

# PEPFAR Data for Accountability Transparency Impact Monitoring (DATIM)

PEPFAR Data Approval User Guide

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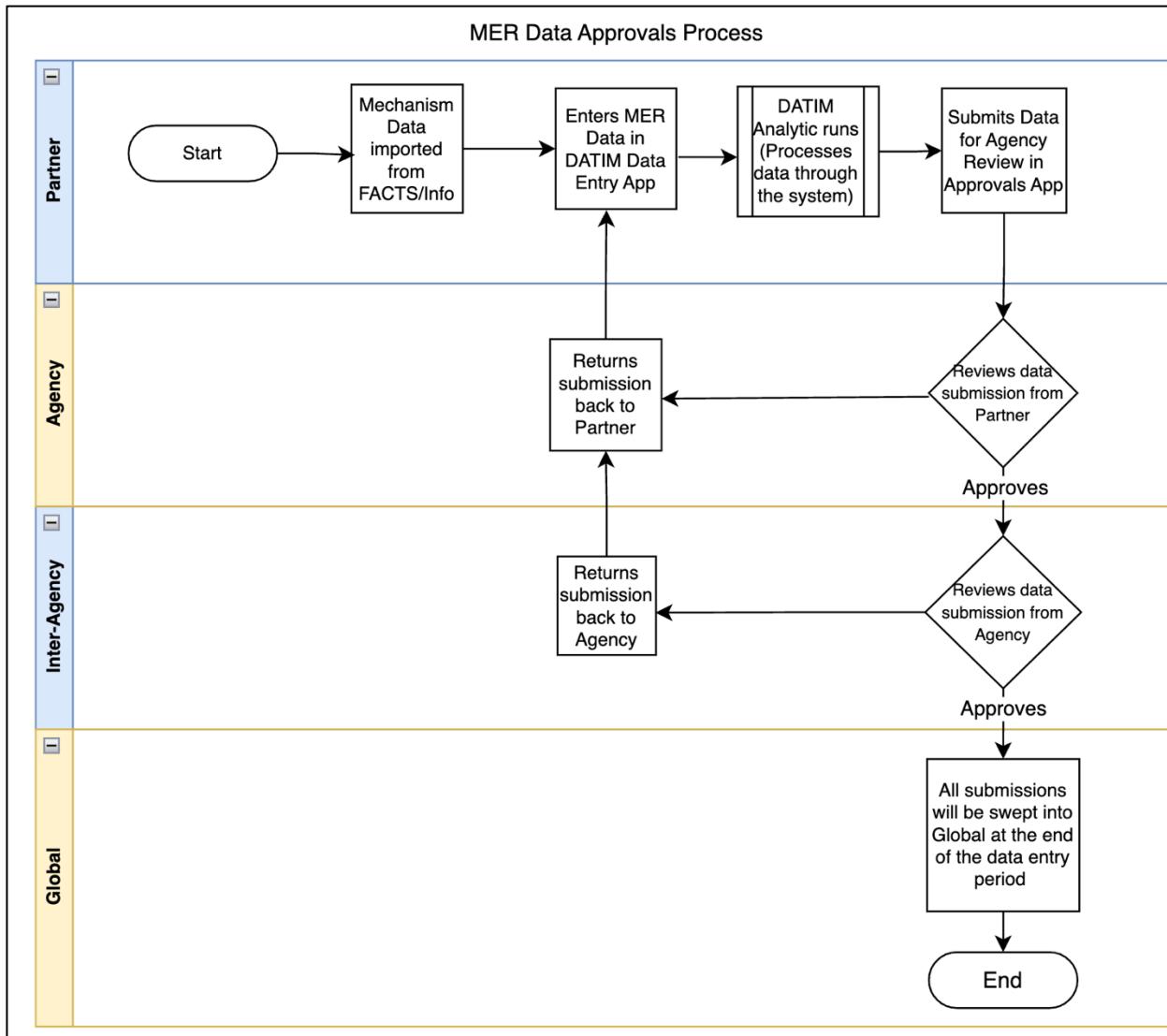
## Background

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](#)



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



**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/>.



**DATIM**  
Accountability • Transparency • Impact

What would you like to do?

Request a user account on DATIM  
→  Contact my DATIM user administrator about something else

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

**Approvals**

Workflow MER Results	Period Jan - Mar 2024	Operating Unit Kenya	<input checked="" type="checkbox"/> GO
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- Select “Workflow”. As an Implementing Partner, the data you intend to submit will most likely be “MER Results” data.
- Select “Period”
- Select “Operating Unit”.

**Approvals**

Workflow MER Results	Period Jan - Mar 2024	Operating Unit Kenya	<input checked="" type="checkbox"/> GO										
<div style="display: flex; justify-content: space-around;"> <span><a href="#">VIEW 3</a></span> <span><a href="#">ACCEPT</a></span> <span><a href="#">SUBMIT 1</a></span> <span><a href="#">RECALL 1</a></span> <span><a href="#">RETURN</a></span> </div>													
3 mechanisms		<input type="text"/> Search <span>X</span>											
<table border="1"> <thead> <tr> <th><input type="checkbox"/> Mechanism ↑</th> <th>OU</th> <th>Agency</th> <th>Partner</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> [REDACTED]</td> <td>Kenya</td> <td>HHS/CDC</td> <td>[REDACTED]</td> <td>submitted by partner</td> </tr> </tbody> </table>				<input type="checkbox"/> Mechanism ↑	OU	Agency	Partner	Status	<input type="checkbox"/> [REDACTED]	Kenya	HHS/CDC	[REDACTED]	submitted by partner
<input type="checkbox"/> Mechanism ↑	OU	Agency	Partner	Status									
<input type="checkbox"/> [REDACTED]	Kenya	HHS/CDC	[REDACTED]	submitted by partner									

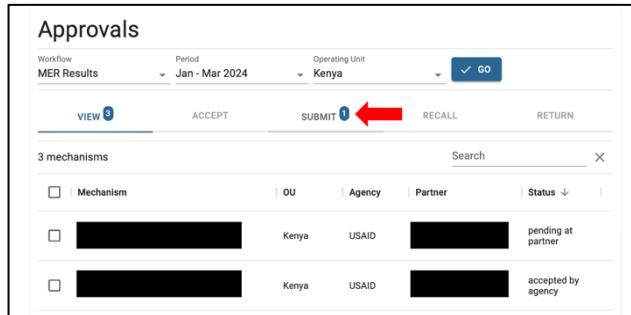
- Click “Go” - From here, select the tab that corresponds to the action you would like to take:

- 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.

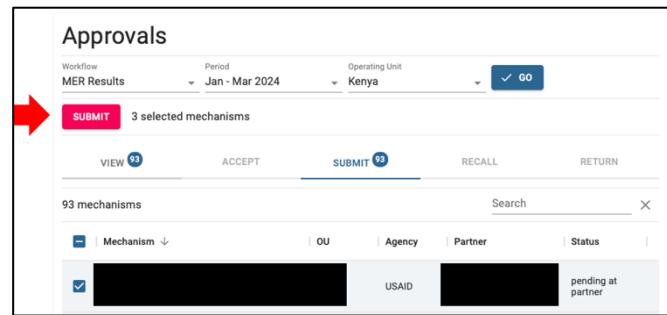
- Submit Data:

- Click the “SUBMIT” column tab,



The screenshot shows the 'Approvals' page. At the top, there are dropdown menus for 'Workflow' (MER Results), 'Period' (Jan - Mar 2024), and 'Operating Unit' (Kenya). Below these are buttons for 'VIEW 93', 'ACCEPT', 'SUBMIT 1' (highlighted with a red arrow), 'RECALL', and 'RETURN'. A table below shows '3 mechanisms' with columns for Mechanism, OU, Agency, Partner, and Status. The first row shows 'pending at partner'. The second and third rows are redacted.

- Select the applicable mechanism(s),
- Then click the red “SUBMIT” button



The screenshot shows the 'Approvals' page after selecting mechanisms. The 'SUBMIT' button is highlighted with a red arrow. The table now shows '93 mechanisms' with a selected row highlighted. The selected row shows 'pending at partner'.

- 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.

**Approvals**

**SUBMIT MECHANISM** **BACK**

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

Workflow MER Results  
Period Jan - Mar 2024

160357 - 72061521CA00020 - USAID AMPATH Uzima

Mech [REDACTED]  
OU [REDACTED]  
Agency [REDACTED]  
Partner [REDACTED]

Dataset MER Results: Narratives (IM) ▾

MER Results: Narratives (IM)  Quarterly Reporting  Semiannually Reporting  Annually Reporting  
MER Results: Community Based  
MER Results: Facility Based  
MER Results: Operating Unit Level (IM)

Health Systems  
Faith-based

- Once ready, click the red “SUBMIT MECHANISM” button:

**Approvals**

**SUBMIT MECHANISM**  **BACK**

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

Workflow MER Results  
Period Jan - Mar 2024

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/>.

- 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.

The screenshot shows the 'Approvals' page with the following interface elements:

- Workflow:** MER Results
- Period:** Jan - Mar 2024
- Operating Unit:** Kenya
- GO** button
- Tabs:** VIEW (37), ACCEPT (3), SUBMIT (0), RECALL (1), RETURN (3)
- Search:** Search bar and X button
- Table Headers:** Mechanism, OU, Agency, Partner, Status
- Table Data:** Two rows of mechanisms. Each row includes a checkbox, a redacted mechanism name, Kenya, USAID, and a redacted partner name. The status for both rows is 'submitted by partner'.

- **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".

Approvals

**SUBMIT MECHANISM** **RETURN MECHANISM** **BACK**

pending at partner submitted by partner accepted by agency submitted by agency accepted by inter-agency submitted by inter-agency accepted by global

Workflow MER Results

Period Jan - Mar 2024

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.

Approvals

**SUBMIT MECHANISM** **RETURN MECHANISM** **BACK**

pending at partner submitted by partner accepted by agency submitted by agency accepted by inter-agency submitted by inter-agency accepted by global

Workflow MER Results

Period Jan - Mar 2024

160356 - 72061522CA00001 - USAID  
Dumisha Afya

Mech [REDACTED]

OU [REDACTED]

Agency [REDACTED]

Partner [REDACTED]

Dataset

MER Results: Narratives (IM) **Reporting** **Semiannually Reporting** **Annually Reporting**

MER Results: Narratives (IM)

MER Results: Community Based

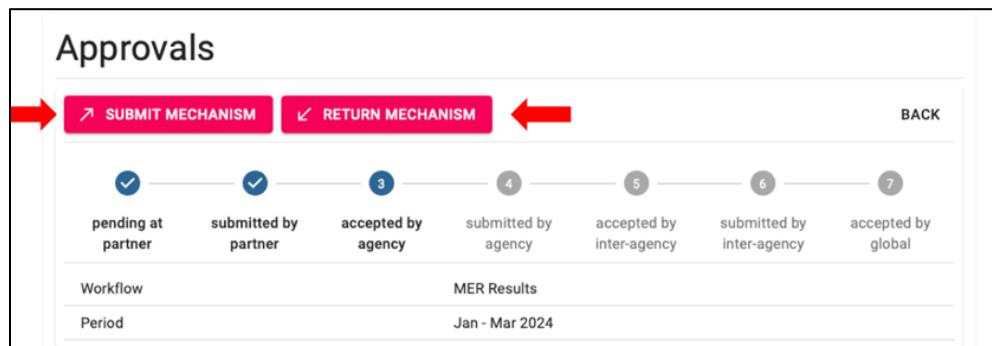
MER Results: Facility Based

MER Results: Operating Unit Level (IM)

Health Systems

Faith-based

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)



The screenshot shows the 'Approvals' screen. At the top, there are two buttons: 'SUBMIT MECHANISM' and 'RETURN MECHANISM', both highlighted with red arrows. To the right of these buttons is a 'BACK' link. Below the buttons is a horizontal timeline with seven steps: 1. pending at partner (checkmark), 2. submitted by partner (checkmark), 3. accepted by agency (circle with '3'), 4. submitted by agency (circle with '4'), 5. accepted by inter-agency (circle with '5'), 6. submitted by inter-agency (circle with '6'), and 7. accepted by global (circle with '7'). Below the timeline, there are two sections: 'Workflow' and 'MER Results'. The 'Workflow' section shows 'Period' as 'Jan - Mar 2024'.

3. **Recall button:** If a mechanism is submitted and the data requires additional edits, click the **Recall** button to “unsubmit” the data.



The screenshot shows the 'Approvals' screen. The 'RECALL MECHANISM' button is highlighted with a red arrow. The rest of the interface is identical to the previous screenshot, including the timeline, 'Workflow' section, and 'MER Results' section.

## 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:

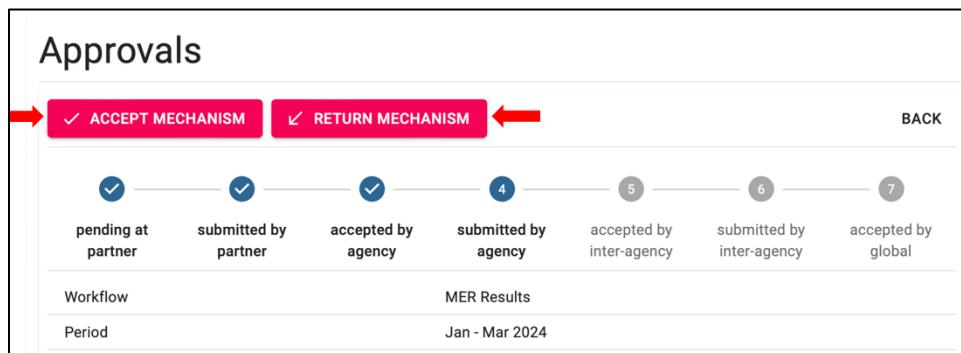
- Only Inter-Agency accounts with the “Approvals: Accept Data” User Role (a.k.a. “Data Action”) can access the Approvals App and review and accept data that has been submitted by OU Agency users using the Approvals App.

- 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)



The screenshot shows the 'Approvals' screen. At the top, there are two buttons: 'ACCEPT MECHANISM' and 'RETURN MECHANISM', both highlighted with red arrows. To the right of these buttons is a 'BACK' link. Below the buttons is a horizontal progress bar with seven steps, each represented by a circle with a number: 1, 2, 3, 4, 5, 6, and 7. The first four steps (1, 2, 3, 4) have a checkmark icon above them, while steps 5, 6, and 7 are empty circles. Below the progress bar, the text 'Workflow' is followed by 'MER Results' and 'Period' (Jan - Mar 2024).

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**.

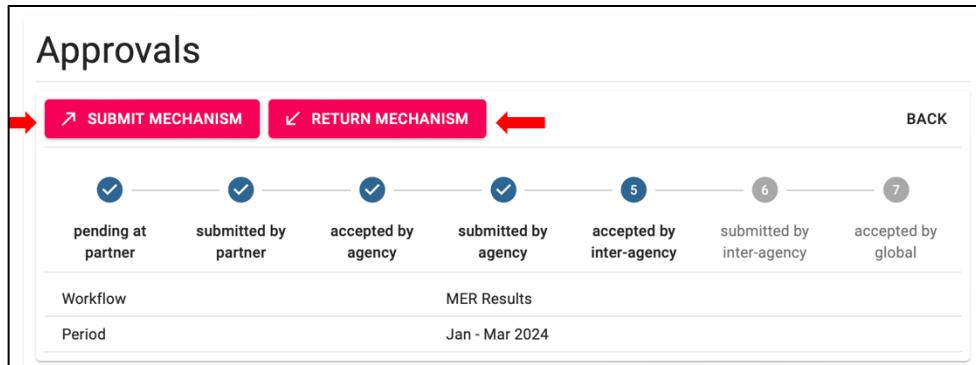
Approvals

**SUBMIT MECHANISM** **RETURN MECHANISM** **BACK**

pending at partner submitted by partner accepted by agency submitted by agency accepted by inter-agency submitted by inter-agency accepted by global

Workflow MER Results

Period Jan - Mar 2024



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.