PEPFAR Data for Accountability Transparency Impact Monitoring (DATIM)

PEPFAR Data Approval User Guide
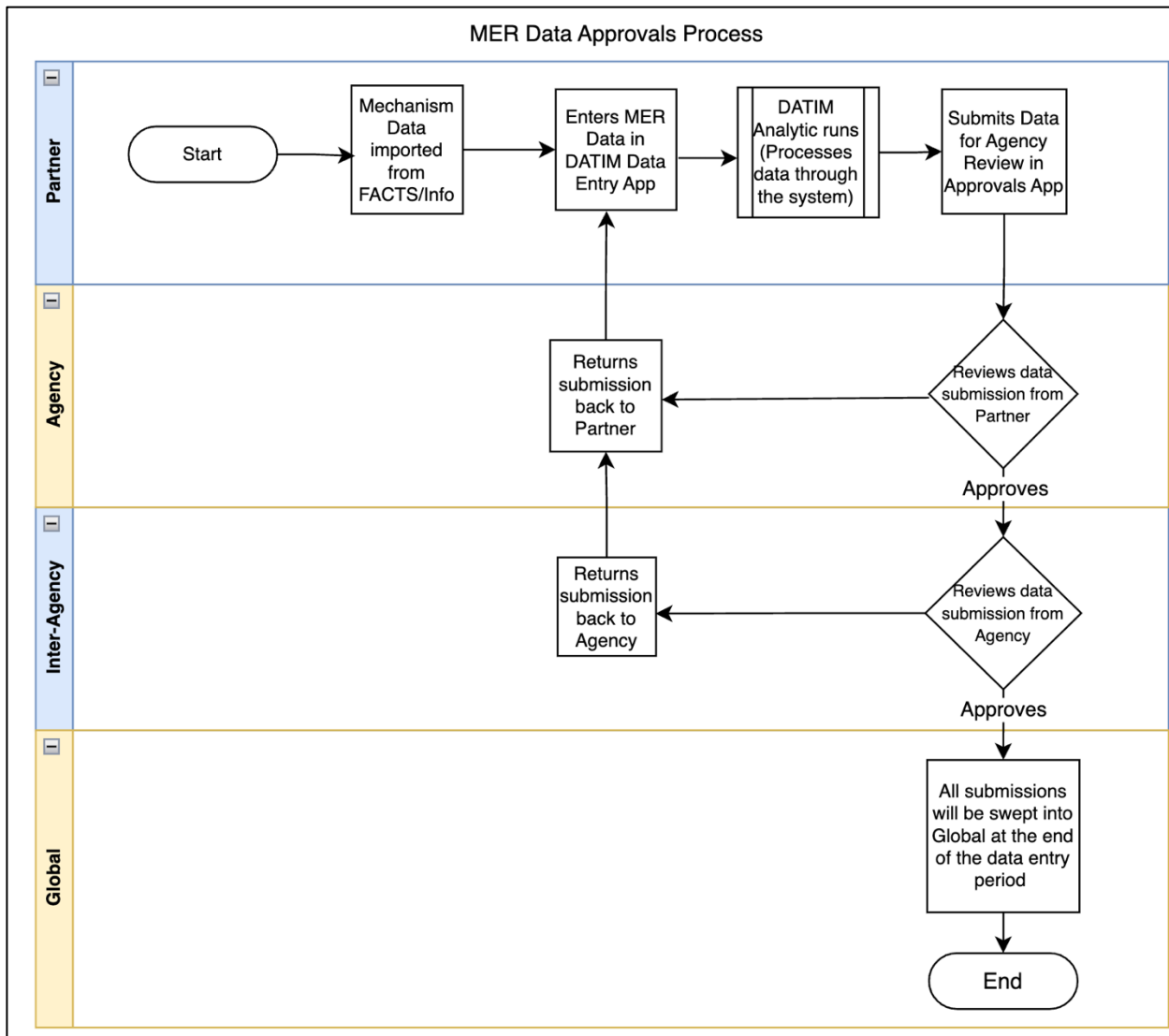
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Background

The Data Approval application is a function within DATIM that facilitates the process of submitting facility, community, subnational, and national level indicator data for review and approval. It begins by entering or importing data in the Data Entry App and then reviewing and submitting it from the Implementing Partner(s) to their in-country Agency points-of-contact, then the Inter-Agency points-of-contact (typically in the PEPFAR Coordinators Office (PCO)), and "up" to the GHSD HQ/Global level. The following guide will be walking through the Approvals process for MER.

For information and guidance pertaining to HRH and ER approval processes, please click here for the Expenditure Reporting Guide

Approvals

The image below illustrates the overall MER workflow process of the Approvals App:

MER Data Approvals Process

Partner	Start → Mechanism Data imported from FACTS/Info → Enters MER Data in DATIM Data Entry App → DATIM Analytic runs (Processes data through the system) → Submits Data for Agency Review in Approvals App
Agency	Returns submission back to Partner ← Reviews data submission from Partner — Approves
Inter-Agency	Returns submission back to Agency ← Reviews data submission from Agency — Approves
Global	All submissions will be swept into Global at the end of the data entry period → End

Partner users can view, enter, and edit site-level MER data associated with their mechanism(s). In addition, Implementing Partners may also use DATIM's analytic and visualization tools to review data and/or run reports associated with their entered data. Implementing Partner users also can "submit" data to their respective Agency Representatives for review and approval in DATIM.

User examples: IP M&E Staff, Data Clerks, Country Director and/or Senior Leadership

Agency users are responsible for "accepting" data submissions from Implementing Partners, reviewing these submissions, and then "submitting" data up to in-country Inter-Agency users. While they can accept and submit any Implementing Partner data associated with their "home" agency (i.e., USAID, CDC, DoD, Peace Corps, etc.), it is important to establish and communicate clear approval workflow protocols outside of DATIM to minimize confusion and ensure accountability within and

across teams. Typically, country teams assign IP data approval duties to relevant AORs/CORs or in-country leads during planning and reporting cycles.

User examples: Agency AORs/CORs, SI/M&E Staff, in-country Agency Lead(s)

Inter-Agency users "accept" Agency submissions, review data that will aggregate to the inter-agency technical area totals, and potentially deduplicate data across partners/agencies. Once the inter-agency reviews have been completed, the PEPFAR Coordination Office and/or SI Liaison then "submits" these site-level data to OGAC HQ for final review.
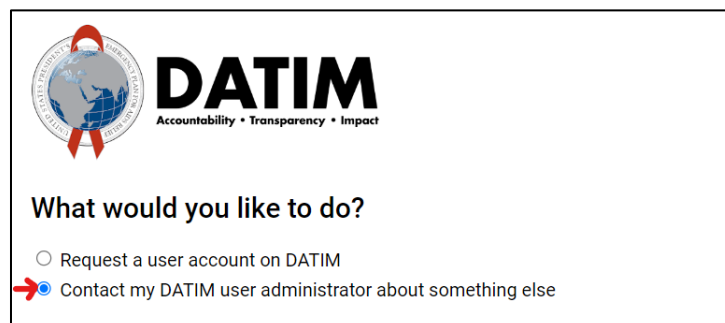
Please note that DATIM users with a formal agency role (i.e., as an Activity Manager) will not receive direct access to the inter-agency dataset; to view this data, your DATIM User Administrator will need to create "read-only" inter-agency accounts for all those associated with the inter-agency review process.

Partners

Reviewing and Submitting Data (Partners)

The Approvals app allows DATIM users to submit their data for approval by the Agency Manager, Inter Agency and ultimately, OGAC Headquarters/Global.

ACCESS: Only Partner accounts with the "Approvals: Submit Data" User Role (a.k.a. "Data Action) can access the Approvals App and submit data for their mechanisms. To request this permission, please contact your User Administrator using the form on https://register.datim.org/.

1. Once you have selected Approvals, chose your desired parameters from the 3 dropdown options:

a) Select "Workflow". As an Implementing Partner, the data you intend to submit will most likely be "MER Results" data.
b) Select "Period"
c) Select "Operating Unit".

2. Click "Go" - From here, select the tab that corresponds to the action you would like to take:
   - **View:** This tab displays all your mechanisms, regardless of their status or whether the mechanisms appear under Submit or Recall tabs.
   - **Submit:** This tab displays mechanisms with data that have not yet been submitted for review and approval. (These may be submitted in future steps).
   - **Recall:** This tab displays mechanisms with data that have been submitted to the Agency level for review. They can only be recalled if the Agency user *has not yet accepted* your submission.
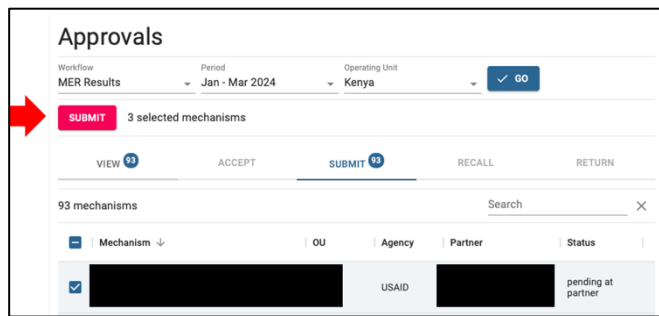
Please note: you can select multiple mechanisms, but only mechanisms with the same status can be selected.

3. Submit Data:

- Click the "SUBMIT" column tab,
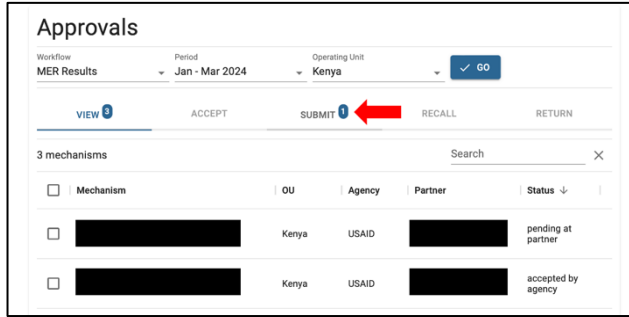
- Select the applicable mechanism(s),
- Then click the red "SUBMIT" button

- Scroll down to review data by selecting the applicable dataset(s). Please keep in mind:

  - If you have multiple mechanisms selected, then the data will be aggregated if entered for the same MER Indicators.
  - Data will only appear after the DATIM Analytics process has been completed. This means it could take 20-30 minutes before recently entered data will be visible in the Approvals App.

- Once ready, click the red "SUBMIT MECHANISM" button:

4. **Recall Mechanism:** If your data has been submitted but additional edits are needed, click the **Recall Mechanism** button. This will bring the mechanism(s) back down from "submitted by partner" to "pending at partner".
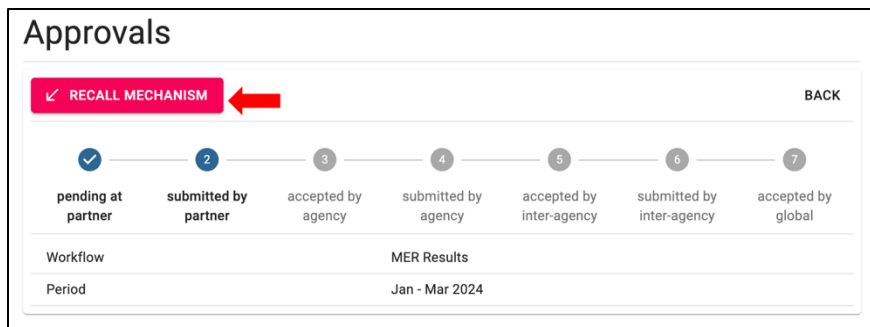
Agency Users

Reviewing, Accepting and Submitting Data (Agency Approvers Level)

This section describes accessing the PEPFAR DATIM Approval App at the **_Agency level_**.

Once MER data has been submitted by an Implementing Partner, the Agency user can review and approve the submitted mechanism data.

> **ACCESS**:
>
> - Only Agency accounts with the "Approvals: Accept Data" User Role (a.k.a. "Data Action) can access the Approvals App and review and accept data that has been submitted by Partners using the Approvals App.
> - Only Agency accounts with the "Approvals: Submit Data" User Role (a.k.a. "Data Action) can access the Approvals App and submit data for their in-country Partner mechanisms.
> - To request this permission, please contact your User Administrator using the form on https://register.datim.org/.

1. Once you have selected Approvals, chose your desired parameters from the 3 dropdown options:

> - Select "Workflow". As an Agency User, the data you intend to review/submit will most likely be "MER Results" data.
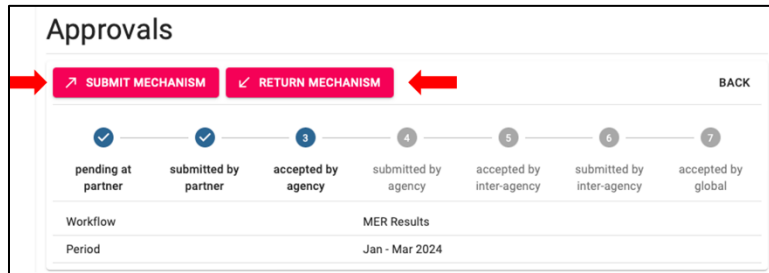> - Select "Period"
> - Select Operating Unit.

2. From here, five tabs display with all applicable mechanisms that have been submitted by Ips for agency review and approval.
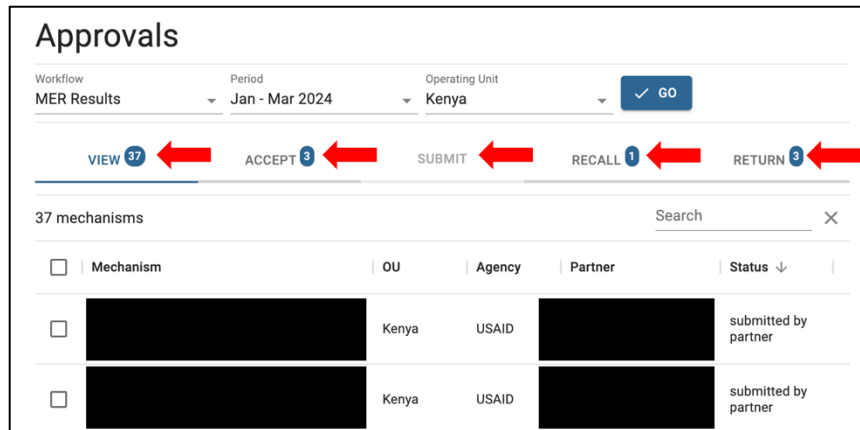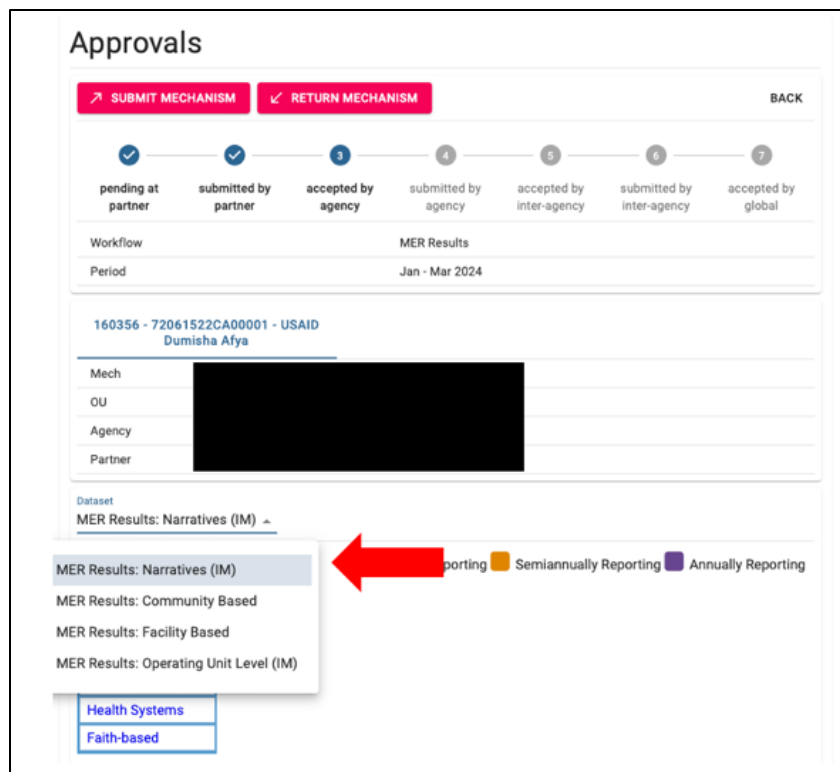

- **View:** This tab displays all available mechanisms, regardless of their status or whether the mechanism appear under Accept, Submit, Recall or Return tabs.
- **Accept:** This tab only displays the mechanisms that have been submitted from the Implementing Partner for your review and approval. Accepting a mechanism in this tab moves the mechanism to "accepted by agency" status.
- **Submit:** This tab displays the mechanisms that have been submitted by the Implementing Partner and have been accepted and reviewed by the Agency user (or any other Agency users from the same Operating Unit and Agency). Any mechanisms in this tab are ready for submission to the Inter-Agency level or need to be returned to the Implementing Partner. Once submitted, the mechanism is moved to "submitted by agency" status for review by the Inter-Agency user.
- **Recall:** This tab displays the mechanisms that have been submitted by you (or any other Agency users from the same Operating Unit and Agency). Recalling a submitted mechanism in this tab moves the mechanism to "accepted by agency" status
- **Return:** This tab displays the mechanisms with "submitted by partner" status that can be returned to the Implementing Partner.

3. Select the tab that corresponds to the action you want to take (to view, accept, submit, recall, or return data).

Please note that within each of the displayed tabs, you can select multiple mechanisms and execute applicable actions by clicking the button on the tab. All available mechanisms with the same status can be selected by checking the box at the top next to the word "Mechanism".

1. **Accept:** To review and then accept Partner mechanism data, scroll down and select the applicable dataset(s).
   - While reviewing, please keep in mind:
   - If you have multiple mechanisms selected, then the data will be aggregated if entered for the same MER Indicators.
   - Data will only appear after the DATIM Analytics process has been completed. This means it could take 20-30 minutes before recently entered data will be visible in the Approvals App.

2. **Submit/Return Mechanism buttons:** Once the data has been accepted and is ready for submission, you can click the **Submit Mechanism** button. If the data is reviewed and edits are required by the Implementing Partner, click the **Return Mechanism** button. *(See the image below for a highlighted example)*
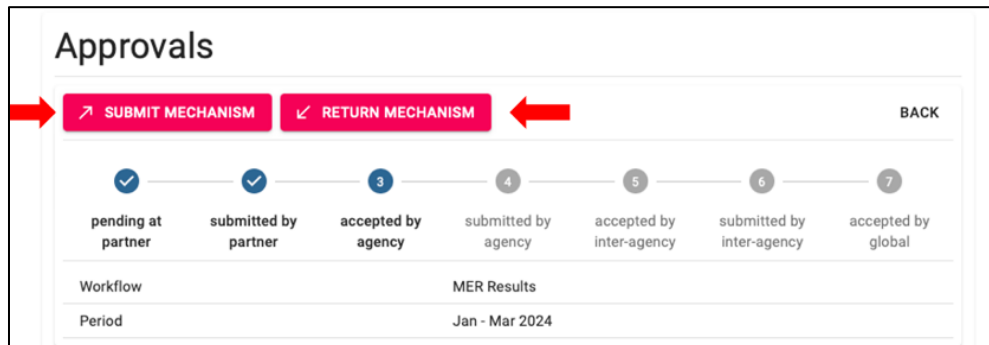
3. **Recall button:** If a mechanism is submitted and the data requires additional edits, click the **Recall** button to "unsubmit" the data.
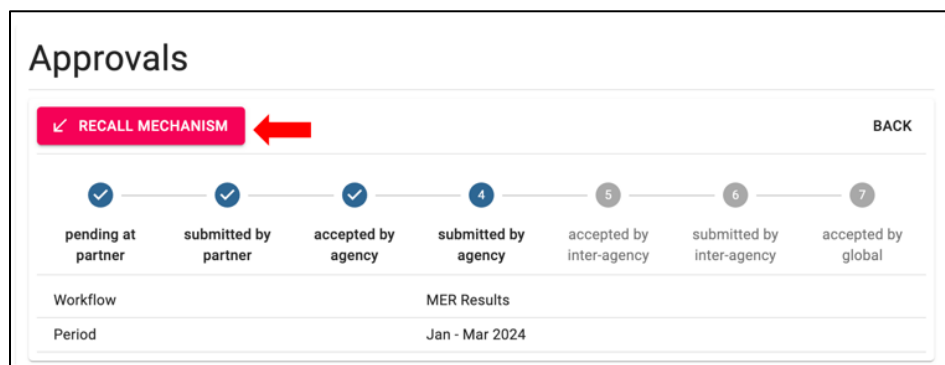
Interagency Users

Reviewing, Accepting and Submitting Data (Inter-Agency Level)

This section describes accessing the PEPFAR DATIM Approval App at the ***Inter-Agency Level***. Once data has been submitted by the Agency level user, the Inter-Agency Level user can review and approve the submitted mechanism data.

ACCESS:

- Only Inter-Agency accounts with the "Approvals: Accept Data" User Role (a.k.a. "Data Action) can access the Approvals App and review and accept data that has been submitted by OU Agency users using the Approvals App.

- Only Inter-Agency accounts with the "Approvals: Submit Data" User Role (a.k.a. "Data Action) can access the Approvals App and submit data for their in-country mechanisms.
- To request this permission, please contact your User Administrator using the form on https://register.datim.org/.

1. Once you have selected Approvals, chose your desired parameters from the 3 dropdown options:

   - Select "Workflow".
   - Select "Period"
   - Select Operating Unit.

2. Click "Go". From here, five tabs display with all applicable mechanisms that have been submitted by the Agency Manager for Inter-agency review and approval.
   - **View:** This tab displays all available mechanisms, regardless of their status or whether the mechanism appear under Accept, Submit, Recall or Return tabs.
   - **Accept:** This tab displays the mechanisms that have been submitted from Agency Users for your review and approval. Accepting a mechanism in this tab moves the mechanism to "accepted by inter-agency" status.
   - **Submit:** This tab displays the mechanisms that are ready for submission to the Global level or need to be returned to the Agency level (or any other Inter-Agency users from the same Operating Unit). Recalling a mechanism will move it back to this column. Submitting mechanisms from this tab will change their status to "submitted by inter-agency".
   - **Recall:** This tab displays the mechanisms that have been submitted by you (or any other Inter-Agency users from the same Operating Unit). Recalling a submitted mechanism in this tab will change its status back to "accepted by inter-agency" status.
   - **Return:** This tab displays the mechanisms with "submitted by agency" status that can be returned to the Implementing Partner

3. Select the tab that corresponds to the action you want to take (to view, accept, submit, recall, or return data).

***Please note** that within each of the displayed tabs, you can select multiple mechanisms and execute applicable actions by clicking the button on the tab. All available mechanisms with the same status can be selected by checking the box at the top next to the word "Mechanism".*

1. **Accept:** To review and then accept Partner mechanism data, scroll down and select the applicable dataset(s). While reviewing, please keep in mind:
   a) If you have multiple mechanisms selected, then the data will be aggregated if entered for the same MER Indicators.
   b) Data will only appear after the DATIM Analytics process has been completed. This means it could take 20-30 minutes before recently entered data will be visible in the Approvals App.

2. Once a desired mechanism(s) is selected from one of the tabs, click on the applicable action (highlighted above via the red arrows). The data set form containing the data to be accepted, submitted, or recalled will display allowing you to execute the desired action.

3. **Return Mechanism(s)** buttons: If the data is reviewed and edits are required by the Agency user, click the **Return Mechanism** button. (See the image below for a highlighted example)
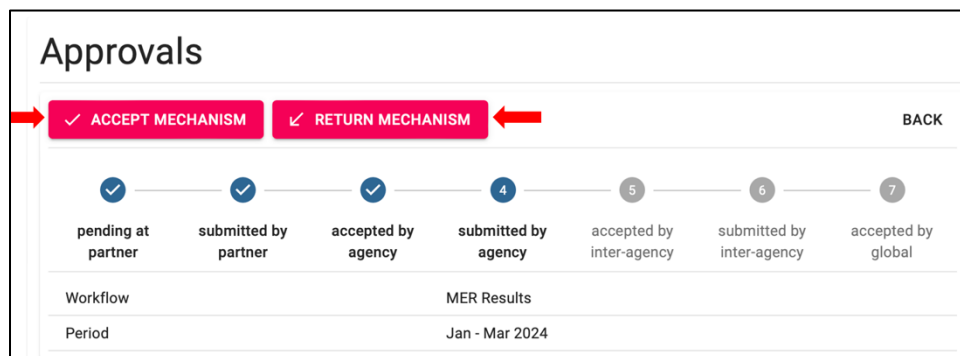
4. **Submit/Return** buttons: Once the data has been accepted and is ready for submission to the Global level, click the **Submit Mechanism** button. If the data is reviewed and additional edits are required by the Agency user, click the **Return Mechanism**.
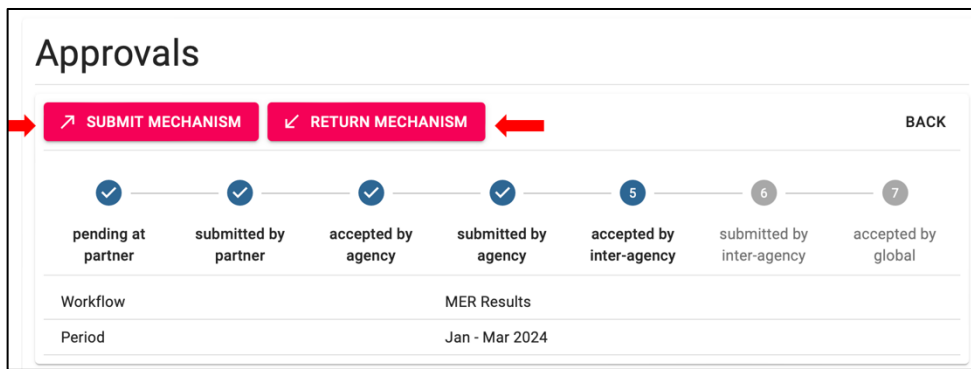
5. **Recall Mechanism button:** If a mechanism status is "submitted by inter-agency" to the Global Level, and the data requires additional edits, click the **Recall Mechanism** button to "unsubmit" the data.