



PEPFAR

U.S. President's Emergency Plan for AIDS Relief

Overview

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 evaluation data.

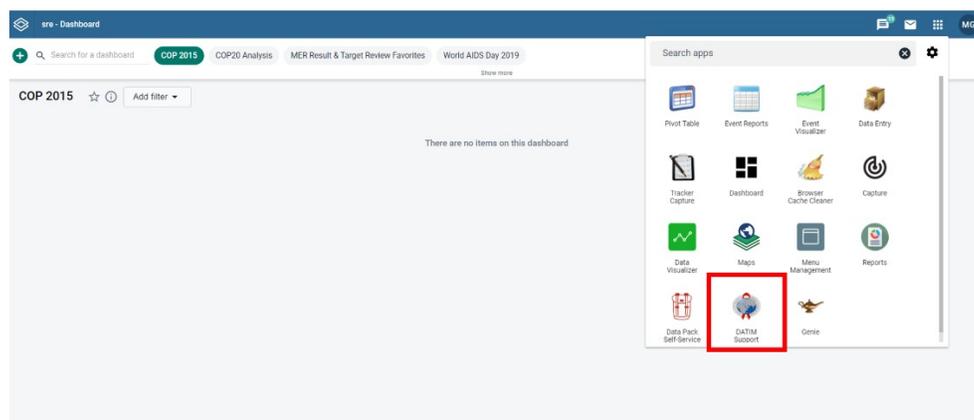
Note: All evaluations including the CoAg- and contract-level evaluations will use the Planning Form in the Tracker App of DATIM. The planning form more directly aligns evaluations with what was proposed and approved at COP. This form and the enrollment form need to be completed after COP approval and are required for all evaluations. We recognize that often CoAg evaluations do not have the required information until sometime after COP. Agencies should now track CoAg evaluations from the time their IM is proposed, to when it is awarded, and then to enter details as soon as the evaluation is planned. Agencies should also provide a Semi-Annual Status Update form for these to at least indicate that they are complete.

** Please do not create test and training accounts in production.*

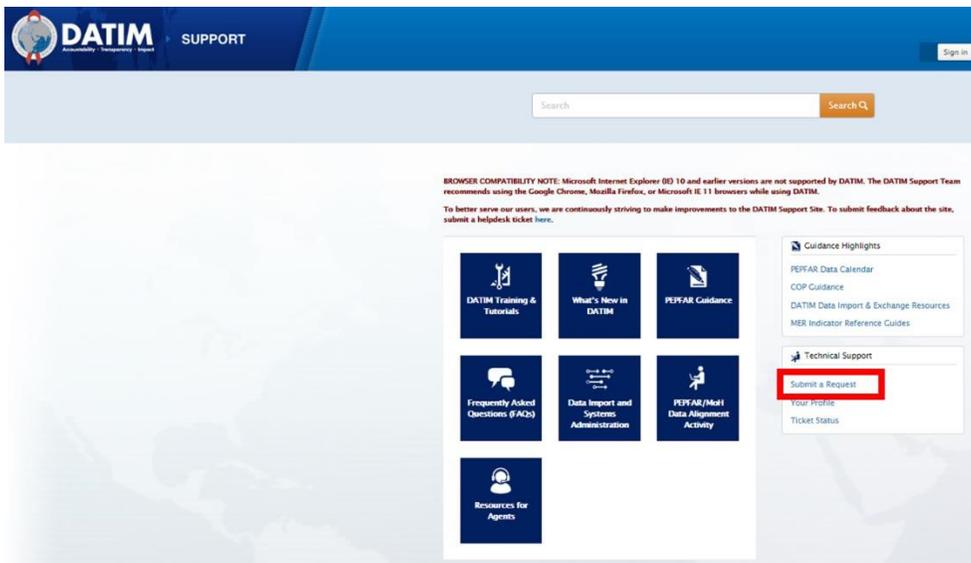
Access

In order to have access to Tracker Capture for reporting evaluations, a request for a new ESoP 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.

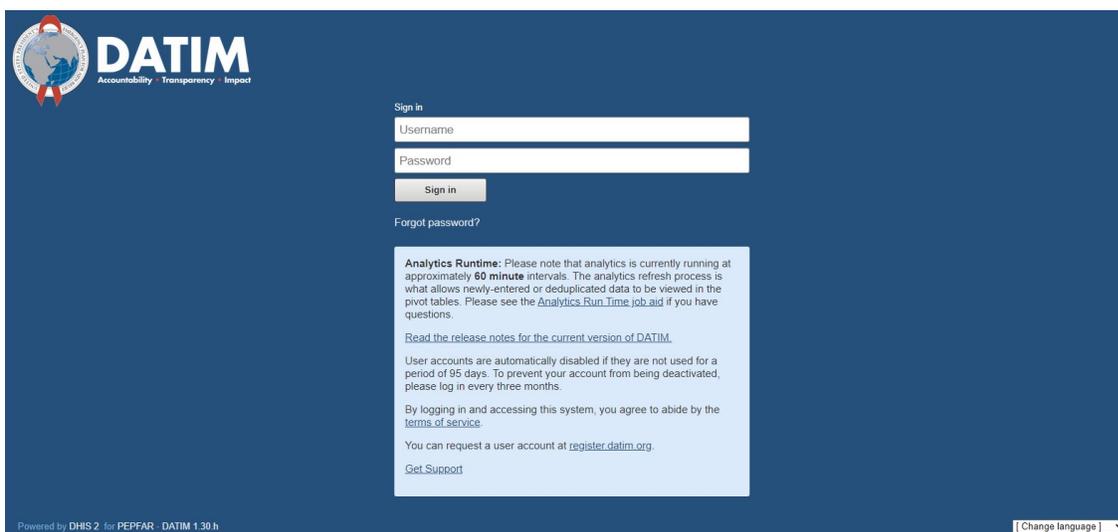
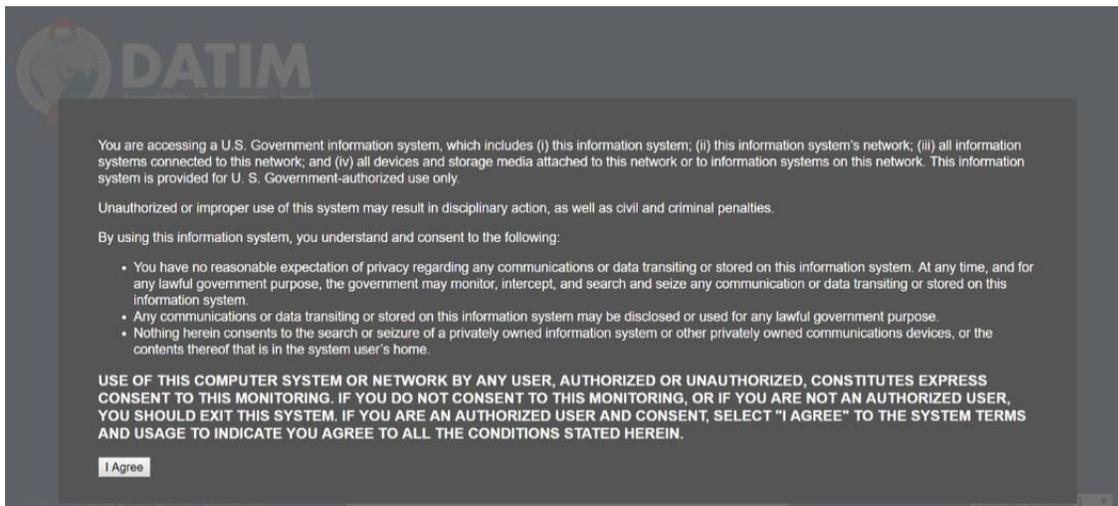


Or

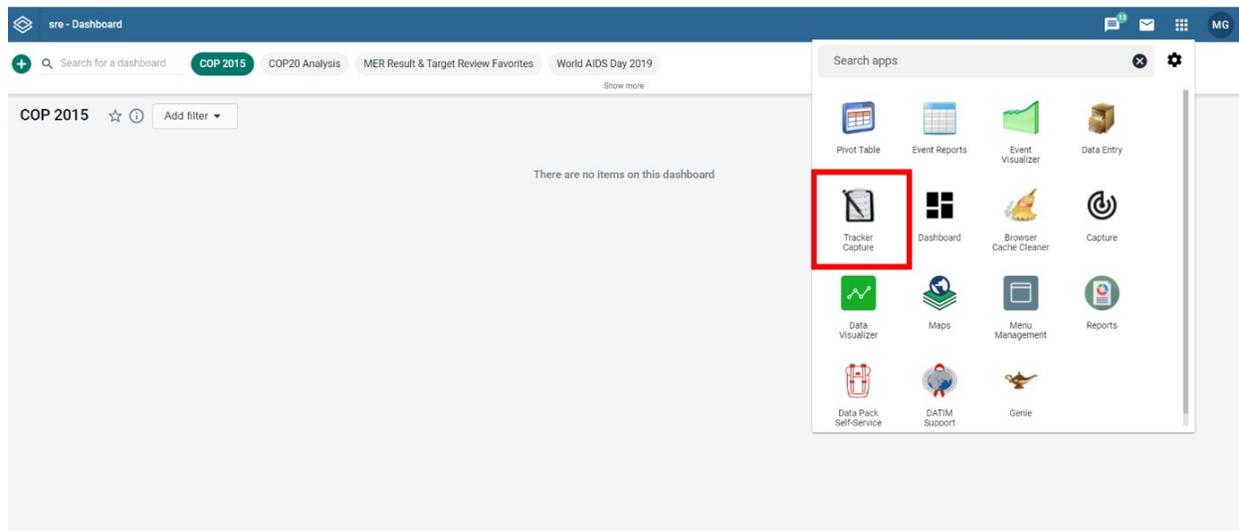


Data Entry

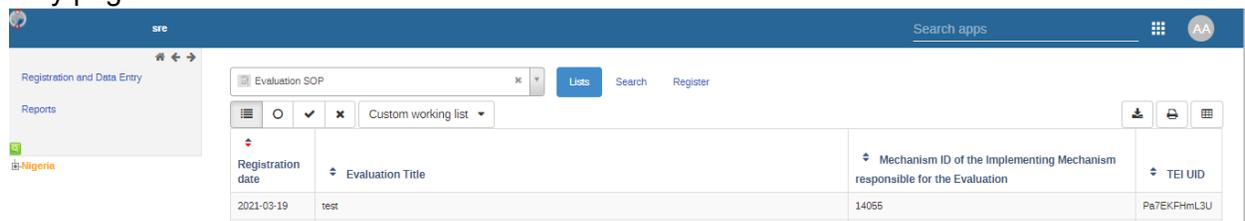
Step 1: Login to DATIM (DATIM.org) with your correct account credentials:



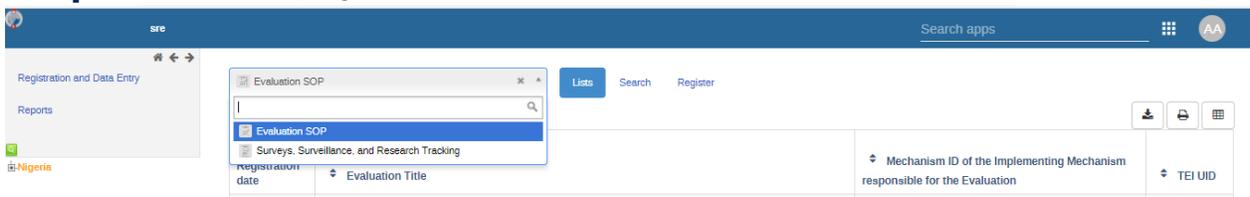
Step 2: On the top right-hand corner of the screen, select the **Apps menu** where you should see Tracker Capture (you may need to use the scroll down button on the right side of the menu):



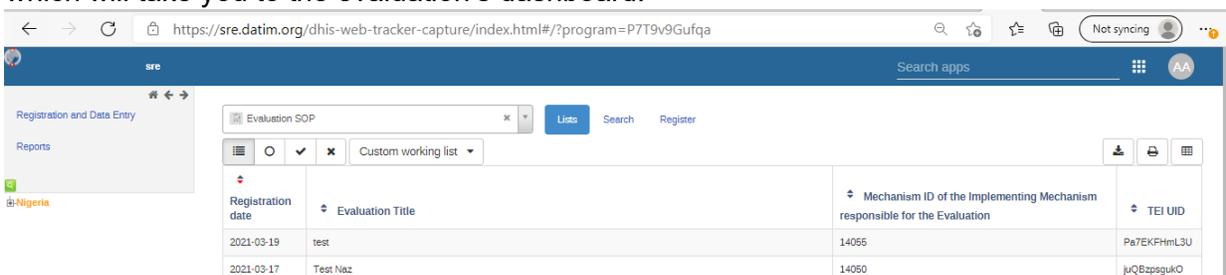
Step 3: Select the **Tracker Capture** app, which will take you to the registration and data entry page:



Step 4: Select the program **Evaluation SOP**:



Step 5: For **ongoing evaluations**, search and click the evaluation event that you want to edit, which will take you to the evaluation's dashboard:



Step 6: For new evaluations, select **Register** and complete the **ESOP Enrollment Form**:

The screenshot shows the SRE web application interface. At the top, there is a navigation bar with 'sre' on the left and 'Search apps' on the right. Below the navigation bar, there is a search bar with 'Evaluation SOP' entered. To the right of the search bar are buttons for 'Lists', 'Search', and 'Register'. The 'Register' button is highlighted with a red box. Below the search bar, there is a table with columns for 'Registration date', 'Evaluation Title', 'Mechanism ID of the Implementing Mechanism responsible for the Evaluation', and 'TEI UID'. The table contains two rows of data. Below the table, there is a section for 'Enrollment' with fields for 'Enrolling organisation unit' (Nigeria) and 'Enrollment Report Date' (2021-03-19). Below the enrollment fields, there is a section for 'Profile' with the title 'ESOP Enrollment Form'. This section contains 12 numbered questions with corresponding input fields.

Registration date	Evaluation Title	Mechanism ID of the Implementing Mechanism responsible for the Evaluation	TEI UID
2021-03-19	test	14055	Pa7EKFHmL3U
2021-03-17	Test Naz	14050	JuQBzpsgukO

Enrollment

Enrolling organisation unit: Nigeria

Enrollment Report Date: 2021-03-19

Profile

ESOP Enrollment Form

- TEI UID *
- USG Agency funding evaluation *
- Is the evaluation conducted in multiple countries? *
- Countries where evaluation is being conducted *
- Fiscal year the evaluation was originally approved *
- Expected budget of the entire evaluation *
- Is this a cooperative agreement- or contract-level evaluation? *
- Mechanism ID of the implementing mechanism responsible for the evaluation *
- Award number of the implementing mechanism responsible for the evaluation *
- Name of the implementing mechanism responsible for the evaluation (may be the same as the project IM) *
- Name of implementing partner responsible for the

If the study was approved in COP but is no longer going to be implemented (ie it will be deactivated) please be sure to note the rationale in question 59 and 60.

59 Is this study deactivated? If so why? Deactivated studies must provide rationale. OGAC with Agencies will follow up on use of COP funds. *

Yes No

60 If deactivated, please provide rationale

Required

Step 7: If you have another new evaluation to register, select **Save and add new** at the end of the form. If you do not have another new evaluation to register, select **Save and continue**:

Save and continue Save and add new Print form Cancel

NOTE: You must complete all required fields to save the form.

Step 8: Select **Save and continue**, which will take you to the evaluation's dashboard:

The screenshot shows a web application interface for an evaluation form. The top navigation bar includes a search bar and user profile icons. The main content area is divided into several sections:

- Enrollment:** Contains fields for 'Owned by: Nigeria', 'Enrolling organisation unit: Nigeria', and 'Enrollment Report Date *' (2021-03-15). It has buttons for 'Complete', 'Deactivate', and 'Delete'.
- Indicators:** A message box stating 'No indicators exist'.
- Timeline Data Entry:** A message box stating 'No event exists' with a plus sign icon to add events.
- Report:** A message box stating 'No records exist for reporting'.
- Feedback:** A message box stating 'No feedback exist'.
- Profile:** A 'Profile Edit' section containing a table of form fields:

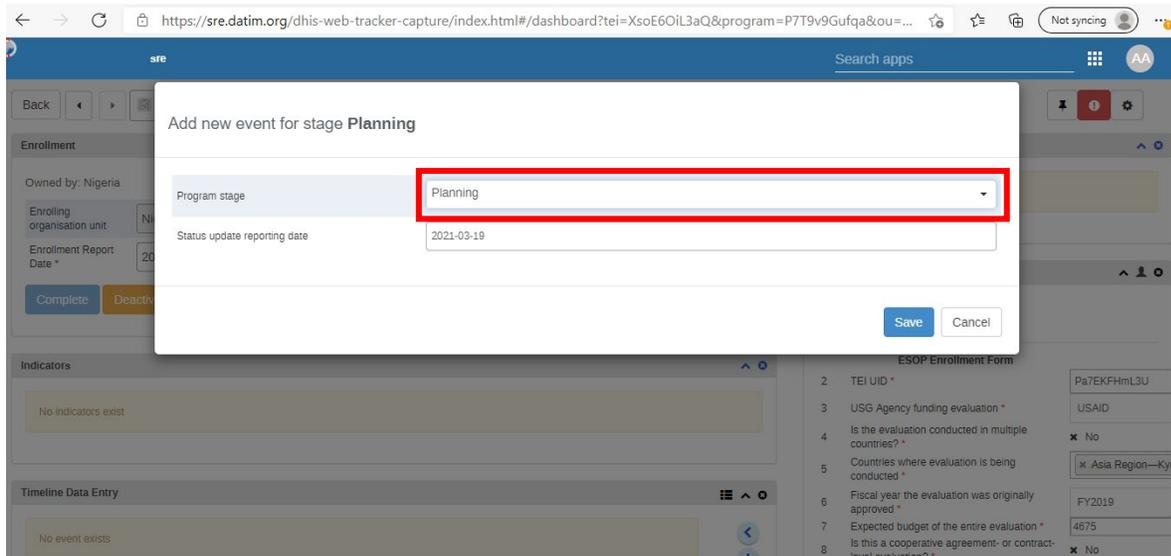
ESOP Enrollment Form	
2. TEI UID *	Pa7EKPHnLSU
3. USG Agency funding evaluation *	USAID
4. Is the evaluation conducted in multiple countries? *	<input checked="" type="checkbox"/> No
5. Countries where evaluation is being conducted? *	in Asia Region—Kyrgyz Republic
6. Fiscal year the evaluation was originally approved? *	FY2019
7. Expected budget of the entire evaluation *	4676
8. Is this a cooperative agreement- or contract-level evaluation? *	<input checked="" type="checkbox"/> No
9. Mechanism ID of the implementing mechanism responsible for the evaluation *	14088
10. Award number of the implementing mechanism responsible for the evaluation *	Award unknown for mechanism 14088
11. Name of the implementing mechanism responsible for the evaluation (may be the same as the project title) *	PLAN-Health
12. Name of implementing partner responsible for the evaluation *	Management Sciences For Health, Inc.
13. DUNS of implementing partner responsible for the evaluation *	071713088
14. Is the primary evaluation partner a local institution? *	<input checked="" type="checkbox"/> No
15. If a local institution, is any individual or group of individuals fulfilling the role as principal investigator/co-investigator/evaluation team lead(s)/other leadership role? *	<input checked="" type="checkbox"/> No

NOTE: If you need to edit your Enrollment form, you may do so by clicking the Edit button in the Profile section and clicking Save at the end of the form when finished.

Step 9: You should complete the **Planning** event form for your evaluation once each fiscal year during the next available reporting period after receiving COP approval. You can only complete **one** Planning form per fiscal year.

In the **Timeline Data Entry** section, click the plus sign to **Add** and **Save** the **Planning** event form for your evaluation. Click **Complete** to save the form:

This is a close-up view of the 'Timeline Data Entry' section. It shows a message box that says 'No event exists'. To the right of the message box is a vertical toolbar with four icons: a left arrow, a plus sign (highlighted with a red box), a calendar icon, and a right arrow.



NOTE: You must complete all required fields to save the form.

NOTE: If you do not click Complete, the data will not be saved and made available for generating reports in the Event Reports app.

Step 10: After clicking Complete, select **Complete** again to stay in the dashboard or **Complete and exit** to return to the registration and data entry page:

6	Fiscal year the evaluation was originally approved *	FY2019
7	Expected budget of the entire evaluation *	4675
8	Is this a cooperative agreement- or contract-level evaluation? *	<input checked="" type="checkbox"/> No
9	Mechanism ID of the implementing mechanism responsible for the evaluation *	14066
10	Award number of the implementing mechanism responsible for the evaluation *	Award unknown for mechanism 14066
11	Name of the implementing mechanism responsible for the evaluation (may be the same as the project ID) *	PLAN-Health
12	Name of implementing partner responsible for the evaluation *	Management Sciences For Health, Inc.
13	DUNS of implementing partner responsible for the evaluation *	071713086
14	Is the primary evaluation partner a local institution? *	<input checked="" type="checkbox"/> No
15	If a local institution, is any individual or group of individuals fulfilling the role as principal investigator/co-investigator/evaluation team lead/other leadership role? *	<input checked="" type="checkbox"/> No
16	Mechanism ID of the implementing mechanism responsible for the evaluation 2 *	Select or search from the list
17	Award number of the implementing mechanism responsible for the evaluation 2 *	
18	Name of the implementing mechanism responsible for the evaluation (may be the same as the project ID) 2 *	
19	Name of implementing partner responsible for the evaluation 2 *	
20	DUNS of implementing partner responsible for the evaluation 2 *	
21	Is the primary evaluation partner a local institution? 2 *	
22	If a local institution, is any individual or group of individuals fulfilling the role as principal investigator/co-investigator/evaluation team lead/other leadership role? 2 *	
23	Mechanism ID of the implementing mechanism responsible for the evaluation 3 *	Select or search from the list
	Award number of the implementing mechanism responsible for the evaluation 3 *	

Step 11: You should complete the **Semi-Annual Status Update** form for your evaluation once per reporting period through the conclusion of your evaluation. Please note you will not be able to edit a previous period's Semi-Annual Status Update form.

In the **Timeline Data Entry** section, under **New event**, click **Add** to select and **Save** to access the **Semi-Annual Status Update** event form for your evaluation. Click **Complete** to save the form:

Timeline Data Entry

2021-06-03
 Nigeria
 Planning
 (Completed)

New event >
Semi-Annual Status Update.
[Add](#) | [Schedule](#) | [Referral](#)

Status update reporting date *

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

Program stage

Period

Timeline Data Entry

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

→

2021-06-03
 Nigeria
 Planning
 (Completed)

Status update reporting date *

Evaluation Inventory – Semi-Annual Status Update

Fiscal year and reporting period of status update *
Required

Do any of the most recently completed status update responses need to be updated? Yes No

Current evaluation stage *
Required

Current evaluation progress *
Required

Start date of data collection

End date of data collection

NOTE: You must complete all required fields to save the form.

Step 12: After clicking Complete, select **Complete** again to stay in the dashboard or **Complete and exit** to return to the registration and data entry page:

Complete

Are you sure you want to complete the selected event?

Complete Complete and exit Cancel

Status update reporting date *

2021-03-31

Evaluation Inventory – Semi-Annual Status Update

Fiscal year and reporting period of status update * FY2021 Q2

Do any of the most recently completed status update responses need to be updated? Yes No

Current evaluation stage * Newly Commencing

Current evaluation progress * Protocol/statement of work/SOW: cleared

Complete Delete Print form

Step 13: Upon reporting the conclusion of your evaluation in the Semi-Annual Status Update form, the Adherence Checklist event form will appear:

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

2021-06-04 Nigeria Planning (Completed)

Status update reporting date *

2021-03-31

Evaluation Inventory – Semi-Annual Status Update

Fiscal year and reporting period of status update * FY2021 Q2

Do any of the most recently completed status update responses need to be updated? Yes No

Current evaluation stage * Completed

Current evaluation progress * Protocol/statement of work/SOW: cleared

Total expenditures at end of the evaluation 0

Complete Delete Print form

New event >

Adherence checklist Add | Referral

Step 14: You should complete the **Adherence Checklist** form for your evaluation once at the conclusion of your evaluation.

In the **Timeline Data Entry** section, under **New event**, click **Add** to select and **Save** to access the **Adherence Checklist** event form for your evaluation. Click **Complete** to save the form:

The screenshot shows the 'Timeline Data Entry' interface. At the top, there is a timeline with two events: '2021-03-31 Nigeria Semi-Annual Status Update (Open)' and '2021-06-04 Nigeria Planning (Completed)'. To the right, a 'New event' dropdown menu is open, showing 'Adherence checklist' with an 'Add' button highlighted in a red box. Below the timeline, there is a 'Status update reporting date' field with the value '2021-03-31'. A modal window titled 'Add new event for stage Adherence checklist' is overlaid on the page, containing a 'Status update reporting date' field with the value '2021-06-04' and 'Save' and 'Cancel' buttons. Below the modal, there is an 'Evaluation Inventory - Semi-Annual Status Update' form with various fields like 'Fiscal year and reporting period of status update', 'Do any of the most recently completed status update responses need to be updated?', 'Current evaluation stage', 'Current evaluation progress', and 'Total expenditures at end of the evaluation'. At the bottom of this form are 'Complete', 'Delete', and 'Print form' buttons.

The screenshot shows the 'Timeline Data Entry' interface with three events in the timeline: '2021-03-31 Nigeria Semi-Annual Status Update (Open)', '2021-06-04 Nigeria Planning (Completed)', and '2021-06-04 Nigeria Adherence checklist (Open)'. The 'Adherence checklist' event is highlighted in yellow. To the right, a 'New event' dropdown menu is open, showing a message: 'All the expected events are already present, cannot create more events.' Below the timeline, there is a 'Status update reporting date' field with the value '2021-06-04'. Below this, there is an 'Adherence Checklist' form with the following fields: '1. Fiscal year and reporting period of status update' (dropdown menu), '2. Final evaluation title in English. (This will automatically update the title in the Evaluation Inventory Enrollment Profile).' (text input field with value 'Test Naz'), '3. Date evaluation report approved by agency' (text input field with value 'yyyy-MM-dd'), '4. Reviewer agency' (dropdown menu), and '5. Reviewer name' (text input field). Each field has a 'Required' label below it.

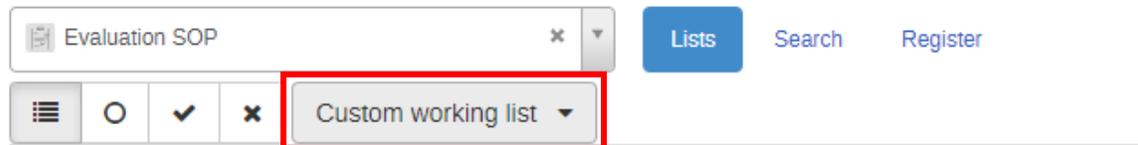
NOTE: You must complete all required fields to save the form.

NOTE: Once you click Complete, you will no longer be able to edit the event form.

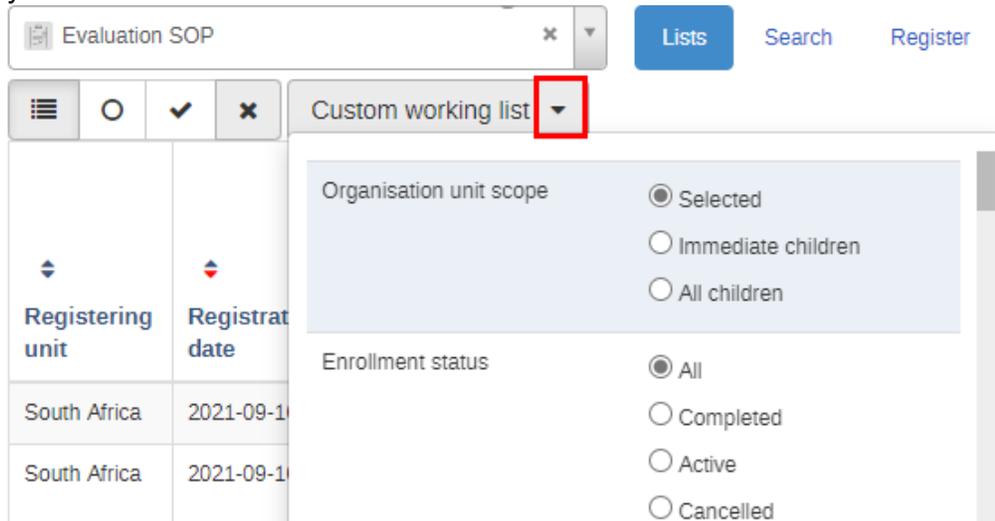
Custom working list

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

Step 1: Once you select the program **Evaluation SOP** the **Custom working list** button is listed directly below the Evaluation SOP program:



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



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

Registering unit	Registration date	Project Name	Value
South Africa	2021-09-1	ESOP-SaSR Countries in project- Turkmenistan	4610
South Africa	2021-09-1	ESOP-SaSR Countries in project- Uganda	2868
South Africa	2021-09-1	ESOP-SaSR Countries in project- Ukraine	2866
South Africa	2021-09-1	ESOP-SaSR Countries in project- Uzbekistan	4610
South Africa	2021-06-1	ESOP-SaSR Countries in project- Vietnam	1658
South Africa	2021-06-1	ESOP-SaSR Countries in project- Zambia	1379
South Africa	2021-06-1	ESOP-SaSR Countries in project- Zimbabwe	1658

Search

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

Evaluation SOP × ▾ Lists Search Register

Custom working list ▾

○ Specific users:

Registering unit	Registration date	ESOP-SaSR TEI UID	ESOP USG agency funding evaluation	ESOP First fiscal year when evaluation funding is approved	ESOP OU multicountry	ESOP Expected budget of the entire evaluation	ESOP Contract- or cooperative agreement evaluation activity	ESOP Mechanism ID of implementing mechanism responsible for the evaluation	ESOP Award number
South Africa	2020-11-11		[Please select]	[Please select]	[Please select]	Is ▾ Exact value	[Please select]		
South Africa	2021-06-11								16583
South Africa	2021-04-01								13695
South Africa	2021-06-11								17769

Reports

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