FY25 PEPFAR Human Resources for Health Inventory

Data Entry, Review and Submission Guide

Version 1.0

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U.S. Department of State

Global Health Security and Diplomacy

Table of Contents

1. Purpose of the FY25 PEPFAR Human Resources for Health (HRH) Inventory Data Entry, Review and Submission Guide

This Guide provides **step-by-step instructions on how to enter, review, accept and submit FY25 HRH Inventory data in DATIM by all types of users** (Implementing Partners, in-country USG Agency, and HQ-based/Global USG Agency) for the Fiscal Year 2025 (FY25) Quarter 4 (Q4) reporting cycle.

However, for any information about the **purpose and definitions of data elements/terms in the FY25 PEPFAR HRH Inventory, please refer to the FY25 PEPFAR HRH Inventory Handbook** (available here under Human Resources for Health).
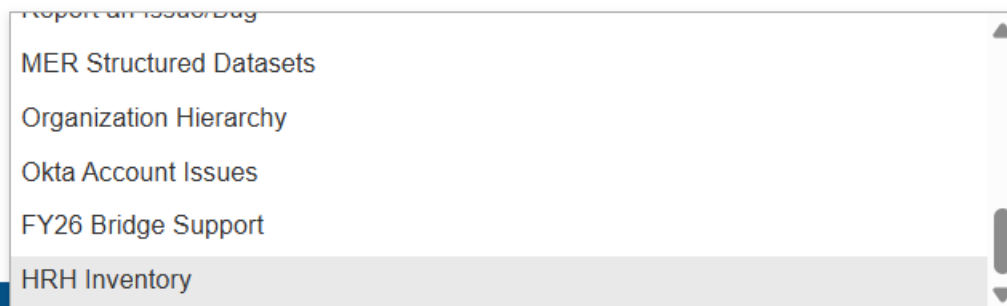
1.1. What To Do If You Have Any Questions

Should you have any questions on any of the content in this Guide or the Handbook or require other assistance, please Submit a request to the DATIM helpdesk. In the drop-down menu, select HRH Inventory. Then fill out the resulting form with your question/request.

DATIM > Submit a request

Submit a request

Please choose from the issue topics below. On the next screen you will be asked for more details on each topic.

- Report an Issue/Bug
- MER Structured Datasets
- Organization Hierarchy
- Okta Account Issues
- FY26 Bridge Support
- HRH Inventory

1.2. HRH Inventory Tools/Components

Entering, reviewing and submitting HRH Inventory data requires use of three tools/components that are accessible via DATIM. See Appendix A for information on obtaining a DATIM account if you do not have an account or need to modify an existing account.
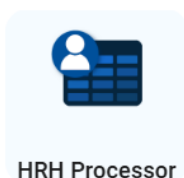
HRH Processor

(1) The **HRH Processor Application** is accessed via DATIM Within the HRH Processor app:
- Implementing Partner (IP) users can **download** an Implementing Mechanism (IM)-specific HRH Inventory template and **upload** the completed template for validation.
- USG Agency users can use the HRH Processor to **review** IM-submitted templates.

(2) The **HRH Inventory Excel Workbook Template** is downloaded from the HRH Processor app via DATIM by IPs. Within the excel-based template:
- IPs **enter** the required data, as described in the HRH Inventory Handbook referenced in Section 1.

(3) The **Approvals Application** is accessed via DATIM. Within the Approvals app:
- IPs can **submit** their final HRH Inventory templates.
- In-country USG Agency users can use the Approval app to **accept** the submitted templates, or **return** to IPs to revise and re-validate in the HRH Process App, and then re-submit in the Approvals app.
- HQ-based USG users also have the option to either accept or return to in-country agency users for revisions.

1.3. HRH Inventory DATIM Workflow

The HRH Inventory DATIM workflow describes the steps involved from an IP downloading their IM-specific HRH inventory template to when USG accepts the submission. The type of user who performs each step in the HRH Inventory workflow is also labelled in the workflow diagrams below. Each step of the diagram is detailed in the Sections that follow.

1.3.1. Prime Implementing Partner DATIM Workflow:

1. Download and fill out template → 2. Upload and validate template in HRH Processor Application → 3. Submit template in Approvals Application
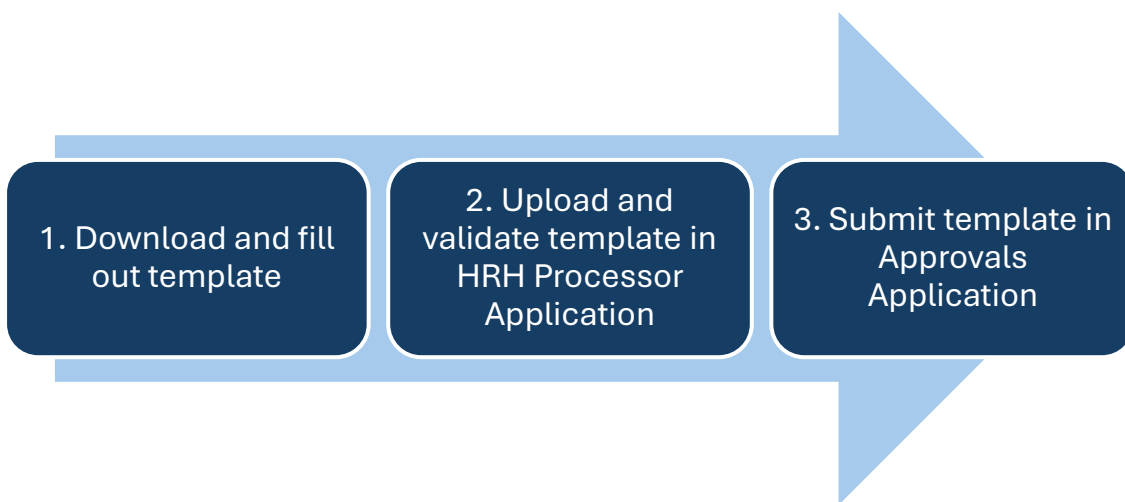
1.3.2. In-Country USG Agency DATIM Workflow:

4. Review IM submissions in HRH Processor App

5. Accept and Submit OR (if revision is needed) return IM submissions in Approvals App
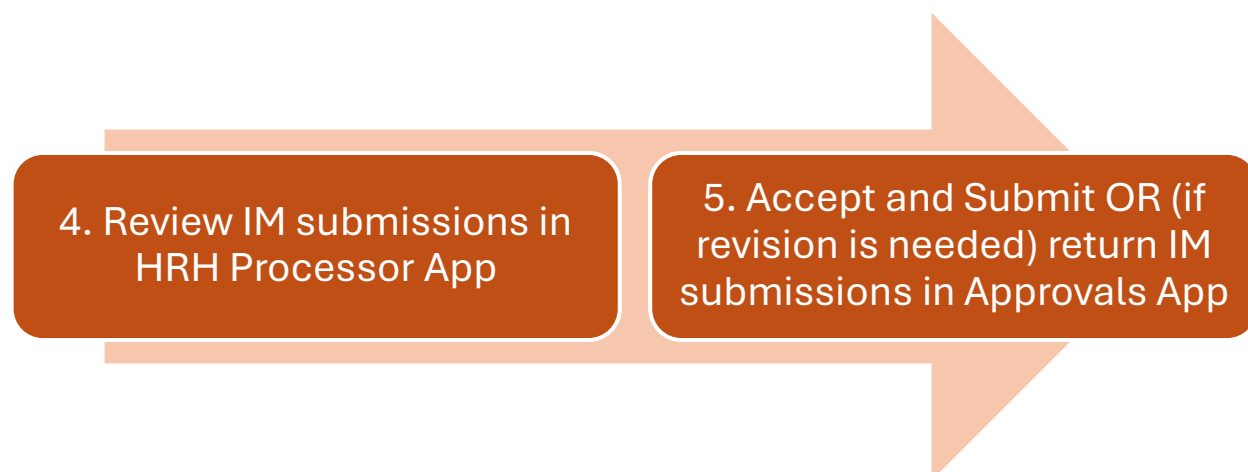
1.3.3. OPTIONAL: Global (HQ-based) USG Agency DATIM Workflow

6. Review agency submissions in HRH Processor App

7. Accept and Submit OR return (if revision is needed) agency submissions in Approvals App
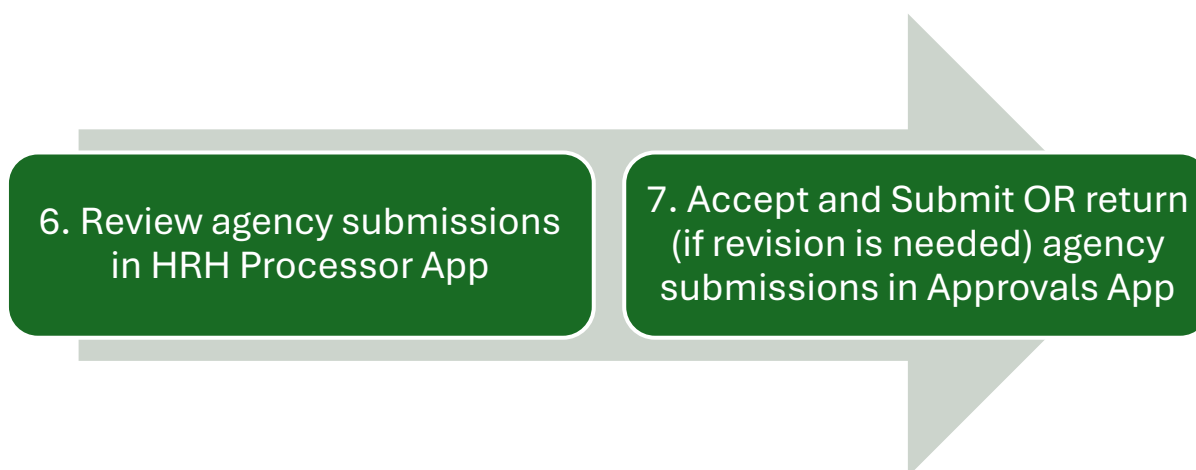
2. Download and Fill Out the HRH Inventory Template (*Prime Implementing Partners Only*)

2.1. Download an IM-specific HRH Inventory Template

Prime Implementing partners (IPs) responsible for filling out the HRH Inventory can download an IM-specific FY25 HRH Inventory template (as an excel workbook) within the **HRH Processor Application** in DATIM.

Each HRH Inventory template is specific to an IM. If you are responsible for completing the HRH Inventory for multiple IMs, you will need to download a separate template for each IM.

1. Be ready with the following information (at a minimum) to retrieve your IM-specific HRH Inventory template from the HRH Processor App:
   - Your Operating Unit (OU)
   - Your IM identification (ID) number

2. Log into DATIM. If you do not have an IP DATIM account or are having issues logging in to an existing account, follow the instructions in Appendix A to request an appropriately configured DATIM account.

3. After logging into DATIM, navigate to the HRH Processor App in the DATIM application menu. See Screenshot #1.

Screenshot #1:
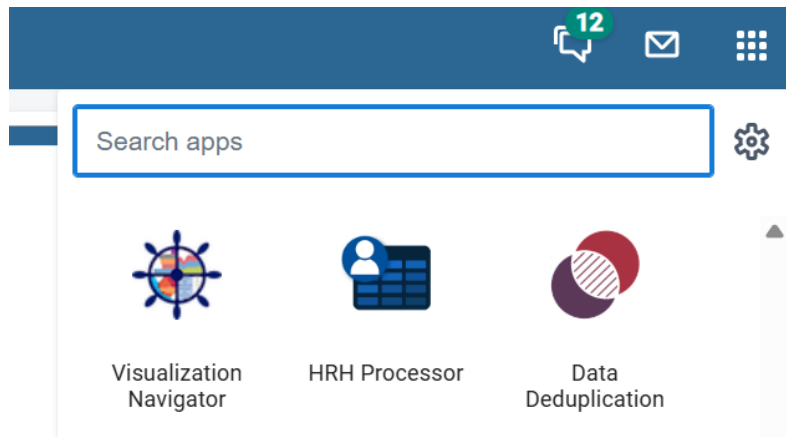
4. Once you click the HRH Processor app, the app will open.

5. On the left-hand side bar, the Operating Unit (OU) associated with your account should be pre-selected under Operating Unit. See left-hand side red box in Screenshot #2 below.

Screenshot #2:

6. Select "FY25" under COP Year.

7. In the "Mechanism" field dropdown list, look for your Mechanism ID, and select.
   a. The "Mechanism" field is in the following format: Mechanism ID – Award Number – Mechanism Name.
   b. The "Mechanism" field is sorted/organized by Mechanism ID i.e. Mechanism ID appears first.

8. Once the screen loads, click on **REQUEST TEMPLATE** to receive your IM-specific template. See red box on the right-side of Screenshot #2 above. This can take several minutes to process. Click only one time, or you may end up downloading multiple templates.

9. The template will download to your browser. Navigate to your relevant downloads folder to open the template. Do not change the filename before uploading the filled-out template in the HRH Processor app. The filename contains the OU and Mechanism ID which MUST be maintained.
   a. The filename MUST have the format:
      hrh_template_OUname_YYYYMMDD_MechanismID
   b. For example, a template for South Africa Mechanism ID 92102 that was downloaded on October 1 2025 should have the format**:
      hrh_template_South_Africa_20251001_92102**

2.2. Fill Out an IM-specific HRH Inventory Template

The excel-based HRH Inventory template consists of three tabs:

- **Cover Sheet:** A coversheet for the template where the OU, Mechanism ID, and Mechanism Name are pre-populated and locked i.e., this tab cannot be edited.
- **Staff List:** The is the main tab for data entry.
- **FTE Calculator:** An optional job aid/scratch pad to help calculate Average Monthly Full-time Equivalent (FTE) which is one of the required columns in the Staff List tab. Any values in this tab are not uploaded to DATIM.

1. Fill out the **Staff List** tab of each IM-specific HRH Inventory template. Each Prime IP will submit one (1) template for the entire IM (i.e., Prime IPs are responsible for collecting data from their subrecipients and reporting into one template per IM). **Refer to the FY25 HRH Inventory Handbook for guidance and definitions on each column in the template.**

2. Keep these points in mind as you fill out the template for your IM.

   a. **Do not add or delete tabs/worksheets**.
   b. Do not delete, modify or add any columns.

c. Many cells contain in-template data validations, such as not permitting an alphabetic text value in a cell that requires a numeric entry.

d. Some validation rules, however, are processed upon uploading into the HRH Processor application. For details, see Section 3.2 on Validation Errors and How to Resolve.

e. **Although copy-and-paste functionality is possible in the template, it is not recommended!** Copy-and-paste is a very common way that errors are introduced into a template, and may pose additional challenges when validating the template in the HRH Processor App.

f. **Do not copy-and-paste from a prior year's HRH Inventory template** to the FY25 template. The order of order columns and data elements have changed, including drop-down options.

g. **Do not change the filename before uploading** in the HRH Processor App. Each template filename contains the OU and mechanism ID which must be maintained.

  - The filename MUST have the format:
    hrh_template_OUname_YYYYMMDD_MechanismID
  - For example, a template for South Africa Mechanism ID 92102 that was downloaded on October 1 2025 should have the format **hrh_template_South_Africa_20251001_92102**

3. Upload and Validate a Filled-out HRH Inventory Template (Prime *Implementing Partners only)*

3.1. Upload and Validate an HRH Inventory Template

1. After filling out the HRH Inventory template completely, log into DATIM.

2. From your DATIM landing page, navigate to the HRH Processor Application. See Screenshot #3.

Screenshot #3:
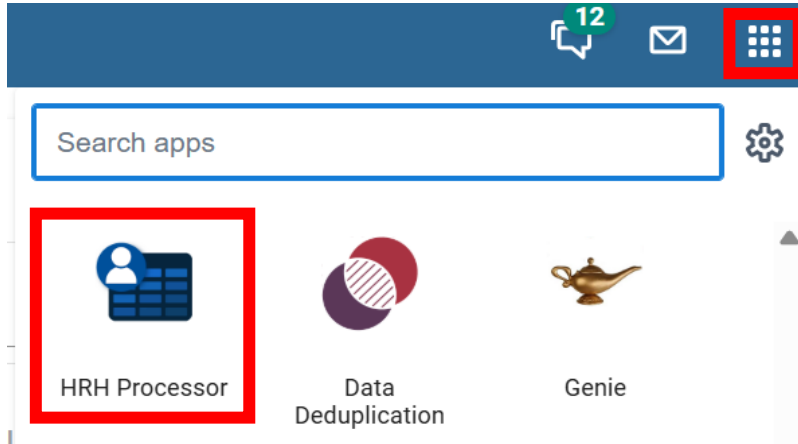
3. Once you click the HRH Processor app, the app will open.

4. On the left-hand side bar, the OU associated with your account should be pre-selected under Operating Unit. See the left red box in Screenshot #2 in Section 2.1 above.

5. Select "FY25" under COP Year.

6. In the "Mechanism" field dropdown list, look for your Mechanism ID, and select.

   a. The "Mechanism" field is in the following format: Mechanism ID – Award Number – Mechanism Name.
   b. The "Mechanism" field is sorted/organized by Mechanism ID i.e. Mechanism ID appears first.

7. The Mechanism ID, Award Name and Mechanism Name should populate. See screenshot #4.

8. Click on **UPLOAD TEMPLATE**. See red box in Screenshot #4.

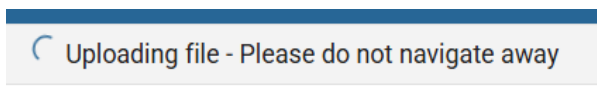Screenshot #4:

Family Health International Partner

Mechanism		Status	
Mech ID	14295	Approval Status:	Pending
Award #	AID674A1400009		DATIM APPROVALS ↗
Mechanism Name	Capacity Development and Support Program		☁ REQUEST TEMPLATE

Prime Partner

Uploaded Template	Status	Del
☁ UPLOAD TEMPLATE		

9. Select the correct template (i.e., the mechanism ID in the Coversheet tab of the template matches the mechanism ID appearing in the HRH Processor App screen) from your local computer to upload. Remember, the template file name MUST have the format: **hrh_template_OUname_YYYYMMDD_MechanismID.**

10. After selecting the correct template file to upload from your local computer, note that it can take up to five (5) or more minutes for the template to process, which is the time it takes to run all the validation checks on the template. Please DO NOT navigate away from the page. Please wait to confirm that your template upload is successful. See screenshot #5.

Screenshot #5:

⟲ Uploading file - Please do not navigate away

11. If the template successfully uploads, the app will update to show the file name that was uploaded and a status of "success". See red boxes in Screenshot #6.

Screenshot #6:

Prime Partner

Uploaded Template	Status	Del
hrh_template_South_Africa_20250917_14295.xlsx	✓ success	🗑

12. If the upload was successful and you got the green check mark, go to Section 4: Submit an IM-specific Template.

13. But, if the uploaded file did not pass the validation checks, then the application will return one or multiple Validation Error and Resolution Message(s). See the red box in Screenshot #7. Details about all validation errors are in Section 3.2 Data Validation Errors and How to Resolve.

14. You will need to remove the uploaded file from the HRH app and then resolve the errors in your local Excel file template offline before continuing:

    a. In the HRH Processor App, click the trash can icon to remove the uploaded file with errors. See the red arrow in Screenshot #7.

Screenshot #7:

3.2. Data Validation Rules and How to Resolve Errors

Table 1 below describes (1) the validation rules that will be assessed upon processing an uploaded HRH Inventory template in the HRH Processor app, (2) the tab and column or field names to which each validation rule applies, (3) the Validation Error and Resolution Message that will appear if any of the validation rules are not met and (4) which validation rules are considered showstoppers. Table 2 below lists the showstopper validation rules in the sequence or order that any errors associated with the rules must be resolved.

1. As mentioned in Section 3.1 Step 13-14, resolve all validation errors in each IM-specific excel-template offline. You will then have to re-upload your IM-specific template in the HRH Processor App.

2. Where relevant, Validation Error and Resolution Messages will reference the tab and cell number in the HRH Inventory template where the error occurred. Use this tab/cell

number to identify where the error must be resolved (see Validation Error and Resolution Messages in Table 1 below).

3.2.1. Showstopper and Other Validation Rules

IMPORTANT: The HRH Processor app will check the entire template against each validation rule at a time in a sequential order. That is, all records in the template will be checked against the first rule, and then the second, and so on. If a rule fails, the system will report the error(s) before moving on. However, **some validation rules are classified as showstoppers** (see Table 1 and Table 2 below)**. Showstoppers are critical checks that, if failed, will immediately stop the validation process until the error it has flagged is resolved**. When a showstopper error is encountered, the HRH Processor app will return a report indicating the issue along with all non-showstopper errors encountered before it, and no further records or rules will be processed until a revised file correcting the showstopper error is re-uploaded. In addition, the HRH Processor app can only return a maximum of fifty (50) Validation Error and Resolution Messages at a time to avoid overloading the processor. This means that between 1 and 50 errors may be returned with each upload and it is possible that even after these errors are resolved, more errors may be returned upon template re-upload and re-validation. Therefore, IP users should continue to re-upload and re-validate the template until no more validation errors are returned. To avoid repeated rejections and speed up processing, when encountering a showstopper error, check to ensure that all similar showstopper errors in the template are corrected before re-uploading.

Table 1: Validation Rules and Validation Error and Resolution Messages

Validation Rule	Applies to (Tab/Column or Field Name)	Validation Error and Resolution Message	Showstopper Error?
Unexpected Tabs/Worksheets.	Coversheet/StaffList	The template uploaded is invalid. Use a current, unmodified version of the template downloaded from the HRH Processor App.	No
Mechanism ID in the template must match Mechanism ID	Coversheet/Mechanism ID field	The template's mechanism ID and the mechanism ID selected in the HRH Processor app do not match. Remove this file from the HRH Processor app	No

		and either select the correct mechanism in the app, or use a template with a mechanism that matches the selection in the app.	
Staff List tab must have data entered.	StaffList	The Staff List tab must have data entered. Enter data in the Staff List tab.	Yes
Cells must contain fewer than 250 characters.	StaffList/All cells with data	[Tab/Cell Reference] Cells must contain fewer than 250 characters. Cell contains {length} characters.	No
Dropdown populated with invalid text.	StaffList/Columns B,C,D,E	[Tab/Cell Reference] Data entered must be selected from dropdown list. Select only options from the original dropdown list.	No
Selected Program Area must be aligned with selected Cadre.	StaffList/Column B/Column C	[Tab/Cell Reference] Selected Program Area does not align with the selected Cadre. Change either the Program Area or Cadre to align appropriately.	No
Row has data, but some required columns are blank.	StaffList/Columns B-G	[Tab/Cell Reference] If data were entered in a row, data entry in Columns B, C, D, E, F, G is required.	Yes
Number of months worked in past year must be numeric.	StaffList/Column F	[Tab/Cell Reference] Number of months worked in the past year should be a number.	Yes
Number of months worked in past year must be greater than 0 and cannot exceed 12.	StaffList/Column F	[Tab/Cell Reference] Number of months worked in the past year should be between zero and twelve (0-12).	No
Average FTE per month must be numeric.	StaffList/Column G	[Tab/Cell Reference] Average FTE per month must be a number.	Yes
Average FTE per month must be greater than zero	StaffList/Column G	[Tab/Cell Reference] Average FTE per month must be between 1 and 1.005.	No

and cannot exceed 1.005.			
Geography is not valid per DATIM.	StaffList/Column H, I	[Tab/Cell Reference] Location options must be from the drop-down list. Select only location options from the original drop-down list and ensure that the second location column is a sub-location within the first column.	Yes
Expenditure columns must be numeric and be a numeric value between $0-$1M.	StaffList/Column J,K,L	[Tab/Cell Reference] Expenditure (column {annual_expenditure}), Fringe (column {annual_fringe}) and Non-Monetary Expenditures (column {annual_nonmonetary}) must be a numeric value between $0M-$1M.	Yes
Either Sum of Annual Expenditure or Annual Non-monetary expenditure must have a value.	StaffList/Column J/L	[Tab/Cell Reference] Either "Sum of Annual PEPFAR Expenditure" or "Annual PEPFAR Non-Monetary Expenditure" must have a value. Enter a value for either column J or L.	No

Table 2: Sequence of Showstopper Validation Rules

Showstopper Validation Rules (Must be resolved first in this sequence/order otherwise validation process stops)
Staff List tab must have data entered
Row has data, but some required columns are blank
Expenditure columns must be numeric and must be a value between $0-$1M
Average FTE per month must be numeric

Number of months of worked in past year must be numeric
Geography must be valid per DATIM

3. After all validation errors are resolved, re-upload the completed template as described in Section 3.1.

4. Upon successful upload, the app will update to show the file name that was uploaded and a status of "success". See Screenshot #6 above.

4. Submit an HRH Inventory Template (Prime Implementing Partner Users only)

Once the template passes validation (i.e., you get a green check mark as shown in Screenshot # 6 above), IPs must submit the HRH Inventory template in the Approvals App.

1. While still in the HRH Processor App after your template passes validation, click **DATIM APPROVALS** under Status. See red box in Screenshot #8.

Screenshot #8:
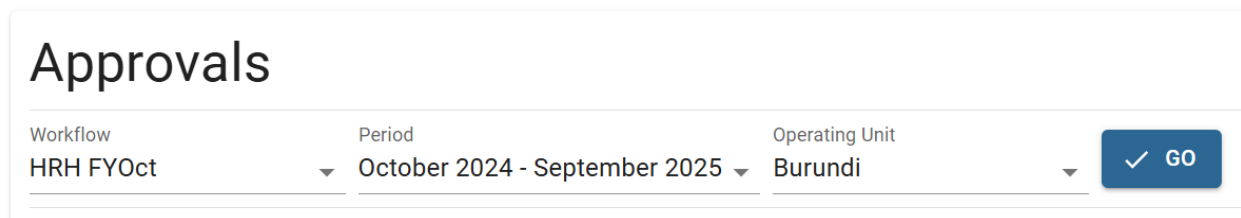
2. This will take you directly to the Approvals Application in DATIM without having to go back to the DATIM landing page.

3. If you access the Approvals App directly from the HRH Processor App, you can skip to Step 6 below to submit the IM-specific template for that single IM. However, if you access the Approvals App from the DATIM landing page, you can submit several templates at once (akin to a bulk submission of templates). You will need to enter the following information to see all the templates available for submission. See Screenshot #9. Once in the Approvals App, you <u>may</u> need to enter the following information to see available templates for submission. See Screenshot #9.

    a. Workflow: HRH FYOct
    b. Period: October 2024 – September 2025
    c. Operating Unit: [select the OU for which you want to submit validated template(s)]
    d. Then click the blue GO button.

Screenshot #9:

4. Once the records load, you will see several tabs (View, Accept, Submit, Return). Under the Submit tab, you should see a list of records (or validated templates). See screenshot #10.

5. Select the checkbox next to all the mechanism templates you want to submit. Then click the red **SUBMIT** button. See Screenshot 10.

Screenshot #10:

Approvals

Workflow	Period	Operating Unit	
HRH FYOct ▾	October 2024 - September 2025 ▾	South Africa ▾	✓ GO

SUBMIT   1 selected mechanism

VIEW ⑤	ACCEPT	SUBMIT ⑤	RECALL	RETURN

5 mechanisms   Search ☒

☐	Mechanism	OU	Agency ↑	Partner	Status	
☑	160588 - GH002381 - Wits Health Consortium (PTY), Ltd	South Africa	HHS/CDC	WITS HEALTH CONSORTIUM (PTY) LTD	pending at partner	

6. This will take you to the final submission step. Confirm the correct Mechanism appears. Once confirmed, click the red **SUBMIT MECHANISM** button. See screenshot #11.

Screenshot #11:

Approvals

↗ **SUBMIT MECHANISM**   BACK

①	②	③	④	⑤	⑥	⑦
pending at partner	submitted by partner	accepted by agency	submitted by agency	accepted by global agency	submitted by global agency	accepted by global

Workflow	HRH FYOct
Period	October 2024 - September 2025

160588 - GH002381 - Wits Health Consortium (PTY), Ltd

| Mech	160588 - GH002381 - Wits Health Consortium (PTY), Ltd
OU	South Africa
Agency	HHS/CDC
Partner	WITS HEALTH CONSORTIUM (PTY) LTD

Dataset
HRH ▾

Please use the HRH Processor App for adding, updating, and reviewing HRH templates.

7. Once submitted, at the top of the screen, "pending at partner" should now have a blue check mark, and "submitted by partner" should be highlighted in blue. See screenshot #12.

Screenshot #12:
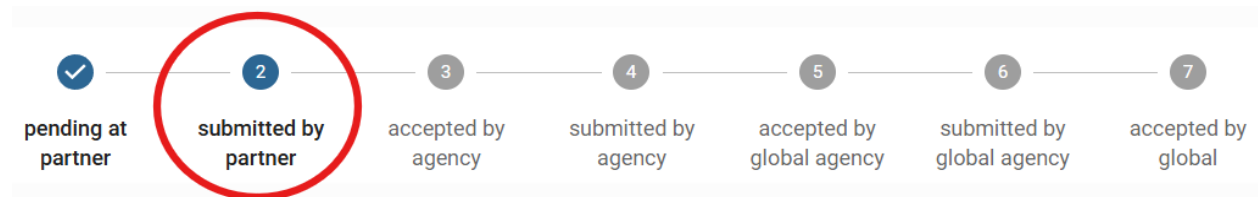
8. Before exiting the Approvals App, confirm that the template has been submitted. Click the **BACK** button on the top right-hand corner (See Screenshot #12 above). Under the "View" tab, for each IM-specific template that was successfully submitted by the IP, the status should be "submitted by partner". See Screenshot #13.

Screenshot #13

9. Even after you've submitted your IM-specific template, a USG Agency user <u>may</u> return your submission for revision. If your previously submitted template is returned, under the "View" tab, the status will appear as "pending at partner" again. Make any relevant revisions in the template offline and re-upload, re-validate and re-submit your revised template again as per the step-by-step instructions starting in Section 3.1.

5. Review and Accept (or Return) an IP Submission (USG Agency In-Country Users Only)

Once IPs have filled out, validated, and submitted their HRH Inventory templates, USG Agency (In-Country) users can review submitted templates in the HRH Processor Application and either accept and submit the templates OR return to the IP(s) for revision.

5.1. Review IP Submissions in the HRH Processor Application

1. Log into DATIM and navigate to the HRH Processor application in the DATIM Application menu.
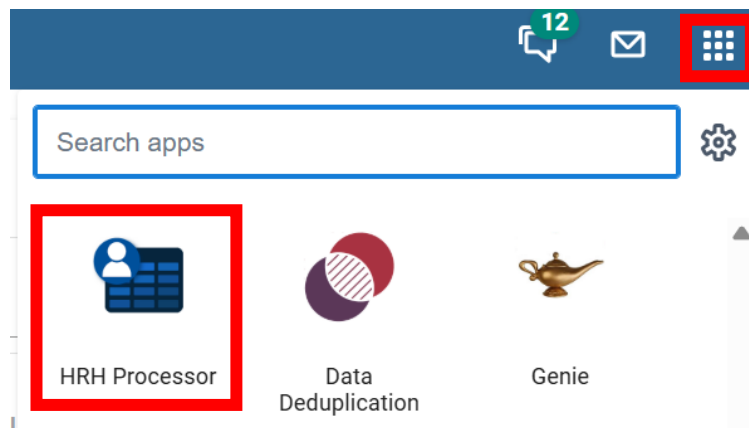
2. Your OU will load by default in the lefthand pane. Select the fiscal year of interest (for this year, COP24/FY25). See Screenshot #13.

3. The HRH Processor app may take some time to load. Once it does, you will see all the in-process or submitted HRH inventory templates for your Agency and OU. See Screenshot #13.

Screenshot #13:

Overview		
Total Templates Uploaded		2
Templates with warnings		0
Templates with errors		0

Uploaded Templates

Mech ID ^	Mechanism	Organization	Award Nr	Status	Approval Status		File
14295	Capacity Development and Support Program	Family Health International	AID674A1400009	✓ success	Pending at Partner	⬈	⬇
82199	EpiC	Family Health International	7200AA19CA00002	✓ success	Submitted by Partner	⬈	⬇

4. **Reviewing submissions:** Under "Uploaded Templates", you will see a list of IM-specific templates and the status of each (if templates have been uploaded). See Screenshot #13 above.

    a. **Approval Status**
        i. **Pending at Partner:** A template labelled with Approval Status "Pending at Partner" is still in process by the IP. These templates cannot yet be accepted by USG users.
        ii. **Submitted by Partner:** A template labelled with Approval Status "Submitted by Partner" is ready to review and accept or return.

    b. **Downloading Templates for Review:** Both "Pending at Partner" templates and "Submitted by Partner" templates can be downloaded and reviewed by clicking the downward arrow icon under "File". See Screenshot #13 above.
        i. **Note:** A file downloaded at status "Pending at Partner" has not necessarily passed validations and should be considered still in-progress.

5. If you are ready to accept and submit a specific IM's template, the Approvals application can also be accessed directly by selecting the arrow "new window" button next to the approval status. See Screenshot #14. If you want to return the submission for revisions, go to Section 5.3 Return IP Submissions for Revision.
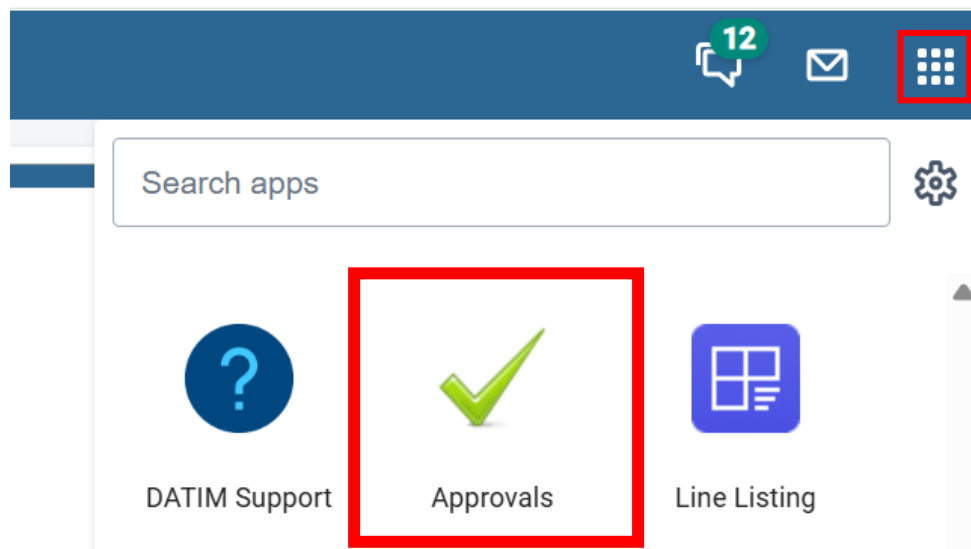
Screenshot #14:
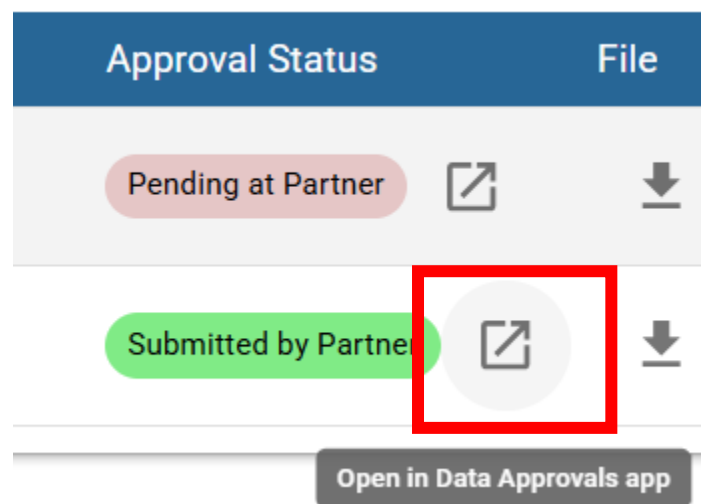
5.2. Accept and Submit IP Submissions in the Approvals Application

1. To access Approvals application to accept and submit HRH Inventory templates that an IM has submitted,
   a. **Either** click the shortcut in the HRH Processor (See steps 4 and 5 in Section 5.1)
   b. **OR** navigate to the DATIM application menu in the upper right-hand corner of DATIM. Select the "Approvals" application. See screenshot #15.

Screenshot #15:

2. If you didn't take the shortcut above, within the Approvals application, choose the following (also See Screenshot #16).
   a. Workflow: "HRH FYOct"
   b. Period: "October 2024 – September 2025"
   c. Operating Unit: [select the OU for which you want to accept and submit an IP submission].
   d. Then click "Go" to search.

Screenshot #16:

Approvals

Workflow	Period	Operating Unit	
HRH FYOct ⌄	October 2024 - September 2025 ⌄	Burundi ⌄	✓ GO

3. Once the records load, you will see several tabs.
   a. **"View"** tab displays all available IM-specific templates for your Agency and OU, and the approval status for each template.
      i. **Pending at Partner:** A template labelled with Approval Status "Pending at Partner" is still in process by the IP. These templates cannot yet be accepted.
      ii. **Submitted by Partner:** A template labelled with Approval Status "Submitted by Partner" is ready to accept.
   b. The **"Accept"** tab displays all IM-specific templates that have been "submitted by the partner".

4. In the Accept tab, select one or more templates using the checkbox to the left, and then click the red **ACCEPT** button at the top of the screen. Note, this will also lock the submitted HRH Inventory template for the IP i.e., the IP will no longer be able to edit this template. See Screenshot #17.

Screenshot #17:

Approvals

Workflow	Period	Operating Unit	
HRH FYOct ⌄	October 2024 - September 2025 ⌄	South Africa ⌄	✓ GO

ACCEPT 1 selected mechanism

VIEW 96	ACCEPT 1	SUBMIT 95	RECALL	RETURN 2

1 mechanisms   Search   ✕

☑	Mechanism ↑	OU	Agency	Partner	Status	
☑	160588 - GH002381 - Wits Health Consortium (PTY), Ltd	South Africa	HHS/CDC	WITS HEALTH CONSORTIUM (PTY) LTD	submitted by partner	

1 row selected   ‹ 1 ›

5. After you click the red **ACCEPT** button, the page should reload indicating the in-country USG agency user can now accept the mechanism by clicking the red **ACCEPT MECHANISM** button. See Screenshot #18.

Screenshot #18:

6. Once accepted, "accepted by agency" circle should become blue. Then click **SUBMIT MECHANISM**. See Screenshot #19.

Screenshot #19:

7. At this point, "submitted by agency" circle should become blue. Any additional actions are for USG HQ-based Global Agency users. See Screenshot #20.

Screenshot #20:

| pending at partner | submitted by partner | accepted by agency | submitted by agency | accepted by global agency | submitted by global agency | accepted by global |
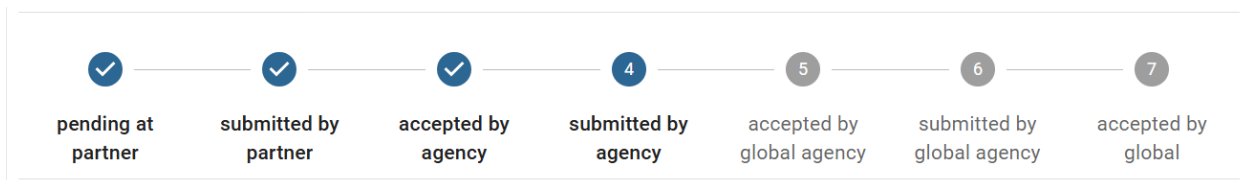
8. Even after you (as an agency user) have accepted and submitted a template, a Global Agency user's review may result in the need for revisions by the IP. After discussion with the relevant Global Agency user, you (as the agency user) can return the submission to the partner for revisions. See Section 5.3 for instructions.

5.3. Return an IP Submission for Revision

If an IP submission needs revision, the IM-specific template can be **returned** to the IP by the USG In-Country Agency user.

1. Log into the Approvals Application in DATIM as described in Section 5.2 Steps 1 and 2.

2. The "Return" tab displays all IM-specific templates that an agency user can return to the IP level for revision. The status of these templates will vary depending on where they are in the DATIM workflow described in Section 1.1. See Screenshot #21. For example, "accepted by agency" means this template has been accepted by the Agency in-country user, but you could still decide to return to the IP for any revisions. "submitted by partner" means this template was submitted by the IP, but you could still also return this template to the IP for revision.

Screenshot #21:

3. In the Return tab, check the box on the lefthand side for the mechanism that you would like to return to the IP for revision.
   a. Reminder that the "Mechanism" field has the following format: Mechanism ID – Award Number – Mechanism Name.

4. Then, click the red **RETURN** button. See screenshot #21 above.

5. Once the screen reloads, confirm the mechanism that appears is the one you want to return. Then click the red **RETURN MECHANISM** button. See Screenshot #22.

Screenshot #22:

6. Keep clicking the red **RETURN MECHANISM** button until only the "pending at partner" circle is blue and displays the number 1 within that circle. That will mean the template for this IM will be available in the HRH Processor app for the IP to revise and re-submit.

6. OPTIONAL: Review and Accept (or Return) in-Country Agency Submissions (*Global HQ-based* USG *Agency Users Only*)

In this step, Global (i.e., HQ-based) USG Agency users have the option to accept and submit OR return HRH Inventory templates that were previously accepted by their respective in-country agencies. Again, this step in the overall workflow is **optional for USG Agency HQ-based Global.**

6.1. Review In-Country Agency Submissions in the HRH Processor Application

1. Log into DATIM and navigate to the HRH Processor application in the DATIM Application menu. See Screenshot #23.

Screenshot #23:
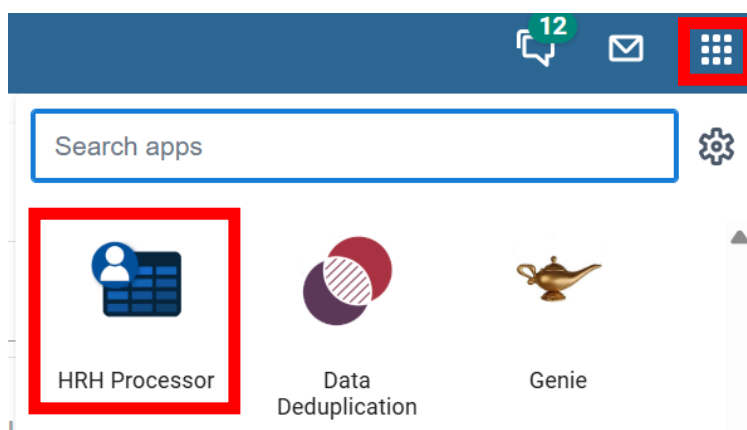
2. As a Global Agency user, you have access to all IM-specific HRH Inventory templates by OU for your agency only. Once the app loads, in the left-hand navigation, select the following. See top left in Screenshot #24.
   a. Operating Unit
   b. fiscal year of interest (for this year, COP24/FY25).

3. The app may take some time to load the information. Once it does, you will see all the HRH inventory templates (at various levels of "approval status") for your Agency and OU. See Screenshot #24.

Screenshot #24:

4. **Reviewing submissions:** Under "Uploaded Templates", you will see a list of IM-specific HRH Inventory templates and the Approval Status of each uploaded template. See Screenshot #24.

   a. **Approval Status**

      i.   **Pending at Partner:** A template labelled with Approval Status "Pending at Partner" is still in process by the IP. These templates cannot yet be accepted by USG users.

      ii. **Submitted by Partner:** A template labelled with Approval Status "Submitted by Partner" is ready for **in-country USG Agency** to accept (or return if revisions are needed).

      iii. **Accepted by Agency:** A template labelled with Approval Status "Accepted by Agency" has been accepted by the **in-country USG Agency**.

      iv. **Submitted by Agency:** A template labelled with Approval Status "Submitted by Agency" has been **submitted to the Global HQ-based Agency level** to be Accepted (or returned to the In-Country Agency level if revisions are needed).

b. **Downloading Templates for Review:** Templates at any approval status can be downloaded and reviewed by clicking the downward arrow icon under "File". See screenshot #25.

   i. **Note:** A file downloaded at status "Pending at Partner" has not necessarily passed validations and should be considered in-progress.

5. Global Agency users can accept templates that are at the "**Submitted by Agency**" status. If you are ready to accept a specific IM's template, the Approvals App can also be accessed directly by selecting the arrow "new window" button next to the approval status. See red box in Screenshot #25. If you want to Return the submission to the agency to coordinate revisions with the IP, go to Section 6.3 Return Submission to Agency.
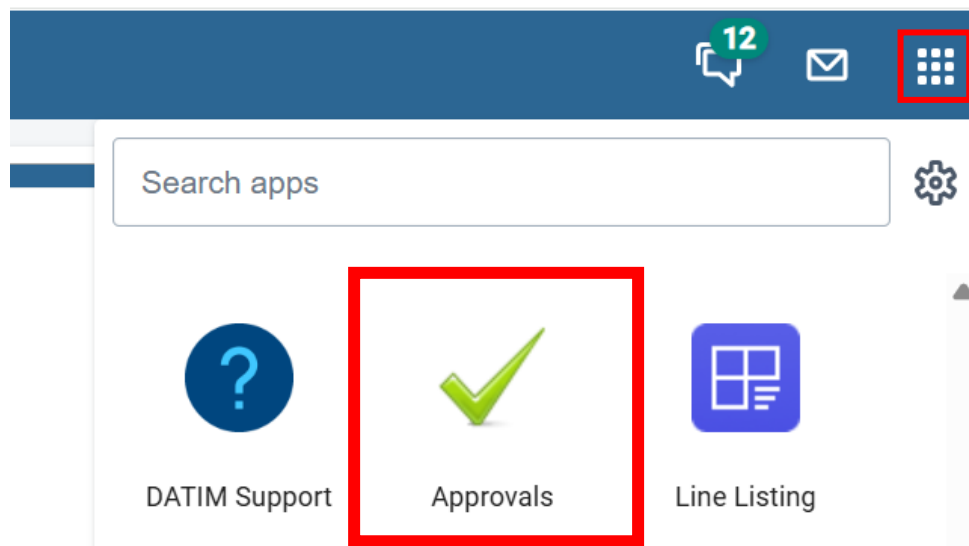
Screenshot #25:
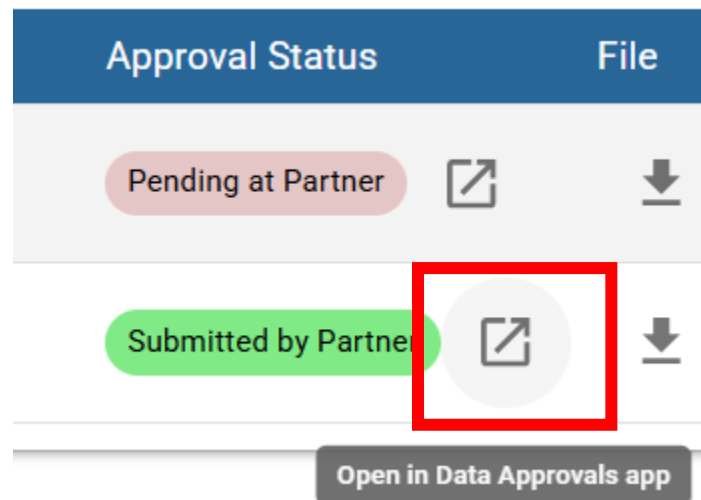
6.2. Accept and Submit In-Country Agency Submissions in the Approvals Application

1. To access the Approvals App to accept USG Agency HRH Inventory templates,
   a. **EITHER** click the shortcut in the HRH Processor App for a single submission (as described in Section 6.1 Step 5)
   b. **OR** navigate to the DATIM application menu in the upper right-hand corner of DATIM. Select the "Approvals" application. See Screenshot #26.

Screenshot #26:

2. If you didn't take the shortcut in Step 1 (a) above, within the Approvals App, choose the following as needed. See Screenshot #27.
    a. Workflow: HRH FYOct
    b. Period: October 2024 – September 2025
    c. Operating Unit: [Select the OU for which you want to accept and submit an agency submission].
    d. Then click "Go" to search

Screenshot #27:

3. Once the records load, you will see several tabs.

    a. The **"View"** tab will display all available IM-specific HRH Inventory templates for your Agency and OU and the approval status for each template.

        i. **Approval Status**

1. **Pending at Partner:** A template labelled with Approval Status "Pending at Partner" is still in process by the IP. These templates cannot yet be accepted by USG users.
2. **Submitted by Partner:** A template labelled with Approval Status "Submitted by Partner" is ready for **in-country** agency to accept (or return if revisions are needed).
3. **Accepted by Agency:** A template labelled with Approval Status "Accepted by Agency" has been accepted by the **in-country** agency.
4. **Submitted by Agency:** A template labelled with Approval Status "Submitted by Agency" indicates that it has **been submitted to the Global HQ-based Agency** level to be Accepted (or returned to the In-Country Agency level if revisions are needed).

b. The **"Accept"** tab displays all IM-specific HRH inventory templates that have been submitted by the in-country USG Agency to the Global Agency level. This indicates the in-country USG agency step in the workflow is complete.

4. In the Accept tab, select one or more IM-specific HRH inventory templates using the checkbox to the left, and then click the red **ACCEPT** button at the top of the screen. Note: This will lock the submissions for the in-country Agency users. See Screenshot #27.

Screenshot #27:

Approvals

Workflow	Period	Operating Unit	
HRH FYOct	October 2024 - September 2025	South Africa	✓ GO

ACCEPT   1 selected mechanism

VIEW 96	ACCEPT 1	SUBMIT 95	RECALL	RETURN 1

1 mechanisms   Search   ✕

☑	Mechanism ↑	OU	Agency	Partner	Status	
☑	160588 - GH002381 - Wits Health Consortium (PTY), Ltd	South Africa	HHS/CDC	WITS HEALTH CONSORTIUM (PTY) LTD	submitted by agency	

5. Now you can ACCEPT the agency submission as a Global Agency User. Click the red **ACCEPT SUBMISSION** button. See Screenshot #28.

Screenshot #28:

6. The "Accepted by global agency" circle should be blue. Then click the red **SUBMIT MECHANISM**. See Screenshot #29.

Screenshot #29:

7. The "submitted by global agency" circle should be blue at this stage. Then click **ACCEPT MECHANISM** to accept at global.

8. As a final step, the "accepted by global" circle should be blue. See Screenshot #30.

Screenshot #30:

Approvals

| ✓ RETURN MECHANISM | | | | | | BACK |

pending at partner — submitted by partner — accepted by agency — submitted by agency — accepted by global agency — submitted by global agency — accepted by global (7)

| Workflow | HRH FYOct |
| Period | October 2024 - September 2025 |

6.3. Return an In-Country Agency Submission for Revision

If an in-country Agency user has submitted an IM-specific HRH inventory template that needs revision, that IM-specific template can be **returned** by a Global HQ-based Agency user to the in-country Agency to then follow up with the IP for revisions.

1. Log into the Approvals Application in <u>DATIM</u> as described in Section 6.2 Step 1 (b) and Step 2.

2. Go to the "Return tab" which displays all IM-specific templates with different statuses. The status of these templates will vary depending on where they are in the DATIM workflow described in Section 1.1. See Screenshot #31. For example, "submitted by agency" means this template has been submitted by the Agency in-country user, but you (as the HQ-based global agency user) could still decide to return the template to the in-country agency user to coordinate any revisions with the IP.

3. Check the box on the left-hand side for the IM that you would like to return to the in-country Agency. See Screenshot #31.
   a. Reminder that the "Mechanism" field in the Approvals application is in the following format: Mechanism ID – Award Number – Mechanism Name.

4. Then, click the red **RETURN** button. See Screenshot #31.

Screenshot #31:

5. The previously submitted by agency template for this IM is now ready to return to agency level. Click the red **RETURN MECHANISM** button until the "submitted by agency" circle displays the number 4 instead of a blue check mark. The template is now at the "accepted by agency" status and the in-country agency user return it to the IP for revisions. See Screenshot #32.

Screenshot #32:

Appendix A. Setting up DATIM Accounts for HRH Inventory Reporting

A.1 Implementing Partner Accounts

A.1.1. New to DATIM

- If you are an implementing partner (IP) who has never had a DATIM account, navigate to register.datim.org
- Enter your first name, last name, and organizational email address.
- Then, select "Partner" for account type, select the OU worked in, and check "HRH Data Entry" and "Approvals: Submit Data" per the below screenshot.

- Enter a "Justification" for the request, such as "I need access to DATIM to submit the HRH Inventory".
- Submit the form. This will trigger both 1) The creation of a DATIM account, and 2) the creation of an Okta account and you will receive emails regarding these account creations.
  - Okta is the Department of State solution for single sign on and multi-factor authentication. You will need to set up your Okta account in order to log in to DATIM.
- Follow the instructions in your email to set up the account.

A.1.2. Have an existing DATIM Account, But Need HRH Processor and/or Approvals Application Access

- If you are an implementing partner who has an existing DATIM account but require access to the HRH Processor application, please navigate to register.datim.org.
- Select the option "Contact my User Administrator about something else"

- Fill out the form, then specify in your message that you would like HRH Processor and Approvals app access for the FY25 HRH Inventory.
- If your user administrator does not get back to you promptly, feel free to submit a request to the DATIM Helpdesk.

A.1.3 Locked out of DATIM Account

If you have an existing DATIM and Okta account but are locked out of it or receive an error when attempting to log in, please follow the instructions on the user support site to troubleshoot your account access.

A.2 In-Country USG Agency Accounts

A.2.1. New to DATIM

- If you are an in-country USG Agency user who has never had a DATIM account, navigate to register.datim.org
- Enter your first name, last name, and organizational email address.
- Then, select "Agency (in country)" for account type, select the agency name, the OU worked in, and check "HRH View Only".
- Check "Approvals: Accept Data" and "Approvals: Submit Data" if you will be reviewing and approving IP data.

- Enter a "Justification" for the request, such as "I need access to DATIM to review the FY25 HRH Inventory"
- Submit the form. This will trigger both 1) The creation of a DATIM account, and 2) the creation of an Okta account and you will receive emails regarding these account creations.
    - Okta is the Department of State solution for single sign on and multi-factor authentication. You will need to set up your Okta account in order to log in to DATIM.
- Follow the instructions in your email to set up your account.

A.2.2 Have an existing DATIM Account, But Need HRH Processor and Approval Applications Access

- If you are an in-country USG Agency user who has an existing DATIM account but require access to the HRH Processor application, please navigate to register.datim.org.
- Select the option "Contact my User Administrator about something else"

What would you like to do?

○ Request a user account on DATIM

◉ Contact my DATIM user administrator about something else

- Fill out the form, then specify in your message that you would like HRH Processor and Approvals app access for the FY25 HRH Inventory.
- If your user administrator does not get back to you promptly, feel free to submit a request to the DATIM Helpdesk.

A.2.3 Locked out of DATIM Account

If you have an existing DATIM and Okta account but are locked out of it or receive an error when attempting to log in, please follow the instructions on the user support site to troubleshoot your account access.

A.3 Global HQ-based USG Agency Accounts

A.3.1 New to DATIM

- If you are a Global (HQ-based) USG Agency user who has never had a DATIM account, navigate to register.datim.org
- Enter your first name, last name, and organizational email address
- Then, select "Global Agency (for ER/HRH)" for account type, select the agency name, the OU worked in, and check "HRH View Only"
- Check "Approvals: Accept Data" and "Approvals: Submit Data" if you will be reviewing and approving agency data

- Enter a "Justification" for the request, such as "I need access to DATIM to review the HRH Inventory"
- Submit the form. This will trigger both 1) The creation of a DATIM account, and 2) the creation of an Okta account and you will receive emails regarding these account creations.
  - o Okta is the Department of State solution for single sign on and multi-factor authentication. You will need to set up your Okta account in order to log in to DATIM.
- Follow the instructions in your email to set up your account.

A.3.2 Have an existing DATIM Account, But Need HRH Processor and Approvals Application Access

- If you are a Global (HQ-based) USG Agency user who has an existing DATIM account but require access to the HRH Processor application, please navigate to register.datim.org.
- Select the option "Contact my User Administrator about something else"

What would you like to do?

○ Request a user account on DATIM

◉ Contact my DATIM user administrator about something else

- Fill out the form, then specify in your message that you would like HRH Processor and Approvals app access for the FY25 HRH Inventory.
- If your user administrator does not get back to you promptly, feel free to submit a request to the DATIM Helpdesk.

A.3.3 Locked out of DATIM Account

If you have an existing DATIM and Okta account but are locked out of it or receive an error when attempting to log in, please follow the instructions on the user support site to troubleshoot your account access.

A.4 DATIM Primary User Administrator Reminder

DATIM's decentralized user management model requires Primary User Administrators (PUAs) to grant certain accounts and to update permissions. DATIM's standard guidance for PUAs is available on the user support site: https://help.datim.org/hc/en-us/articles/4417040107412-DATIM-Primary-User-Administrator-PUA-Guide