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Surveys-Surveillance and Research (SaSR) Data Entry Step-by-Step Guide

2021

Agenda

This step-by-step guide to SaSR data entry in the DATIM Tracker Capture Application covers the following topics:

1. Data Entry Overview and Introduction to SaSR forms
2. Good Data Entry Practices
3. Accessing and Navigating the DATIM Tracker Capture App
4. Creating, Adding, Completing, and Saving the SaSR Data Entry Forms
5. Filtering and Viewing Activities
6. Support

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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
- SaSR Data Entry consists of **3 required forms:**
  1. Enrollment Form
  2. Semi-Annual Status Update
  3. Project Completion Form

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Good Data Entry Practices

- Review Reference Guide for SaSR 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 SaSR data.

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SaSR Data Entry User Guide

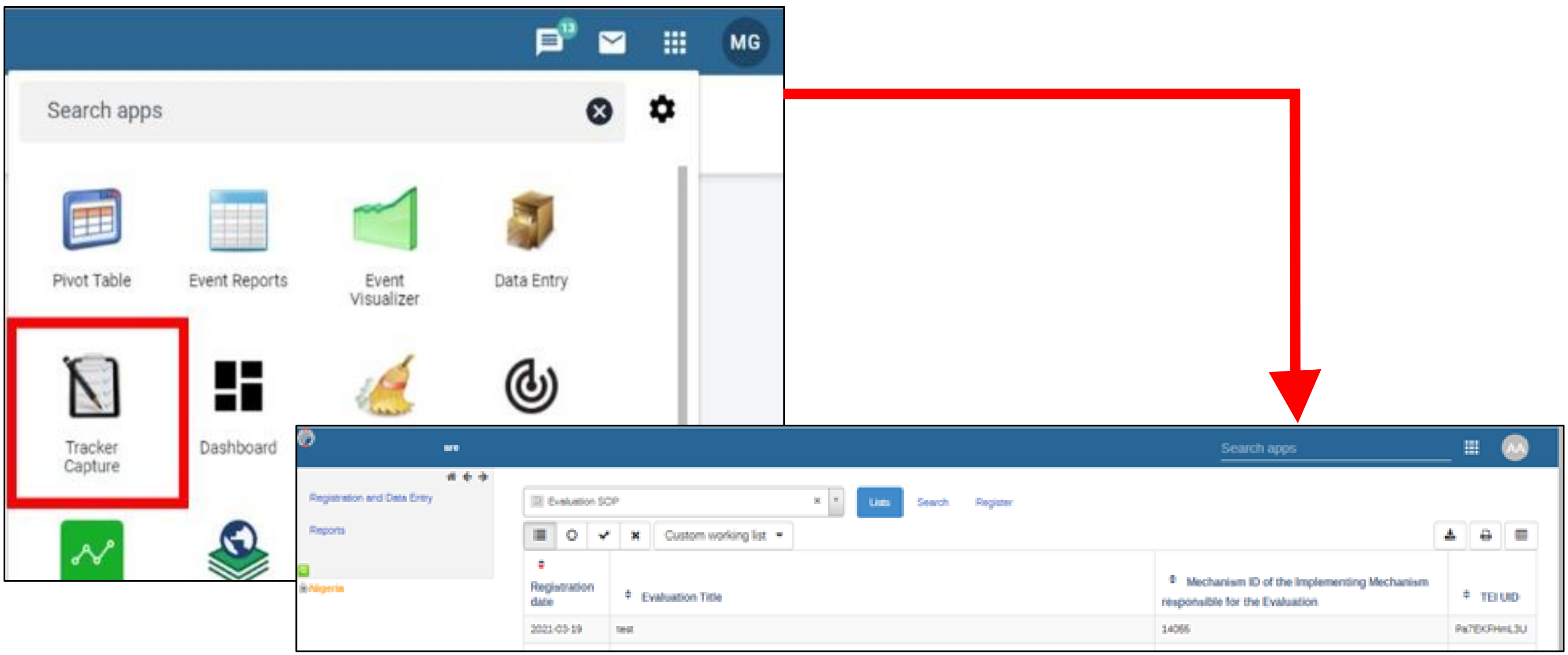
- This training will follow along the ESOP Data Entry Tracker User Guide available via DATIM Support (datim.zendesk.com).

*(PEPFAR Guidance > Surveys-Surveillance and Research (SaSR) > **SaSR Data Entry User Guide**)*

Accessing DATIM and the Tracker Capture App

Step 1: Log in to DATIM (datim.org). Submit a request for a new user account via register.datim.org.

Step 2: Select **Apps menu > Tracker Capture** to access the registration and data entry page:

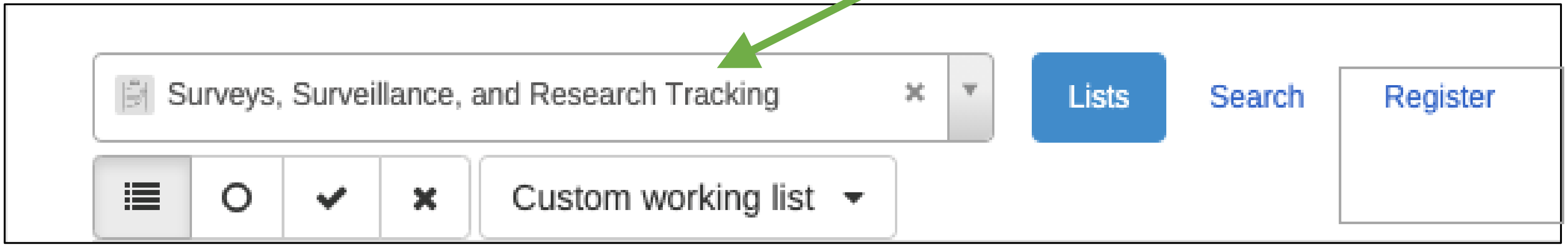


Navigating Tracker

Step 3: Once Tracker loads, make sure the OU org unit level is selected on the left-hand side.

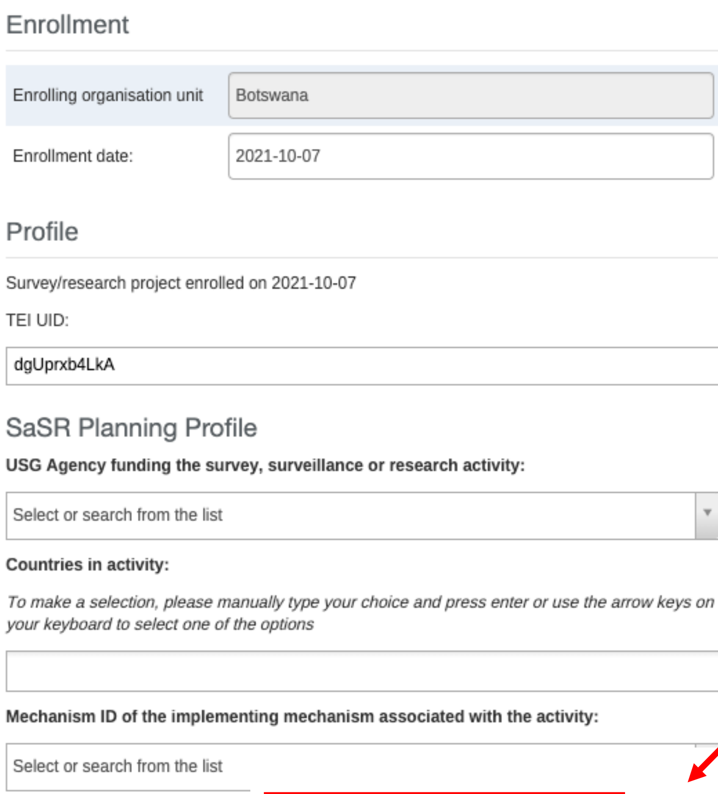
Step 4: Register a new Survey, Surveillance, or Research activity:

- Select **Surveys, Surveillance and Research Tracking** from the dropdown list. It will automatically default to ESoP.
- Click **Register.**

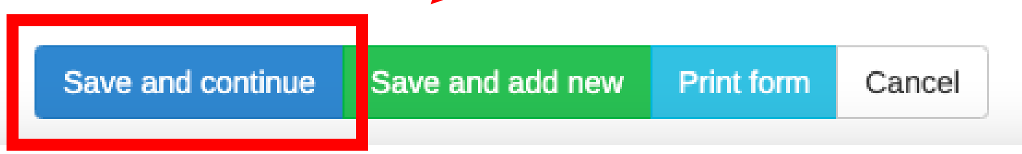


Enrollment Form

The enrollment form consists of a section for your SaSR Planning Profile and Activity Details



After filling out the form, click "Save and continue."

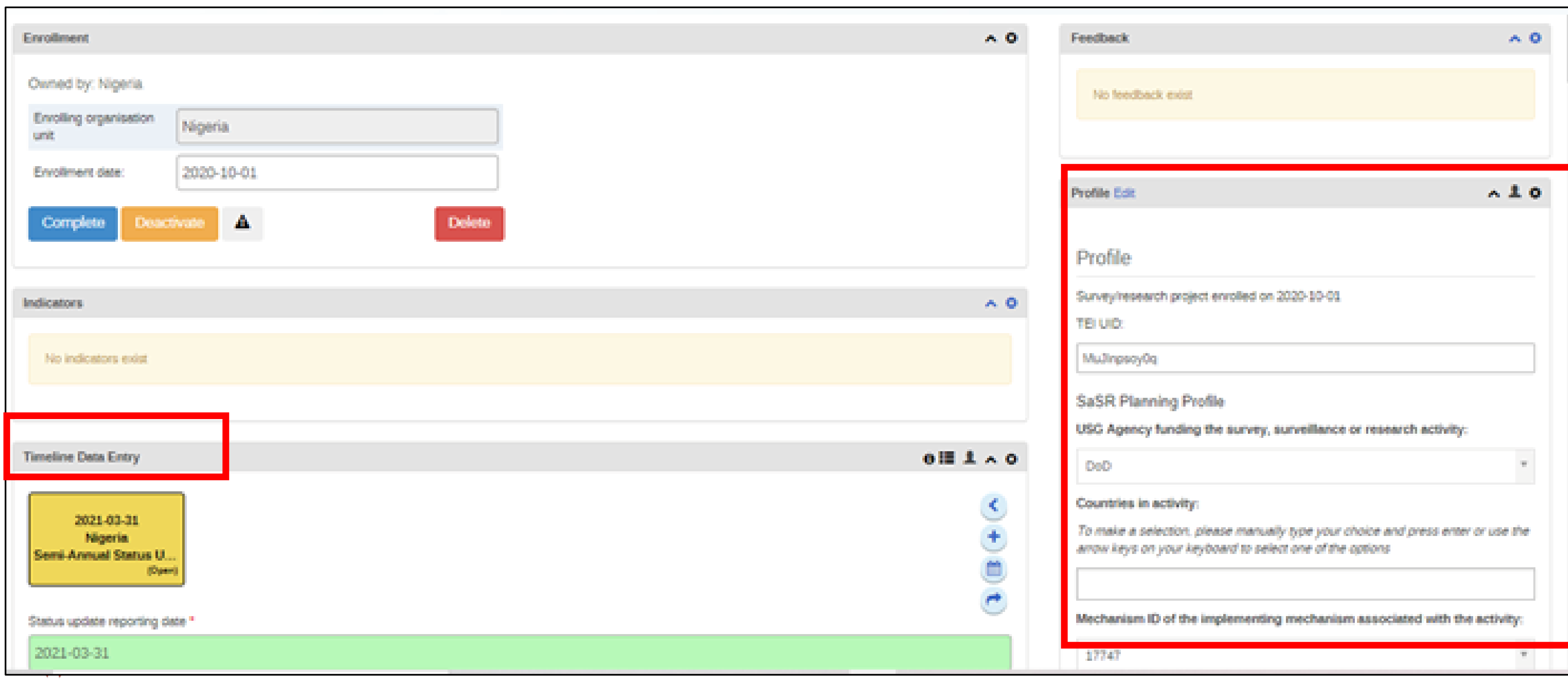


SaSR Planning Profile and Activity Details continued

- When you finish the form, click **Save and continue**.
  - If you are unable to save and continue, scroll back up to make sure that all fields marked “required” are filled.
  - Hitting **Save and add new** will register your SaSR activity in DATIM, but it will also load a page for another submission.
    - Click **“Cancel”** if you clicked this by mistake. Information for your intended SaSR upload will still be saved.

Enter a Semi-Annual Status Update

1. After you “Save and continue” a dashboard will load
   - On the right in a window titled “Profile,” your recently entered SaSR activity will appear here. **To edit your Enrollment form**, click **Profile > Edit** > **Save**.
- On the left, is a window titled “Timeline Data Entry”.



Enter a Semi-Annual Status Update (Cont.)

2. In the "Timeline Data Entry" box, click "**Semi-Annual Status Updates.**"
3. The "Status update reporting data" field is defaulted to the last day of the quarter for which you are entering the data.
4. From the drop-down menu, enter the following data elements. Click **"Complete"** upon finishing data entry to save the update.

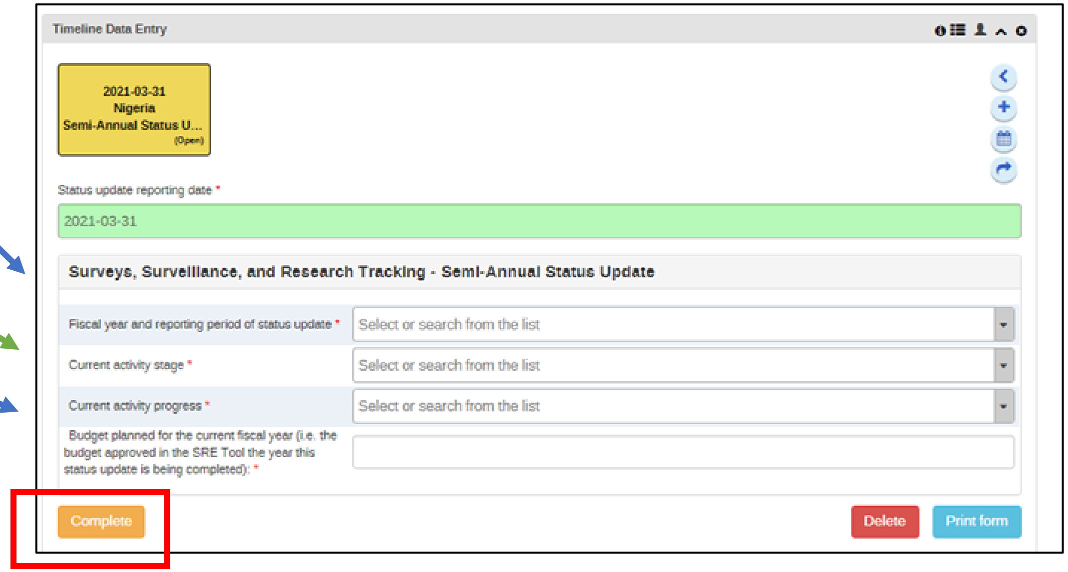
FY & reporting period of status update

Current activity stage

Current activity progress

Budget planned for the current FY

Complete

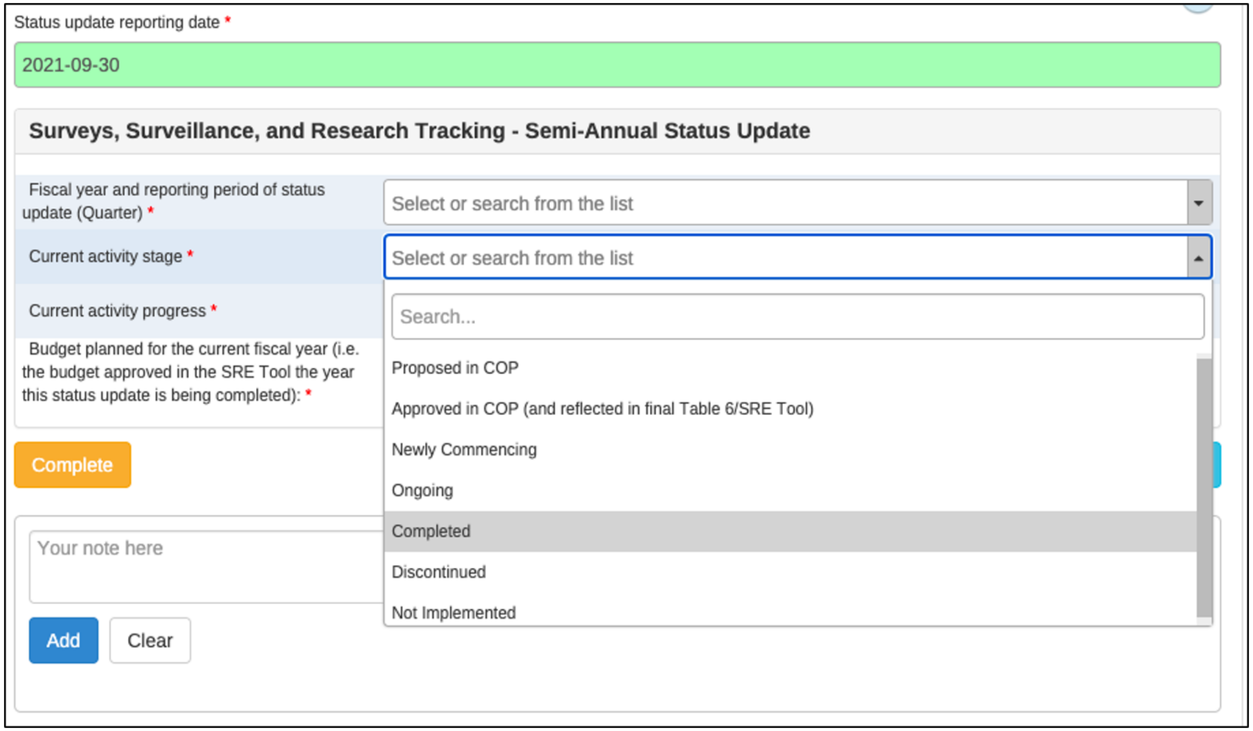


Enter a Semi-Annual Status Update (Cont.)

Once a project is complete:

In a Semi-Annual Status Update, select **Project Completion** from the “Program Stage” drop down.

Note: Before you can fill out the project completion form you must indicate that the project is completed in a semi-annual update.



Project Completion Form

A project is completed once the final report has been completed by the Implementing Agency.

Then a team can fill out the **Project Completion Form**.

1. Navigate to the Tracker Capture App and select the SaSR activity to be marked completed. Once the activity dashboard loads, select the **“+”** in the **“Timeline Data Entry”** box. Select **"Project Completion Form"**

Project Completion Form (Cont.)

SaSR Project Completion Form

2. Enter the following data for final title, data collection dates, sampling methodology, sample size, total expenditures, and the public report/publication link

3. The "**fiscal year and reporting period of status update**" field is pre-populated to the current period.

4. From the drop-down menu, enter the following data elements. Click **"Complete"** when data entry is concluded to save the entry.

See Screenshot on following slide.

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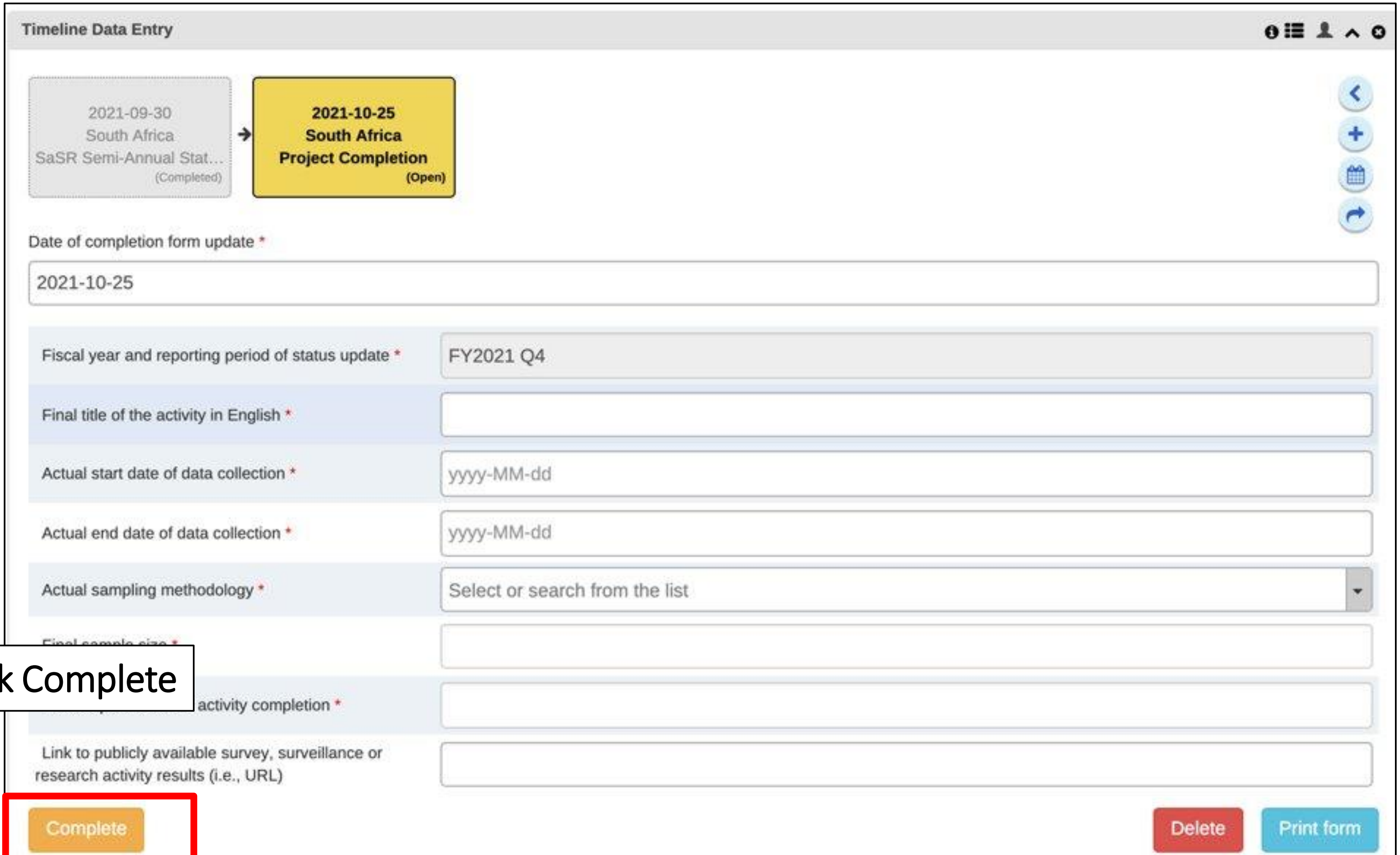
Project Completion Form (Cont.)

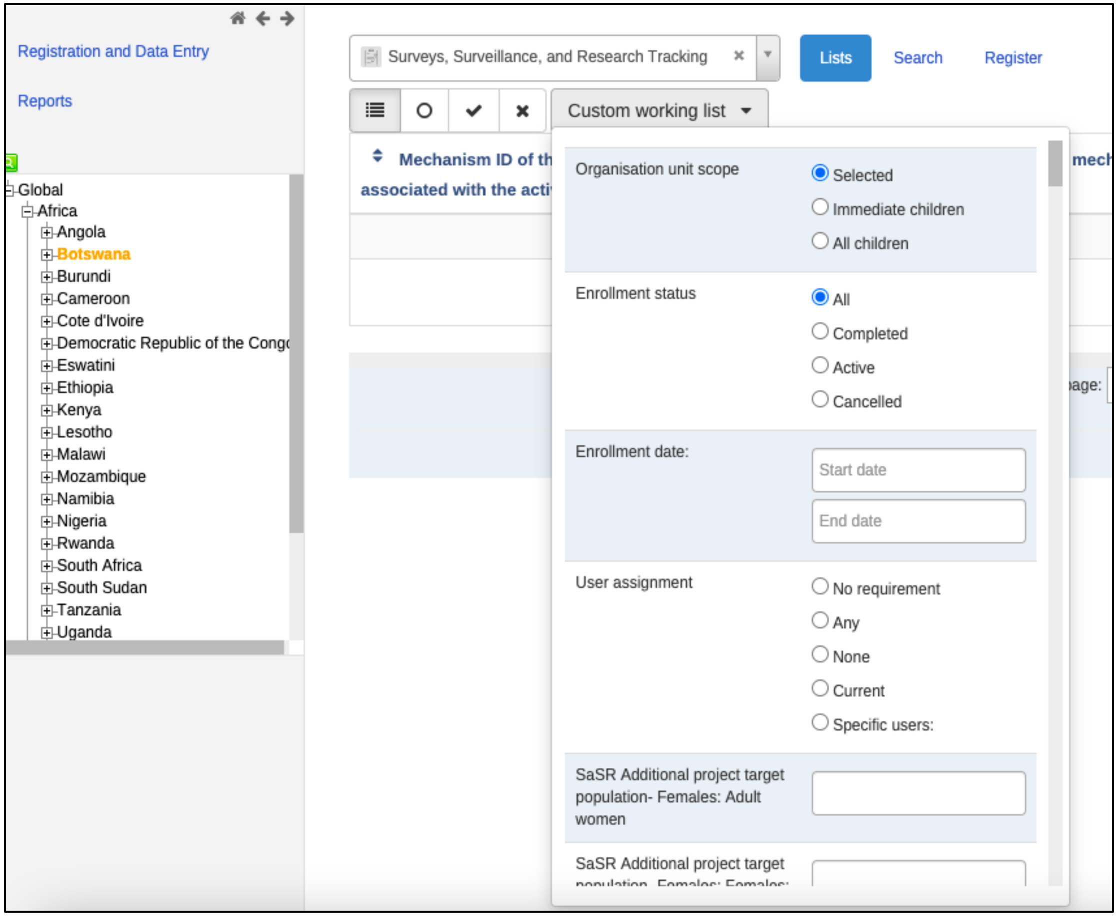
SaSR Project Completion Form



Click Complete

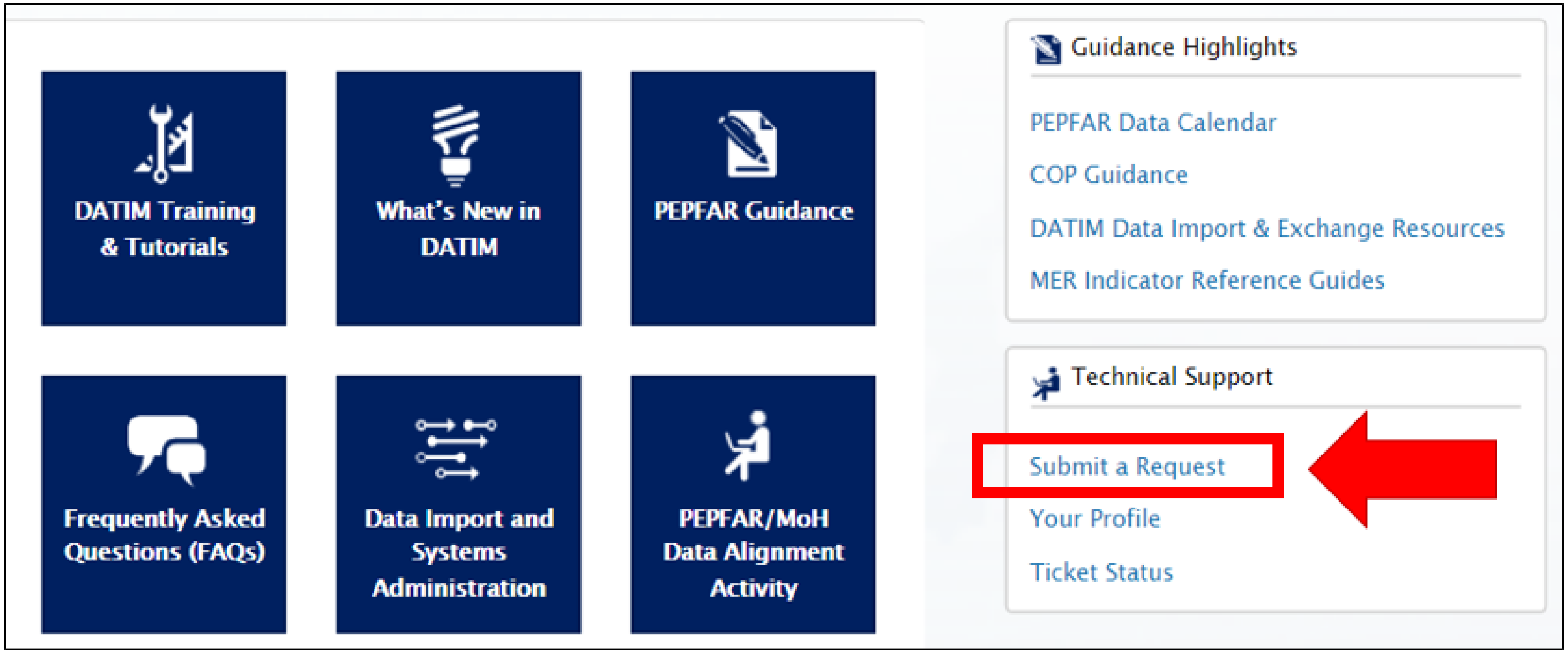
Filtering and Viewing Evalutions – Custom Working List

Use the Tracker Capture app to **filter** through your OU **to view SaSR submissions.** The Custom working list allows you to easily find activities and track progress through individual SaSR submissions.



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!