

Evaluation SOP (ESOP) Dashboards and TEI Reports User Guide

There are two ways to generate an ESOP Report in DATIM: From the SRE Dashboard or through the TEI Reports.

ESOP Dashboards in DATIM

There are several custom dashboards to examine new and ongoing ESOP activities throughout the activity's lifecycle. You will also be able to view information about recently completed adherence checklists.

Below are detailed instructions on how to access ESOP Dashboards:

1. Login to DATIM
2. Navigate to the 'SRE Dashboard' in the ribbon on the top



#	Status update reporting date	Enrollment Report Date	Incident date	Organisation unit	ESOP FY RP planning form is being created	ESOP-SaSR TEI UID	ESOP USG agency funding evaluation	ESOP Evaluation title	ESOP Evaluation questions	ESOP Evaluation implementing mechanism	ESOP Mechanism ID of IM responsible	ESOP Contract or cooperative agreement	ESOP Primary technical area	ESOP Evaluation type, primary	ESOP Evaluation progress	ESOP Expected budget of the entire evaluation	ESOP Planned start date of data collection	ESOP Planned end date of data collection	ESOP Evaluative complete date
									This pilot study includes a pre and post test										

3. Here is a list of the ESOP analytic reports on the SRE Dashboard:
 - a. **ESOP Enrollments FY22** – All enrollments entered during the FY22 data entry period
 - b. **ESOP Planning Updates FY22** – All Planning Form updates with “FY2022 Q2 or Q4” entered for the ‘ESOP FY RP planning form is being created’ data element
 - c. **ESOP Semi-Annual Status Updates FY22** - All Semi-Annual Status updates with “FY2022 Q2 or Q4” entered for the ‘ESOP FY and reporting period of status update’ data element
 - d. **ESOP Adherence Checklist and ESOP Adherence to Standards FY22** – All Adherence Checklists with “FY2022 Q2 or Q4” entered for the ‘ESOP FY and Reporting Period Status update_adhere’ data element
 - e. **Completed Evaluations by Agency FY22 (Q2-Q4)** – Count of each type of evaluation by agency that were entered as ‘completed’ in the Semi-Annual Status Update for FY22 Q2 or FY22 Q4

- f. **F Data Call Ongoing Evaluations by Type by Agency FY22** – All Evaluations entered as Confirmed in COP, Newly Commencing, or Ongoing in the Semi-Annual Status Update for FY22 Q2 or FY22 Q4
- g. **ESOP Deactivated by FY** – All evaluations that were entered as deactivated in the Enrollment Form
- h. **ESOP Completed by FY** – All evaluations that have a completed Adherence Checklist (this means that the Adherence Checklist has been fully filled out and the ‘Complete’ button at the bottom of the data entry screen has been clicked)
- i. **ESOP Enrollments FY21** – same as above but for FY21
- j. **ESOP Planning Updates FY21** – same as above but for FY21
- k. **ESOP Semi-Annual Status Updates FY21** – same as above but for FY21
- l. **ESOP Adherence Checklist and ESOP Adherence to Standards FY21** – same as above but for FY21
- m. **Completed Evaluations by Agency FY21 (Q2-Q4)** – same as above but for FY21
- n. **F Data Call Ongoing Evaluations by Type by Agency FY21** – same as above but for FY21

ESOP TEI Report in DATIM

1. Navigate to the ‘Reports’ App by clicking on the 9 dots on the top right of your DATIM homepage

The screenshot shows the DATIM Dashboard interface. At the top, there is a navigation bar with the title 'DATIM - Dashboard' and a user profile 'KK'. Below the navigation bar, there are several dashboard tabs: 'COP19/FY20 1. Clinical Cascade Dashboard', 'COP19/FY20 2. Testing Dashboard', 'COP19/FY20 3. Treatment Dashboard', and 'COP19/FY20 4. Adherence Dashboard'. The 'COP19/FY20 1. Clinical Cascade Dashboard' is currently selected. On the right side of the dashboard, there is a 'Search apps' section with a grid of application icons. The 'Reports' icon, which is a red circle with a white document icon, is highlighted with a red rectangular box. Other icons in the grid include Pivot Table, Event Reports, Event Visualizer, Tracker Capture, Dashboard, Browser Cache Cleaner, Capture, Data Visualizer, Interpretations, Maps, Menu Management, ERB, HRH, Digital Health, and Genie. The main content area of the dashboard displays a welcome message and a note about data updates.

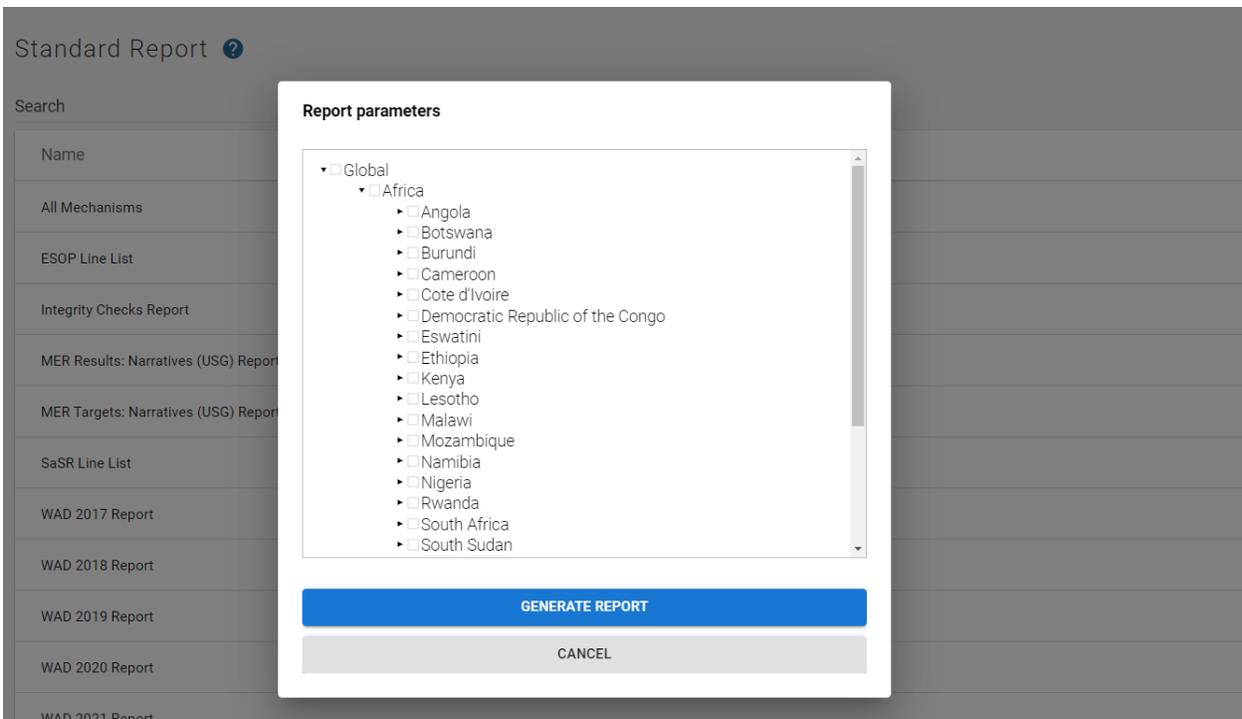
2. Click 'Standard Report'

The screenshot shows the 'DATIM - Reports' dashboard. The 'Standard Report' card is highlighted with a red border. It contains the following text: 'Standard Report', a bar chart icon, 'View and add reports based on the JasperReports library. These can be based on report tables and can be designed in iReport.', and a 'View Reports' link. Other cards include 'Data Set Report', 'Reporting Rate Summary', 'Resource', and 'Org unit distribution report', each with a brief description and a 'Get Report' link.

3. Find and click 'ESOP Line List'

The screenshot shows the 'Standard Report' page. A sidebar on the left lists report categories: Standard Report, Data Set Report, Reporting Rate Summary, Resource, and Org unit distribution report. The main content area is titled 'Standard Report' and features a search bar. Below the search bar is a list of reports with a red border around the 'ESOP Line List' entry. The list includes: All Mechanisms, ESOP Line List, Integrity Checks Report, MER Results: Narratives (USG) Report, MER Targets: Narratives (USG) Report, SaSR Line List, WAD 2017 Report, WAD 2018 Report, WAD 2019 Report, WAD 2020 Report, and WAD 2021 Report.

4. Select your OU and click 'Generate Report' – use arrows to expand and collapse geographic areas. Note that SRE activities are reported at the OU level



5. The report will populate in the browser. Columns have different color headings to indicate which program stage that information is entered.
 - a. Blue headers are from the Enrollment Form
 - b. Red headers are from the Planning Form
 - c. Green headers are from the Semi-Annual Status Update Form
 - d. Purple headers are from the Adherence Checklist Form
6. This report can also be downloaded by clicking the 'Download CSV' button on the top right of the page

TEI Report [Download CSV](#)

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ESOP-SaSR TEI UID	Organisation Unit	ESOP Is this study deactivated	ESOP If deactivated provide rationale	ESOP USG agency funding evaluation	ESOP First COP year when evaluation funding is approved	Enrollment Date	ESOP OU multicountry	ESOP Expect budget of the e evaluation
cokyunvudxc	Uganda			HHS/CDC		2020-06-04	false	0
i8U10xY5k0W	Vietnam			HHS/CDC	FY2018	2020-05-26	false	630000
tcvzPKXrqA1	Uganda			HHS/CDC		2020-06-04	false	0

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Using the Downloaded ESOP TEI Report

1. Navigating the ESOP TEI Report. Here is where to find the data for each form:
 - a. Enrollment Form Columns – A to CP
 - b. Planning Form Columns – CQ to CZ
 - c. Semi-Annual Status Update Form Columns – DA to DG
 - d. Adherence Checklist Form Columns – DH to EU
2. Add a filter to Row 1

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
1	ESOP-Sasi Organisati	ESOP Is th	ESOP If de	ESOP USG	ESOP First	Enrollm	ESOP OU r	ESOP Expi	ESOP Cont	ESOP Mec	ESOP Awa	ESOP Eval	ESOP Eval	ESOP Eval	ESOP Eval	ESOP Loca	ESOP Loca	ESOP Mec	ESOP Mec	ESOP Awa	ESOP Eval					
2	QVchIV57	Namibia		USAID			#####	FALSE		13752	MEASURE	MEASURE	EVALUATI	FALSE	TRUE											
3	Agg67nxk	Guyana		HHS/CDC	FY2016	#####	FALSE	0	TRUE	100054	NUZGGHO	Guyana Cj	Caribbean	8.57E+08	TRUE	TRUE										
4	hNkxUwA9	Mozambique		USAID			#####	FALSE	390000	FALSE	7328	MEASURE	MEASURE													
5	lBU1DwY8	Vietnam		HHS/CDC	FY2018	#####	FALSE	630000	TRUE	82033	GH001016	Vietnam / Vietnam	f	5.55E+08	FALSE	FALSE										
6	lS9lBk6d	Nigeria		DOD	FY2021	#####	FALSE	57420	TRUE	70255	W81XWHI	Henry Jcd	Henry M.	1.45E+08	FALSE	FALSE										
7	ezZc6Y08	Vietnam		HHS/CDC	FY2019	#####	FALSE	9516	TRUE	18271	HCMC DOI	HCMC DOI	5.55E+08	FALSE	FALSE											
8	MggA0qv	Angola		USAID			#####	TRUE	125000	TRUE		LINKAGES			FALSE	FALSE										
9	Kx0COLIT	Central Asia Region		USAID			#####	TRUE			17067	HIV	TBD		FALSE	FALSE										
10	QvTACjK	Vietnam		HHS/CDC	FY2014	#####	FALSE	0		9976	GH001016	Vietnam / VIETNAM	5.55E+08	TRUE	TRUE	18271	0	HCMC DOI	HCMC DOH							
11	XmXQIWA	Kenya		USAID	FY2015	#####	TRUE	195279	TRUE		AID-OAA-	OPTIONS	FH360	FALSE	FALSE											
12	TulaPruU	South Afrh	FALSE	USAID	FY2018	#####	FALSE	1950000	TRUE	18594	AID0AAA-	Project SC	Populatio	71050090	FALSE	FALSE										
13	lPmfrdRO	Cote d'Ivoire		HHS/HRSA	FY2017	#####	FALSE	50000	TRUE	18639	CoAg	JHPiEGO	sites supp	FALSE	FALSE											
14	lTmfrdQH	South Africa		USAID			#####	FALSE	250000	FALSE	70308	WITS RHI	WITS RHI	0	TRUE											
15	lB8c447	Lesotho		USAID			#####	FALSE				EQUIP-Let	N/A													
16	Om8s9mV	Vietnam		HHS/CDC	FY2018	#####	FALSE	0		82033	GH002210	VAAC	Vietnam /	5.55E+08			13007	GH002065	Vietnam Vietnam	National Tuberculosis Control P			9974	GH002061	Ho Chi Mi	Ho Chi Minh C
17	lEHczVU	Kenya		USAID			#####	TRUE				OPTIONS	AVENIR HEALTH	FALSE	FALSE											
18	ZQzK9G0d	Mozambique		HHS/CDC			#####	FALSE	400000	FALSE		ASPIRES	FH360	FALSE	FALSE											
19	luyhYU7V	Asia Region		HHS/CDC			#####	TRUE	45000			SUZGGHO0994-03		FALSE	FALSE											
20	l937p0dA	Namibia		HHS/CDC	FY2019	#####	FALSE	210000	TRUE	16771	GH001410	Namibia A	Regents o	94878337	FALSE	TRUE										

3. Filtering for your OU – Navigate to Column B and select your OU(s) from the drop down

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
1	ESOP-Sasi Organisati	Kenya		USAID			#####	FALSE		13752	MEASURE	MEASURE	EVALUATI	FALSE	TRUE											
11	XmXQIWA	Kenya		USAID	FY2015	#####	TRUE	195279	TRUE		AID-OAA-	OPTIONS	FH360	FALSE	FALSE											
17	lEHczVU	Kenya		USAID			#####	TRUE				OPTIONS	AVENIR HEALTH	FALSE	FALSE											

4. Filtering for your Agency – Navigate to Column E and select your Agency from the drop down

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC			
1	ESOP-S-	Organiz-	ESOP H-	ESOP H-	ESOP F-	Enrollm-	ESOP O-	ESOP C-	ESOP M-	ESOP A-	ESOP E-	ESOP E-	ESOP E-	ESOP L-	ESOP L-	ESOP M-	ESOP A-	ESOP E-	ESOP E-	ESOP E-	ESOP L-	ESOP M-	ESOP A-	ESOP E-	ESOP E-	ESOP L-	ESOP M-	ESOP A-	ESOP E-	ESOP E-	ESOP E-	
2	OV0VHV	Sort A to Z				#####	FALSE		13792																							
3	Ag8pZr	Sort Z to A				#####	FALSE	0	TRUE	100054	NIJ2G6H0	Guyana C/	Caribbean	8.576+08	TRUE	TRUE																
4	8NKVUx	Filter by Color				#####	FALSE	390000	FALSE	7328																						
5	8BU0dx	Text Filters				#####	FALSE	630000		82033	GH001016	Vietnam /	Vietnam /	5.55E+08	TRUE	TRUE																
6	891bjk	Search				#####	FALSE	57420	TRUE	70255	WB1XWHJ	Henry Jad	Henry M.	1.45E+08	FALSE	FALSE																
7	8Z26FH	OK				#####	FALSE	9516	TRUE	18271		HCMC DO	HCMC DO	5.55E+08																		
8	8ggADJ	Cancel				#####	TRUE	125000	TRUE																							
9	KXCOOL					#####	TRUE																									
10	QvTfCj					#####	FALSE	0		9976	GH001016	Vietnam /	Vietnam /	5.55E+08	TRUE	TRUE					18271											
11	XmXlQj					#####	TRUE	195279	TRUE																							
12	TuLxPh					#####	FALSE	1900000	TRUE																							
13	19nftfd					#####	FALSE	50000		18639		Colg	JHPIESG	sites supp	FALSE	FALSE																
14	17MfHfC					#####	FALSE	250000	TRUE	70308	72067419	Health Ec	WITS RH	6.93E+08	TRUE	TRUE																
15	1FB6C4					#####	FALSE																									
16	Dmb8Sh					#####	FALSE	0		82033	GH002210	VAAC	Vietnam /	5.55E+08																		
17	1EH4zCl					#####	TRUE																									
18	1ZQJ6G					#####	FALSE	400000	FALSE																							
19	1u4HyUj					#####	TRUE	45000																								
20	0937qp					#####	FALSE	210000	TRUE	16771	GH001410	Namibia l	Regents o	94878337	FALSE	TRUE																
21	19E38GI					#####	FALSE	0	TRUE																							
22	1BLM4K					#####	FALSE	5625284	FALSE																							
23	1PpyCH					#####	FALSE	50000	FALSE																							
24	1MS6u4k					#####	FALSE		TRUE																							
25	1Wotw2MI					#####	FALSE	18000	TRUE	70110	WB1XWHJ	Kenya Del	Henry M.	1.45E+08	FALSE	FALSE																
26	1Hk0UvUj					#####	FALSE		TRUE																							
27	1RjLRe30					#####	FALSE																									
28	1FKF8e13					#####	FALSE	0	FALSE																							
29	19Z2v6i2					#####	FALSE	40000		82033	GH001016	Vietnam /	Vietnam /	5.55E+08																		

5. Filtering by Primary Evaluation Type – Navigate to Column AY and select your Primary Evaluation Type

	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD	BE	BF	BG	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV	BW	BX
1	ESOP O-	ESOP P-	ESOP P-	ESOP E-	ESOP E-	ESOP Evaluation type, prima	ESOP E-	ESOP S-	ESOP P-	ESOP H-	ESOP P-	ESOP P-	ESOP P-	ESOP C-	ESOP S-	ESOP H-	ESOP P-	ESOP E-	ESOP M-	ESOP E-							
2							Mixed	OVC & care givers: Not disaggregated	Assessme	FALSE																	
3							Quantitat	Non-Targ PLHIV	ASP: Not I	Care and treatment:	TRUE																
4							Mixed	OVC & care givers: Not disaggregated		TRUE																	
5							Quantitat	Non-Targ PLHIV	ASP: Health manage	Residenti	TRUE																
6							Quantitat	Non-Targ PLHIV	unknc ASP: Heal	Care and t	Change in	TRUE															
7							Quantitat	Non-Targ PLHIV	ASP: Not Disaggregated		FALSE																
8							Other	Mixed	Key Pops: Sex workers	Care and treatment:	FALSE																
9							Process	Mixed	Key Pops: People who inject drugs		FALSE																
10							Mixed	Key Pops: Not disag	ASP: Not I	Care and treatment:	FALSE																
11							Qualitative		Adaptable		FALSE																
12							Mixed	Non-Targ Not disag	ASP: Not I	Care and treatment:	TRUE																
13							Process	Mixed	Key Pops: PLHIV	ASP: Proci	Care and t	missing	FALSE														
14							Quantitat	Non-Targ PLHIV	ASP: Publi	Care and t	Viral supp	TRUE															
15							Mixed	Priority Pops: Mobile Pops	(A) To est		FALSE																
16							Other	Quantitat	Non-Targ Not disag	ASP: Policy, planning, coordina	FALSE																
17							Quantitat	Key Pops: Not disaggregated		Adaptable	FALSE																
18							Mixed	Non-Targeted Pop: Young people & adolescents		FALSE																	
19							Quantitative			FALSE																	
20							Quantitat	Non-Targ PLHIV	ASP: Heal	Care and treatment:	TRUE																
21							Mixed	OVC & care givers: Not disaggregated		FALSE																	
22							Mixed	Non-Targeted Pop: Young people & adolescents		FALSE																	
23							Quantitat	Non-Targ Not disag	ASP: Heal	Care and treatment:	FALSE																
24							Quantitat	Priority Pops PLHIV	ASP: Labo	Care and treatment:	FALSE																
25							Quantitat	Key Pops: PLHIV	ASP: Heal	Care and treatment:	TRUE																
26							Quantitat	Key Pops: PLHIV	ASP: Health management infor		FALSE																
27							Other	Quantitat	Non-Targeted Pop: Not disaggregated		TRUE																
28							Quantitat	Non-Targeted Pop: Young people & adolescents		FALSE																	

6. Filtering for 'Ongoing' Evaluations –
- Navigate to Column DO and select 'Blanks' which will filter out all evaluations that have an Adherence Checklist, which indicates the evaluation is complete
 - Navigate to Column DC and deselect Discontinued and Not Implemented – this will filter out evaluations that have been discontinued or not implemented, but will keep ongoing evaluations and evaluations that are marked as completed but with no Adherence Checklist

CO	CP	CQ	CR	CS	CT	CJ	CV	CW	CX	CY	CZ	DA	DB	DC	DD	DE	DF	DG	DH	DI	DJ	DK	DL	DM	DN	DO	DP	DQ
ESOP S	ESOP E	ESOP F	ESOP G	ESOP H	ESOP I	ESOP J	ESOP K	ESOP L	ESOP M	ESOP N	ESOP O	ESOP P	ESOP Q	ESOP R	ESOP S	ESOP T	ESOP U	ESOP V	ESOP W	ESOP X	ESOP Y	ESOP Z	ESOP AA	ESOP AB	ESOP AC	ESOP AD	ESOP AE	ESOP AF
Tanzania	FY2021 Q2 FY2018	2018	COP	Report_w																								
Nigeria	FY2021 Q4 FY2018	0	COP	Report_w																								
Vietnam	FY2021 Q4 FY2018	0	COP	Report_w																								
Zambia	FY2021 Q4 FY2018	0	COP	Report_w																								
Dominican	FY2021 Q2 FY2021	0	COP	Report_w																								

- b. Option 2 - offers a more holistic picture of evaluations nearing completion and needing an adherence checklist
 - i. Navigate to Column CV and select 'Report Writing Cleared, Report Writing Disseminated, and Report Writing in Clearance'
 - ii. Navigate to Column DO and select 'Blanks'

CO	CP	CQ	CR	CS	CT	CJ	CV	CW	CX	CY	CZ	DA	DB	DC	DD	DE	DF	DG	DH	DI	DJ	DK	DL	DM	DN	DO	DP	DQ
Western	FY2021 Q4 FY2016						riting_disseminated																					
Kenya	FY2021 Q4 FY2017						riting_disseminated																					
Nigeria	FY2021 Q4 FY2018						riting_disseminated																					
Zambia	FY2021 Q4 FY2021						riting_disseminated																					
Ukraine	FY2021 Q4 FY2017						riting_disseminated																					
Tanzania	FY2021 Q2 FY2018						riting_disseminated																					
Kenya	South Africa						riting_disseminated																					
South Africa	South Africa						riting_disseminated																					
South Africa	South Africa						riting_disseminated																					
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