



PEPFAR

U.S. President's Emergency Plan for AIDS Relief

Evaluation Standards of Practice (ESoP) Data Entry Step-by-Step Guide

2021

Agenda

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

1. Data Entry Overview
2. ESoP Data Entry Forms
3. Good Data Entry Practices
4. Accessing and Navigating the DATIM Tracker Capture App
5. Adding, Completing, and Saving the ESoP Data Entry Forms
6. Filtering and Viewing Evaluations
7. Support

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**:
 1. Enrollment Form (formerly Evaluation Inventory)
 2. Planning Form
 3. Semi-Annual Status Updates (formerly Quarterly Status Updates)
 4. Adherence Checklist

Enrollment Form and Planning Form

1. Enrollment Form:

- Purpose: Follows the logic of the SRE tool and includes similar **data on the approved evaluation** (e.g. mech info, evaluation title/questions/type, target population, technical area, health outcome, implementing agency, POC, PI, and approved budget).
- Timeframe: Completed in Q2 after COP approval. Agency users will confirm all approved evaluations are entered into Tracker.

2. Planning Form:

- Purpose: Provides additional info on **evaluation progress**, current FY **budget**, planned data collection dates, and planned end of evaluation
- Timeframe: Ideally completed with enrollment form in Q2. Can be completed in Q4 to allow further discussion of evaluation plans.

Semi-Annual Status Update and Adherence Checklist

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.

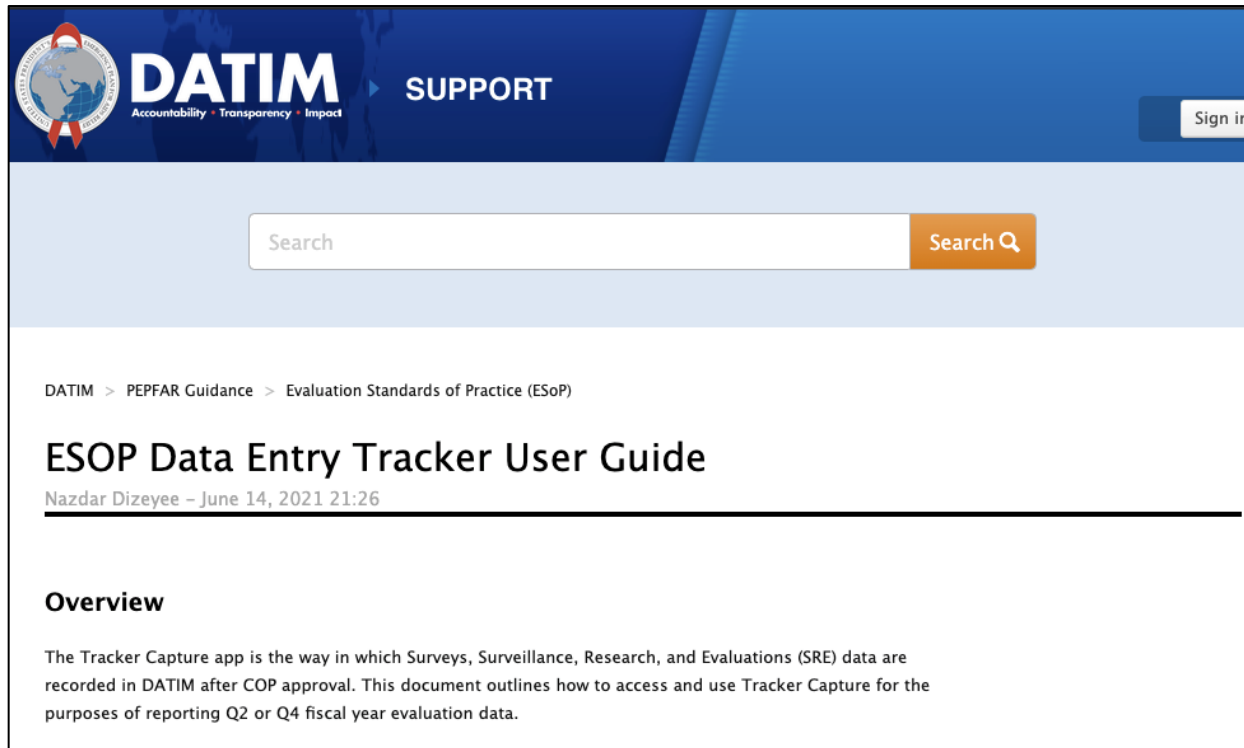
Good Data Entry Practices

- Review Reference Guide for 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.*
- SGAC does **not** advise that users rely on the Event Reports app to pull or view ESOP data.

ESoP Data Entry Tracker User Guide

- This training follows the **ESoP Data Entry Tracker User Guide** available via [DATIM Support](https://datim.zendesk.com) (datim.Zendesk.com).

(PEPFAR Guidance > Evaluation Stands of Practice (ESoP) > ESoP Data Entry Tracker User Guide)



The screenshot shows the DATIM Support website interface. At the top left is the DATIM logo with the tagline "Accountability • Transparency • Impact" and the word "SUPPORT" next to it. A "Sign in" button is located in the top right corner. Below the header is a search bar with the placeholder text "Search" and an orange "Search" button with a magnifying glass icon. The main content area displays the breadcrumb "DATIM > PEPFAR Guidance > Evaluation Standards of Practice (ESoP)" followed by the title "ESOP Data Entry Tracker User Guide" and the author information "Nazdar Dizyee - June 14, 2021 21:26". A horizontal line separates the title from the "Overview" section. The "Overview" section contains the text: "The Tracker Capture app is the way in which Surveys, Surveillance, Research, and Evaluations (SRE) data are recorded in DATIM after COP approval. This document outlines how to access and use Tracker Capture for the purposes of reporting Q2 or Q4 fiscal year evaluation data."

Accessing DATIM and the Tracker Capture App

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

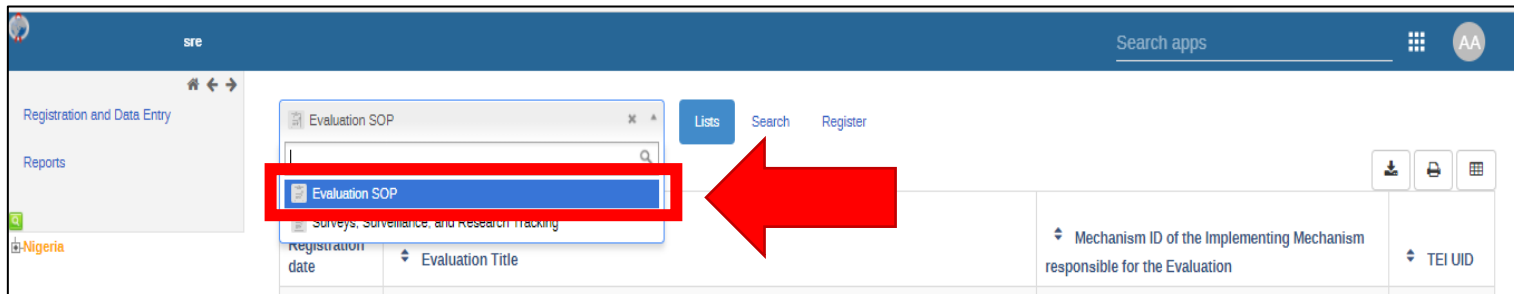
Step 2: Select **Apps menu > Tracker Capture** to access the registration and data entry page:

The image shows two screenshots from the DATIM system. The top screenshot displays the 'Search apps' menu with various application icons. The 'Tracker Capture' icon, which depicts a clipboard with a pencil, is highlighted with a red rectangular box. A red arrow originates from the top right of this box and points down to the Tracker Capture app interface shown in the bottom screenshot. The bottom screenshot shows the 'Tracker Capture' app's main interface, featuring a 'Registration and Data Entry' section with a table of data.

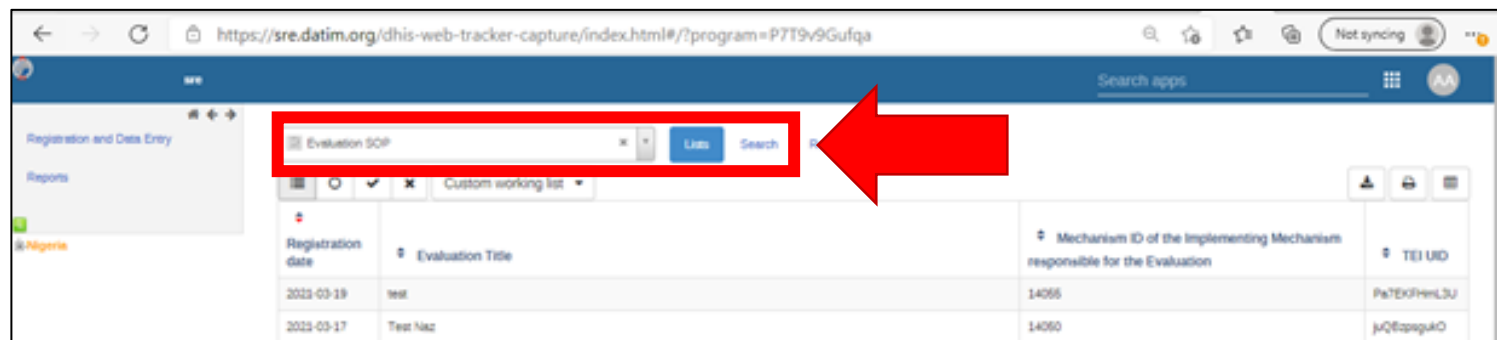
Registration date	Evaluation Title	Mechanism ID of the Implementing Mechanism responsible for the Evaluation	TEI UID
2021-05-19	test	14055	Pa7EXFmLSU

Navigating Tracker Capture

Step 3: Select the program Evaluation SOP:



Step 4: For **ongoing evaluations**, search for and select the evaluation event you want to edit, which will take you to the evaluation's dashboard.



Registering New Evaluations

Step 5: For new evaluations, select **Register** and complete the **ESOP Enrollment Form**:

The screenshot shows a web interface for registering new evaluations. At the top, there is a search bar with 'Evaluation SOP' entered, and a 'Register' button highlighted with a red box and a red arrow pointing to it. Below the search bar, there are links for 'Lists' and 'Search'. The main content area is divided into two sections: 'Enrollment' and 'Profile'.

Enrollment Section:

- Enrolling organisation unit: Nigeria
- Enrollment Report Date *: 2021-03-19

Profile Section:

ESOP Enrollment Form

2	TEI UID *	dTektZ4tMn6
3	USG Agency funding evaluation *	Select or search from the list
4	Is the evaluation conducted in multiple countries? *	<input type="radio"/> Yes <input type="radio"/> No
5	Countries where evaluation is being conducted *	
6	Fiscal year the evaluation was originally approved *	Select or search from the list
7	Expected budget of the entire evaluation *	
8	Is this a cooperative agreement- or contract-level evaluation? *	<input type="radio"/> Yes <input type="radio"/> No
9	Mechanism ID of the implementing mechanism responsible for the evaluation *	Select or search from the list
10	Award number of the implementing mechanism responsible for the evaluation *	
11	Name of the implementing mechanism responsible for the evaluation (may be the same as the project IM) *	
12	Name of implementing partner responsible for the	

Required elements include:

1. OU and Report date
2. TEI UID
3. USG Agency funding evaluation
4. Is the evaluation conducted in multiple countries?
5. Countries where evaluation is being conducted
6. Fiscal year approved
7. Expected budget
8. Cooperative agreement or contract-level?
9. Mech ID
10. Award #

And so on...!

Saving New Evaluations

Step 6: To register another evaluation, select **Save and add new** at the end of the form.

If you do not have another new evaluation, select **Save and continue** to move to the evaluation's dashboard.



NOTE: You must complete all required fields to save the form.


Viewing and Editing New Evaluations

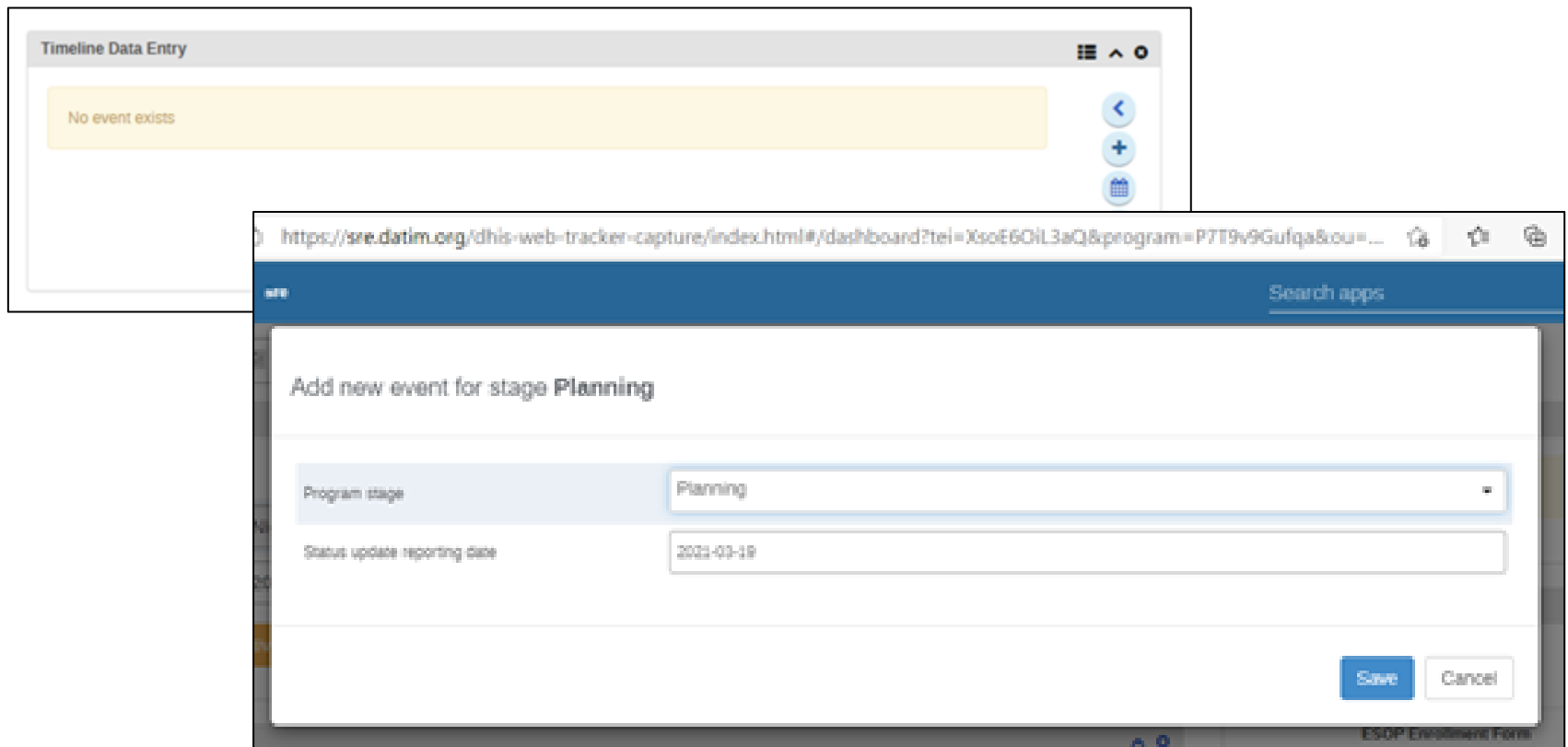
Step 7: From the **evaluation's dashboard**, you can view your evaluation info. To edit your Enrollment form, click **Profile > Edit > Save**.

The screenshot displays the 'Evaluation-EGP' dashboard. The top navigation bar includes a 'Back' button and a search bar. The main content area is divided into several sections:

- Enrollment:** Shows 'Owned by: Nigeria'. Fields include 'Enrolling organization unit' (Nigeria) and 'Enrollment Report Date' (2022-03-28). Buttons for 'Complete', 'Cancel/Revert', and 'Delete' are visible.
- Indicators:** A yellow message box states 'No indicators exist'.
- Timelines (Data Entry):** A yellow message box states 'No events exist'.
- Reports:** A yellow message box states 'No records exist for reporting'.
- Feedback:** A yellow message box states 'No feedback exist'.
- Profile Edit:** A detailed form for 'EGP Enrollment Form' with 16 numbered fields:
 1. ID: UN
 2. UN Agency funding evaluator: UN/WHO
 3. Is the evaluation conducted in multiple countries?: No
 4. Countries where evaluation is being conducted: Asia Region/Myanmar/Republic
 5. Fiscal year the evaluation was originally approved: FY2022
 6. Expected budget of the entire evaluation: \$071
 7. Is this a cooperative agreement or contract level evaluation?: No
 8. Mechanism ID of the implementing mechanism responsible for the evaluation: 14088
 9. Award number of the implementing mechanism responsible for the evaluation: Award unknown for mechanism 14088
 10. Name of the implementing mechanism responsible for the evaluation (may be the same as the project ID): P4U's Health
 11. Name of implementing partner responsible for the evaluation: Management Sciences For Health, Inc.
 12. OUN ID of implementing partner responsible for the evaluation: 0717,0088
 13. Is the primary evaluation partner a local institution?: No
 14. If a local institution, is any individual or group of individuals fulfilling the role as principal investigator/co-investigator/evaluation team leader/other leadership role?: No

Adding the Planning Form

Step 8: To add the Planning form, click **Timeline Data Entry** >  *plus sign button* > **Add** and **Save** the form.



The screenshot displays two overlapping browser windows. The top window, titled "Timeline Data Entry", shows a message "No event exists" and a vertical toolbar with a back arrow, a plus sign, and a calendar icon. The bottom window shows the "Add new event for stage Planning" form. The form includes a dropdown menu for "Program stage" set to "Planning" and a text input for "Status update reporting date" with the value "2021-03-19". At the bottom right of the form are "Save" and "Cancel" buttons. The browser's address bar shows a URL from "se.datim.org".

NOTE: You must complete all required fields to save the form.

Completing the Planning Form

Step 9: Complete the **Planning** event form once per fiscal year.

The image shows a screenshot of a planning form with various fields. A red arrow points to the field for the name of the implementing partner responsible for the evaluation. The form includes the following fields and values:

5	Was the evaluation ever originally approved?	Yes
6	Fiscal year the evaluation was originally approved?	FY 2024
7	Expected budget of the entire evaluation?	4875
8	Is this a cooperative agreement or contract level evaluation?	<input checked="" type="radio"/> No
9	Mechanism ID of the implementing mechanism responsible for the evaluation?	14088
10	Award number of the implementing mechanism responsible for the evaluation?	Award unknown for mechanism 14088
11	Name of the implementing mechanism responsible for the evaluation (may be the same as the project ID)?	PLA019491
12	Name of implementing partner responsible for the evaluation?	Management Sciences For Health, Inc.
13	OU/ID of implementing partner responsible for the evaluation?	071710000
14	Is the primary evaluation partner a local institution?	<input checked="" type="radio"/> No
15	If a local institution, is any individual or group of individuals fulfilling the role as principal investigator/investigator/evaluator/lead/other leadership role?	<input checked="" type="radio"/> No
16	Mechanism ID of the implementing mechanism responsible for the evaluation 2?	Select or search from the list
17	Award number of the implementing mechanism responsible for the evaluation 2?	
18	Name of the implementing mechanism responsible for the evaluation 2 (may be the same as the project ID) 2?	
19	Name of implementing partner responsible for the evaluation 2?	
20	OU/ID of implementing partner responsible for the evaluation 2?	
21	Is the primary evaluation partner a local institution 2?	

Elements include:

1. Fiscal year and reporting period the planning form is being created
 2. Fiscal year the evaluation was approved
 3. Approved current fiscal year budget
 4. Out-year budget
 5. Funded through COP or HOP?
 6. Current evaluation progress
- And so on...!*

Saving the Planning Form

Step 10: Click **Complete** to save the form. After clicking Complete, select **Complete** again to stay in the dashboard or **Complete and exit** to return to the registration and data entry page:

The screenshot displays the 'Timeline Data Entry' interface for a 'Nigeria Planning' event. The form is divided into several sections. The 'Evaluation Inventory - Planning' section contains the following fields:

- Fiscal year and reporting period the planning form is being created: FY2021 Q2
- Fiscal year the evaluation was originally approved: FY2019
- Approved current fiscal year budget of evaluation: 10000
- Outyear budget of evaluation: 10000
- Is the evaluation funded through COP or HOP?: Both
- Current evaluation progress: Data collection: in progress
- Planned start date of data collection: 2021-03-19
- Planned end date of data collection: 2021-03-31
- Planned evaluation completion date: 2021-03-31
- Planned evaluation progress: Data collection: completed

At the bottom of this section, the 'Complete' button is highlighted with a red box and a red arrow. To the right, there is a 'New event' section with a 'Quarterly Status Update' button and a 'Add / Schedule / Refresh' link. Further right, there are additional form fields for evaluation details, including fiscal year, budget, and implementing mechanism information.

NOTE: You must complete all required fields to save the form. If you do not click **Complete**, the data will not be saved and made available for generating reports in the Event Reports app.

Adding the Semi-Annual Status Update Form

Step 11: To add the Semi-Annual Status Update form, click **Timeline Data Entry > Add > Save**.

Timeline Data Entry

2021-06-03
Nigeria
Planning
(Completed)

Status update reporting date *

2021-06-03

New event >

Semi-Annual Status Update.
Add | Schedule | Referral

Add new event for stage **Semi-Annual Status Update.**

Program stage: Semi-Annual Status Update.

Period: January - March 2021

Save Cancel

Completing the Semi-Annual Status Update Form

Step 12: Complete the **Semi-annual status update** form 2x per fiscal year.

Timeline Data Entry

2021-03-31
Nigeria
Semi-Annual Status U...
(Open)

2021-06-03
Nigeria
Planning
(Completed)

Status update reporting date *

2021-03-31

Evaluation Inventory – Semi-Annual Status Update

Fiscal year and reporting period of status update *
Select or search from the list
Required

Do any of the most recently completed status update responses need to be updated?
 Yes No

Current evaluation stage *
Select or search from the list
Required

Current evaluation progress *
Select or search from the list
Required

Start date of data collection
yyyy-MM-dd

End date of data collection
yyyy-MM-dd

Complete

Delete Print form

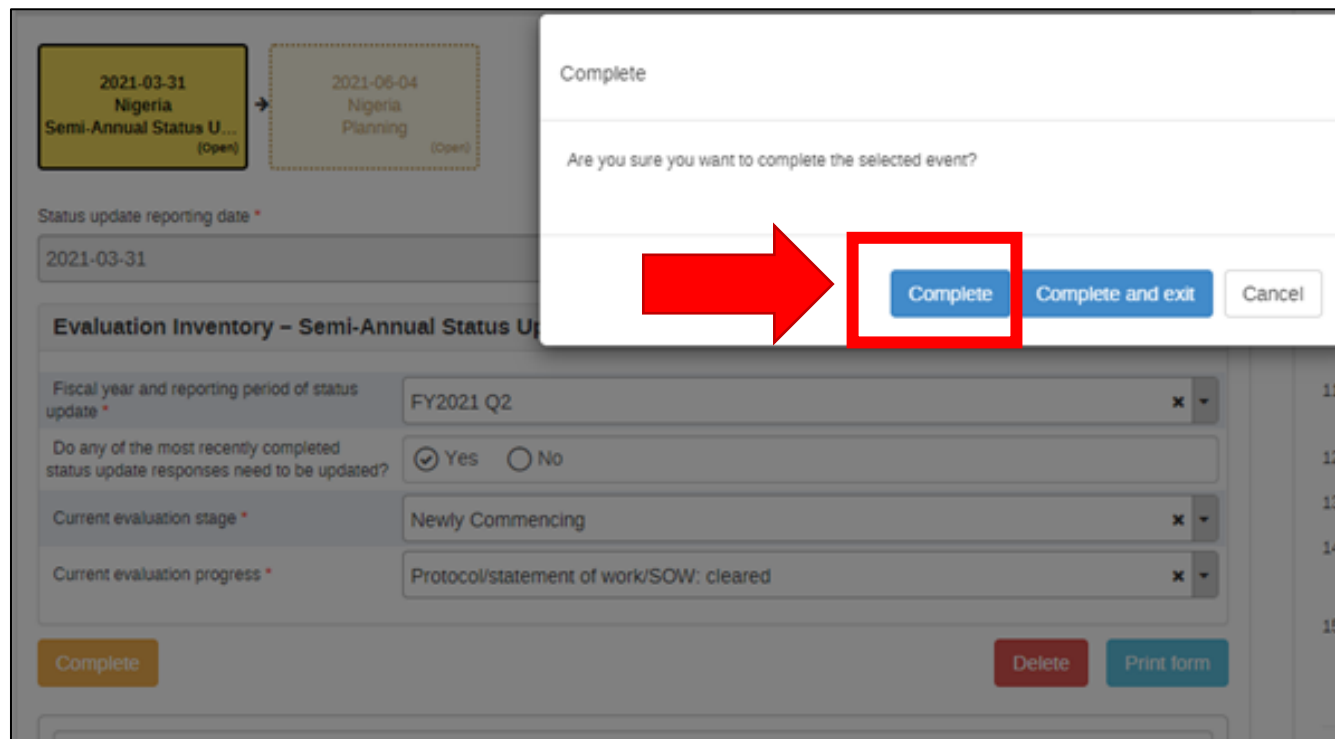
Elements include:

1. Fiscal year and reporting period of status update
2. Do any of the most recently completed status update responses need to be updated?
3. Current evaluation stage
4. Current evaluation progress
5. Start date of data collection
6. End date of data collection

And so on...!

Saving the Semi-Annual Status Update Form

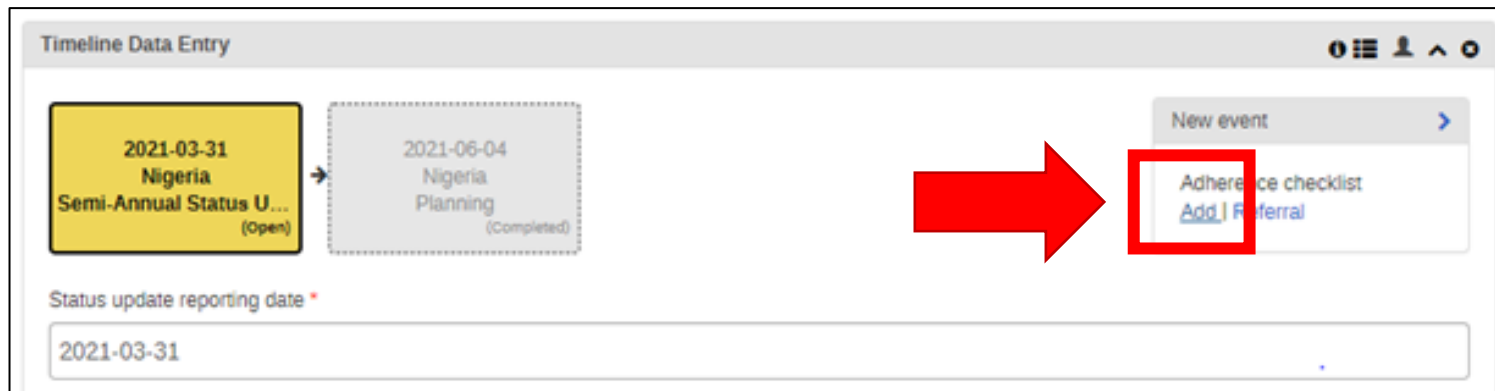
Step 13: Click **Complete** to save the form. After clicking Complete, select **Complete** again to stay in the dashboard or **Complete and exit** to return to the registration and data entry page:



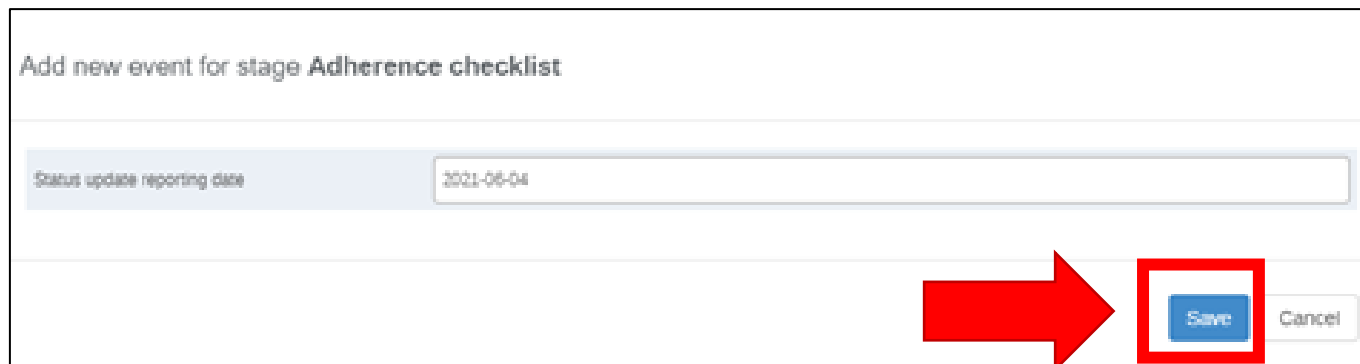
NOTE: You must complete all required fields to save the form.

Adding the Adherence Checklist Form

Step 14: Upon reporting the conclusion of your evaluation in the Semi-Annual Status Update form, the Adherence Checklist event form will appear. To add the Adherence Checklist form, click **Timeline Data Entry > New Event > Add > Save**.



The screenshot shows the 'Timeline Data Entry' interface. On the left, a yellow box represents a completed event: '2021-03-31 Nigeria Semi-Annual Status U... (Open)'. An arrow points to a grey box representing a completed event: '2021-06-04 Nigeria Planning (Completed)'. To the right, a 'New event' dropdown menu is open, with 'Adherence checklist' and 'Add Referral' options. A red arrow points from the 'Adherence checklist' option to the right. Below the events, there is a 'Status update reporting date' field with the value '2021-03-31'.



The screenshot shows the 'Add new event for stage Adherence checklist' form. The 'Status update reporting date' field is set to '2021-06-04'. At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points from the 'Save' button to the right, and another red arrow points from the right edge of the form back to the 'Save' button.

Completing the Adherence Checklist Form

Step 15: Complete the **Adherence Checklist** form once at the conclusion of your evaluation.

2021-03-31
Nigeria
Semi-Annual Status Up...
(Open)

2021-06-04
Nigeria
Planning
(Completed)

2021-06-04
Nigeria
Adherence checklist
(Open)

Status update reporting date *

2021-06-04

Adherence Checklist

1. Fiscal year and reporting period of status update *
Required
Select or search from the list

2. Final evaluation title in English. (This will automatically update the title in the Evaluation Inventory Enrollment Profile). *
Test Naz

3. Date evaluation report approved by agency *
Required
yyyy-MM-dd

4. Reviewer agency *
Required
Select or search from the list

5. Reviewer name *
Required

Elements include:

1. Fiscal year and reporting period of status update
2. Final evaluation title in English
3. Date evaluation report approved by agency
4. Reviewer agency
5. Reviewer name

And so on...!

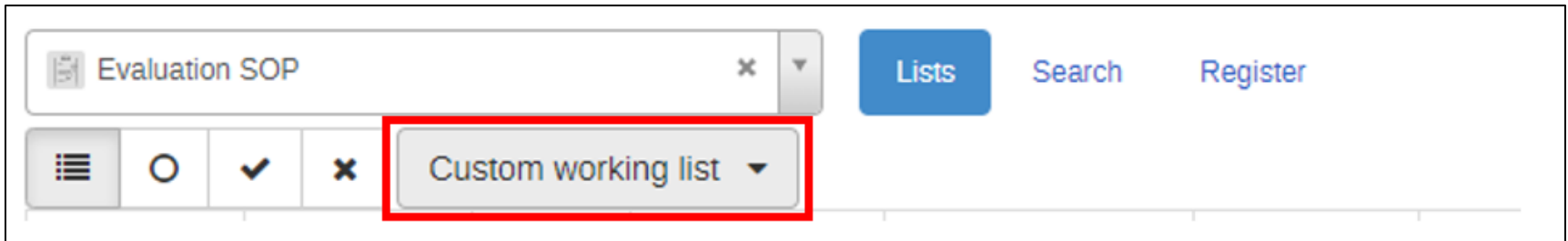
Saving the Adherence Checklist Form

Step 16: You must complete all required fields to save the form. Once you click Complete, you will no longer be able to edit the event form.

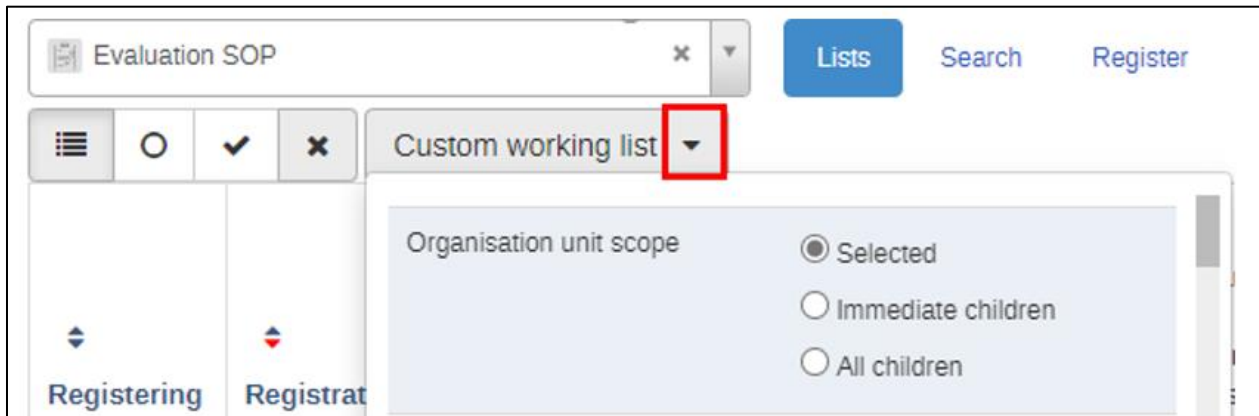
Custom Working List

The **Custom Working List** filters evaluations by Enrollment Status, TEI UID, etc.

- **Step 1:** After selecting the program Evaluation SOP, the Custom working list button is directly below the program name.



- **Step 2:** From the drop-down, choose filters that apply to your search.



Custom Working List

- **Step 3:** Scroll to the bottom of the list and click on the **Search** button. A list of relevant evaluations will be returned:
- **NOTE:** You must manually type in the answers to any fields that show Please Select while we fix the issue with the dropdowns:

South Africa	2021-09-1	ESOP-SaSR Countries in project- Ukraine	<input type="text"/>	2866
South Africa	2021-09-1	ESOP-SaSR Countries in project- Uzbekistan	<input type="text"/>	4610
South Africa	2021-06-1	ESOP-SaSR Countries in project- Vietnam	<input type="text"/>	1379
South Africa	2021-06-1	ESOP-SaSR Countries in project- Zambia	<input type="text"/>	
South Africa	2021-06-1	ESOP-SaSR Countries in project- Zimbabwe	<input type="text"/>	1658

Evaluation SOP

Lists Search Register

Custom working list

Specific users:

Registering unit	Registration date	ESOP-SaSR TEI UID	<input type="text"/>
South Africa	2020-11-1	ESOP USG agency funding evaluation	<input type="text" value="[Please select]"/>
		ESOP First fiscal year when evaluation funding is approved	<input type="text" value="[Please select]"/>
		ESOP OU multicountry	<input type="text" value="[Please select]"/>
South Africa	2021-06-1	ESOP Expected budget of the entire evaluation	Is <input type="text" value="Exact value"/>

Viewing Evaluations

SRE Dashboard

- The SRE dashboard allows Agency users to quickly access new data submitted during the current FY across the 4 ESOP data entry forms.
- The SRE dashboard shows the total completed evaluations in a FY and adherence to the 11 PEPFAR Evaluation SOPs.
- Access the SRE dashboards in DATIM via the Dashboard app.

sre - Dashboard

Search for a dashboard

COP19/FY20 1. Clinical Cascade Dashboard COP19/FY20 2. Testing Dashboard COP19/FY20 3. Treatment Dashboard

Show more

SRE Dashboard

Edit Share Add filter

ESOP Enrollments FY21 (Q2-Q4)

#	Enrollment date	Incident date	Organisation unit	ESOP TEI UID	ESOP USG agency funding evaluation	ESOP First fiscal year when funding is approved	ESOP Evaluation title	ESOP Evaluation mechanism
1	2021-08-11 00:00:00.0	2021-08-11 00:00:00.0	Thailand	EJUJuq9M9qq	HHS-CDC	FY2021	Evaluation of an HIV-related stigma and discrimination program in health care settings in Thailand	Thailand Thailand Public Health
2	2021-07-29 00:00:00.0	2021-07-29 00:00:00.0	Rwanda	YWs3vevKK72	HHS-CDC	FY2021	Evaluating the Impact of HIV-1 Recent Infection Testing on Incremental HIV Testing Yield and Adverse Events Linked to Return of Recent Infection Testing Results in Rwanda	Recency HQ Mec
3	2021-06-01 00:00:00.0	2021-06-01 00:00:00.0	Zimbabwe	MZN6K5AF6xe	HHS-HRSA	FY2020	Zimbabwe 3HP Rollout in Fast Track Model	Optimizing Mome Sustainable Epide (OpCon)
4	2021-05-14 00:00:00.0	2021-05-14 00:00:00.0	Zimbabwe	JzSNxdtEQpT	HHS-CDC	FY2021	Formative evaluation of Electronic Health Record (EHR) system usage and user satisfaction at selected health facilities in Zimbabwe	[Placeholder]
5	2021-05-12 00:00:00.0	2021-05-12 00:00:00.0	Vietnam	ZU5Uw129ZW8	HHS-CDC	FY2022	Vietnam key population size estimation	VAAC
6	2021-05-10 00:00:00.0	2021-05-10 00:00:00.0	Dominican Republic	ACNjgNABr9z	USAID	FY2021	test	BizAIDS

ESOP Planning Updates FY21

Search apps

Pivot Table Event Reports Event Visualizer Data Entry

Tracker Capture Mobile Configuration **Dashboard** App Management

Data approval Browser Cache Cleaner Capture Data Administration

Data Quality Data Visualizer Datastore Management Import/Export

Support

- For programmatic questions, please email [SGAC SI@state.gov](mailto:SGAC_SI@state.gov).
- For systems issues and data changes, please submit a helpdesk ticket to DATIM Support ([datim.Zendesk.com](https://datim.zendesk.com)).

DATIM Training & Tutorials

What's New in DATIM

PEPFAR Guidance

Frequently Asked Questions (FAQs)

Data Import and Systems Administration

PEPFAR/MoH Data Alignment Activity

Guidance Highlights

- PEPFAR Data Calendar
- COP Guidance
- DATIM Data Import & Exchange Resources
- MER Indicator Reference Guides

Technical Support

- Submit a Request**
- Your Profile
- Ticket Status



Thank you!