



PEPFAR



USAID
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USAID Local Partner Training: *New HRH Reporting Requirement*

September 15, 2021

USAID/OHA Health Workforce Branch

Welcome and Agenda

HRH Inventory

8:30 - 8:35 am	Introduction
8:35 - 9:10 am	Overview of HRH inventory template data elements
9:10 - 9:45 am	HRH Inventory Template Demo w/ Staffing Examples
9:45 - 10:10 am	Overview of Data Reporting / How to obtain a DATIM account
10:10 - 10:30 am	Next steps

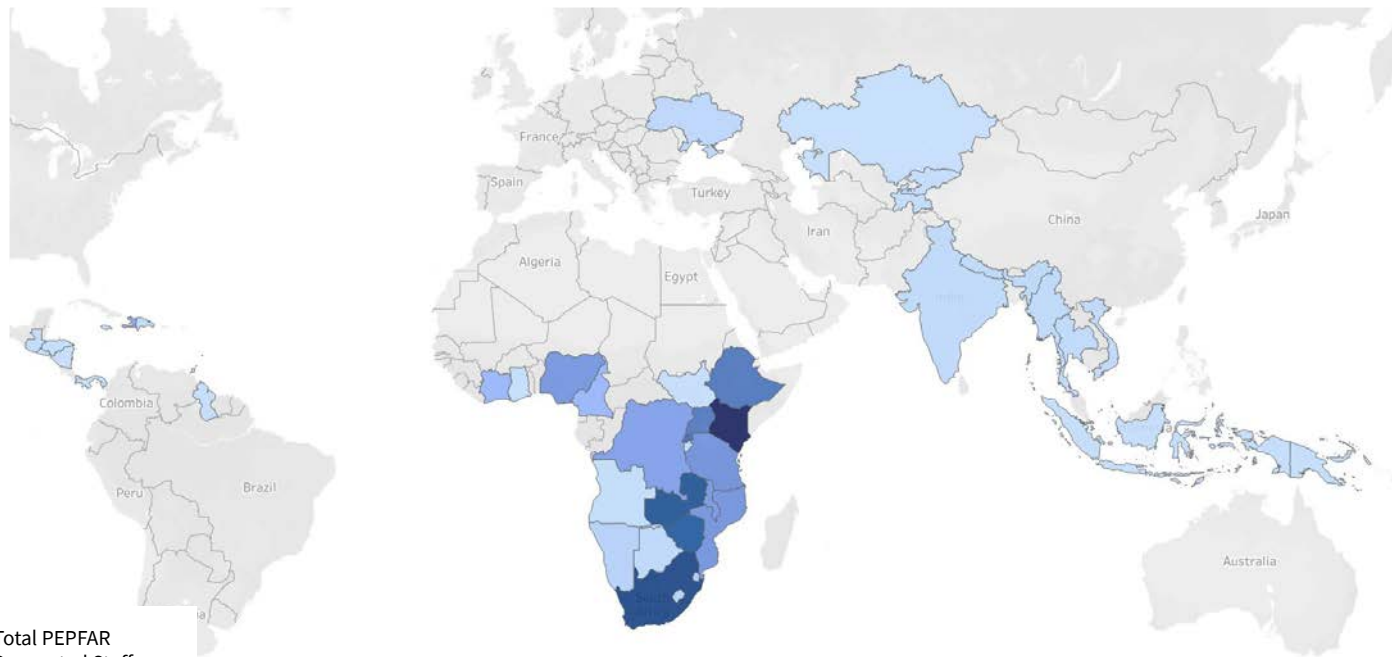
Introduction

Presenter: Sarah Ackerman, AAAS S&T Fellow



HRH staffing is a significant investment for PEPFAR

PEPFAR supported over 210,000 health workers in FY20



During the COVID-19 pandemic, PEPFAR-supported **staff have enabled rapid adaptations** to continue provision of HIV services

Staff have also been **leveraged to support the COVID-19 response**

Total PEPFAR Supported Staff
FY20 Q4 HRH_CURR

Total HRH_CURR



A new HRH reporting requirement to better capture staffing and related expenditures

- As PEPFAR looks forward to the next 5 yrs, **HRH is critical to further advancement and sustaining HIV gains**
- Existing data does not provide enough insight into entire footprint of investment
- More robust data enables **further optimization** and **increases accountability** of HRH investment by providing insight in:
 - staffing function
 - location
 - compensation
- Enables stronger leverage of PEPFAR supported staff during COVID-19

Introduction of the new PEPFAR HRH Inventory

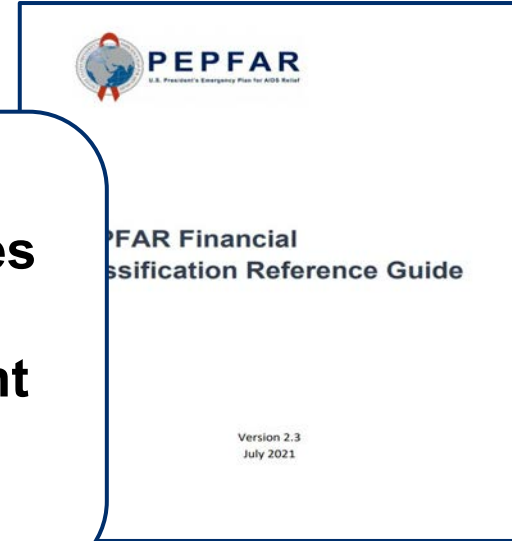
MER



Link: [here](#)

- **HRH_CURR** - supported workers working on HIV-related activities
- **HRH_STAFF_NAT** - all workers working on HIV-related activities
- **HRH_PRE** - pre-service training

ER



Link: [here](#)

- **Personnel: Salaries** - HCW Clinical; HCW Ancillary; Other Staff
- **Fringe Benefits**
- **Contractual: Contracted** - HCW Clinical; HCW Ancillary; Interventions; Other Contracts

**NEW Human Resources
for Health (HRH)
Reporting Requirement
Starting Q4 2021**

How the new requirement is different from HRH_CURR

HRH_CURR	Upcoming Reporting Requirement
Aggregated number of individual staff	Individual level data that collect Full Time Equivalence (FTE) reflect level of effort on HIV
Limited list of cadre categories (clinical lay, laboratory, pharmacy, social service, management, other)	More extensive list of cadre categories w/ employment titles
Limited to facility and community staff, and some above-site	ALL PEPFAR-funded staff (across Prime and Sub-Recipients)
Annual expenses for salary, stipend, non-monetary	Annual Expenses for Compensation (Salary, Contract, Stipends) and Fringe (Including Value of Non-Monetary Support)
Site level staff aligned to DATIM hierarchy, above site staff reported as “data reported above the PSNU level”	Aligned to DATIM hierarchy
	And more fields..

Alignment of the NEW HRH inventory to expenditure reporting (ER)

- **HRH** Employment Titles are mapped to **ER** Cost Categories
- **HRH** Inventory collects Mode of Hiring (Salary, Contract, Non-monetary only) aligned to **ER** Cost Categories
- **HRH** Primary Program Areas are the same as **ER** Program Areas
- **HRH** Inventory collects Expenditure, which is the same as **ER**
- **HRH** Inventory separates Salary/Contract Expenditure from Fringe Expenditure, which is the same as **ER**

Keep an eye out for this note on later slides

Important Note: Connecting HRH to ER

Format and reporting structure of the new HRH inventory



Excel Template

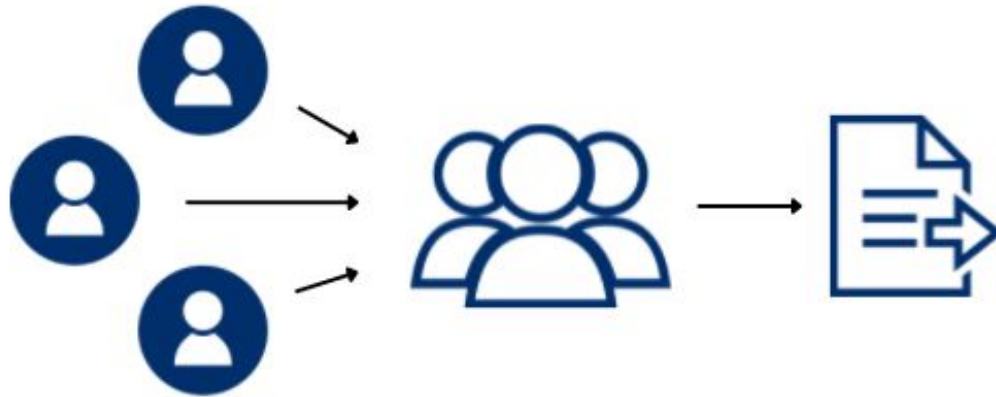
- The final version of the template will be available October 1st within the new HRH DATIM App (Note: DATIM will accept all versions of the template)
- 1 template per mechanism
- 1 entry in template per individual
- **Do not modify the HRH template (e.g. do not add or delete columns)**

Template Submitted to DATIM

- All those submitting or reviewing HRH Inventory templates will need to request an HRH DATIM account
- **All data validation checks will be shown upon upload into DATIM and will need to be corrected before the template is accepted.**

Applicable mechanisms for HRH inventory reporting

All mechanisms that report to ER (Expenditure Reporting) should report to the HRH Inventory*

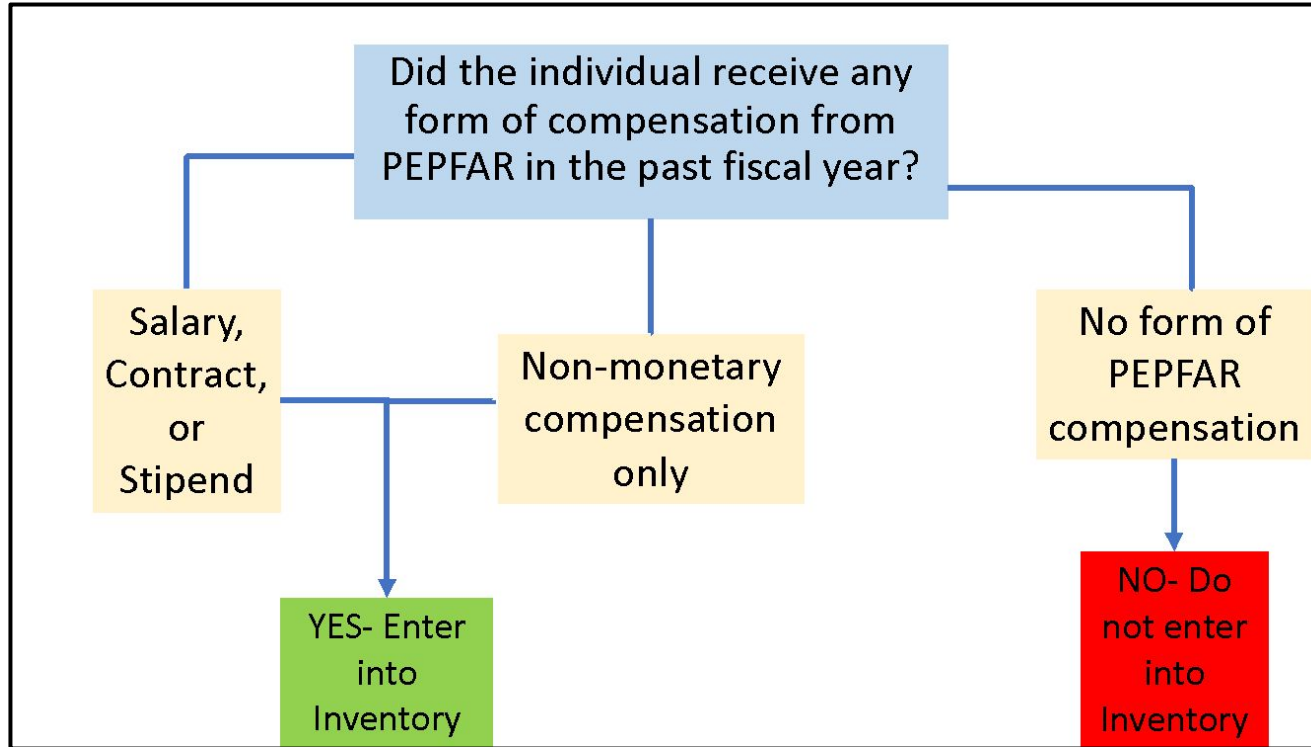


Subrecipient partners submit completed templates to prime

Prime partner consolidates prime and subrecipient staffing and submits **one template per IM**

*all mechanisms with expenditures associated with COP approvals

Applicable individuals/ staff to be reported in the HRH inventory



Every individual that has received any form of compensation from PEPFAR over the past fiscal year:

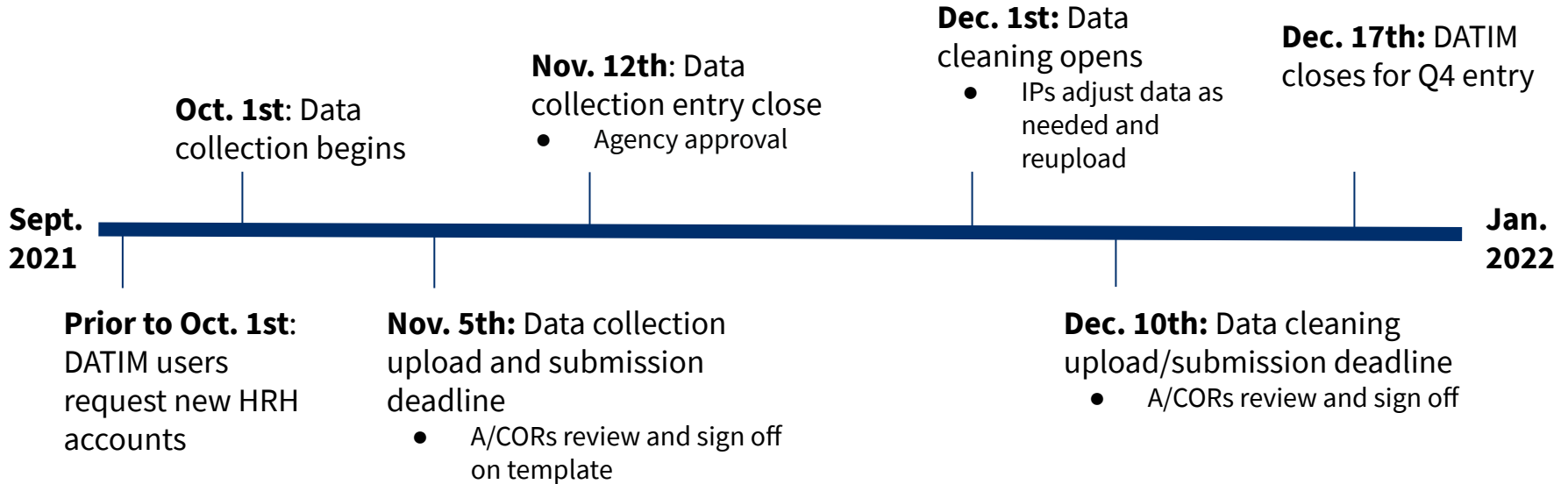
- ALL types of staff: Health workers, program management, TA, HQ-based staff charged directly to the IM
- Salary, stipend, contract, fringe including non-monetary support
- Prime and subrecipient IPs

Not included in the Inventory:

- Staff charged to NICRA only
- USG

HRH Inventory Reporting Timeline

Current Reporting Timeline (*matches other PEPFAR data streams*):



What is needed in order to complete the HRH inventory requirement?

1. A copy of the OU specific HRH Inventory Template

- a. A final version of the template will be available within the HRH DATIM app starting October 1st
- b. All versions of the template will be accepted in the DATIM app

2. The HRH Inventory Guidance Materials

- a. See DATIM Zendesk materials [here](#)

3. Internal Records

- a. HR/ Payroll
- b. Program Records that capture staff work and location

4. An HRH DATIM Account

- a. Register.datim.org (see later slides)



Knowledge Check

- **What mechanisms need to report the HRH Inventory?**

*Response: **All mechanisms that report in ER and that have expenditures associated with COP approvals.***

Knowledge Check

- **What types of staff should be included?**
 - a) **Prime Partner**
 - b) **Sub-Recipients**
 - c) **Program Management**
 - d) **Clinical and Ancillary Staff who Deliver Services**
 - e) **Other Staff who provide technical assistance and support non-service delivery activities**
 - f) **ALL of the above**

*Response: f) **All staff** that receive some form of support should be reported: health workers, program management, TA, and HQ-based staff charged directly to the IM. This applies to prime partner and subrecipient staffing. Staff receiving all types of compensation should be included (salary, stipend/contract, non-monetary support).*

Knowledge Check

- **Should staff working for subrecipient partners be reported in the HRH inventory?**
 - a) Yes
 - b) No

*Response: **a) Yes** All PEPFAR-supported subrecipient staff working for a mechanism should be reported. There should be one template submission per IM, which should include staffing information for the prime partner as well as any subrecipients.*

Knowledge Check

- **When does the new HRH Reporting Requirement begin?**

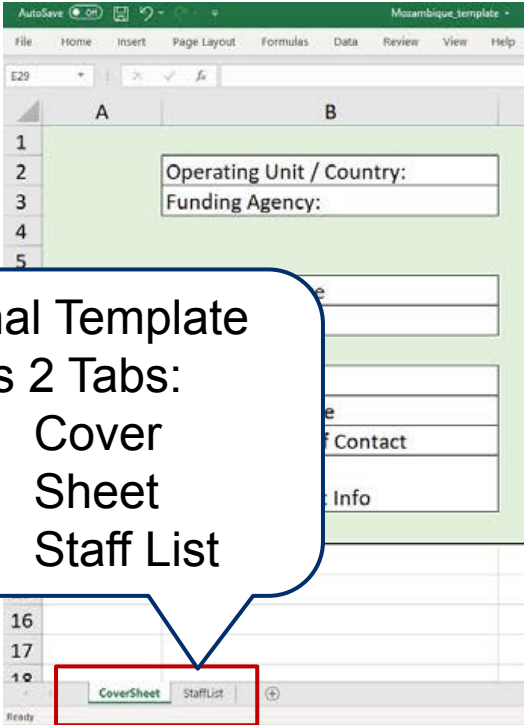
*Response: **Q4, October 1st 2021.** It is a new annual reporting requirement which is replacing HRH_CURR*

Overview of Key HRH Inventory Template Data Elements

Presenter: Sarah Ackerman, AAAS S&T Fellow



HRH Inventory Template



Final Template has 2 Tabs:

- Cover Sheet
- Staff List

- Each OU has its own HRH Inventory Template (excel based)
- See detailed guidance in the PEPFAR [Handbook](#)
- Each Mechanism must submit **one** completed template to DATIM
- Template errors will only appear upon upload into the HRH DATIM app
- This section will review key elements of the template
 - Look out for “Data Entry Errors” which show examples of DATIM app errors

Overview of template: Cover sheet tab

	A	B	C	D	E
1					
2		Operating Unit / Country:		Mozambique	
3		Funding Agency:			
4					
5					
6		Completion Date			
7		Completed By			
8					
9		Mechanism ID			
10		Mechanism Name			
11		PRIME IP Point of Contact			
12		PRIME IP Contact Info			
13					
14					

The first tab contains data fields asking for:

- Unique information about the IM, such as name and mechanism ID
- Name of the prime partner organization
- Name of the person at the prime IP who can be contacted for follow-up questions regarding the data submitted

These elements must be completed by the Prime for the final template submission to the DATIM app

Sub recipients may choose to complete this tab, but only the consolidated template with Prime information will be submitted into DATIM

Overview of template: Staff list tab

The screenshot shows an Excel spreadsheet with the following columns and headers:

Record Number (optional)	Sex	Employment title	Employed through Prime or Sub IP?	Mode of Hire	MCH Staff/seconded to MOH?	Months of Work in Past Year	Average FTE per Month	Work in or support multiple sites (Roving Staff)?	SNU1	PSNU/Community	Facility	Valid OU	Primary Program Area?	Deliver services DIRECTLY to beneficiaries?	In past year provided support for the COVID response?	Sum of Annual PEPFAR Expenditure, excluding Fringe	Annual PEPFAR Fringe Expenditure	Comments

The second tab is where data on individual staff is entered:

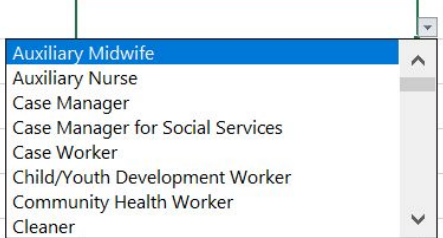
- **One row entry per staff member**
- Must complete all fields (with the exception of DATIM hierarchy (blue), record number, and comments see later slides)
- Only choose from drop downs, do not write in text
- Do not modify the template

Order of questions and corresponding data elements on the *staff list* tab

- Record Number - optional
- Sex
- **Employment Title**
- Is this Staff Member employed through the Prime IP or Sub IP?
- **Mode of Hiring**
- Is this worker designated as a MOH employee/seconded to MOH?
- Month of work in the past year
- **Average FTE per Month**
- **Does this staff member work in/support multiple sites (Roving Staff)?**
- **DATIM Hierarchy (Geography)**
- **What PEPFAR Program Area does the staff member PRIMARILY support?**
- **Does this staff member deliver services DIRECTLY to beneficiaries?**
- In the past year, has this Staff Member provided support for the COVID response?
- **Sum of Annual PEPFAR Expenditure for Staff Member: Salary, Contract, Stipend (USD)?**
- **Expenditure on Annual Fringe from PEPFAR, if any (USD)?**

Template data element: *Employment Titles*

	Sex	Employment title	Employed through Prime or Sub IP?	M
		<input type="text" value=""/>		



The image shows a screenshot of a data entry form. The form has a table with five columns: an empty column, 'Sex', 'Employment title', 'Employed through Prime or Sub IP?', and 'M'. The 'Employment title' cell is active, and a dropdown menu is open, displaying a list of job titles: Auxiliary Midwife, Auxiliary Nurse, Case Manager, Case Manager for Social Services, Case Worker, Child/Youth Development Worker, Community Health Worker, and Cleaner. The 'Auxiliary Midwife' option is currently selected and highlighted in blue.

- Select the employment title of the individual
- Please note: The job titles may not exactly match the official job title of the individual. Select the employment title that *best* describes the official job title of the individual
- Each staff member should be represented in one row only
- Dropdown list of alphabetical titles
- **All titles are defined in the HRH inventory handbook**

Template data element: *How to determine Employment Title*

Employment title should reflect the work being done, **NOT** training or qualifications

How to Determine Employment Title

Employment Title:



Current Employment Title



Degree or Training

Example: A nurse who provides mentorship service and not nursing services should be reported in the template as a **mentor, not** as a nurse

Organization of Employment Titles

Full List of Employment Titles Under Each ER Cost Category

Employment Categories (ER Cost Category)

Employment Titles

This is the only element you will select in the template

HCW: Clinical	HCW: Ancillary	Other Staff
<ul style="list-style-type: none"> -Doctor -Clinical Officer -Nurse -Auxiliary Nurse -Nursing Assistant -Midwife -Auxiliary Midwife -Clinical Social Worker -Clinical/Retention Case Manager -Laboratory Technologist/Technician -Laboratory Assistant/Phlebotomist -Pharmacy Assistant -Pharmacy Technician -Pharmacist -Testing and Counseling Provider -Medical Assistant -Other clinical provider not listed 	<ul style="list-style-type: none"> -Peer Educator -Peer Navigator -Expert Client -Lay Counselor -Linkage Navigator -HIV Diagnostic Assistant -Lay worker providing adherence support -CHW -Social Worker -Social Welfare Assistant -Case Manager -Case Manager for Social Services -Case Worker -Psychologist -Psychiatrist -Psychology Assistant -Child/Youth Development Worker -Mother Mentor -Cough Monitor -Other community-based cadre 	<ul style="list-style-type: none"> -Program Management Accounting Workers -Program Management Administrative Staff -Program Management Finance Workers -Program Management Legal Staff -Other Program Management Staff -Facility Administrator -Laboratory Manager -Pharmacy Manager -Human Resource -Manager -Cleaner -Janitor/Maintenance -Security Guard -Driver -Fleet Manager -Other supportive staff not listed (example, receptionist) -Information Systems Officer -Information Systems Manager -M&E Officer -M&E Advisor -Data Capturer -Data Clerk -File Clerk -Data Managers -Program Management Technical Advisor -Mentor -Trainer -Technical Advisor -Logistics Manager -Epidemiologist -Other Professional Staff

Note: Program Management Staff limited to this set of employment titles

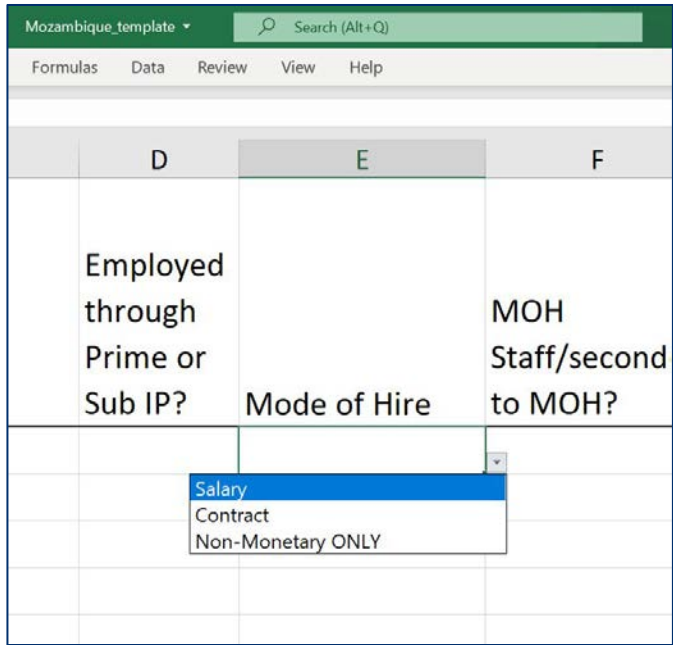
Important Note:
Connecting HRH to ER ²⁵

Knowledge Check

- **You have a medical doctor by training working for your program as a Technical Advisor for care and treatment. Should you select “Doctor” or “Technical Advisor” as the employment title?**
 - a) Doctor
 - b) Technical Advisor

*Response: **Technical Advisor**. You should select an employment title based on the job the person is hired to do - not based on their education level or qualifications.*

Template data elements *Mode of Hiring*



The screenshot shows an Excel spreadsheet with the following content:

	D	E	F
	Employed through Prime or Sub IP?	Mode of Hire	MOH Staff/second to MOH?

A dropdown menu is open over the 'Mode of Hire' cell (E2), showing the following options:

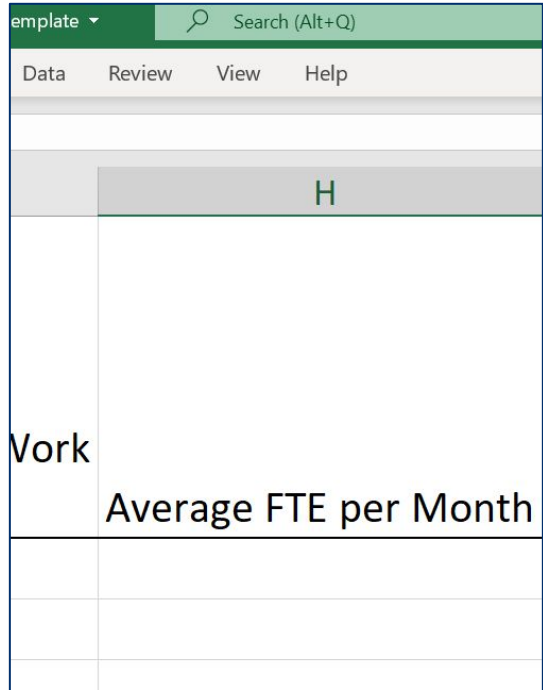
- Salary
- Contract
- Non-Monetary ONLY

Indicate **the mode or how** the individual is hired. Select the option that best reflects the primary mode of hire for each staff.

- Salary is defined as PEPFAR-funded compensation for workers who are employed by an IP and receive a salary or wage. *Salaried staff must enter both salary and fringe amounts (see later slides)*
- Contract is defined as PEPFAR-funded compensation through contract(s) for a worker who is not directly employed by an IP, but contracted to perform services. *Note: This includes PEPFAR-supported workers that receive stipends.*
- Non-Monetary ONLY is defined as PEPFAR-funded compensation for workers that is provided in the form of non-monetary compensation. This can include phone cards, travel reimbursement, meals, etc. These workers do not receive any other form of compensation from PEPFAR.

Please note that these are mutually-exclusive fields. For example, if an individual receives both a salary and non-monetary compensation, select Salary as the mode of hire.

Template data element: *Average Full Time Equivalence (FTE) per Month*



The screenshot shows a data entry interface with a search bar at the top and a menu with 'Data', 'Review', 'View', and 'Help'. Below the menu is a table with a header row containing 'H' and a data row with the label 'Average FTE per Month'.

	H
Work	Average FTE per Month

Enter the average percent of full-time equivalent (FTE) worked by the individual staff per month.

- Enter free text, value 0-1.0
- Reported as a decimal, where 0 = no work on average per month, and 1 = full time work per month.
- Only enter the FTE supported by PEPFAR on the IM being reported. Do not report FTE supported by MOH or other entities.

FTE Calculator Available will be available on DATIM Zendesk soon

FTE Calculator Examples

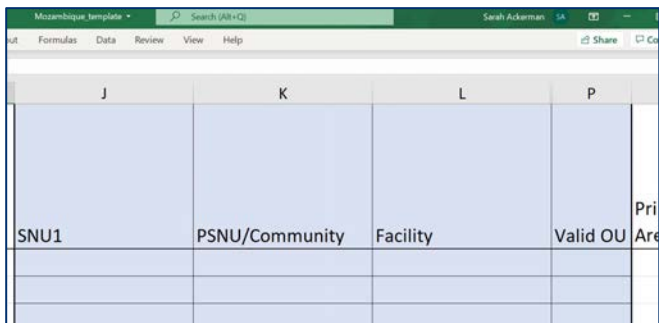
FTE Calculator Option	Example	Formula	Average Monthly FTE
1. The PEPFAR worker's hours generally remain constant per week	A nurse works 20 hours per week each week all year	20 hours / 40 hours	0.5
2. The PEPFAR worker's hours generally remain constant per month	A case manager works 50 hours every month all year	50 hours / (40 hours * 4.33 weeks/month)	0.289
3. PEPFAR worker's hours differ per week in a month	A data clerk works 40 hours for three weeks and 20 hours the last week of each month	Average (40, 40, 40, 20 hours) / 40 hours	0.875
4. PEPFAR worker's hours vary month to month	A community health care worker works 40 hours per month from Jan-Mar, but does not work the rest of the year	(40 hours / 168 Jan hours) + (40 hours / 160 Feb hours) + (40 / 184 hours) / 12	0.059
*These examples assume a full time work week is 40 hours, this can be adjusted using line 4 in the FTE calculator			

Template data element: *Work in Multiple Sites (Roving Staff)*

Year	Average FTE per Month	Work in or support multiple sites (Roving Staff)?

- **Roving Staff Definition:** PEPFAR-supported worker who provides services at multiple *facility* sites on a regular basis
- Enter yes/ no for each individual staff:
 - **NO:** Individual staff **do not** provide work at multiple facility sites. This includes workers that occasionally or rarely provide services to more than one site as the worker does not provide services to more than one site on a regular basis
 - **YES:** Individual staff **does** work at multiple facility sites.
- Roving Staff **are only associated** w/ site level program areas and should be reported to the PSNU level (see later slides)
- Roving Staff are only associated with facilities, a staff member working across communities or above-site entities should answer NO.

Template data element: *DATIM Hierarchy*



The screenshot shows an Excel spreadsheet with a green header bar. The spreadsheet has columns labeled J, K, L, and P. The rows contain the following data:

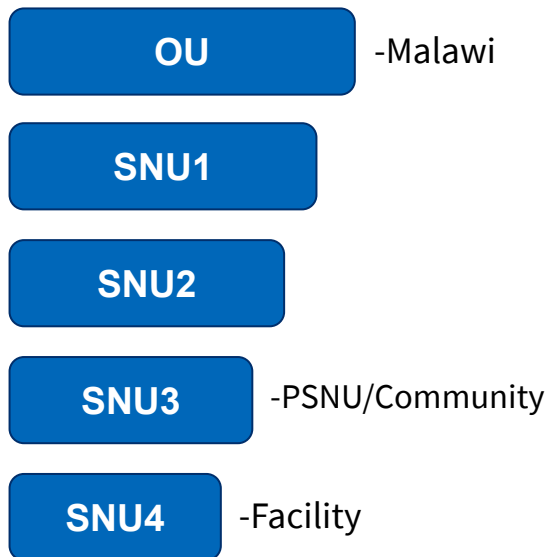
J	K	L	P	
SNU1	PSNU/Community	Facility	Valid OU	Pri
				Are

- Select the DATIM Hierarchy component that corresponds to the primary location where work was performed.
- In instances where individuals work in multiple locations, indicate where the majority of work was performed. If work is split evenly, choose one.
- Note: You must fill out the template from largest hierarchy (left most column) to smallest (see next slides to determine how to report each type of staff)
 - Example on the left: SNU1 > PSNU/Community > Facility
- Hierarchy components on all templates (there are three types templates (see later slides))
 - OU (Regional Only)
 - SNU1
 - PSNU
 - Community (Select templates only)
 - Facility

Template data element: *DATIM Hierarchy Example - Malawi*

Key Definitions

- **OU** - Operating Unit. Either a Country or Region.
- **SNU** - Sub-National unit. A smaller geographic area than the OU.
 - **PSNU** - Priority SNU. The geographic unit/level at which PEPFAR program targets are set
 - **Community** - A geographic area/unit higher than the facility level, sometimes equivalent to the PSNU
 - **Facility** - lowest SNU in the DATIM hierarchy



Malawi_template (1) Search (Alt+Q)

Template columns are labeled with PSNU, Community, and Facility Designations (except for regional templates)

SNU1	SNU2	PSNU/Community	Facility	Valid OU
------	------	----------------	----------	----------

Examples of locations of workers

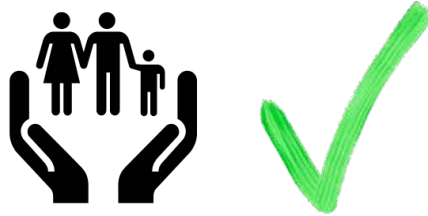
- Each entry must complete the DATIM Hierarchy down to the *appropriate level*
- The appropriate level is based on the location of the worker
- Example worker locations
 - International workers
 - National focused staff
 - Military
 - Roving Staff (including TA to more than one facility)
 - Community Workers
 - Above Site Workers
 - TA-providers to one facility
 - Facility based

How to determine the location of work

The location of work is defined as where the individual performs their work, rather than the office they report to

How to Determine Location of Work

Location of Work:



Place where work
is performed



Physical place of work

Example: An above site program manager who sits at a desk in facility X, but provides assistance to the entire SNU1, should be reported to the SNU1, not facility X

Geographic Levels for Reporting

International workers **only** report on the Staff List Tab in regional templates

The levels of hierarchy allowed for staff varies by the staff member's role or location. The chart below shows which levels are required (✓) and which levels are not allowed (✗).

DATIM Geo-graphic Level	International Workers	National Focused Staff	Military	Roving Staff (including TA to more than one facility)	Community Workers	Above Site Workers*	TA providers to one facility	Facility-based Staff
OU (Regional templates only)	✓	✓	✓	✓	✓	✓	✓	✓
SNU1	✗	✓	✓	✓	✓	✓	✓	✓
PSNU	✗	✗	✗	✓	✓	✓	✓	✓
Community (in OUs with community separate from PSNU)	✗	✗	✗	✗	✗	✓	✓	✓
Facility	✗	✗	✗	✗	✗	✗	✓	✓

*Complete columns starting from the largest hierarchy component to the smallest

*Above site workers should enter to the lowest relevant level, which may be community, or may be a higher level in the geography. Facility is not allowed.

Overview of template data elements: *DATIM Hierarchy*

1	Record Number (optional)	2	Sex	3	Employment title	4	Employed through Prime or Sub IP?	5	Mode of Hire	6	MOH Staff/seconded to MOH?	7	Months of Work in Past Year	8	Average FTE per Month	9	Work in or support multiple sites (Roving Staff)?	10	SNU1	11	PSNU/Community	12	Facility	13	Valid OU	14	Primary Program Area?	15	Deliver services DIRECTLY to beneficiaries?	16	In past year provided support for the COVID response?	17	Sum of Annual PEPFAR Expenditure, excluding Fringe	18	Annual PEPFAR Fringe Expenditure	19	Comments		
2																																							
3																																							
4																																							
5																																							
6																																							
7																																							

There are 3 types of DATIM Hierarchy, always highlighted in blue

The three templates are based on the DATIM hierarchy for that specific OU

We will now review how to report each type of staff within each of the three template types

Three DATIM Hierarchy template options

OUs with combined PSNU/Community Columns (option 1)	OUs with separate PSNU and Community Columns (option 2)	Regional Hierarchy Columns (option 3)
Botswana	Angola	Asia Regional
Cameroon	Burundi	Western Hemisphere Region
DRC	Côte d'Ivoire	West Africa Region
Ethiopia	Eswatini	
Malawi	Haiti	
Mozambique	Kenya	
Namibia	Lesotho	
Ukraine	Nigeria	
Zambia	Rwanda	
Zimbabwe	S. Africa	
	S. Sudan	
	Tanzania	
	Uganda	
	Vietnam	

DATIM Hierarchy option 1: OUs with PSNU/Community Level

This chart shows the levels of DATIM hierarchy allowed for staff with a PSNU/Community level template (option 1).

OUs with combined PSNU/Community Columns				
Location of Work	Work in or support multiple sites (Roving Staff)?	SNU1	PSNU/Community	Facility
National and Military	No	Yes	No	No
Above Site Workers	No	Any valid combination of Geographical Selections Above Facility		No
Community	No	Yes	Yes	No
Roving Across Facilities	Yes	Yes	Yes	No
Facility/ TA at one facility	No	Yes	Yes	Yes

DATIM Hierarchy option 2: OUs with separate PSNU and Community Levels

This chart shows the levels of DATIM hierarchy allowed for staff with a PSNU and separate Community level template (option 2).

OUs with separate PSNU and Community Columns					
Location of Work	Work in or support multiple sites (Roving Staff)?	SNU1	PSNU	Community	Facility
National and Military	No	Yes	No	No	No
Above Site Workers	No	Any valid combination of Geographical Selections Above Facility			No
Community	No	Yes	Yes	No	No
Roving Across Facilities	Yes	Yes	Yes	No	No
Facility / TA at one facility	No	Yes	Yes	Yes*	Yes

*If community is not known, choose the same value as the PSNU

DATIM Hierarchy option 3: OUs using Regional Level Templates

This chart shows the levels of DATIM hierarchy allowed for staff with a Regional level template (option 3).

Regional Hierarchy Columns					
Location of Work	Work in or support multiple sites (Roving Staff)?	Country/SNU1	Any valid combination of Geographical selections above Facility Level	Any valid combination of Geographical Selections Stopping at and including PSNU	Any valid combination of Geographical Selections down to the Facility Level
International	No	Yes	--	--	--
National, Military	No	Yes	Yes	--	--
Above Site Workers	No	Yes	Yes	--	--
Community	No	Yes	--	Yes	--
Roving Across Facilities	Yes	Yes	--	Yes	--
Facility / TA at one facility	No	Yes	--	--	Yes

Data Entry Error: Facility indicated for multiple-site/roving staff

- If a resource is indicated to work in multiple sites or be a roving staff member in Column I (*Column I = Yes*), a facility cannot be indicated. Multiple site/roving staff members must be attributed to the PSNU level and not below.

	I	J	K	L	P
Work in or support multiple sites (Roving Staff)?					
	PSNU1	PSNU/Community	Facility	Valid OU	
Yes	Centre	Cite Verte	Asssavie	Valid	
No	Nord O	Kumbo East	Kitem Integrated Health	Valid	

The above entry will be flagged upon upload and give the following error message in the HRH app:

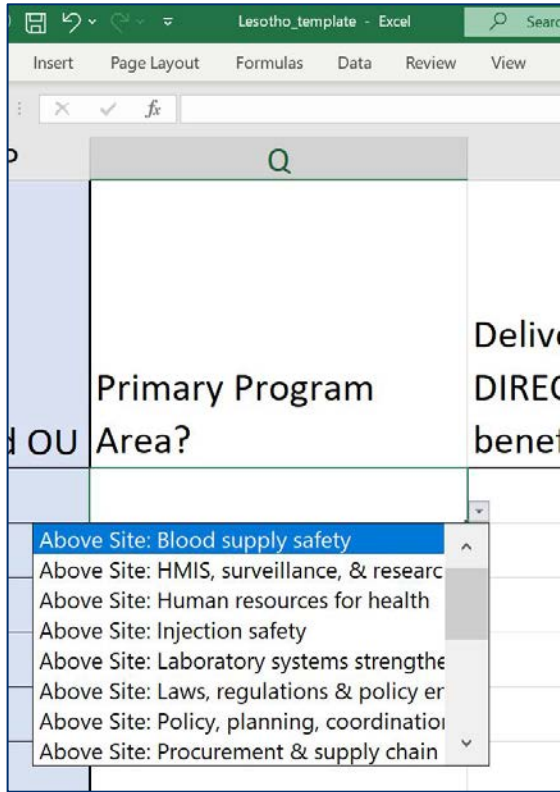
“For multiple sites/roving staff, the facility/community levels must not be applicable.”

Knowledge Check

- **How should community workers answer the question “does staff work in or support multiple sites”?**
 - a) Yes
 - b) No

*Response: **b) No** Staff that are working only at the community and are not attached to any facilities should answer no. This question is intended to capture facility-based workers that move across multiple facility sites.*

Template data elements: *Primary Program Area*



Select the primary PEPFAR program area that the individual staff supports.

- If the individual supports multiple program areas, please select the one that occupies the majority of their time.
 - If the individual supports two areas equally, please select one to report. The other may be listed in the comments section, if desired
- Only workers who support work at a community or facility (including rovers) can select a Site Level program area, as per the Financial Classification definition of Site Level. All others must select an Above Site program area.

Important: Connecting HRH to ER

Overview of Program Area Options

Site Level				Above Site Level
Prevention (Prev) - PrEP	Socioeconomic (SE)	Testing (HTS)	Care and Treatment (C&T)	Blood supply safety
Prevention (Prev) - VMMC				HMIS, surveillance, & research
Prevention (Prev) - Other				Human resources for health
				Injection safety
				Laboratory systems strengthening
				Laws, regulations & policy environment
				Policy, planning, coordination & management of disease control programs
				Procurement & supply chain management
				Public financial management strengthening
				Not Disaggregated
				Program Management

Important: Connecting HRH to ER

Summary of Employment Category and Program Area



Reminder!
You have
already
selected an
Employment
Title in the
template

Employment Category (ER) *Each employment title falls into one of these categories	Primary Program Area
Clinical	Site (C&T, HTS, SE, Prev.)
Ancillary	Site (C&T, HTS, SE, Prev.)
Program Management	Above Site (PM)
Other Staff	Site (C&T, HTS, SE, Prev.)
	Above Site (ASP)

Summary of Locations of Work and Program Area



Reminder!

You have already determined location of work in the DATIM Hierarchy section

Location of Work	Primary Program Area
Above Site	Above Site (ASP or PM)
Community	Site Level (C&T, HTS, SE, or Prev.)
Roving Staff	
Facility	

Data Entry Error: Facility is indicated but Primary Program Area is Above-Site

- If a Facility is indicated in Column L (i.e. Column L is not null), the Primary Program Area indicated in Column Q must be a “Site Level” program area

L	P	Q
Facility	Valid OU	Primary Program Area?
Asssavie	Valid	Above Site: Program Mana

The above entry will be flagged upon upload and give the following error message in the HRH app:

"Human resource in {row} has been indicated to work at facility level. Primary Program Area should begin with "Site Level: ..."

IMPORTANT Note about Primary Program Area

If the PEPFAR-supported worker works on more than one program area you must:

1. Choose a *primary* program area
2. Report FTE and Expenditure (\$\$) for the **entire** worker, not just for the primary program area

Example: You are reporting a full-time nurse who spends $\frac{3}{4}$ of her time on Care and Treatment and $\frac{1}{4}$ of her time on Testing. Her total annual expenditure is \$2,500.

You would report this worker on one line in the template:

Primary Program Area = Care and Treatment

FTE = 1

Expenditure = \$2,500

Summary of Employment Category with SD and NSD



Employment Category (ER)
*Each employment title falls into one of these categories



Primary Program Area

Direct Service Delivery or Non-Service Delivery

Reminder! You have already selected an Employment Title and Program Area

Employment Category (ER) *Each employment title falls into one of these categories	Primary Program Area	Direct Service Delivery or Non-Service Delivery
Clinical	Site (C&T, HTS, SE, Prev.)	Direct Service Delivery
Ancillary	Site (C&T, HTS, SE, Prev.)	Direct Service Delivery
Project Management	Above Site (PM)	Non-Service Delivery
Other Staff	Site (C&T, HTS, SE, Prev.)	Non-Service Delivery
	Above Site (ASP)	

Data Entry Error: Staff is indicated to work within an Above-Site program area AND Direct Service Delivery

- If an individual is indicated to work within an Above-Site program area in Column Q, Column R must be “Non-Service Delivery”

Q	R
Primary Program Area?	Deliver services DIRECTLY to beneficiaries?
Above Site: Laboratory systems strengthening	Direct Service Delivery
Site Level: Testing (HTS)	Direct Service Delivery

The above entry will be flagged upon upload and give the following error message in the HRH app:

“Human resource in {row} has been indicated to work at above-site level. Above-site human resources must be Non-Service Delivery.”

Template data elements: *Expenditure*

The HRH Inventory collects **Expenditure**, which is the same as ER Expenditure is how much was spent in the last fiscal year on the PEPFAR-supported worker

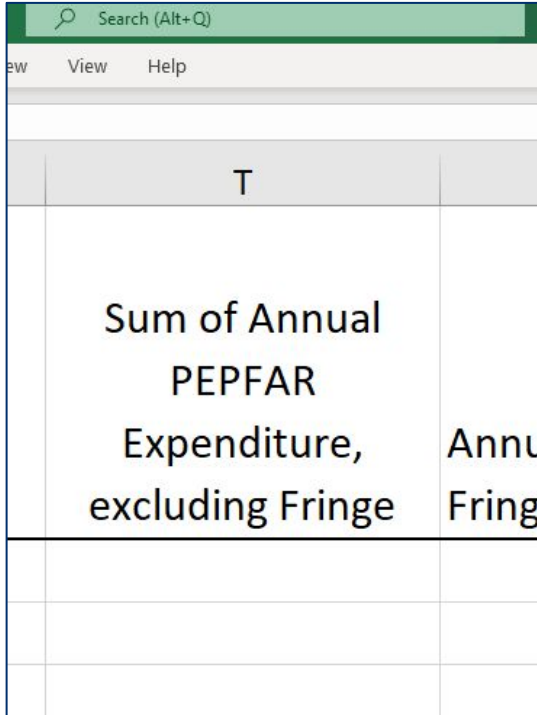
The HRH Inventory **does not** collect annual salary

The HRH Inventory collects Expenditure in two columns

1. Sum of Annual PEPFAR Expenditure, excluding Fringe
2. Annual PEPFAR Fringe Expenditure

Important: Connecting HRH to ER

Template data elements: *Sum of Annual PEPFAR Expenditure, excluding Fringe*



The screenshot shows a software interface with a search bar at the top containing the text "Search (Alt+Q)". Below the search bar is a menu bar with the options "ew", "View", and "Help". The main area of the interface is a table with a header row containing the letter "T". The table has two columns. The first column contains the text "Sum of Annual PEPFAR Expenditure, excluding Fringe" and the second column contains the text "Annu Fring".

T	
Sum of Annual PEPFAR Expenditure, excluding Fringe	Annu Fring

Enter the total amount expended on the individual staff's compensation, excluding fringe and non-monetary expenditure, over the past fiscal year.

- Free text, numeric
- All Salaries, wage, contract fees and other payments made to staff should be entered here.
- All PEPFAR expenditure data must be reported in United States dollars (USD).
- Include expenditures from September 30th 2020 to October 1st 2021

Important: Connecting HRH to ER

Template data elements: *Annual PEPFAR Fringe Expenditure*

	U
Annual PEPFAR Fringe Expenditure	Annual PEPFAR Fringe Expenditure

Enter the total amount expended on individual staff's fringe benefits, including non-monetary expenditures (in USD).

- Free text, numeric
- Fringe should include the cost of employer's share and should exclude any fringe benefits that are included as part of an approved indirect cost rate.

Expenditure on workers who only receive non-monetary support should be captured in this field.

Include expenditures from September 30th 2020 to October 1st 2021



Important: Connecting HRH to ER

Overview of Annual PEPFAR Fringe Expenditure

Included Costs	Excluded Costs
<ul style="list-style-type: none">● Non-monetary compensation paid to employees, entered as their USD equivalent value● Fringe benefits in the form of regular compensation paid to employees during periods of authorized absences from the job, such as vacation, sick leave, military leave.● Fringe benefits in the form of employer contributions or expenses for social security, employee insurance, workmen's compensation insurance, pension plan costs, etc.● Other allowable costs for fringe benefits (see OMB Circular A-122), such as housing assistance and rural housing allowance.	<ul style="list-style-type: none">● Stipends, cash awards, bonuses or performance-based pay should all be entered in the “Sum of annual PEPFAR Expenditure, excluding fringe.”● PEPFAR funding for the construction or renovation of housing for healthcare workers, even if in place of providing a housing allowance to obtain housing on the market, should not be included in the HRH Inventory.● Costs of fringe benefits that were classified as indirect

Non-monetary compensation, what is included and what is not

Non-monetary compensation **includes** anything purchased for the purpose of incentivizing work. Non-monetary **DOES NOT include** supplies or other resources required for fulfilling job duties

INCLUDED in non-monetary compensation 	Do NOT include in non-monetary compensation 
Purchase of household goods, clothing, or other items for personal use	Gumboots, bicycles, or other supplies intended to be used to perform work
Air time given to the individual exclusively for personal use	Air time for individuals that require air time to perform their work
Purchase of travel for personal use	Reimbursement or purchase of travel for the purpose of traveling to a work site

Note: All non-monetary compensation estimates should be reported in the Annual PEPFAR Fringe Expenditure column

Summary of Mode of Hiring and Expenditure (USD\$) for Salaried Workers

Staffing Scenario Examples		Mode of Hiring (column E)	Sum of Annual PEPFAR Expenditure, excluding Fringe (column T)	Annual PEPFAR Fringe Expenditure (column U)
1	Salaried Worker	Salary*	Salary Expenditure	Fringe Expenditure
2	Salaried Worker receiving an additional smaller stipend		Salary Expenditure + additional stipend expenditure	Fringe Expenditure
3	Salaried Worker receiving an additional non-monetary amount		Salary Expenditure	Fringe Expenditure + non-monetary compensation estimate

* All Salaried workers must enter an amount for fringe, if the worker does not receive fringe, enter zero

Summary of Mode of Hiring and Expenditure (USD\$) for Contract Workers

Staffing Scenario Examples		Mode of Hiring (column E)*	Sum of Annual PEPFAR Expenditure, excluding Fringe (column T)	Annual PEPFAR Fringe Expenditure (column U)
1	Contract Worker	Contract	Contract Expenditure	--
2	Stipend Worker		Stipend Expenditure	--
3	Contract Worker receiving fringe benefits		Contract Expenditure	Fringe Expenditure
4	Stipend Worker receiving non-monetary compensation		Stipend Expenditure	Non-monetary compensation estimate

Summary of Mode of Hiring and Expenditure (USD\$) for Non-monetary ONLY

Staffing Scenario Examples		Mode of Hiring (column E)*	Sum of Annual PEPFAR Expenditure, excluding Fringe (column T)	Annual PEPFAR Fringe Expenditure (column U)
1	Non-monetary only worker	Non-monetary ONLY	--	Non-monetary compensation estimate

Q&A

Moderator: Jerilyn Hoover, Health Science Specialist



HRH Inventory Template Demo w/ Staffing Examples

Presenter: Jason Roffenbender, Social Scientist



Staffing Scenarios

Scenario A

- Direct Service Delivery at a single facility

Scenario B

- Direct Service Delivery at multiple facilities

Scenario C

- Direct Service Delivery within a community but not facility based

Scenario D

- Non Service Delivery at multiple facilities

Scenario E

- Program Management - Above Site

Scenario F

- HRH Advisor seconded to the Ministry of Health

Staffing Scenarios

Scenario A: Direct Service Delivery at a single facility

A female nurse works full-time during the year at one, IP-supported facility. She was hired at the start of the year to provide HIV care and treatment services and is paid her salary directly by the prime implementing partner. In the past year, she was asked to divert some of her time to focus on COVID testing. Her total salary expenditure over the 12 months was \$11,000, and her annual fringe expenditure totaled \$1,820.

Follow Up: What if the IP hired a total of 10 female nurses at the same time for the same salary, but three worked at a separate facility?

HRH_Inventory Column Heading	Response
Record Number (Optional)	
Sex	Female
Employment Title	Nurse
Employed through Prime or sub IP	Prime
Mode of Hire	Salary
MOH Staff/ Seconded to MOH	No
Months of Work in Past Year	12
Average FTE per month	1.0
Work in or support multiple sites (Roving Staff)	No
SNU Level to Report	All SNUs (down to, and including,FACILITY)

Staffing Scenarios

Scenario A: Direct Service Delivery at a single facility

A female nurse works full-time during the year at one, IP-supported facility. She was hired at the start of the year to provide HIV care and treatment services and is paid her salary directly by the prime implementing partner. In the past year, she was asked to divert some of her time to focus on COVID testing. Her total salary expenditure over the 12 months was \$11,000, and her annual fringe expenditure totaled \$1,820.

Follow Up: What if the IP hired a total of 10 female nurses at the same time for the same salary, but three worked at a separate facility?

HRH_Inventory Column Heading	Response
Primary Program Area	Site Level: Care and Treatment
Deliver Services DIRECTLY to beneficiaries	Direct Service Delivery
In past year provided support for the COVID response?	Yes
Sum of Annual PEPFAR Expenditure, excluding Fringe	\$11,000
Annual PEPFAR Fringe Expenditure	\$1,820

Staffing Scenarios

Scenario B: Direct Service Delivery at a multiple facilities

A female nurse provides care and treatment services and works full-time supporting multiple facilities. She was hired halfway through the year. Her salary is paid directly by the prime implementing partner. In the past year, she helped screen and test clients for COVID with part of her time. Her annual salary would be \$11,000 for 12 months. Her total salary expenditure over the period she worked was \$5,500, and her fringe expenditure totaled \$935.

HRH_Inventory Column Heading	Response
Record Number (Optional)	
Sex	Female
Employment Title	Nurse
Employed through Prime or sub IP	Prime
Mode of Hire	Salary
MOH Staff/ Seconded to MOH	No
Months of Work in Past Year	6
Average FTE per month	1.0
Work in or support multiple sites (Roving Staff)	Yes
SNU Level to Report	All SNUs down to 'PSNU' Column Label (including PSNU the facilities are located within)

Staffing Scenarios

Scenario B: Direct Service Delivery at a multiple facilities

A female nurse provides care and treatment services and works full-time supporting multiple facilities. She was hired halfway through the year. Her salary is paid directly by the prime implementing partner. In the past year, she helped screen and test clients for COVID with part of her time. Her annual salary would be \$11,000 for 12 months. Her total salary expenditure over the period she worked was \$5,500, and her fringe expenditure totaled \$935.

HRH_Inventory Column Heading	Response
Primary Program Area	Site Level: Care and Treatment
Deliver Services DIRECTLY to beneficiaries	Direct Service Delivery
In past year provided support for the COVID response?	Yes
Sum of Annual PEPFAR Expenditure, excluding Fringe	\$5,500
Annual PEPFAR Fringe Expenditure	\$935

Staffing Scenarios

Scenario C: Direct Service Delivery within a community but not facility based

A sub IP provides pretest counseling, testing, and post-test counseling services through mobile community-based testing.

The sub IP hires 10 testing and counseling providers, 5 men and 5 women. Each of the 10 staff are hired through contracts that pay them \$2,850 each for six months of full-time work. There is no fringe with this contract.

HRH_Inventory Column Heading	Response
Record Number (Optional)	
Sex	Male for male staff rows, Female for female staff rows
Employment Title	Testing and Counseling Provider
Employed through Prime or sub IP	Sub IP
Mode of Hire	Contract
MOH Staff/ Seconded to MOH	No
Months of Work in Past Year	6
Average FTE per month	1.0
Work in or support multiple sites (Roving Staff)	No
SNU Level to Report	All SNUs down to 'PSNU' Column Label (including PSNU the community is located within)

Staffing Scenarios

Scenario C: Direct Service Delivery within a community but not facility based

A sub IP provides pretest counseling, testing, and post-test counseling services through mobile community-based testing.

The sub IP hires 10 testing and counseling providers, 5 men and 5 women. Each of the 10 staff are hired through contracts that pay them \$2,850 each for six months of full-time work. There is no fringe with this contract.

HRH_Inventory Column Heading	Response
Primary Program Area	Site Level: Testing (HTS)
Deliver Services DIRECTLY to beneficiaries	Direct Service Delivery
In past year provided support for the COVID response?	No
Sum of Annual PEPFAR Expenditure, excluding Fringe	\$2,850
Annual PEPFAR Fringe Expenditure	\$0

Staffing Scenarios

Scenario D: Non-Service Delivery at multiple facilities

A female data entry clerk works full-time on PrEP data entry between three facilities. She was hired at the start of Q2 and receives a salary which is paid through the Prime IP. In the past year, she did not provide support for the COVID response. She has an annual salary of \$4,500. Since she was hired three months after the start of the year, she earned \$3,600 for the 9 months that she worked. Her annual PEPFAR fringe expenditure for those nine months is \$600.

HRH_Inventory Column Heading	Response
Record Number (Optional)	
Sex	Female
Employment Title	Data Entry Clerk
Employed through Prime or sub IP	Prime
Mode of Hire	Salary
MOH Staff/ Seconded to MOH	No
Months of Work in Past Year	9
Average FTE per month	1.0
Work in or support multiple sites (Roving Staff)	Yes
SNU Level to Report	All SNUs down to 'PSNU' Column Label (including PSNU the community is located within)

Staffing Scenarios

Scenario D: Non-Service Delivery at multiple facilities

A female data entry clerk works full-time on PrEP data entry between three facilities. She was hired at the start of Q2 and receives a salary which is paid through the Prime IP. In the past year, she did not provide support for the COVID response. She has an annual salary of \$4,500. Since she was hired three months after the start of the year, she earned \$3,600 for the 9 months that she worked. Her annual PEPFAR fringe expenditure for those nine months is \$600.

HRH_Inventory Column Heading	Response
Primary Program Area	Site Level: Prevention (PREV) PrEP
Deliver Services DIRECTLY to beneficiaries	Non-Service Delivery
In past year provided support for the COVID response?	No
Sum of Annual PEPFAR Expenditure, excluding Fringe	\$3,600
Annual PEPFAR Fringe Expenditure	\$600

Staffing Scenarios

Scenario E: Program Management Above Site

A female Senior Finance Officer manages program funds, oversees project audits, as well as financial and administrative reporting requirements. She works at the IP office in the capital city, but the program is implemented across 15 sites across the country. She worked full-time for the entire year, and her salary expenditure was \$37,200. Her fringe expenditure totaled \$6,800.

HRH_Inventory Column Heading	Response
Record Number (Optional)	
Sex	Female
Employment Title	Finance Staff
Employed through Prime or sub IP	Prime
Mode of Hire	Salary
MOH Staff/ Seconded to MOH	No
Months of Work in Past Year	12
Average FTE per month	1.0
Work in or support multiple sites (Roving Staff)	No
SNU Level to Report	SNU 1

Staffing Scenarios

Scenario E: Program Management Above Site

A female Senior Finance Officer manages program funds, oversees project audits, as well as financial and administrative reporting requirements. She works at the IP office in the capital city, but the program is implemented across 15 sites across the country. She worked full-time for the entire year, and her salary expenditure was \$37,200. Her fringe expenditure totaled \$6,800.

HRH_Inventory Column Heading	Response
Primary Program Area	Above Site: Program Management
Deliver Services DIRECTLY to beneficiaries	Non-Service Delivery
In past year provided support for the COVID response?	No
Sum of Annual PEPFAR Expenditure, excluding Fringe	\$37,200
Annual PEPFAR Fringe Expenditure	\$6,800

Staffing Scenarios

Scenario F: HRH Advisor seconded to MOH

A female HRH Advisor is employed through a prime partner, and seconded to the Ministry of Health to support the development of a new national HRH strategy. She works at the Ministry of Health office in the capital city. She worked full-time for the entire year, and her salary expenditure was \$31,400. Her fringe expenditure totaled \$5,430.

HRH_Inventory Column Heading	Response
Record Number (Optional)	
Sex	Female
Employment Title	Technical Advisor
Employed through Prime or sub IP	Prime
Mode of Hire	Salary
MOH Staff/ Seconded to MOH	Yes
Months of Work in Past Year	12
Average FTE per month	1.0
Work in or support multiple sites (Roving Staff)	No
SNU Level to Report	SNU 1

Staffing Scenarios

Scenario F: HRH Advisor seconded to MOH

A female HRH Advisor is employed through a prime partner, and seconded to the Ministry of Health to support the development of a new national HRH strategy. She works at the Ministry of Health office in the capital city. She worked full-time for the entire year, and her salary expenditure was \$31,400. Her fringe expenditure totaled \$5,430.

HRH_Inventory Column Heading	Response
Primary Program Area	Above Site: Human resources for health
Deliver Services DIRECTLY to beneficiaries	Non-service Delivery
In past year provided support for the COVID response?	No
Sum of Annual PEPFAR Expenditure, excluding Fringe	\$31,400
Annual PEPFAR Fringe Expenditure	\$5,430

Staffing Scenarios

- For **INTERNATIONAL WORKERS**, such as U.S. based staff that spend a portion of their time supporting the IM, **leave all geographic hierarchy columns blank.**
- For **REGIONS**, the SNU1 level is the country where the worker performs their work.
- For **MILITARY**, select the military SNU. Leave all other geographic hierarchy columns blank.

- **Roving staff** should leave all geographies below the PSNU level (community and facility) blank.
- **Community workers** should leave all geographies below the PSNU level (community and facility) blank.
- **Above Site** workers must leave the facility level blank (at minimum)
- Staff assigned to a facility that spend a portion of their time in the community should be entered at the facility to which they are assigned.

Knowledge Check

- **You employ a facility administrator who supervises staff and manages workflow but does not see clients directly. Would this person be reported as service delivery or non-service delivery?**
 - a) Service delivery
 - b) Non-service delivery

*Response: **b) Non-service delivery** This person is not directly providing services to clients.*

Q&A

Moderator: Jerilyn Hoover, Health Science Specialist



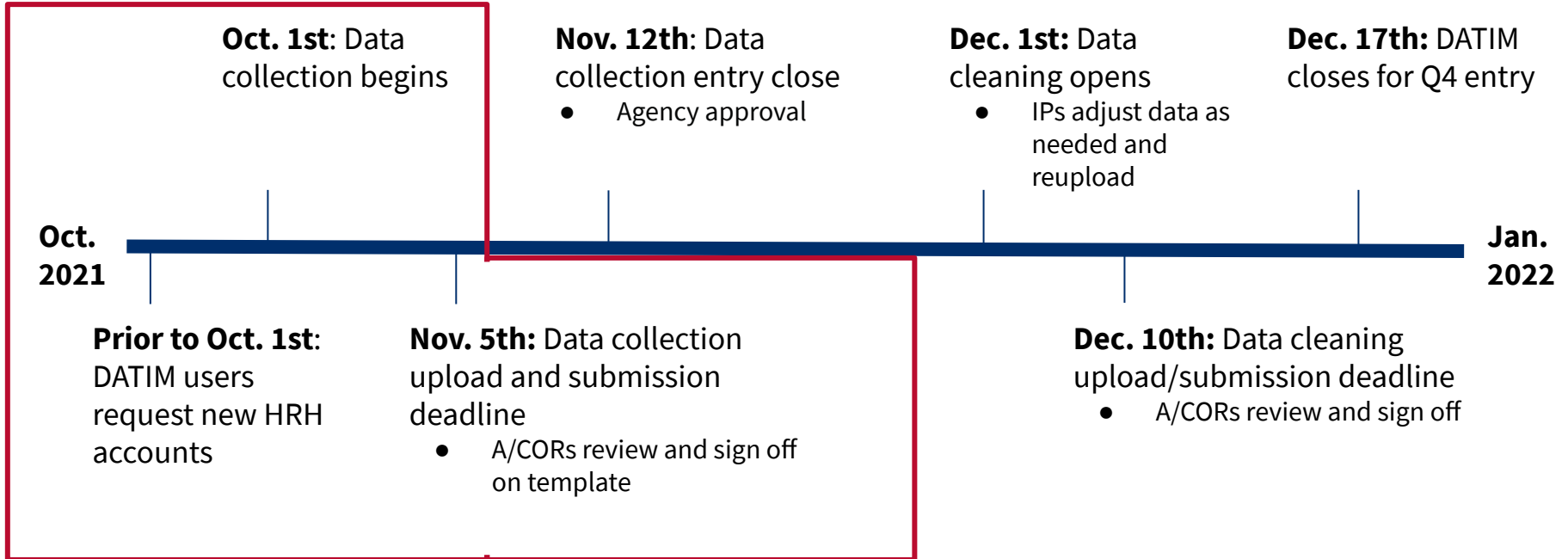
Overview of Reporting in DATIM

Presenter: Sarah Ackerman, AAAS S&T Fellow



Recap of reporting timeline

Current Reporting Timeline *(matches other PEPFAR data streams):*



Steps to HRH inventory reporting for partners

1. Request an HRH DATIM account at register.datim.org
2. Log into DATIM.org and download your OU-specific template starting October 1st
3. Complete the template
4. Navigate to the HRH app in DATIM and upload the template
5. Correct any errors as indicated upon upload
6. Navigate to the Data Approval app and click “Submit” to fully submit the template for DATIM and USAID approval
7. Await template approval, or make any revisions as requested

Requesting a HRH DATIM account

- HRH Inventory Processor will be a new application and data stream within DATIM
- In order to submit, approve, or interact with the HRH Inventory application, **existing DATIM user accounts will need to be updated or new accounts created**
- Request an account between now and October 1st
 - You can request an account after October 1st if necessary
- See the following slides for how to:
 - Register for a new account, including HRH access
 - Update your current DATIM account to obtain HRH access

Requesting a NEW! HRH DATIM account



What would you like to do?

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

Please enter your details below to request a user account on DATIM.

First Name *

Last Name *

Email Address *

User Type *

- USG
- Implementing Partner
- MoH Data Alignment

Operating Unit *

Please select an Operating Unit

Implementing Partner Name (official US Government registered name): *

Please provide the name of the implementing Partner

Preferred Language *

Data stream(s) you need access to: *

- ER
- HRH
- MER
- VMMC NAE

Access Type *

- Data Entry HRH Inventory
- Data Entry VMMC NAE
- Submit Data
- Read Data

Are you requesting this account on behalf of someone else?

- Yes
- No

Justification for request *

- Go to register.datim.org
- Select “Request a user account on DATIM”
- Enter your details (name, email, OU etc.)
- Choose “Implementing Partner”
- Choose access to “HRH”
- Choose access type “Data Entry HRH Inventory” and “Submit Data”
- Justify your request

Updating an existing DATIM account to access HRH



What would you like to do?

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

Please enter your details below to contact your User Administrator.

First Name *

Last Name *

Email Address *

User Type *

- USG [Ⓞ]
 Implementing Partner [Ⓞ]
 MoH Data Alignment [Ⓞ]

Operating Unit *

Please select an Operating Unit

Implementing Partner Name (official US Government registered name): *

Please provide the name of the Implementing Partner

Message to User Administrator *

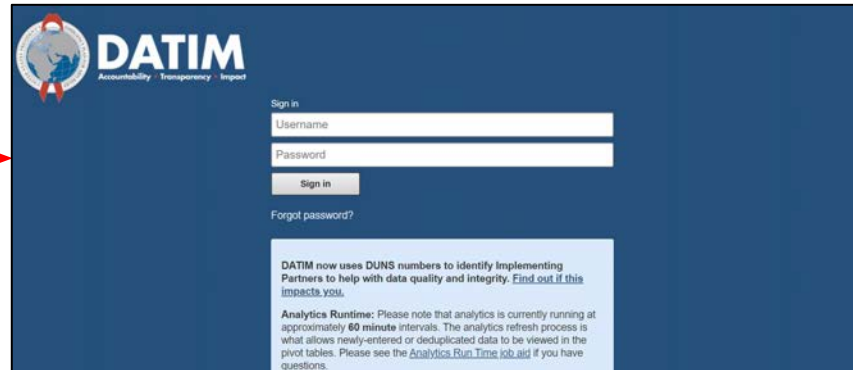
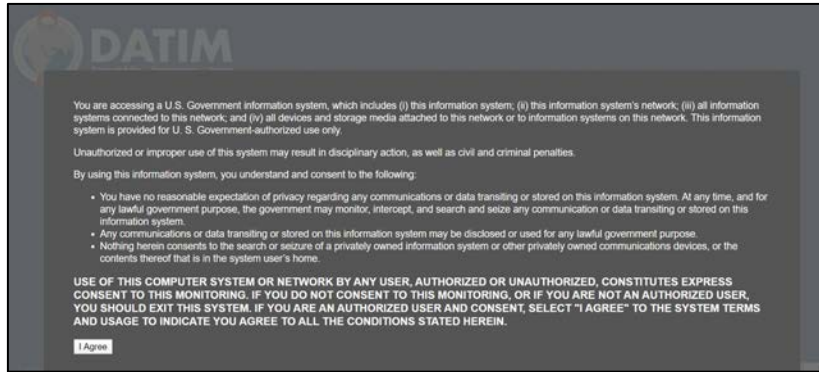
Update my account to gain access to new HRH reporting app

Submit

- Go to register.datim.org
- Select “Contact my DATIM user administrator about something else”
- Enter your details (name, email, OU etc.)
- Choose access to “Implementing Partner”
- Include a message to your administrator
 - Ex: “Update my account to gain access to new HRH reporting app”

Downloading and Uploading the HRH template

STEP 1: Log in to DATIM—<https://www.datim.org>



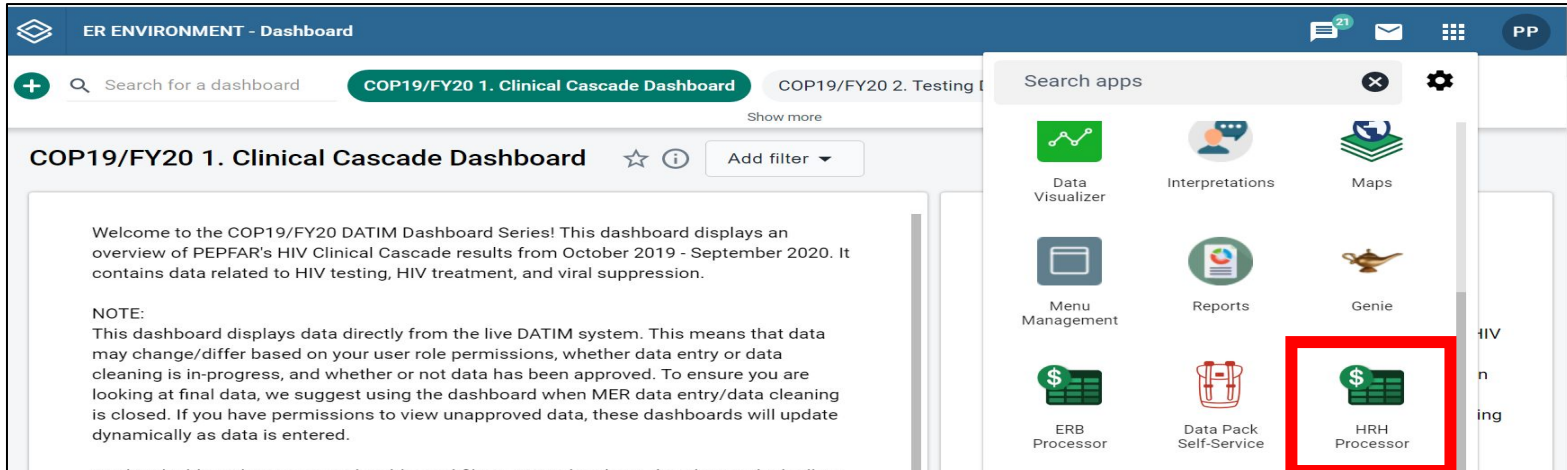
Downloading and Uploading the HRH template

STEP 2: Navigate to HRH Processor App

On the top right hand corner of the screen, select the **apps** menu



Within the apps menu, select the **HRH Processor** app



Downloading and Uploading the HRH Template

STEP 3: HRH Processor

HRH Processor < INSERT PARTNER NAME Partner

Operating Unit
South Africa

COP Year
COP 20 (FY21)

Mechanism

Please select a Funding Mechanism to submit templates

- Use the HRH Processor app to select:
 - OU
 - COP Year (COP20)
 - Funding Mechanism
- Request HRH template
- Upload HRH template

Downloading and Uploading the HRH Template

STEP 4: Partner Download Template


HRH Processor <

Operating Unit
South Africa


COP Year
COP 20 (FY21)

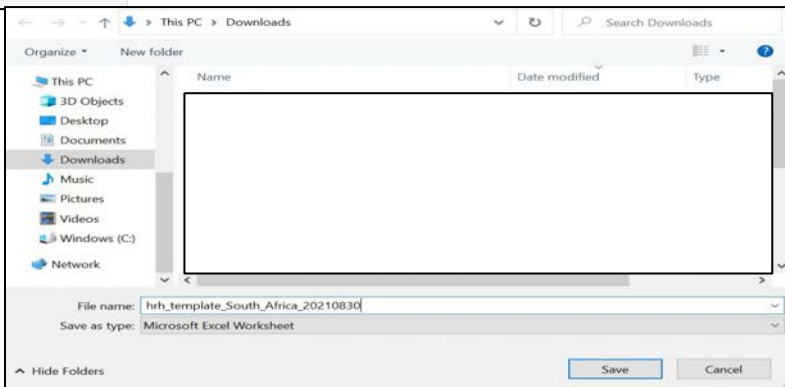
Mechanism
18483 - NU2GGH00...

Insert Partner Name Partner

Mechanism		Status
Mech ID	18483	Approval Status: Pending
Award #	NU2GGH001934	 REQUEST TEMPLATE
Mechanism Name	Wits Health Consortium	

Prime Partner

DUNS #	Uploaded Template	Status	Del
 UPLOAD TEMPLATE			



- Click the **Request Template** icon under the Status field
- Save template to your computer

Downloading and Uploading the HRH Template

STEP 5: Complete the template

Record Number (optional)	Sex	Employment title	Employed through Prime or Sub IP?	Mode of Hire	MCH Staff/seconded to MOH?	Months of Work in Past Year	Average FTE per Month	Work in or support multiple sites (Roving Staff)?	SNU1	PSNU/Community	Facility	Valid OU	Primary Program Area?	Deliver services DIRECTLY to beneficiaries?	In past year provided support for the COVID response?	Sum of Annual PEPFAR Expenditure, excluding Fringe	Annual PEPFAR Fringe Expenditure	Comments

- Remember! Complete both tabs (Cover Sheet and Staff List)
- To complete the template follow the instructions outlined earlier in this presentation and in the HRH Inventory [Handbook](#)
- Submit one template per mechanism
 - Consolidate Subrecipient staffing data and Prime staffing data together into the staff list tab

Downloading and Uploading the HRH Template

STEP 6: Partner Upload Template

HRH Processor <

Operating Unit
South Africa

COP Year
COP 20 (FY21)

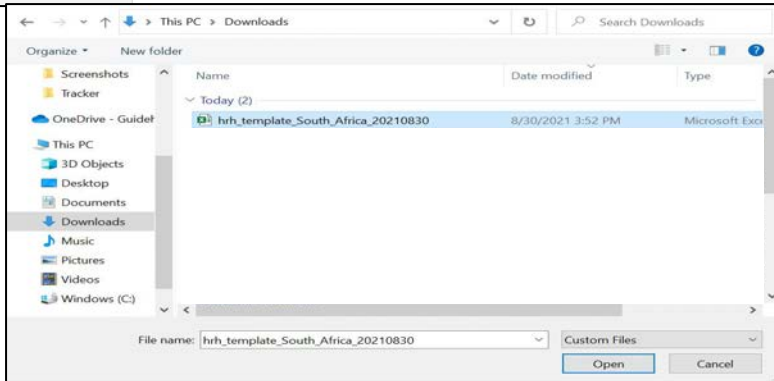
Mechanism
18483 - NU2GGH00...

Insert Partner Name Partner

Mechanism	Status
Mech ID: 18483	Approval Status: Pending
Award #: NU2GGH001934	REQUEST TEMPLATE
Mechanism Name: Wits Health Consortium	

Prime Partner

DUNS #	Uploaded Template	Status	Del
	UPLOAD TEMPLATE		



- Click the **Upload Template** icon in the Prime Partner upload field
- Select the template document and wait for file to upload
- Click **Upload HRH template**
- Assess Upload Status

Assessing Template Upload Status

If your template is successfully uploaded, you will see the following status:

Prime Partner

DUNS #	Uploaded Template	Status	Int	Del
639391218	COP20FY21_HRH_18483.xlsx	✓ success	7	

If there is an error in your uploaded template, you will see the following error status:

Prime Partner

DUNS #	Uploaded Template	Status	Int	Del
639391218	COP20FY21_HRH_18483.xlsx	! 1 error	7	

Navigating Upload Errors

Data Validations in DATIM HRH App

- Data quality validations are processed upon upload to DATIM
- These checks are logical or value checks
- The template can be uploaded as many times as needed to correct errors
- We recommend uploading the template early and often to catch errors and to ensure they are corrected well before the November 5th deadline
- The template must fully pass all validations before the IP is able to successfully submit

Completing a Final Quality Check Before Submission and Avoiding Upload Errors

Prior to uploading the template into the DATIM HRH App, it is important to conduct a data quality check. The template has been designed to minimize data entry errors through the inclusion of drop-down lists. However, a number of issues will trigger data entry error messages. To minimize the number of identified errors, perform the following check on the template prior to upload:

- ✓ **Check for completeness: Incomplete fields will trigger an error message.**
 - Ensure that all required fields in the Cover Sheet and Staff List Tabs are complete, consistent with each other and valid entries.
 - Ensure that all started rows are completed.
- ✓ **Check for logic: Use the error messages checks listed in the Definitions table as your guide to ensure each entry makes sense.**
 - Ensure all staff have been categorized and entered consistently (work location, roving, program area, employment title, etc.)
- ✓ **Check for duplicates:**
 - If you are using record numbers, ensure that each one is unique.
 - Ensure that the same staff person is not entered more than once
- ✓ **Check for extreme values:**
 - Check the compensation ranges in Sum of Annual PEPFAR Expenditure, excluding Fringe; and in Annual PEPFAR Fringe Expenditure and flag those that seem to be extreme values.
 - Ensure values are added in USD
- ✓ **Check the geography**
 - Check the “Valid OU” column in the template. This column will say “Valid” if a valid hierarchy of locations have been entered. For all that are not Valid, review selections to identify any overwriting of the dropdown fields.

Downloading and Uploading the HRH Template

STEP 7: Final Template Submission

HRH Processor < Insert Partner Name Partner

Operating Unit
South Africa

COP Year
COP 20 (FY21)

Mechanism
18483 - NU2GGH00...

Mechanism

Mech ID 18483

Award # NU2GGH001934

Mechanism Name Wits Health Consortium

Prime Partner

DUNS # Uploaded Template

639391218 COP19FY20_HRH_18483.xlsx

Search apps

Reports

Genie

ERB Processor

Data Pack Self-Service

HRH Processor

Data Approval

- Use the **Data Approval** app to select:
 - o Data Set
 - o Period
- Use the **“View”** tab to see all IMs to which you have access
- Use the **“Submit”** tab to see which IMs are ready for submission
- Select 1 or several IMs to submit, then Proceed

DATIM Approvals

Workflow: HRH FYOct Period: October 2021 - September 2022 Organisation Unit: South Africa

VIEW 12 ACCEPT SUBMIT 11 RECALL 1 RETURN

12 mechanisms

Mechanism ^

17025 - AID674A1200029 - HIV Innovations for Patient Outcomes for Priority Populations (INROADS)

DATIM Approvals

Workflow: HRH FYOct Period: October 2021 - September 2022 Organisation Unit: South Africa

SUBMIT 11

1 selected mechanism(s)

VIEW 12 ACCEPT SUBMIT 11 RECALL 1 RETURN

1 mechanism(s) selected

Mechanism ^	OU	Agency	Partner	Status
<input checked="" type="checkbox"/> 17025 - AID674A1200029 - HIV Innovations for Improved Patient Outcomes for Priority Populations (INROADS)	South	USAID	WITS HEALTH CONSORTIUM (PTY)	pending at

Knowledge Check

- **When will you see error messages if something in the HRH inventory template is incorrectly entered?**
 - a) Immediately as you enter the data in the template- errors will appear in red
 - b) When you attempt to upload to DATIM app- you will see an error message
 - c) You will only be notified of errors after the submission has been reviewed by agency staff

*Response: **b) When you attempt to upload to DATIM app** You will see an error message if there are any corrections needed for the template to be accepted.*

Knowledge Check

- **Will DATIM accept a template if there are outstanding error messages?**
 - a) Yes
 - b) No

*Response: **b) No** All error messages must be addressed by making changes to the data in the template before DATIM will accept the submission.*

Q&A

Moderator: Jerilyn Hoover, Health Science Specialist



Next Steps

Presenter: Sarah Ackerman, AAAS S&T Fellow



Accessing OGAC Guidance and Instructions

All guidance and instructions related to submitting HRH in DATIM can be found at <https://datim.zendesk.com>.

The screenshot shows the DATIM Support website. At the top left is the DATIM logo with the tagline 'Accountability - Transparency - Impact' and the word 'SUPPORT'. A search bar is located below the logo. A 'Sign in' button is in the top right corner. Below the search bar, there is a 'BROWSER COMPATIBILITY NOTE' and an 'Important Notice'. A grid of six blue tiles with white icons and text is displayed: 'DATIM Training & Tutorials', 'What's New in DATIM', 'PEPFAR Guidance', 'Frequently Asked Questions (FAQs)', 'Data Import and Systems Administration', and 'PEPFAR/MoH Data Alignment Activity'. To the right of the grid is a 'Guidance Highlights' section with a list of links. Below that is a 'Technical Support' section with links for 'Submit a Request', 'Your Profile', and 'Ticket Status'. A red callout box on the left points to the 'DATIM Training & Tutorials' and 'PEPFAR Guidance' tiles. A red callout box on the right points to the 'Technical Support' section.

2 key places to find guidance and instructions

Technical support available!

Accessing Guidance and Instructions cont'd



PEPFAR Guidance

- [Intro to PEPFAR HRH Inventory](#)
- [HRH Definitions](#)
- [HRH Inventory Handbook](#)
- HRH Inventory Template (within DATIM app)
- Checklists Before Submitting and Approving HRH Inventory Template
- [FAQ](#)
- Job Aids
- HRH FTE Calculator
- [User Administration: Creating New HRH User Accounts](#)
- [DATIM Data Approval Level Statuses and Actions HRH](#)



DATIM Training & Tutorials

***Please check back regularly on DATIM Zendesk as the above materials will be posted on a rolling basis.

Next Steps

1. Prior to October 1st, submit form at register.datim.org to obtain an HRH DATIM account and access to final HRH template
2. Review template and guidance materials (this presentation and recording will be sent out via email)
3. Direct questions about the training to: hrh-reporting-helpdesk@usaid.gov
4. Direct mechanism specific questions to A/CORs, Activity Managers and Mission HRH POCs
5. Begin collating data needed to complete the inventory *Recommend upload prior to November 5th submission deadline to give ample time to respond to any errors

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Erin Dunlap

Ben Kasdan

HRH Mission POCs

PEPFAR ST3 for HRH Inventory Development



PEPFAR



USAID
FROM THE AMERICAN PEOPLE

Thank you for your attention!

Q&A

Moderator: Jerilyn Hoover, Health Science Specialist

