Agenda

This training covers the following topics:

1. What is SRE?

2. What is ESoP?

3. How does ESoP inform PEPFAR programs?

4. How is ESoP reported?

5. Accessing ESoP Data

6. ESoP Data Flow

7. ESoP Data Calendar

8. ESoP Data Entry Overview

9. ESoP Data Entry Forms

10. Good Data Entry Practices

11. Resources and Support

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Surveys-Surveillance, Research, and Evaluation (SRE)

What is SRE?

SRE is the set of data that includes **Surveys-Surveillance and Research (SaSR)** data and **Evaluation Standards of Practice (ESoP)** data.
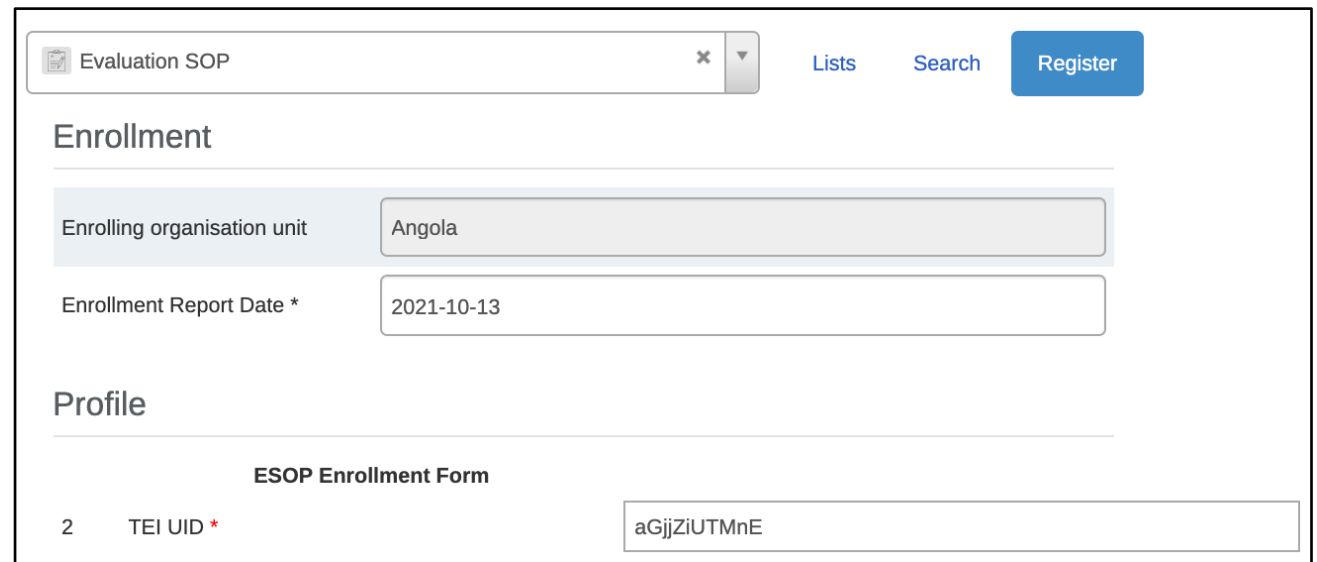
$$\text{SRE} = \text{SaSR} + \text{ESoP}$$

SRE data reporting ensures that PEPFAR-supported countries are collecting the **right kinds of information** that will help **fill information gaps** related to PEPFAR program planning and performance.

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Evaluation Standards of Practice (ESoP)

What is ESoP?

- Evaluation Standards of Practice (ESoP) is **PEPFAR's guidance** for ensuring high standards of evaluation planning, implementation, dissemination, and use.

- Each evaluation is entered in the reporting forms as a separate **"Enrollment."**

- ESoP does *not* consist of any epidemiological data.

Screenshot of a new Enrollment reporting form in DATIM

Evaluation Standards of Practice (ESoP)

Examples of ESoP Evaluations

- **Examples of ESoP evaluations conducted by PEPFAR:**

  o Evaluation of community-based treatment for drug-resistant tuberculosis in Bangladesh

  o Evaluation of the life skills program for HIV and STI prevention in schools in Cote d'Ivoire

  o An assessment of data quality in a multi-site electronic medical record system in Haiti

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Evaluation Standards of Practice (ESoP)

How does ESoP inform PEPFAR programs?
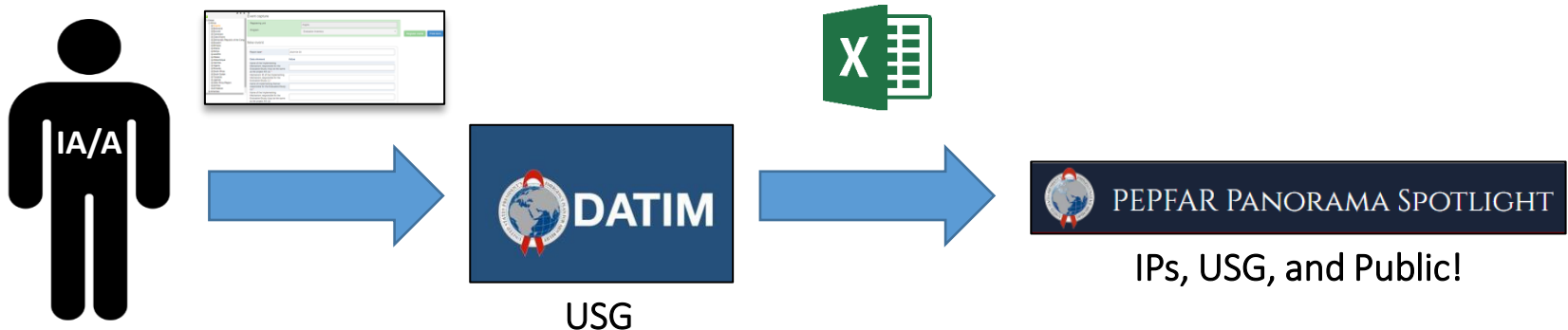
- **ESoP can be used to answer questions such as:**
  - What evaluation activities are occurring and where?
  - What questions are being answered?
  - What was the level of adherence to PEPFAR's standard of practices for these evaluation activities?

- Based on these answers, we can ask: *How can findings be leveraged to inform program decision-making across PEPFAR programs?*

ESoP Reporting Process

How is ESoP data reported?

1. <u>Reported:</u> Agency and Interagency users report ESoP data semi-annually in Q2 and Q4 via the **DATIM Tracker Capture app.**

2. <u>Reviewed:</u> OGAC users provide feedback on the data that is in Tracker Capture.

3. <u>Viewed:</u>
   - USG users can view semi-annual data in **Tracker Capture.**
   - ESoP data is also **reported annually** through the **Annual Report to Congress** and the **State/F Evaluation Repository, posted on Panorama Spotlight.**

IA/A

DATIM

USG

PEPFAR PANORAMA SPOTLIGHT

IPs, USG, and Public!

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Accessing ESoP Data

ESoP data can be accessed in the following systems:
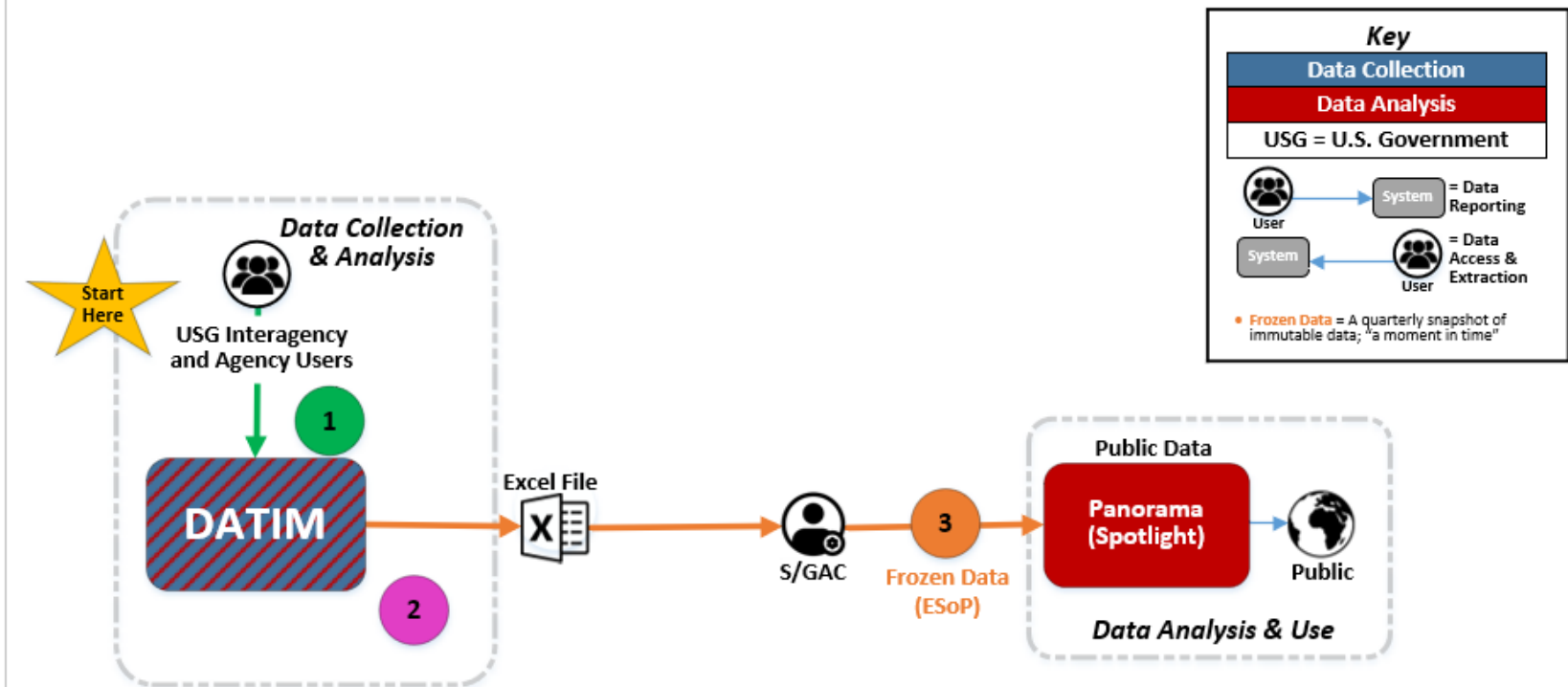
- DATIM* (Tracker Capture App)

- Panorama Spotlight*

Note: Systems in blue are accessible by IPs and USG users. Systems in orange are USG-only.

ESoP Data Flow

PEPFAR CENTRALLY SUPPORTED SYSTEMS & DATA FLOWS
SRE (SaSR & ESoP)

SRE: Surveys Surveillance, Research, and Evaluations =
(SaSR: Surveys, Surveillance, and Research; and ESoP: Evaluation Standards of Practice)

Key

| Data Collection |
| Data Analysis |
| USG = U.S. Government |

User → System = Data Reporting
System ← User = Data Access & Extraction

• **Frozen Data** = A quarterly snapshot of immutable data; "a moment in time"

Data Collection & Analysis

Start Here

USG Interagency and Agency Users

1

DATIM

2

Excel File

S/GAC

3

Frozen Data (ESoP)

Public Data

Panorama (Spotlight)

Public

Data Analysis & Use

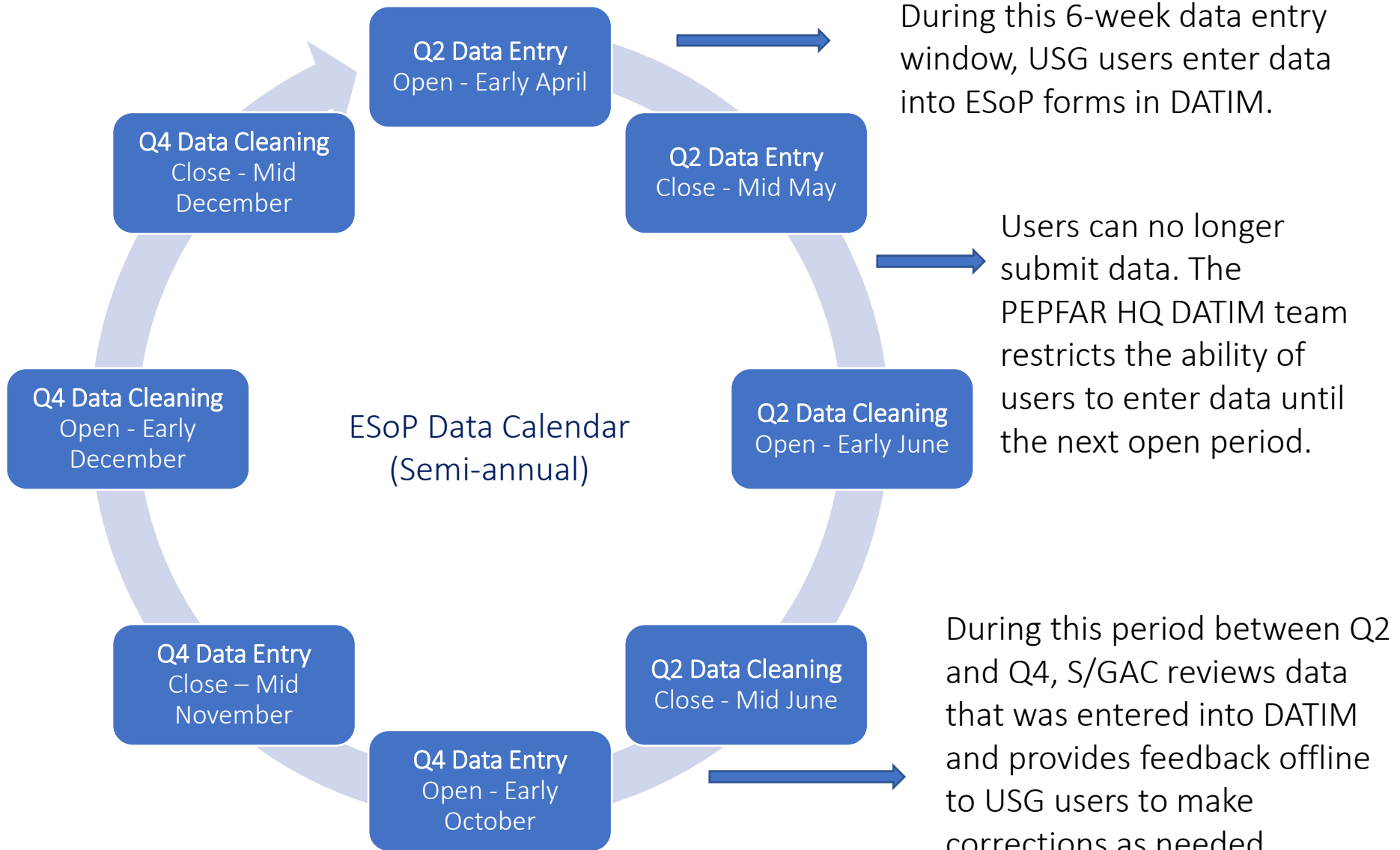| STEP 1	STEP 2	STEP 3
DATA ENTRY *Semi-annually (Q2 & Q4)* Twice a year in Q2 and Q4, USG Interagency and Agency users enter SRE data into DATIM via the Tracker Capture application data entry screen.	**DATA CLEANING** *Continuously as data is entered; and during semi-annual cleaning window* Data cleaning takes place in DATIM. S/GAC reviews SRE data twice a year during the data cleaning period.	**DATA PULL** *Once annually (end of Q4)* Once annually in Q4, S/GAC pulls cleaned SRE data from DATIM into an Excel file. ESoP data is uploaded to Panorama Spotlight.

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ESoP Data Calendar

Q2 Data Entry
Open - Early April

Q2 Data Entry
Close - Mid May

Q4 Data Cleaning
Close - Mid December

Q4 Data Cleaning
Open - Early December

ESoP Data Calendar
(Semi-annual)

Q2 Data Cleaning
Open - Early June

Q4 Data Entry
Close – Mid November

Q4 Data Entry
Open - Early October

Q2 Data Cleaning
Close - Mid June

During this 6-week data entry window, USG users enter data into ESoP forms in DATIM.

Users can no longer submit data. The PEPFAR HQ DATIM team restricts the ability of users to enter data until the next open period.

During this period between Q2 and Q4, S/GAC reviews data that was entered into DATIM and provides feedback offline to USG users to make corrections as needed.

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Data Entry Overview

- SRE data is reported by Interagency and/or Agency users, who enter the data directly into **DATIM via the Tracker Capture app.**

- Data Entry is open **twice a year** during Q2 and Q4.

- ESoP Data Entry consists of **4 required forms** (called "events" in Tracker Capture):
    1. Enrollment Form (formerly Evaluation Inventory)
    2. Planning Form
    3. Semi-Annual Status Updates (formerly Quarterly Status Updates)
    4. Adherence Checklist

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Enrollment Form and Planning Form

1. Enrollment Form:

- <u>Purpose</u>: Follows the logic of the SRE tool and includes similar **data on the approved evaluation** (e.g. mechanism information, evaluation title/questions/type, target population, technical area, health outcome, implementing agency, and approved budget).

- <u>Timeframe</u>: Completed in Q2 after COP approval. Agency users will confirm all approved evaluations are entered into Tracker.

2. Planning Form:

- <u>Purpose</u>: Provides additional info on **evaluation progress,** current FY budget, planned data collection dates, and planned end of evaluation

- <u>Timeframe</u>: Ideally completed with enrollment form in Q2. Can be completed in Q4 to allow further discussion of evaluation plans.

3. Semi-Annual Status Update:

- Purpose: Provides data on **expenditures**, updated data collection **timeline**, and **current evaluation stage and progress.**

- Timeframe: **Every 6 months** after enrollment and planning form are completed (every Q2 and Q4) **until evaluation completion.**

4. Adherence Checklist:

- Purpose: The **final form** provides the final evaluation date, title, reviewer, publicly available report, and **assesses the evaluation's adherence to the 11 Evaluation Standards of Practice.**

- Timeframe: This form is completed once the evaluation report has been completed and reviewed by the Implementing Agency.

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Good Data Entry Practices

- Review Reference Guide for a list of ESoP data fields ahead of data entry in Tracker.

- Review User's Guide.

- Ensure DATIM account is active.

- *Do not enter test or dummy data entries.*

- OGAC does **not** advise that users rely on the Event Reports app to pull or view ESoP data.

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Resources

Additional ESoP Resources

- ESoP Resources on DATIM Support (datim.zendesk.com)
  (DATIM > PEPFAR Guidance > Evaluation Standards of Practice (ESoP))
  - o DATIM ESoP Data Entry Reference
  - o ESoP Data Entry Tracker User Guide
  - o The PEPFAR Evaluation Standards of Practice (ESoP) Version 3.1
  - *...and more!*

- SRE Trainings on the PEPFAR Virtual Academy (PVA) (learn.pepfar.net)
  (https://learn.pepfar.net/courses/course-v1:learn-pepfar-net+SYS005PCSS100+2019/about)
  - o Fundamentals of PEPFAR Data & Systems course, ESoP sections
    - – Module 1.4 The Types of Data that PEPFAR Collects
    - – Module 2.4 PEPFAR Data & Systems Flows
    - – Module 4.0 Leveraging PEPFAR Data to Achieve Program Targets
    - **PVA is free and accessible to all PEPFAR staff*

Support

- For programmatic questions, please email SGAC_SI@state.gov.

- For systems issues and data changes, please submit a helpdesk ticket to DATIM Support (datim.Zendesk.com).

Thank you!