

## Annual Expenditure Analysis- Data Input Instructions

Please complete this Excel template and submit it according to the instructions below.

A manual has been provided to assist with this data request. Please review the template and manual now and contact your Activity Manager (AM)/Program Officer (PO)/Agreement/Contracting Officer's Technical Representative (A/COTR) with any questions.

To ensure uniqueness of file names, please use the following conventions when saving your completed templates:

<OU>\_<Agreement ID>\_EP\_<Partner Name>\_<Reporting Cycle>\_<Seq>.xlsx

Where:

<OU> = Two letter international Country code (e.g., VN for Vietnam, TZ for Tanzania, etc.) or Operating Unit (OU)

<Agreement\_ID> = Mechanism Agreement number; the <Agreement ID> is available from the table on the **Results** page in PROMIS

E = E for an Expenditure Analysis Template

P = P for template to be attributed to Prime Partner

<Partner\_Name> = Name of the organization associated with template results; enter Prime Partner name

<Reporting Cycle> = 'yyyy Expenditures' where yyyy is corresponding Fiscal Year (e.g., 2012 Expenditures)

<Seq> = should consist of two numeric digits as follows:

*1st Digit* = template number; 1 for 1st template, 2 for 2nd template (if more than one template of this type ne and so on up to 9

*2nd Digit* = template update number; 1 for initial submission; 2 for the next update (if any), and so on up to 9  
For example, Seq = '34' means the 4th submission of the 3rd template uploaded (3rd in the original sequence)

Note: if a given template fails to upload successfully, its name should be reused in a subsequent upload try after correction

.xlsx = must be saved as a .xlsx Excel file (not .xls)

Example expenditure analysis (E) template file name :

VN\_9740\_EP\_Columbia University\_2012 Expenditures\_11.xlsx

Submit the completed template via the PROMIS web-based application and alert your AM/PO/A/COTR of each draft submission. Respective USG Agency staff (USAID, CDC, DOD, Peace Corps, State) will receive the data from the PROMIS application.

Complete the **Partner Info** page. Be sure to include your organization's contact information. Verify that your inputs include all required information in your submission. Implementing organizations, defined as having a direct financial agreement with a USG Agency, are responsible for collating and submitting all sub-partner data.

For each row on the **Program Information- ...** and **Expenditures- ...** information entry tabs, use the drop downs to select the geographical area (sub-national unit, national or above-national) pertaining to each entry row and associated values entered in the program area fields for that row of data following the guidance provided (see **manual**). Each row can have one or more of the listed program information columns. Enter results in the correct program information column for each row. Each row with results **MUST** specify the sub-national unit in the row in which the results appear. Your trainer will provide additional guidance on how to apply the categories listed on the form.

The Expenditure Analysis reporting period is 12 months (01 October to 30 September). This period is regardless of when your organization receives PEPFAR funding.

Please make note of your general comments regarding this mechanism on the **Partner Info** tab. Please make note of any calculations and comments for the appropriate Program Area heading in the **Program Information - Comments** and **Expenditures - Comments** tabs.

On each **Comments** tab, please explain the following using the comments fields:

- o Explain methods for allocation that differ from the recommended methods in the Expenditure Analysis Manual
- o Explain any expenditure values reported less than 10 USD

In general, more information is better.

Prior to submission, please confirm that each of the data quality issues identified on the **Data Quality Checks** tab are resolved.

All USG partners are entitled to report their achievements regardless of overlap with another partner. The information you provide will help the USG team report more accurate aggregate data.

For the detailed definitions of program and expenditure categories, please refer to the manual provided on the PRO website.

To help with navigation on the different information entry tabs, notice the Quick Links bar on the left-hand column. any of the blue hyperlinks to quickly navigate to that entry sub-section. Additionally, on each information entry tab, hyperlinks to the respective comments field above each entry area. Click a hyperlink to quickly move to the proper cell to enter comments for the Program information area; each link reads "Add Comment". Clicking the correspond next to each comment field will return you to the previous Program Information or Expenditure column.

**\* NOTE: DO NOT ADD COLUMNS OR ROWS TO THE WORKSHEETS**

<b>DS-4213 President's Emergency Plan for AIDS Relief (PEPFAR) Program Expenditures</b>
<i>Please read Agency Disclosure Notice and Instructions prior to completing this form</i>
<p>Public reporting burden for this collection of information is estimated to average 24 hours per response, including time required for searching existing data sources, gathering the necessary documentation, providing the information and/or documents required, and reviewing the final collection. You do not have to supply this information unless this collection displays a currently valid OMB control number. If you have comments on the accuracy of this burden estimate and/or recommendations for reducing it, please send them to: Office of the US Global AIDS Coordinator (S/GAC) U.S. Department of State, SA-29, 2nd Floor, Washington, DC 20522-2920</p>
OMB No. 1405-xxxx OMB approval expires xx/xx/xxxx Burden-24 hours

## PRIVACY STATEMENT

**Personal Information**

- This site is only accessible to authorized PROMIS users with an assigned user identifier and associated transmissions to and from the PROMIS application are protected and secured via SSL encryption.
- PROMIS tracks and associates the following information to each user:
  - o User name – this information is used to ensure a user is uniquely identified within PROMIS.
  - o User organization – this information is used to limit access to only those elements of PROMIS data
  - o User email address – this information is maintained to support user notifications such as a notice of change, a notice to review the site terms of use, etc.
  - o User roles & privileges – this information is used to further limit access to only those PROMIS data elements of PROMIS data that are relevant to your role within your organization.
  - o Each user log-on session to include log-in time and log-out time – this information is used to associate access to the PROMIS web site.
  - o Each PROMIS data element entered, updated, or deleted by you in the course of your interaction with the information is used to track PROMIS data change history, to assess inappropriate PROMIS data changes, and to identify data that may need to be corrected at a future date.
- The PROMIS hosting services provider also tracks information to support site performance to include:
  - o The browser used when accessing PROMIS.
  - o The time and date of each visit to the PROMIS log-in page.
  - o The PROMIS web pages visited.

o The PROMIS web pages visited.

o The address of the web site visited immediately prior to visiting the PROMIS web site.

o Any malicious actions against the PROMIS web service.

- Your information will not be disclosed, given, sold, or transferred unless required for law enforcement law.

- This site is maintained by the U.S. Government and is protected by various provisions of Title 18 are subject to criminal prosecution in Federal court.

#### **Use of Cookies**

- The PROMIS website maintains both session-based and persistent “cookies” on your browser. It stores text information temporarily in your computer’s random access memory (RAM) while you are on your web browser, these cookies are removed. PROMIS persistent cookies store information for a user to identify returning PROMIS users.

#### **HIPAA Privacy Rule Notice**

- The PROMIS web site does not collect or maintain individually identifiable Protected Health Information. Health Partners may have access to such information from their health service provider Sub-Partners in-Care. The entry of only aggregated results by pre-defined health Indicator.

- PROMIS maintains no individual identifiers that may be linked to a specific individual or patient.

- The PROMIS web site maintains only aggregate statistical data. In addition to population counts, it maintains sub-counts for certain Indicators by gender (i.e., male or female) and/or age group (e.g., 18-24). The PROMIS database and application is not covered under the HIPAA Privacy Rule.

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## Partner Information

### Annual Expenditure Analysis

#### Partner Background (Complete the areas in light gray below)

**Partner Organization Name & Agreement ID:** <e.g., ABC Associates: Health Syst

**Director/Chief of Party:**

**Telephone:**

**Cell:**

**E-mail:**

**SI Focal Person (if applicable):**

**Telephone:**

**Cell:**

**E-mail:**

**Financial Focal Person (if applicable):**

**Telephone:**

**Cell:**

**E-mail:**

#### Reporting Information

**Submission Date:**

**Name of Person Submitting Form:**

#### USG Approval (For internal purposes only)

**USG Agency:**

**A/COTR Approval (Name/Date):**

**SI Officer Approval (Name/Date):**

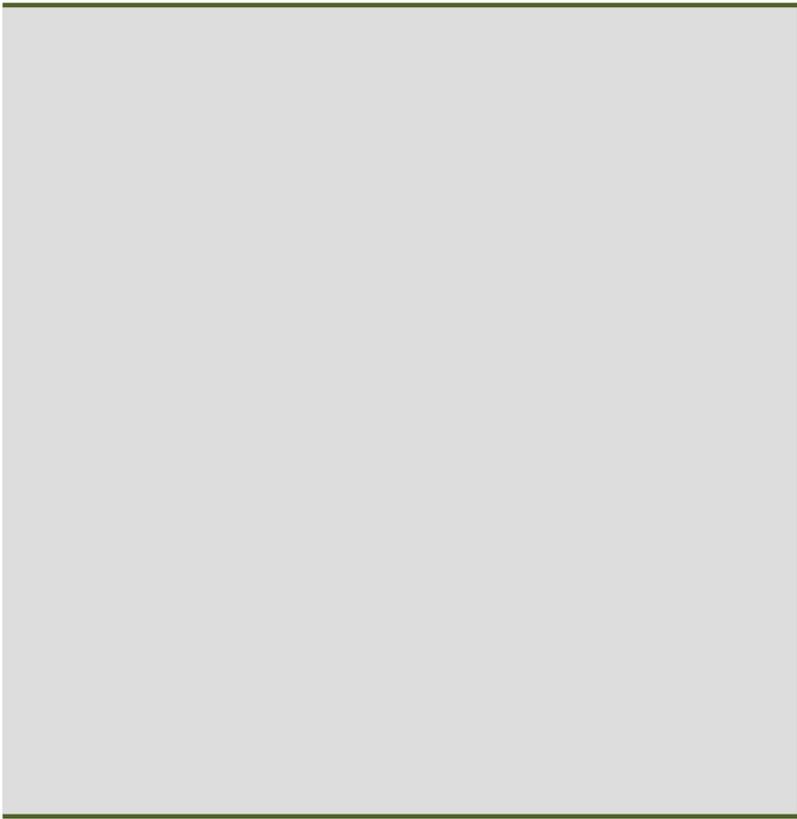
#### Comments (Provide general comments if needed)



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FY 2012

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FBCTS



## Program Information - Comments

Please use the space below to provide comments that will aid in interpreting the data.



**Return to Results Worksheet**  
[Program Information](#)





















































































































































































































































































































































































































































































































































































































































































































































































































































































































































































































































































































































































FBCTS

CBCTS

PMTCT

VMMC

HTC

PEP

BS

LAB

IC

OVC

SORP-GP

SORP-MARPs

PM

SI

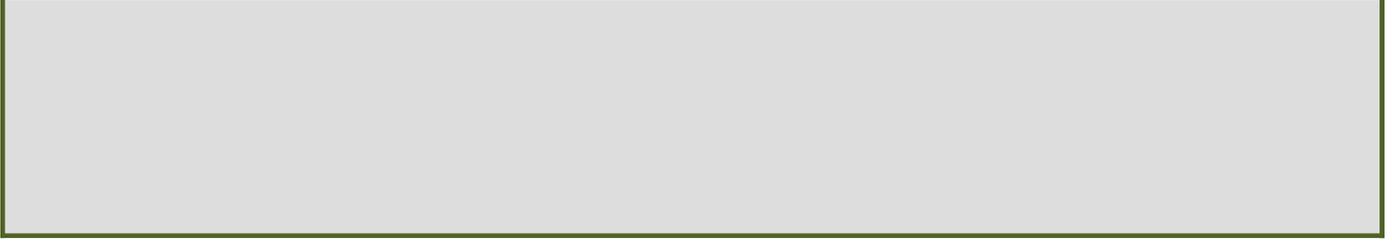
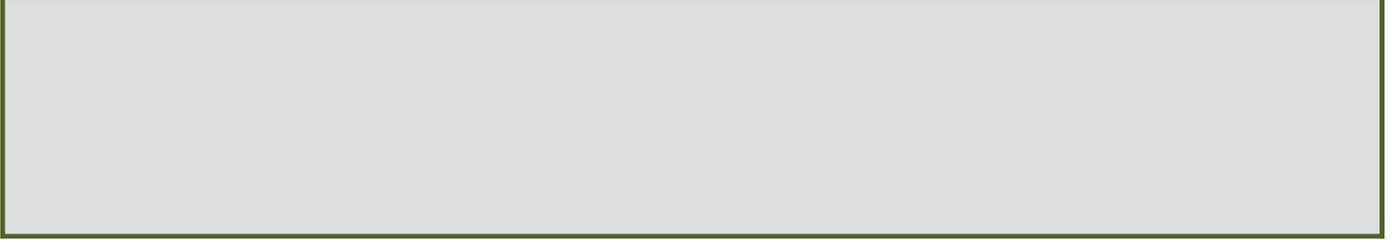
Surveillance

HSS



## Expenditures - Comments

Please use the space below to provide comments that will aid in interpreting the data.







**Return to Expenditures Worksheet**  
[Site-Level](#)

**Return to Expenditures Worksheet**

[Site-Level](#)

**Return to Expenditures Worksheet**

[Site-Level](#)

**Return to Expenditures Worksheet**

[Site-Level](#)

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**Return to Expenditures Worksheet**

[Site-Level](#)

**Return to Expenditures Worksheet**  
[PM](#)

**Return to Expenditures Worksheet**  
[SI](#)

**Return to Expenditures Worksheet**  
[Surveillance](#)

**Return to Expenditures Worksheet**  
[HSS](#)

















































































































































