



Survey, Surveillance, and Research

How to use the Tracker Capture App for SaSR

Overview

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 will also promote the timely release and use of reports, as teams will report on the progress of planned activities from the time the protocol is drafted until dissemination of the final report/results.

Inventory reporting for each activity that is centrally funded (HOP) or funded with COP resources should be reported by in-country agency users in DATIM. The types of surveillance activities may include general population surveys, clinical surveillance, and key population surveys and size estimates as shown below.

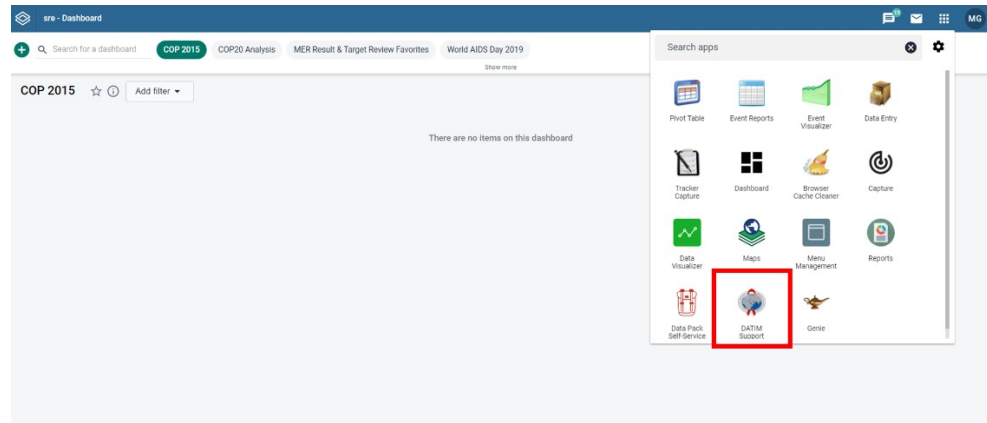
The Tracker Capture app is the way in which Surveys, Surveillance, Research, and Evaluations (SRE) data are recorded in DATIM after COP approval. This document outlines how to access and use Tracker Capture for the purposes of reporting Q2 or Q4 fiscal year activity data.

** Please do not create test and training entries or accounts in the Tracker Capture app.*

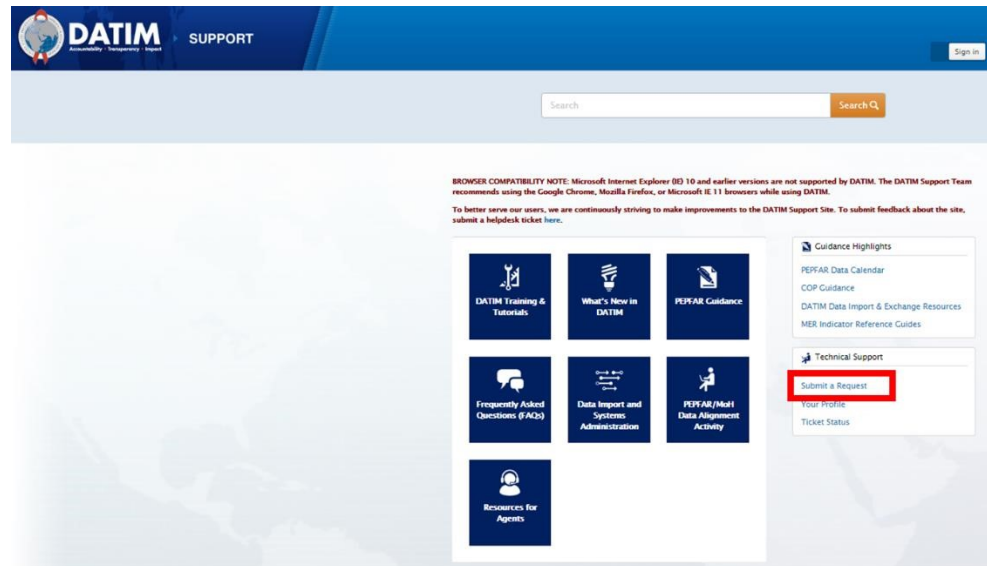
Access

In order to have access to Tracker Capture, a request for a new SaSR user account should be submitted via register.datim.org. This request will then be routed to a User Administrator for approval. Once approval is granted, Tracker Capture will be added to the user's account.

Any questions or issues related to the application should be directed to [DATIM Support](#) by submitting a request.



Or



1. First Step: Clear your Cache!

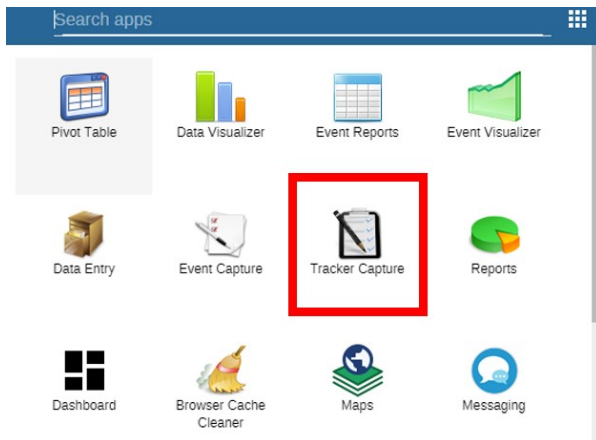
1. Please remember to clear your cache using the **Browser Cache Cleaner** before navigating to the Tracker Capture App.



Browser Cache Cleaner

2. Enter SASR data in DATIM:

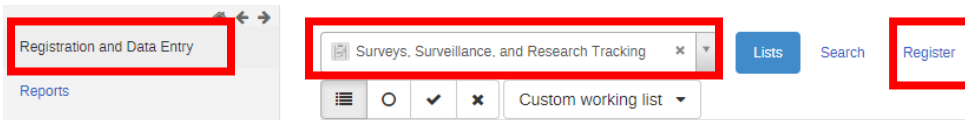
1. Login to DATIM with an **Agency** user account.
2. Access the **Tracker Capture** App.



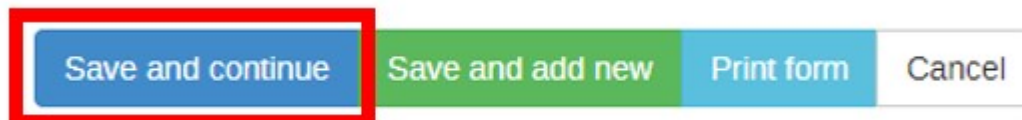
3. Once the App loads, make sure the OU org unit level is selected on the left-hand side (orange highlight indicates it is selected).



4. **Register** a new Survey, Surveillance, or Research activity:
 - a. Make sure **Registration and Data Entry** is selected in the top left.
 - b. Make sure **Surveys, Surveillance and Research Tracking** is present in the option set box in the top middle of the page.
 - c. Click **Register**.



- d. Once screen loads, enter data in the **SaSR Planning Profile**, and **SaSR Activity Details** sections.
- e. Once you have entered your data, hit **Save and continue**.





- **Hint:** If you cannot click **Save and Continue** after entering your data, scroll back up to see if any data is missing in “**Required**” fields.

Required

- Hitting **Save and add new** will register your Survey, Surveillance and Research activity in DATIM, but will also load a new blank registration page. Click cancel if this was clicked inadvertently.

5. Semi-Annual Status Update Overview:

The Semi-Annual Status Update should be used to document any changes in previously registered forms. At a minimum, these changes will be logged semi-annually at Q2 and Q4 reporting, but agency users are encouraged to update as often as necessary. Below, are the fields that can be logged in the update section:

1. Fiscal year and reporting period of status update

2. Current activity stage

- Proposed in COP:** Status for an activity that is proposed, but not yet SGAC and agency approved in the FY COP review.
- Approved in COP (and reflected in final Table 6/SRE Tool):** Activity approved by SGAC and agency for implementation in an upcoming COP year; this status should be reflected in Table 6.
- Newly Commencing** – After approval in COP, the survey, surveillance activity or research project has started. Use this selection to record the actual start date of an SAS-R activity (ie the start of data collection).
- Ongoing** – the approved activity is ongoing.
- Completed** – the approved activity is completed.
- Discontinued** – An approved activity has started, but the country team or agency staff have determined that it is no longer necessary to continue.
- Not Implemented** –The Country team or agency has decided not to implement a previously COP approved activity.

3. Current activity progress

- Protocol/scope: not yet started
- Protocol/scope: under development
- Protocol/scope: in clearance
- Protocol/scope: cleared
- Data collection: not yet started
- Data collection: in progress
- Data collection: completed



- h. Reporting: not yet started
- i. Reporting: preliminary data available
- j. Reporting: in progress
- k. Reporting: in clearance
- l. Reporting: cleared
- m. Reporting disseminated

4. Budget planned for the current fiscal year (i.e the budget approved in the SRE Tool the year this status update is being completed)

6. To enter a Semi-Annual Status Update to SaSR activity:

- a) After you hit “Save and Continue”, a dashboard will load.
 - i) On the right in a window titled “Profile”, your recently entered SaSR activity will appear here.
 - ii) 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'. The 'Indicators' panel shows 'No indicators exist'. The 'Timeline Data Entry' panel is highlighted with a red box and contains a yellow bubble for '2021-03-31 Nigeria Semi-Annual Status U... (Open)'. The 'Profile Edit' panel is also highlighted with a red box and shows 'Profile' information, including 'Survey/research project enrolled on 2020-10-01', 'TEI UID: MuJlnpsyoy0q', 'SaSR Planning Profile', 'USG Agency funding the survey, surveillance or research activity: DoD', and 'Countries in activity:'. A 'Feedback' panel shows 'No feedback exist'.

b) In the “Timeline Data Entry” box, click the “Semi-Annual Status Update” bubble.

This close-up screenshot shows the 'Timeline Data Entry' panel. A yellow bubble with the text '2021-03-31 Nigeria Semi-Annual Status U... (Open)' is highlighted with a red box. Below the bubble, the 'Status update reporting date' is shown as '2021-03-31' in a green bar.



- c) The “Status update reporting date” field is defaulted to the last day of the quarter you are entering the data in.

Timeline Data Entry

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

Status update reporting date *

2021-03-31

- d) Then select the appropriate “Fiscal year and reporting period status update” “Current activity stage” “current activity progress” and “Budget planned for the current fiscal year (i.e. the budget approved in the SRE Tool the year this status update is being completed):” from the drop-down menu.

Timeline Data Entry

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

Status update reporting date *

2021-03-31

Surveys, Surveillance, and Research Tracking - Semi-Annual Status Update

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

Current activity stage * Select or search from the list

Current activity progress * Select or search from the list

Budget planned for the current fiscal year (i.e. the budget approved in the SRE Tool the year this status update is being completed): *

Complete Delete Print form

- e) Finally, “Complete” the status update.



Complete

Delete

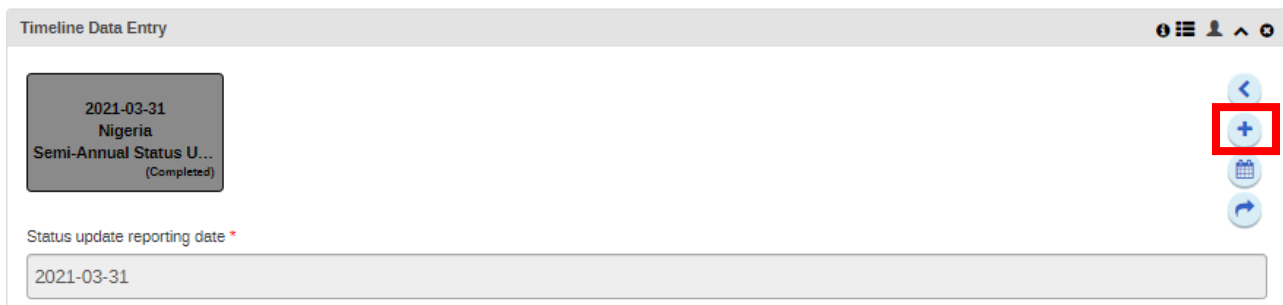
Print form

7. Project Completion Overview:

A project is considered complete when the final report is written, cleared and disseminated. Once this point has been reached, teams can move on to enter the completed project.

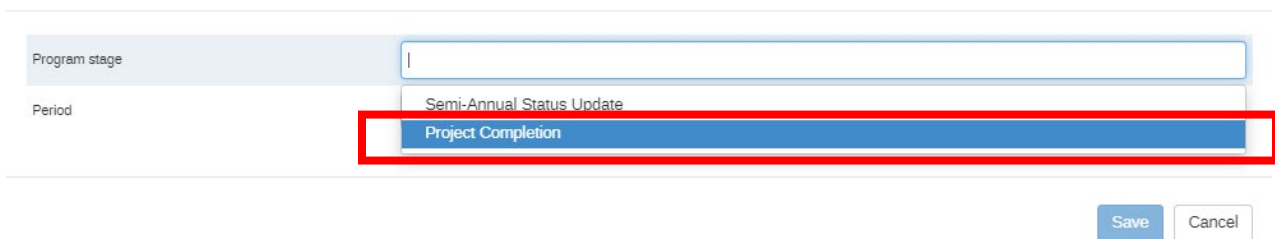
8. To enter a Completion Project in DATIM:

- a) Navigate to the Tracker Capture App and select the SaSR activity to be marked completed.
- b) Once the activity dashboard loads, select the “+” in the “**Timeline Data Entry**” box:



- c) In the pop-up box, select **Project Completion** from the “**Program Stage**” drop down. *Please note that the Project Completion form must be completed after the Semi-Annual Status Update form is completed and the “current activity stage” is marked as Completed. You will not see the Project Completion form from the drop down if the Semi-Annual Status Update has not been completed.*

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



- d) Next, enter the final activity details in the data entry fields that loaded. Then select **Complete**.



Timeline Data Entry ☰ 👤 ⬆ ⬇

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

➔

2021-06-04
Nigeria
Project Completion
(Open)

Date of completion form update *

Fiscal year and reporting period of status update * Required

Final title of the activity in English * Required

Actual start date of data collection * Required

Actual end date of data collection * Required

Actual sampling methodology * Required

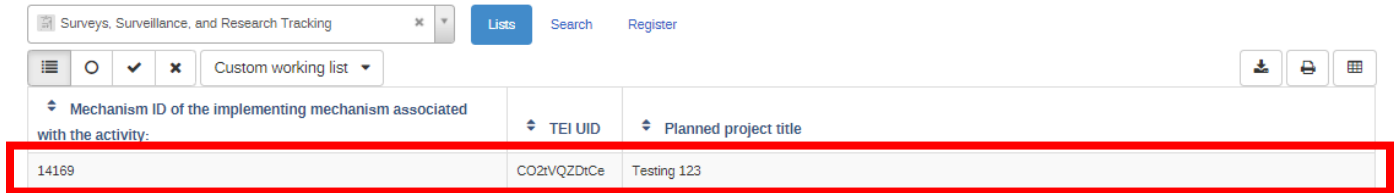
Final sample size * Required

Total expenditures at activity completion *

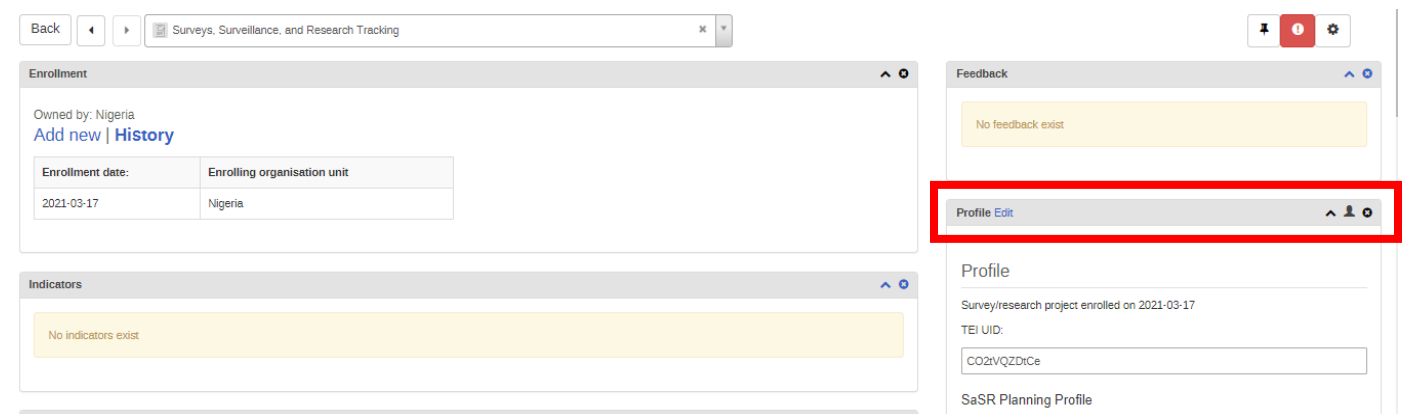


9. To edit the Survey, Surveillance and Research Data Collection SaSR Planning Profile or SaSR Activity Details sections:

a) After selecting the Tracker Capture App, click on the SaSR activity you wish to edit.



b) Select the **Edit** button in the “Profile” window.



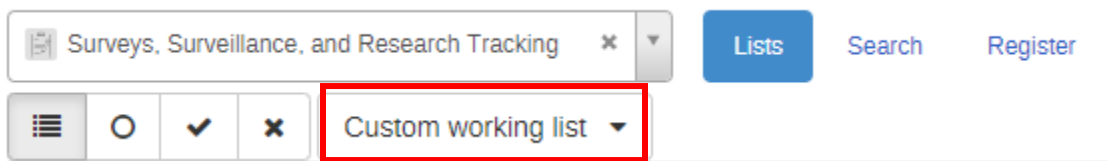
c) Scroll down and update or edit the Survey, Surveillance and Research sections.

d) Hit **Save** at the bottom of the window.

Custom working list

The Custom working list feature is available for users to filter activities by different criteria such as Enrollment Status, TEI UID, etc.

Step 1: Once you select the program **Survey, Surveillance, and Research Tracking** the **Custom working list** button is listed directly below the program:





Step 2: Click on the drop down for **Custom working list** and choose the filters that apply to your search to retrieve the activities:

The screenshot shows a web interface for 'Surveys, Surveillance, and Research Tracking'. At the top, there are buttons for 'Lists', 'Search', and 'Register'. Below the header, there is a search bar and a dropdown menu labeled 'Custom working list', which is highlighted with a red box. The dropdown menu is open, showing two filter categories: 'Organisation unit scope' and 'Enrollment status'. Under 'Organisation unit scope', there are three radio button options: 'Selected' (which is selected), 'Immediate children', and 'All children'. Under 'Enrollment status', there are four radio button options: 'All' (which is selected), 'Completed', 'Active', and 'Cancelled'. To the left of the dropdown, a table is partially visible with the following content:

Mechanism ID of the implementing mechanism associated with the activity
6651
84801

Step 3: Scroll all the way to the bottom of the list and click on the Search button. A list of the activities that fall under your filter will be returned:



Registering unit	Registration date	ESOP-SaSR Countries in project- [Country]	Response
South Africa	2021-09-15	ESOP-SaSR Countries in project- Turkmenistan	4610
South Africa	2021-09-15	ESOP-SaSR Countries in project- Uganda	2868
South Africa	2021-09-15	ESOP-SaSR Countries in project- Ukraine	2866
South Africa	2021-09-15	ESOP-SaSR Countries in project- Uzbekistan	4610
South Africa	2021-06-15	ESOP-SaSR Countries in project- Vietnam	1379
South Africa	2021-06-15	ESOP-SaSR Countries in project- Zambia	1658
South Africa	2021-06-15	ESOP-SaSR Countries in project- Zimbabwe	1658

NOTE: You must **manually** type in the answers to any fields that show **Please Select** while we fix the issue with the dropdowns:

Surveys, Surveillance, and Research Tracking | Lists | Search | Register

Custom working list

Mechanism ID of the implementing mechanism with the activity:

SaSR Specific activity type

SaSR Activity type other



Reports

For information on SaSR reports, please see the following [How to Generate a Report for SaSR](#).