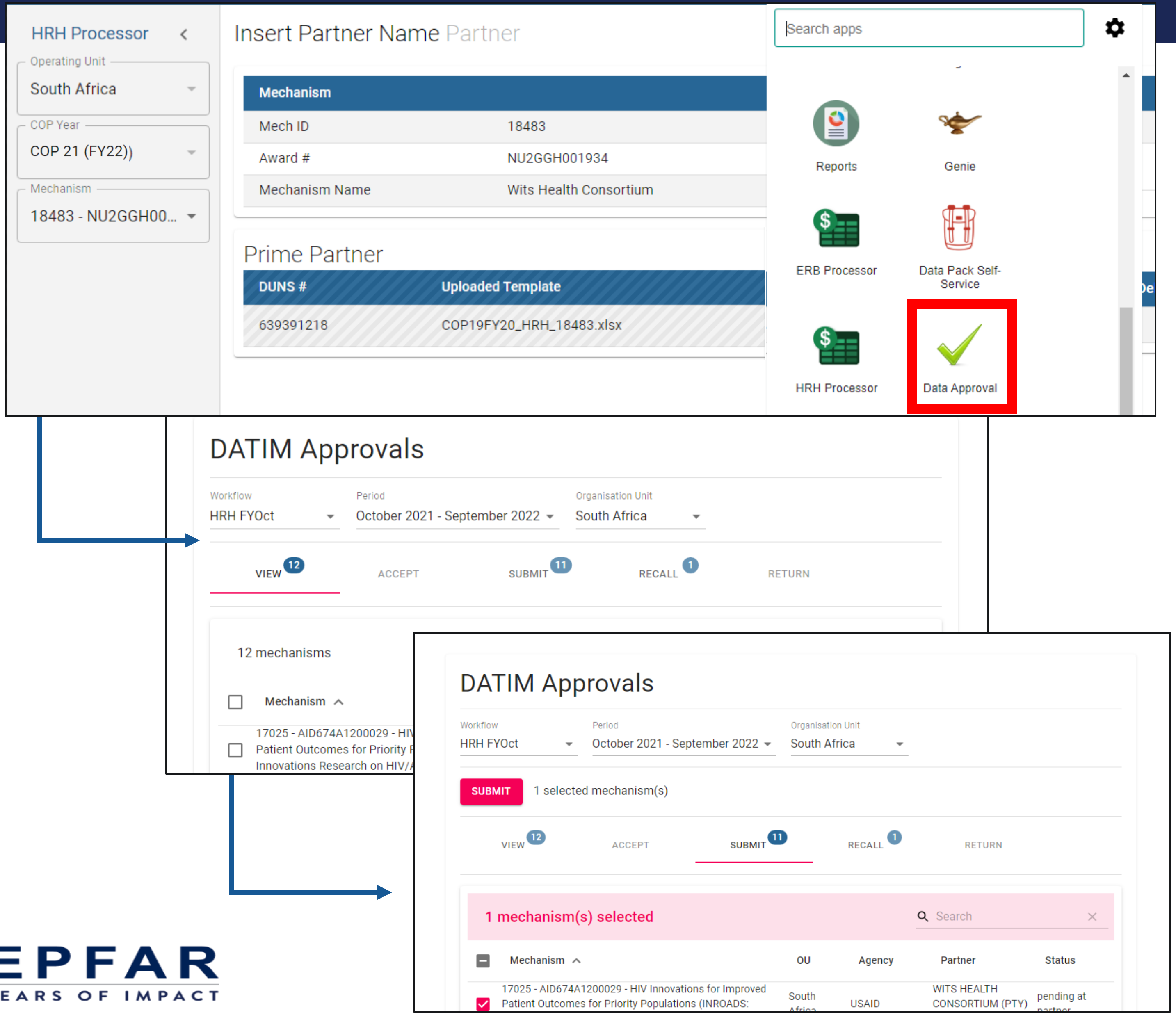
If your template is successfully uploaded, you will see the following status:

Partner Submitting Data- Data Approval App



- 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

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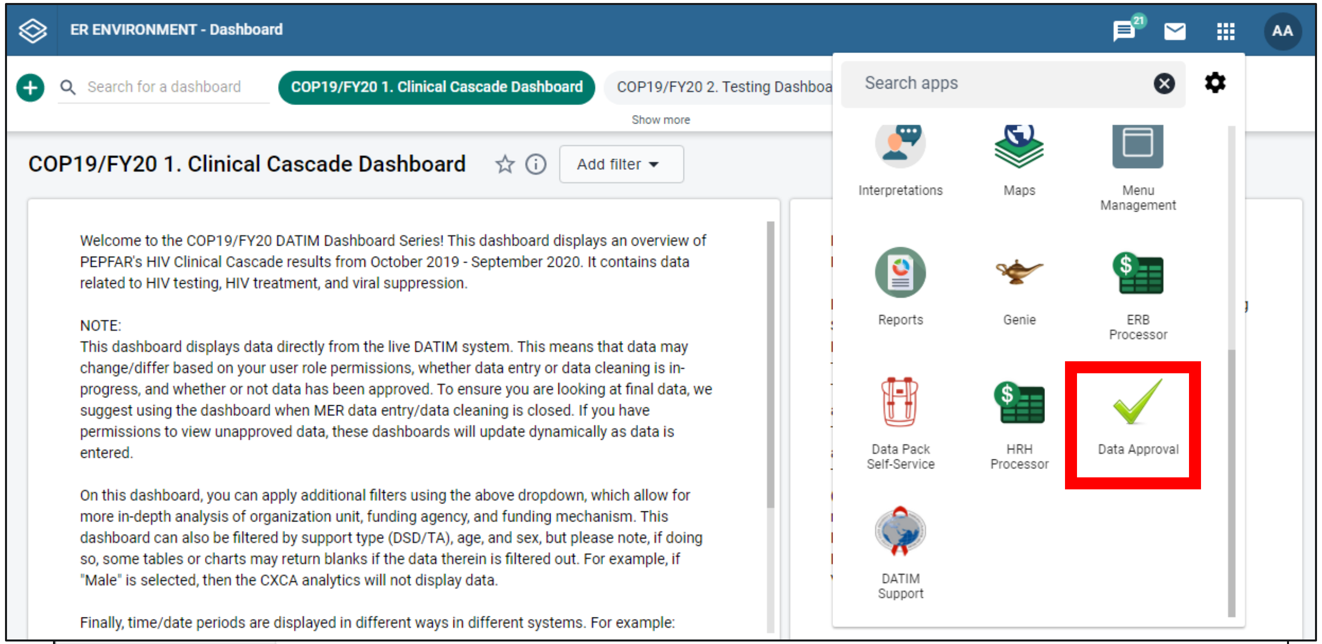
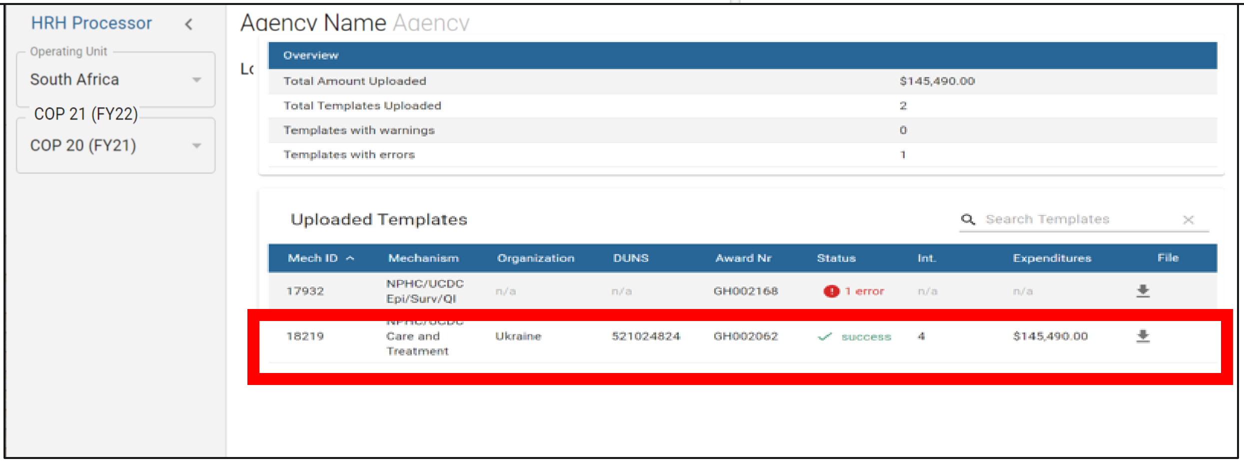
Agency Review of Templates

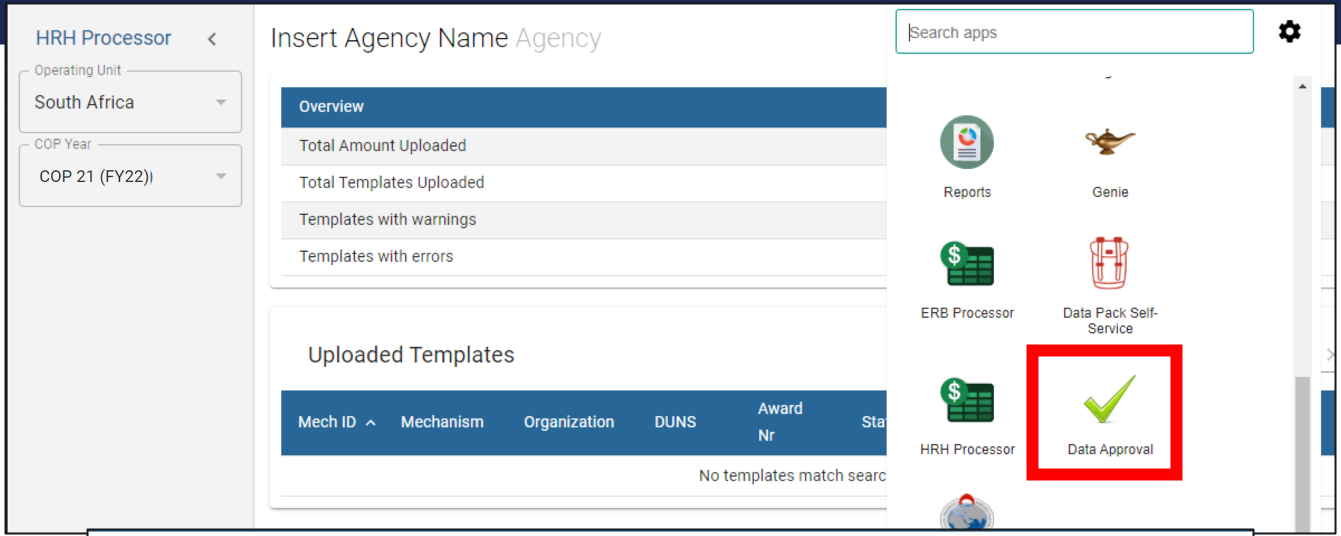


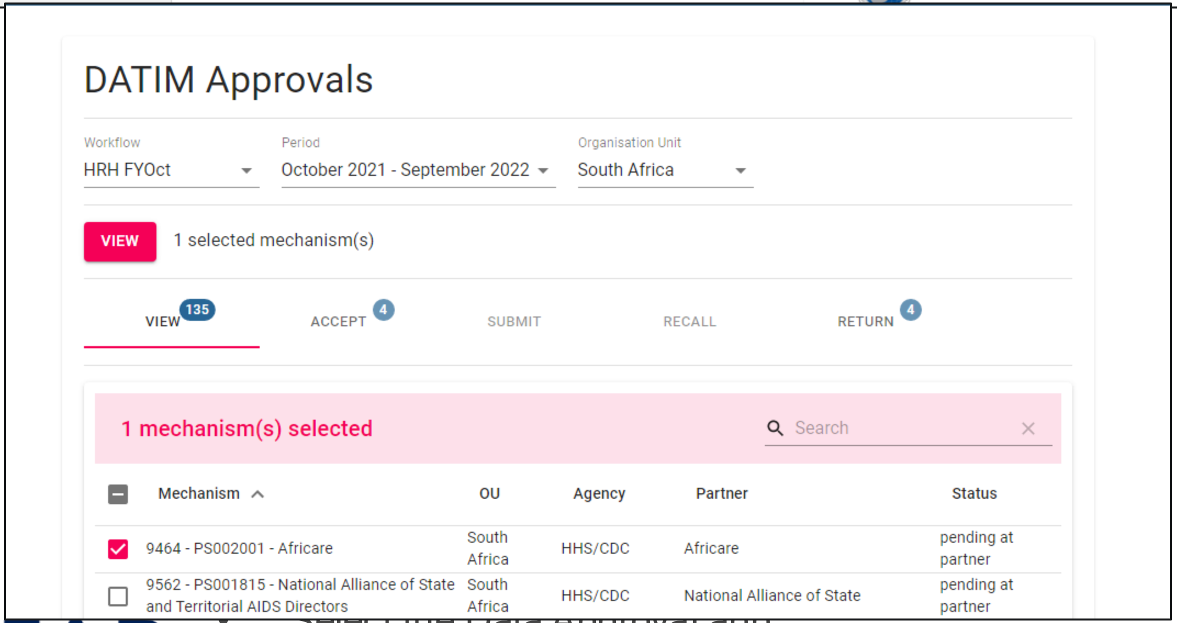


- Use the HRH Processing app to verify the HRH template for the IM being reviewed has been successfully uploaded.
- To review the template, download the file by clicking the button in the column labeled “File”

- Navigate to the HRH Processor app

Submitting/Approving Data for the Agency Reviewer

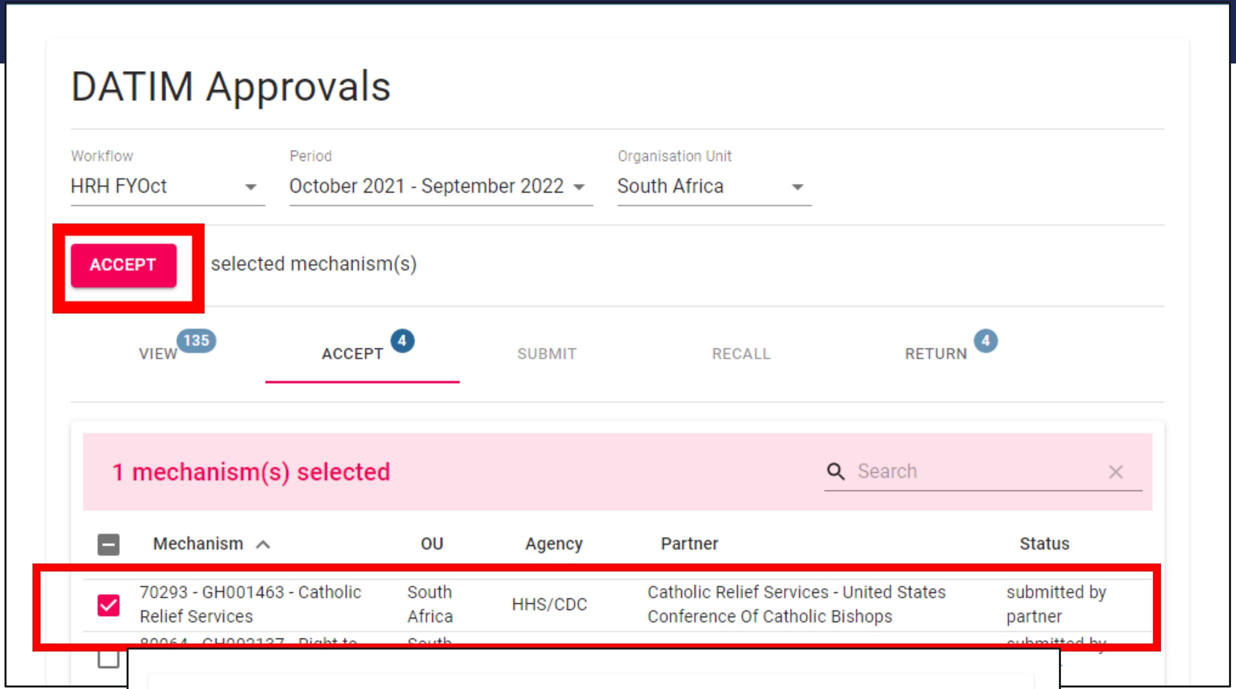


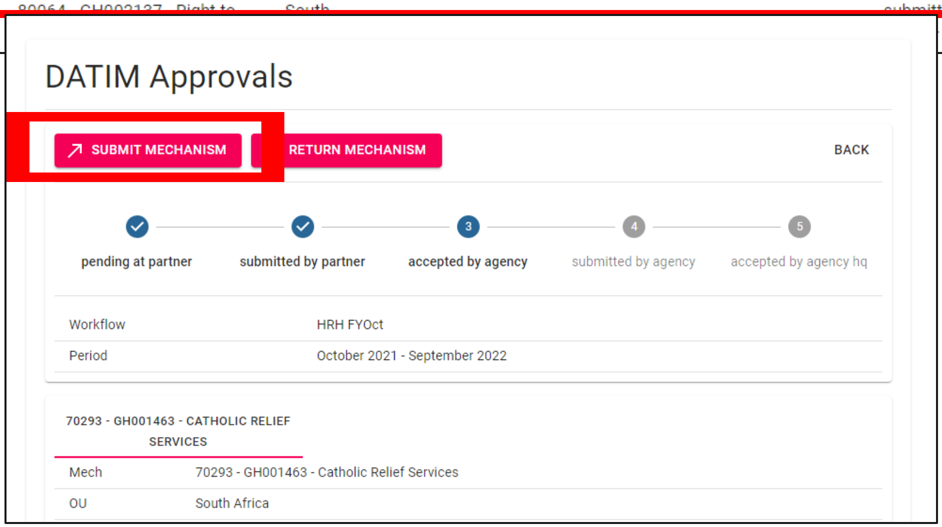


- Select the Data Approval app

- 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





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

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

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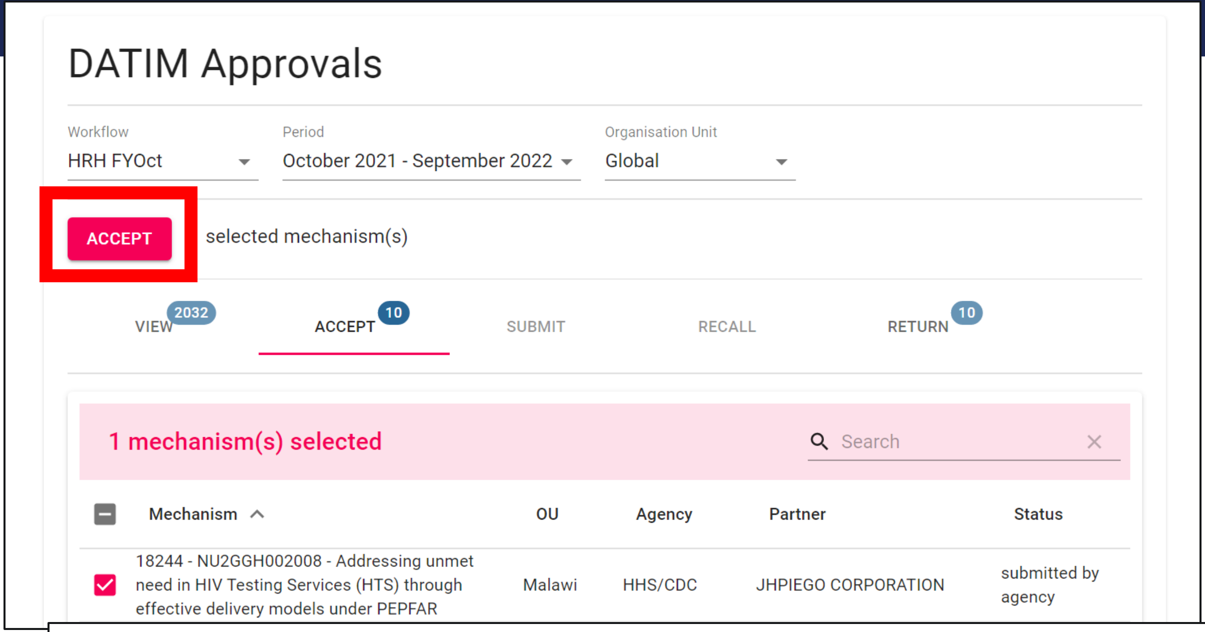
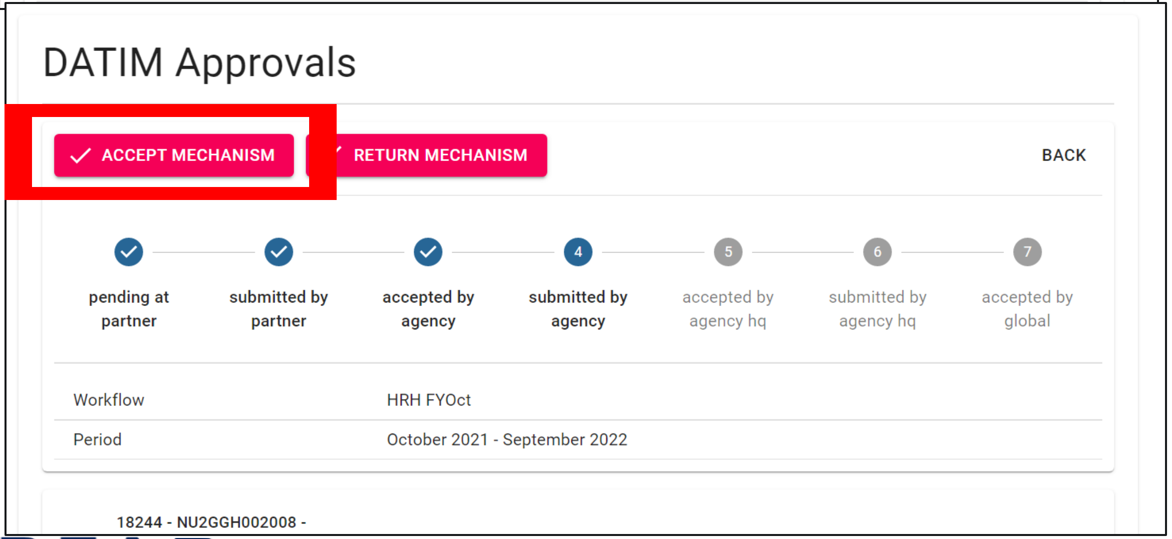
Submitting in the Data Approval app from the Agency HQ View





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

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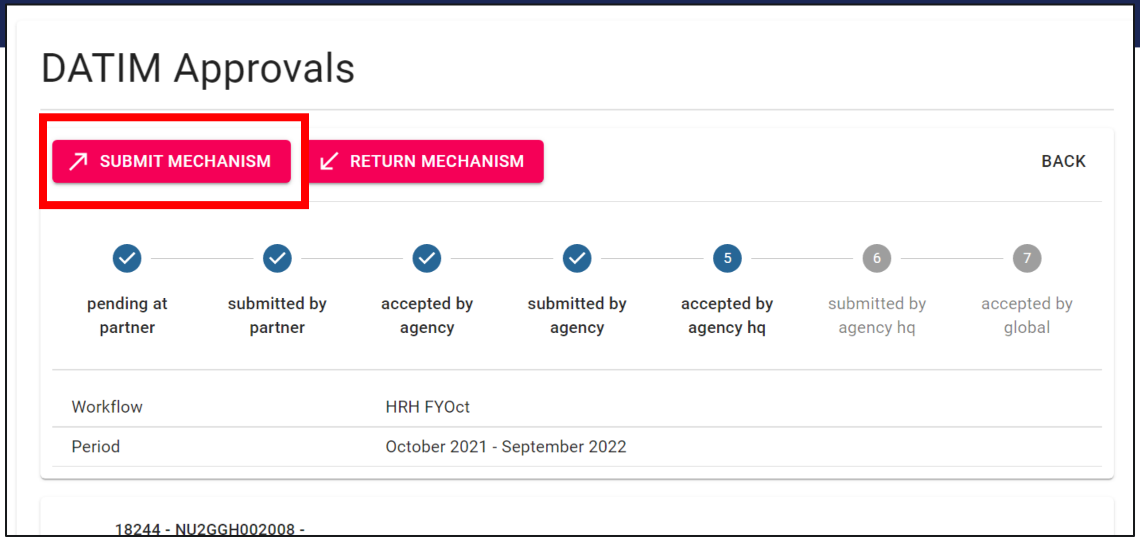
Submitting Data from the Agency HQ View

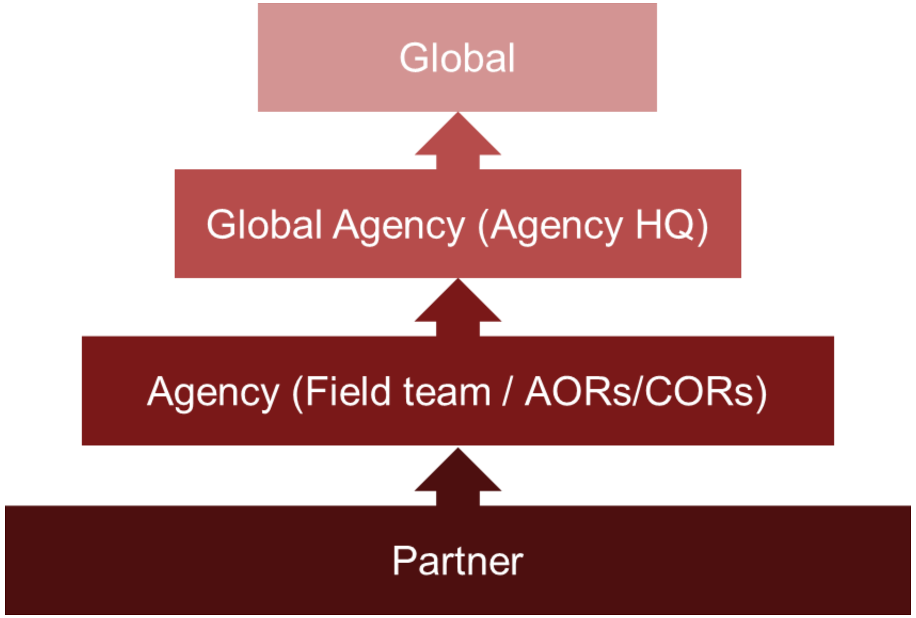


- Use the “Submit” tab to submit all IMs that have been submitted by the partner
- Select 1 or several IMs to accept, then Proceed

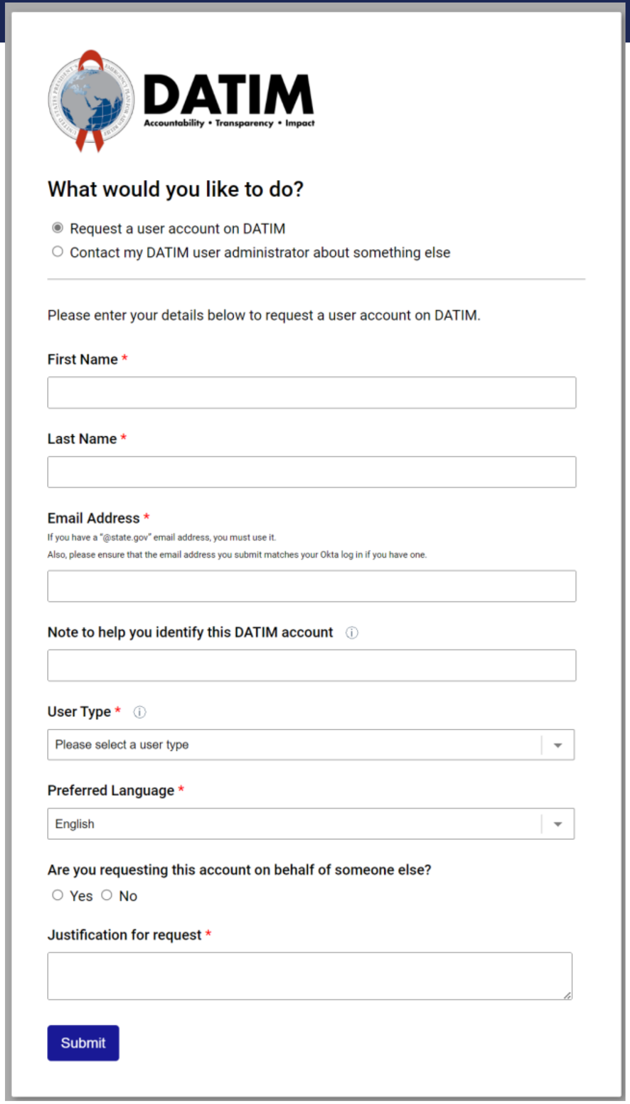
- Status should change to **submitted by agency hq**, then Proceed

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



- To request a new DATIM account, go to register.datim.org
- This request will now include creation of an Okta account
- Complete required fields
- For User Type:
  - If Agency or Agency HQ, select "USG"
  - If Partner, select "Implementing Partner"

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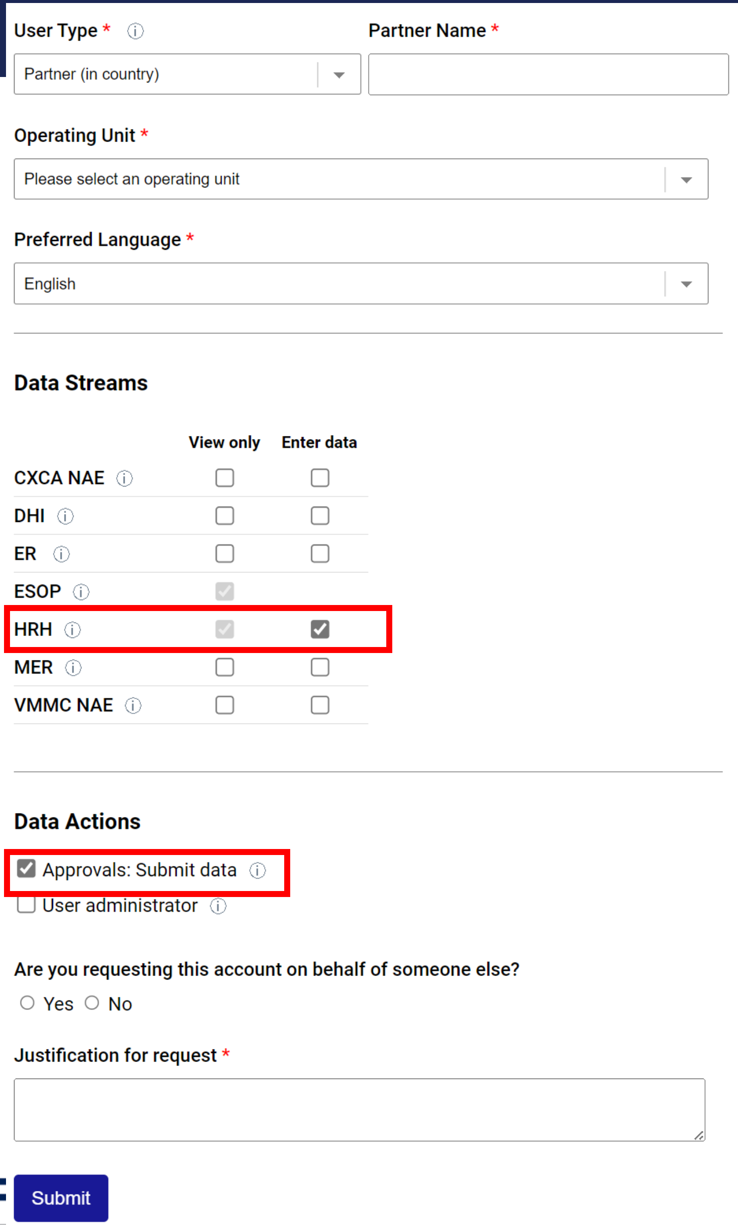
Requesting a new account



- After selecting the User Type, enter remaining required fields.
- Be sure to select HRH Enter Data if the user will require the ability to upload HRH templates
- If the user will be submitting data, check the Approvals: Submit data box

Guidance and Instructions

- All guidance and instructions related to submitting HRH in DATIM can be found at https://help.datim.org/hc/en-us

DATIM > PEPFAR Guidance > HRH

HRH - Program Guidance (Handbook, Webinar, FTE

Katey Muskett - Yesterday at 14:52

The documents below consist of the FY24 HRH Handbook, FTE Calculator, HRH Employment Title/Categories/Cadre, HRH Webinar, HRH Inventory Points of Contact.

For guidance on data entry, DATIM, and systems, please view the HRH - Systems Guidance Zendesk page.

HRH Handbook (FY23 HRH Handbook.pdf)

The handbook includes:

- Acronym definitions
- About the Inventory
- Introduction
- Orientation to the Inventory Template Structure
- Data Element Definitions and Instructions
- Job Titles
- A Second Look at three Jobs : Roving Staff, Community Workers, and TA Providers
- PEPFAR Program Area Definitions
- Completing a Final Quality Check Before Submission

The FTE Calculator (FY23 HRH FTE Calculator.xlsx)

The FTE Calculator attached is a tool attached to the HRH Inventory Template but can also be found below. The FTE Calculator allows Partners to calculate the monthly average FTE to complete Column I of the Staff List on the HRH template.

HRH Employment Title/Categories/Cadre (FY23 HRH Employment Title_Category_Cadre.xlsx)

The HRH Definitions document attached is a reference guide to all HRH Inventory Employment Titles, Program

DATIM > DATIM Training & Tutorials > HRH

HRH - Systems Guidance (Implementing Partner Guide, Err Message & Resolution, User Admin)

Katey Muskett - Today at 10:33

The documents below consist of the FY24 (COP 23) Implementing Partner Step-by-step Guide , DATIM Error Message and Resolution document, HRH Data Entry and Submission for IP Users, Instructions for Creating a New HRH Account, Data Approval Level Statuses, and Password Reset.

For Program guidance including the HRH Handbook, Webinar Slides, and Employment Titles, please view the HRH - Program Guidance Zendesk page.

Logging into DATIM using Okta

DATIM accounts now use Okta as the only form of login. For additional guidance, please reference the DATIM Okta User Support page.

For questions or issues about HRH data entry, submission, or user accounts, please submit a Zendesk ticket at https://datim.zendesk.com/ and it will be routed to the appropriate party.

Implementing Partner Step-by-step Guide (FY24 HRH IP Step by Step Guide.docx)

This document attached below can be used as a final tool before submitting your template to ensure that all correct fields have been filled out and to prevent any upload errors.

DATIM Error Message and Resolution document (FY24 HRH DATIM Error Messages and Resolutions.pdf)

This document attached below explains the on-screen error messages a user might encounter when uploading a template that is invalid. Each one is shown in detail in the document with specific screenshots on what the error

PEPFAR Guidance > HRH

- HRH – Program Guidance (Handbook, Webinar, FTE Calc)

DATIM Training & Tutorials > HRH

- HRH – Systems Guidance (Implementing Partner Guide, Error Message & Resolution, User Admin)

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Q&A

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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: Harry Kim/Laura Tison
  - USAID: Risa Griffin
  - CDC: Yessica Gomez
  - HRSA: Laura Foradori
  - DOD: Rivers Jones

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THANK YOU!

Appendix 1: User Administrator Information

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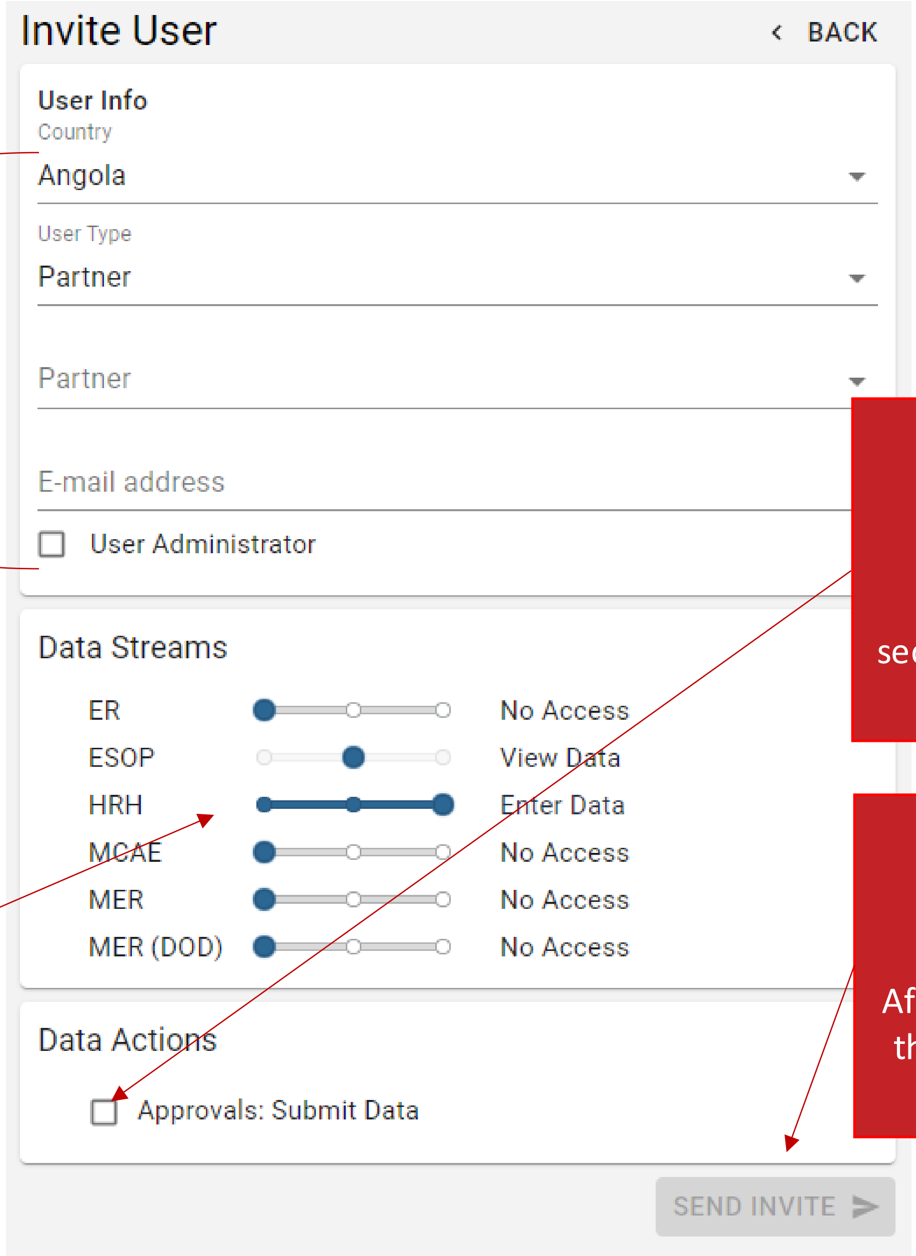
Inviting a HRH Implementing Partner User



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

3

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

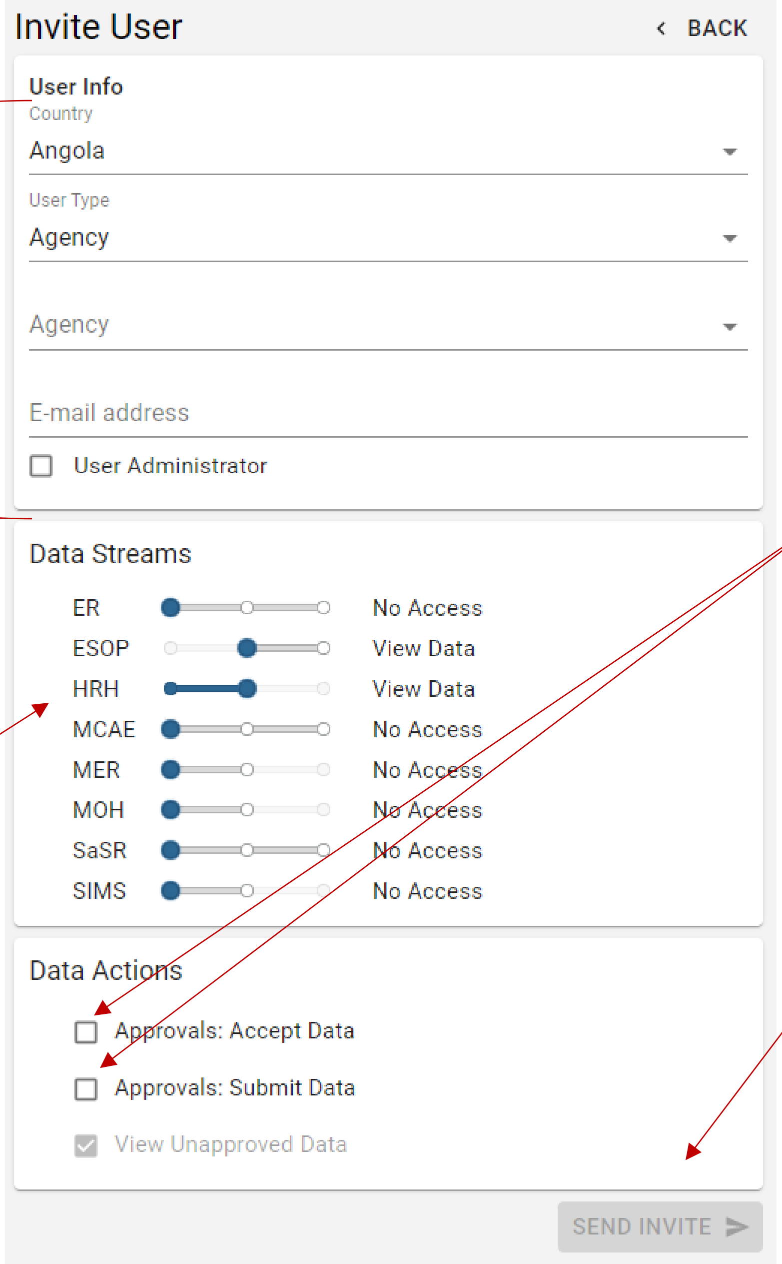
4

After you have completed these steps, press "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

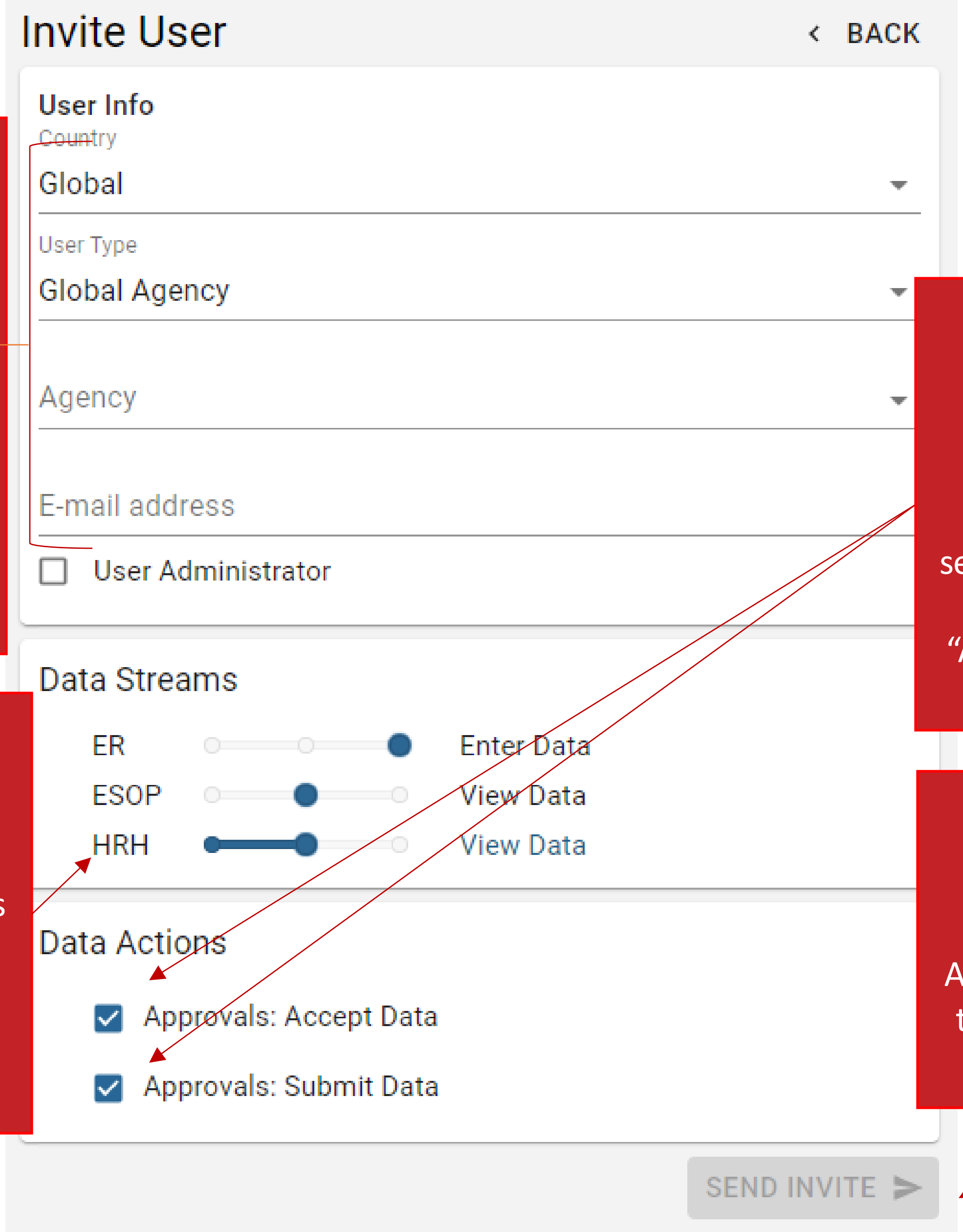
3

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"