**FY 24 HRH:**

Implementing Partner (IP) Step by Step guide

## DOWNLOAD THE TEMPLATE FROM DATIM.ORG:

* After logging into [DATIM](https://www.datim.org/dhis-web-commons/security/login.action), go to the **HRH Processor** App [Note that you will use a State Department **Okta account** to log into DATIM now. Please use our [Okta Help Desk page](https://ghsddatasystems.zendesk.com/hc/en-us/p/DATIM_Okta_Support) for assistance setting up your Okta account.]
* Your OU should be pre-selected. Select **COP 23 (FY24)** as the COP Year
* Select your Mechanism from the **Mechanism** dropdown.
* Click on **REQUEST TEMPLATE** on the upper right part of the screen (this can take ~30 seconds, just click one time, or else you may end up downloading multiple templates).
* The template will be downloaded to your browser. Navigate to your **downloads** folder to open the template (Click on the 3 dots and select **Downloads**). *Please do not change the filename before uploading, as this contains the OU and mechanism ID.*

## ENTERING DATA INTO THE FY24 HRH TEMPLATE:

* Review our [**HRH Template Tips for IPs**](https://help.datim.org/hc/en-us/articles/18470623858068-HRH-Systems-Guidance-Implementing-Partner-Guide-Error-Message-Resolution-User-Admin-) to understand what is and what is not possible when adding data into the template. **It is important to note that there are data validations that will only trigger after uploading to DATIM, and these must all be resolved prior to a successful upload.**
	+ **DO NOT copy and paste from a prior year template into the FY24 template**. The column orders have been changed since last year and options have been updated for certain fields.
	+ It is ok to upload templates more than once, in fact you can do so to periodically check that your template is passing validations. Only data from the last submitted template will be utilized.
* Verify that the template you are using was downloaded from the HRH Processor App in DATIM and **no alterations have been made to the template**. For example, no tabs have been added, deleted, or hidden. **If the template has been altered, this will fail validations.**
* Review FY24 HRH information and guidance as provided to you by your USG awarding agency
* Reference the [HRH Handbook](https://help.datim.org/hc/en-us/articles/18374769252116-HRH-Program-Guidance-Handbook-Webinar-FTE-Calc-)  for guidance on each column and to ensure alignment with GHSD/PEPFAR definitions
* Confirm Annual Expenditure and Fringe match accounting records
* ***The Prime IP will submit one (1) template for the entire Implementing Mechanism***, which should contain consolidated information for the Prime and all subrecipient staffing data.
	+ Note that it is possible to copy and paste from one FY24 template into another FY24 template as long as it is for the same OU. Please note that you may need to exclude the Comments field (Column AI) to do so. The comments column should be able to be copied over by itself without other columns.

## UPLOADING TEMPLATE IN DATIM AND RESOLVING VALIDATIONS

* The template should have downloaded with a pre-set filename. Please preserve this filename when uploading as it contains the OU and Mechanism #.
* Verify that the file is saved as an Excel Workbook file type, or XLSX file
* Confirm that all Cover Sheet fields have been completed
	+ Funding Agency, PRIME UEI, and Sub UEI (if subrecipients) are required fields. UEI field must contain exactly 12 digits. See the handbook for guidance if you do not have or need a UEI.
* Navigate to your OU and Mechanism in the HRH Processor App. Click on UPLOAD TEMPLATE. Select the correct template from your computer. **After uploading a template it can take up to 4 minutes for the template to process, which is the time it takes to run all the validations on the template. Please DO NOT navigate away from the page and wait to confirm that your template upload is successful.**
* After Uploading the template, utilize the [HRH DATIM Error Messages and Resolutions](https://help.datim.org/hc/en-us/articles/18470623858068-HRH-Systems-Guidance-Implementing-Partner-Guide-Error-Message-Resolution-User-Admin-) document to help remediate any validation errors that may arise after uploading.
* Work to resolve all validation errors and re-upload the template – repeat as many times as needed until the template successfully submits.
* **YOU ARE NOT DONE YET!** You must now go submit your mechanism in the Data Approval App.

## SUBMITTING THE TEMPLATE IN DATIM VIA THE DATA APPROVAL APP

* Navigate to the **Data Approval** app in DATIM (submission happens in a different app than HRH Processor)
* Select the **HRH FYOct** Workflow
* Select the **October 2024-September 2025** period
* Select your **OU** in the Organization Unit
* Navigate to the **Submit** tab
* Select the checkbox next to all the mechanisms for which you would like to submit your data
* Click the **Submit** button
* Confirm that the uploaded file is the correct file for the mechanism ID shown above
	+ Confirm that the status field has a green “success” feedback

## BEFORE EXITING DATIM

* Confirm that the template has been submitted
	+ In **Data Approval** app, the status in **View** tab should read **submitted by partner** for each submitted mechanism

## BEFORE DATA ENTRY CLOSE

* Work with your Agency to ensure the data is accepted. There will be a cleaning period available to adjust any data as needed. Please be sure to maintain your template in case adjustments are needed.