



PEPFAR

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

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

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

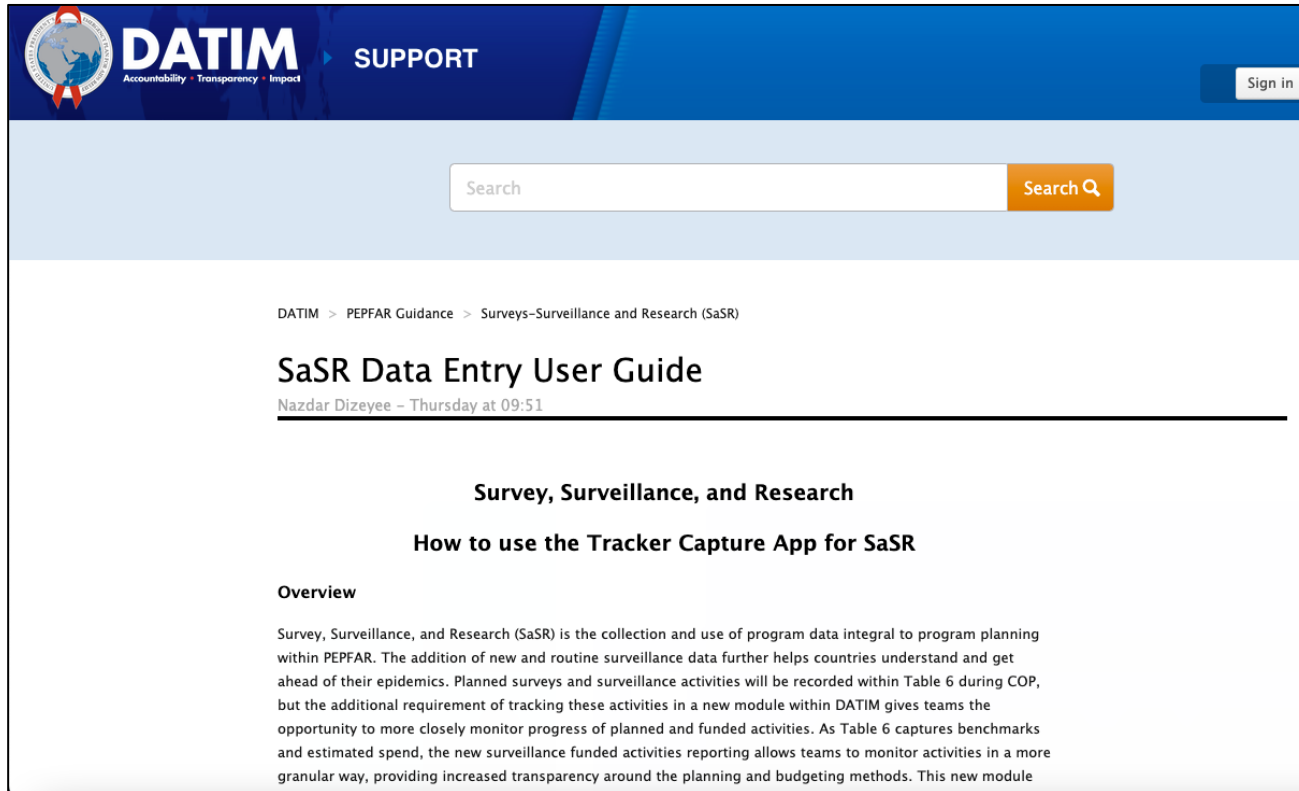
Good Data Entry Practices

- 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.

SaSR Data Entry User Guide

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

(PEPFAR Guidance > Surveys-Surveillance and Research (SaSR) > SaSR Data Entry 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 in the top right. Below the header is a search bar with a "Search" button. The main content area shows a breadcrumb trail: "DATIM > PEPFAR Guidance > Surveys-Surveillance and Research (SaSR)". The title "SaSR Data Entry User Guide" is prominently displayed, followed by the author "Nazdar Dizayee" and the date "Thursday at 09:51". Below this is a section header "Survey, Surveillance, and Research" and a sub-header "How to use the Tracker Capture App for SaSR". Under "Overview", the text states: "Survey, Surveillance, and Research (SaSR) is the collection and use of program data integral to program planning within PEPFAR. The addition of new and routine surveillance data further helps countries understand and get ahead of their epidemics. Planned surveys and surveillance activities will be recorded within Table 6 during COP, but the additional requirement of tracking these activities in a new module within DATIM gives teams the opportunity to more closely monitor progress of planned and funded activities. As Table 6 captures benchmarks and estimated spend, the new surveillance funded activities reporting allows teams to monitor activities in a more granular way, providing increased transparency around the planning and budgeting methods. This new module

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:

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 second screenshot. The second screenshot shows the 'Tracker Capture' application interface. It features a search bar at the top right, a navigation menu on the left, and a main content area with a table of data. The table has columns for 'Registration date', 'Evaluation Title', 'Mechanism ID of the Implementing Mechanism responsible for the Evaluation', and 'TEI UID'. A row of data is visible with the following values: '2021-05-19', 'test', '14055', and 'Pa7EXFmLSU'.

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

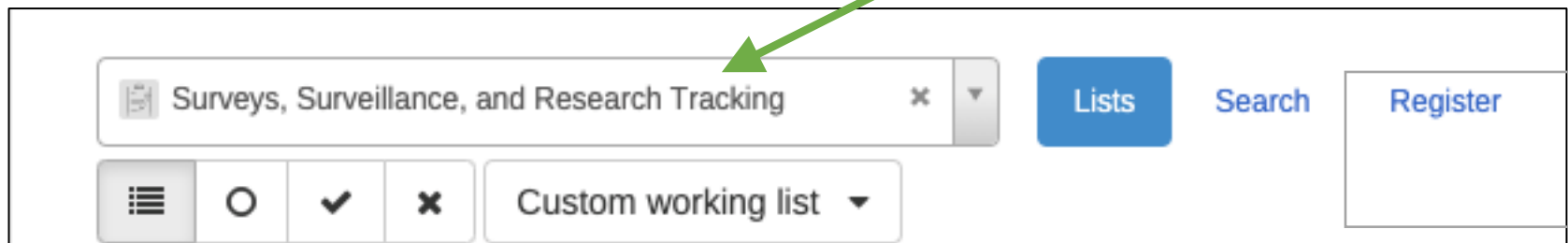
Navigating Tracker

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

Surveys, Surveillance, and Research Tracking × ▾

Lists Search Register

Enrollment

Enrolling organisation unit: Botswana

Enrollment date: 2021-10-07

Profile

Survey/research project enrolled on 2021-10-07

TEI UID: dgUprxb4LkA

SaSR Planning Profile

USG Agency funding the survey, surveillance or research activity:
Select or search from the list ▾

Countries in activity:
To make a selection, please manually type your choice and press enter or use the arrow keys on your keyboard to select one of the options

Mechanism ID of the implementing mechanism associated with the activity:
Select or search from the list

Save and continue Save and add new Print form Cancel

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”.

The screenshot displays a dashboard with several panels. The 'Enrollment' panel shows 'Owned by: Nigeria', 'Enrolling organisation unit: Nigeria', and 'Enrollment date: 2020-10-01'. Below this are buttons for 'Complete', 'Deactivate', and 'Delete'. The 'Indicators' panel shows 'No indicators exist'. The 'Timeline Data Entry' panel is highlighted with a red box and shows a yellow card for '2021-03-31 Nigeria Semi-Annual Status U... (Open)'. Below this is a green bar for 'Status update reporting date *' with the value '2021-03-31'. The 'Profile Edit' panel is also highlighted with a red box and shows 'Profile' information: 'Survey/research project enrolled on 2020-10-01', 'TEI UID: MuZlnps0y0q', 'SaSR Planning Profile', 'USG Agency funding the survey, surveillance or research activity: DoD', 'Countries in activity:' (with a note to manually type choices), and 'Mechanism ID of the implementing mechanism associated with the activity: 17747'.

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

The screenshot shows a web form titled "Timeline Data Entry" for Nigeria. At the top, there is a yellow box with the text "2021-03-31 Nigeria Semi-Annual Status U... (Open)". Below this, the "Status update reporting date" field is set to "2021-03-31" and highlighted in green. The main section is titled "Surveys, Surveillance, and Research Tracking - Semi-Annual Status Update". It contains three dropdown menus: "Fiscal year and reporting period of status update", "Current activity stage", and "Current activity progress", each with the placeholder text "Select or search from the list". Below these is a text input field for "Budget planned for the current fiscal year (i.e. the budget approved in the SRE Tool the year this status update is being completed)". At the bottom right, there are three buttons: "Complete" (highlighted with a red box), "Delete", and "Print form".

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.

The screenshot shows a web form titled "Surveys, Surveillance, and Research Tracking - Semi-Annual Status Update". At the top, there is a field for "Status update reporting date" with the value "2021-09-30" highlighted in green. Below this is a section for "Fiscal year and reporting period of status update (Quarter)" with a dropdown menu set to "Select or search from the list". The "Current activity stage" dropdown is also set to "Select or search from the list" and is highlighted with a blue border. Below this is a search box for "Current activity progress" with the text "Search...". To the right of the search box is a list of activity stages: "Proposed in COP", "Approved in COP (and reflected in final Table 6/SRE Tool)", "Newly Commencing", "Ongoing", "Completed" (highlighted in grey), "Discontinued", and "Not Implemented". At the bottom left, there is a text area labeled "Your note here" with "Add" and "Clear" buttons. An orange "Complete" button is also visible on the left side of the form.

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**"



The screenshot shows the 'Timeline Data Entry' interface. At the top, there is a header with the title 'Timeline Data Entry' and several icons (a list icon, a person icon, an upward arrow, and a refresh icon). Below the header, there is a grey box containing the text: '2021-03-31', 'Nigeria', 'Semi-Annual Status U...', and '(Completed)'. To the right of this box is a vertical stack of four blue circular icons: a left arrow, a plus sign, a calendar icon, and a refresh icon. Below the grey box, there is a label 'Status update reporting date' followed by a red asterisk. Underneath this label is a text input field containing the date '2021-03-31'.

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.

Project Completion Form (Cont.)

SaSR Project Completion Form

Timeline Data Entry

2021-09-30
South Africa
SaSR Semi-Annual Stat...
(Completed)

→

2021-10-25
South Africa
Project Completion
(Open)

Date of completion form update *

2021-10-25

Fiscal year and reporting period of status update *

FY2021 Q4

Final title of the activity in English *

Actual start date of data collection *

yyyy-MM-dd

Actual end date of data collection *

yyyy-MM-dd

Actual sampling methodology *

Select or search from the list

Final sample size *

activity completion *

Link to publicly available survey, surveillance or research activity results (i.e., URL)

Complete

Delete

Print form

Navigation icons: back, add, calendar, refresh

Click Complete



Filtering and Viewing Evaluations – 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.

The screenshot displays the Tracker Capture app interface. On the left, a navigation menu shows a tree structure under 'Registration and Data Entry' and 'Reports', with 'Africa' expanded to show a list of countries including Botswana. The main content area shows a 'Surveys, Surveillance, and Research Tracking' tab with a 'Custom working list' filter overlay. The filter overlay includes the following options:

- Organisation unit scope: Selected, Immediate children, All children
- Enrollment status: All, Completed, Active, Cancelled
- Enrollment date: Start date and End date input fields
- User assignment: No requirement, Any, None, Current, Specific users:
- SaSR Additional project target population- Females: Adult women: [input field]
- SaSR Additional project target population- Females: Females: [input field]

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).

The screenshot displays the DATIM support portal interface. On the left, there is a grid of six blue buttons with white icons and text: 'DATIM Training & Tutorials' (wrench and pencil icon), 'What's New in DATIM' (lightbulb icon), 'PEPFAR Guidance' (document icon), 'Frequently Asked Questions (FAQs)' (speech bubbles icon), 'Data Import and Systems Administration' (circuit board icon), and 'PEPFAR/MoH Data Alignment Activity' (person at computer icon). On the right, there are two white panels. The top panel, titled 'Guidance Highlights', lists links for 'PEPFAR Data Calendar', 'COP Guidance', 'DATIM Data Import & Exchange Resources', and 'MER Indicator Reference Guides'. The bottom panel, titled 'Technical Support', lists links for 'Submit a Request', 'Your Profile', and 'Ticket Status'. A red rectangular box highlights the 'Submit a Request' link, and a large red arrow points to it from the right.



Thank you!