



How to Confirm Account Status in DATIM of your users for PEPFAR Budget and Projected Expenditures

Background

This job aid provides an overview of the step-by-step process to confirm account status in DATIM of your users for PBPET.

Step-by-Step Process

Step 1: Navigate to the DATIM User Administration App.

The screenshot shows the DATIM User Administration interface. On the left is a sidebar with the DATIM logo and the text "DATIM User Administration Search Users". The main area contains a search bar with the placeholder "Search users...", a "SEARCH" button, and an "ADD FILTER" button. Below the search bar, it says "Search for users above or [show all](#)". In the top right corner, there is an "INVITE" button with a plus sign and a person icon.

Step 2: Select ADD FILTER.

This screenshot shows the filter selection interface. At the top, there is a "Filter" dropdown menu with "Name/Username/Email" selected and a search input field with the placeholder "Search Users...". A "SEARCH" button is to the right. Below this, there is a second "Filter" dropdown menu with "Value" selected. A blue box highlights the "ADD FILTER" button. A close button (X) is visible to the right of the filter fields.

Step 3: Select User Group in the lower Filter field.

This screenshot shows the filter selection interface with the lower filter field updated. The "Filter" dropdown menu now has "User Group" selected and is highlighted with a blue box. The "ADD FILTER" button is still visible below the filter fields. The "SEARCH" button and the close button (X) are also present.

Step 4: Select Data ER entry in the lower Value field if you are searching for Partner Users or select Data ER Access in the lower Value field if you are searching for Agency Users.

The screenshot shows a search filter interface. At the top, there is a 'Filter' section with a dropdown menu set to 'Name/Username/Email' and a search input field containing 'Search Users...'. To the right of this section is a blue 'SEARCH' button. Below this, there is another 'Filter' section with a dropdown menu set to 'User Group' and a 'Value' dropdown menu set to 'Data ER entry'. A blue box highlights the 'Data ER entry' text. To the right of the 'Value' dropdown is a grey 'X' icon. At the bottom left of this section is the text 'ADD FILTER'.

Step 5: Select User Type in the upper Filter field.

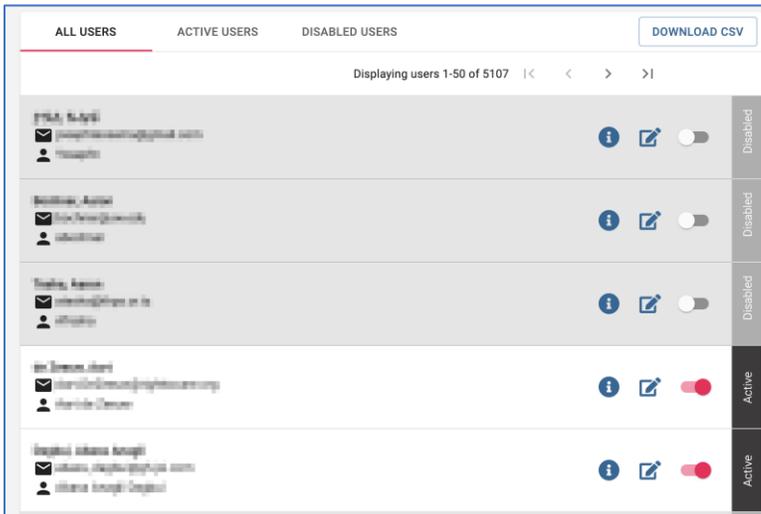
The screenshot shows a search filter interface. At the top, there is a 'Filter' section with a dropdown menu set to 'User Type' (highlighted with a blue box) and a 'Value' dropdown menu. To the right of this section is a blue 'SEARCH' button. Below this, there is another 'Filter' section with a dropdown menu set to 'User Group' and a 'Value' dropdown menu set to 'Data ER entry'. A grey 'X' icon is to the right of the 'Value' dropdown. At the bottom left of this section is the text 'ADD FILTER'.

Step 6: Select "Partner" for Partner Users in the upper Value field or select "Agency" for agency users in the upper Value field.

A solution is to name documents consistently by adhering to a naming convention (e.g., SharePoint Challenges and

The screenshot shows a search filter interface. At the top, there is a 'Filter' section with a dropdown menu set to 'User Type' and a 'Value' dropdown menu set to 'Partner' (highlighted with a blue box). To the right of this section is a blue 'SEARCH' button. Below this, there is another 'Filter' section with a dropdown menu set to 'User Group' and a 'Value' dropdown menu set to 'Data ER entry'. A grey 'X' icon is to the right of the 'Value' dropdown. At the bottom left of this section are the text 'ADD FILTER' and 'CLEAR FILTERS'.

Step 7: Click SEARCH.

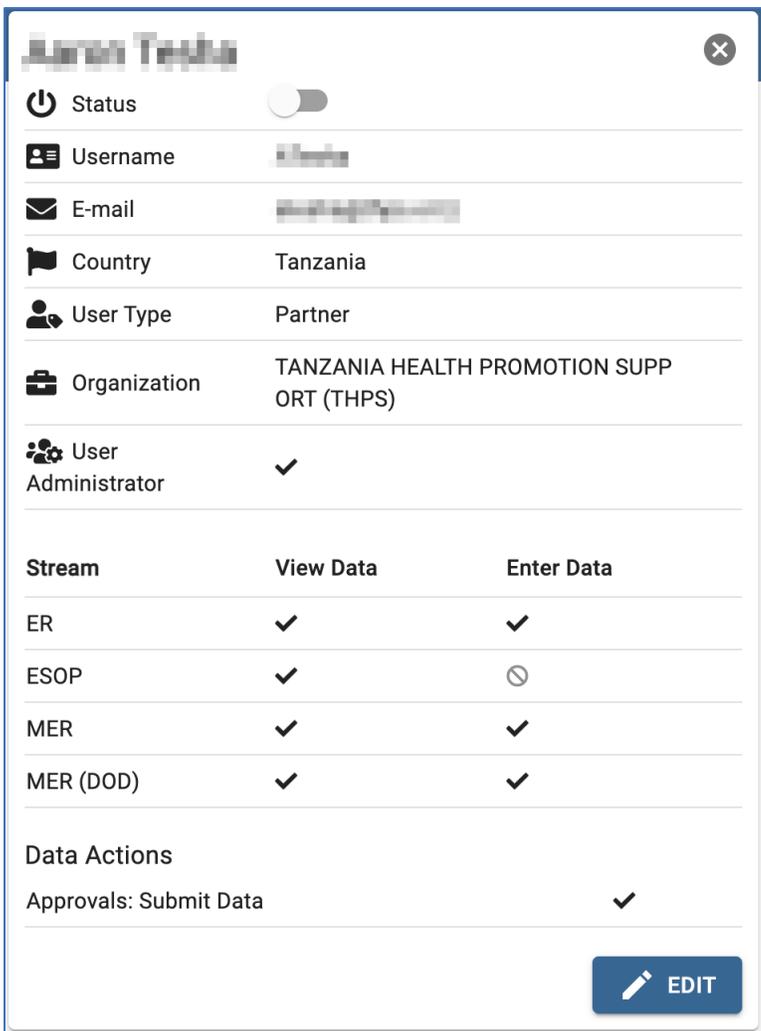


The screenshot shows a user management interface with tabs for 'ALL USERS', 'ACTIVE USERS', and 'DISABLED USERS'. A 'DOWNLOAD CSV' button is in the top right. The main area displays 'Displaying users 1-50 of 5107' with navigation arrows. Below is a list of users with columns for user details, actions (info, edit, status), and status.

User Name	Email	Info	Edit	Status	Overall Status
PTSA, N. Agili	ptsa@healthmanagement.org	Info	Edit	Disabled	Disabled
Bonifacio, Aaron	bonifacio@healthmanagement.org	Info	Edit	Disabled	Disabled
Toshiko, Amano	toshiko@healthmanagement.org	Info	Edit	Disabled	Disabled
Ar. Dennis, David	dennis@healthmanagement.org	Info	Edit	Active	Active
Josephine, Juliana Amugli	amugli@healthmanagement.org	Info	Edit	Active	Active

NOTE: Areas of interest are the Active and Disabled.

Step 8: Use the “i” to verify the organization associated with the account.



The screenshot shows a user profile for Aaron Toshiko. The profile includes a status toggle, personal information (username, email, country, user type), organization (TANZANIA HEALTH PROMOTION SUPPORT (THPS)), and user administrator status. Below this is a table of data actions for various streams.

Stream	View Data	Enter Data
ER	✓	✓
ESOP	✓	⊘
MER	✓	✓
MER (DOD)	✓	✓

Data Actions
Approvals: Submit Data ✓

EDIT

Step 9: Click the Active/Disabled slider if this account needs to be reactivated.



An email will be sent out to this user that their account has been reenabled.