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FY21 Expenditure Reporting Instructions for PEPFAR Implementing Partners

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Expenditure Reporting Overview

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Intended Audience

- Primary Audience: The primary intended audience for this document is PEPFAR Implementing Partners-both prime partners and subrecipients-who will be reporting expenditures for the FY21 cycle
- Secondary Audience: The secondary audience for this document is anyone who supports implementing partners in the expenditure reporting process and thus should have familiarly with the process for implementing partners reporting expenditures (e.g. PEPFAR implementing agency colleagues), and also, future PEPFAR implementing partners, who may want to prepare for expenditure reporting in future cycles.

Expenditure Reporting Submission Overview

- The expenditure reporting submission should include all expenditures made during Fiscal Year 2020 (October 1, 2019 - September 30, 2020)
- Submissions will be made by PEPFAR implementing partners using the expenditure reporting template; one template should be completed for each separate Operating Unit (OU) and mechanism.
- All submissions should comply with federal cost regulations, as outlined in Part 200, Subpart E of the Code of Federal Regulations. This section of the CFR describes cost principles for non-federal entities receiving federal awards, including cost principles related to the classification of direct and indirect costs, the allowability, reasonability and allocability of costs, as well as other cost principles. CFR Part 200 Subpart E can be accessed here: https://www.ecfr.gov/cgi-bin/text-idx?node=2:1.1.2.2.1#sp2.1.200.e
- 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, 1800 G Street, NW, 10th Floor, Washington, DC 20006.

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Expenditure Reporting Compliance with CFR Cost Principles

- All submissions should comply with federal cost regulations, as outlined in Part 200, Subpart E of the Code of Federal Regulations.
- CFR Part 200 Subpart E can be accessed here: https://www.ecfr.gov/cgi-bin/text-idx?node=2:1.1.2.2.1#sp2.1.200.e
- This section of the CFR describes cost principles for non-federal entities receiving federal awards, including cost principles related to the
  - classification of direct and indirect costs,
  - the allowability,
  - reasonability and
  - allocability of costs, as well as other cost principles.
- Value Added Tax (VAT) Foreign taxes charged for the purchase of goods or services that a non-Federal entity is legally required to pay in country is an allowable expense under Federal awards as direct or indirect costs. To the extent that such credits accrued or received by the non-Federal entity relate to allowable cost, these costs must be credited to the Federal awarding agency either as costs or cash refunds. More information can be found here.

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Agency Cost Principles and Reporting Requirements

- In addition to the federal cost principles outlined to the CFR Part 200, each implementing agency may have additional cost principles and other terms that must be respected as part of the expenditure reporting process.
- Implementing partners should confer with their awarding agency to ensure that their expenditure reporting submission complies with expenditure and cost requirements for that agency.
- For awards made by The Department of State, reporting must comply with U.S. Department of State Standard Terms and Conditions, which can be accessed here.

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PEPFAR FY21 Expenditure Reporting Template Overview

- The expenditure reporting template should be used by Implementing Partners to report COP20/FY21 PEPFAR expenditures.
- The template is posted on DATIM Zendesk here: https://datim.zendesk.com/hc/en-us/articles/360016058191-Expenditure-Reporting-Excel-Template
- For those familiar with expenditure reporting (ER), the COP20/FY21 template is the same format as the COP20/FY21 template.
  - IPs are not required to submit expenditures for subrecipients by cost category.
  - Prime Implementing Partners (IPs) will upload and submit templates in DATIM.
  - One separate template should be completed for each separate Operating Unit (OU) and mechanism.
- USG Staff will be involved in the workflow and approval of data.
- Please read through expenditure reporting guidance on this template prior to completing this form. All programmatic guidance and systems instructions can be found on https://datim.zendesk.com.

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DATIM Account User Administration Overview

- User Administrators (UAs) will continue to administer accounts using the established ER process to grant users access to ER.
  - Users *with* existing DATIM accounts with ER access to upload and submit expenditure templates. No additional user administration is necessary.
  - Users *without* existing DATIM accounts with ER data access need to request a new account.
- All accounts with ER access will also have budget and projected expenditure access for future data collection.

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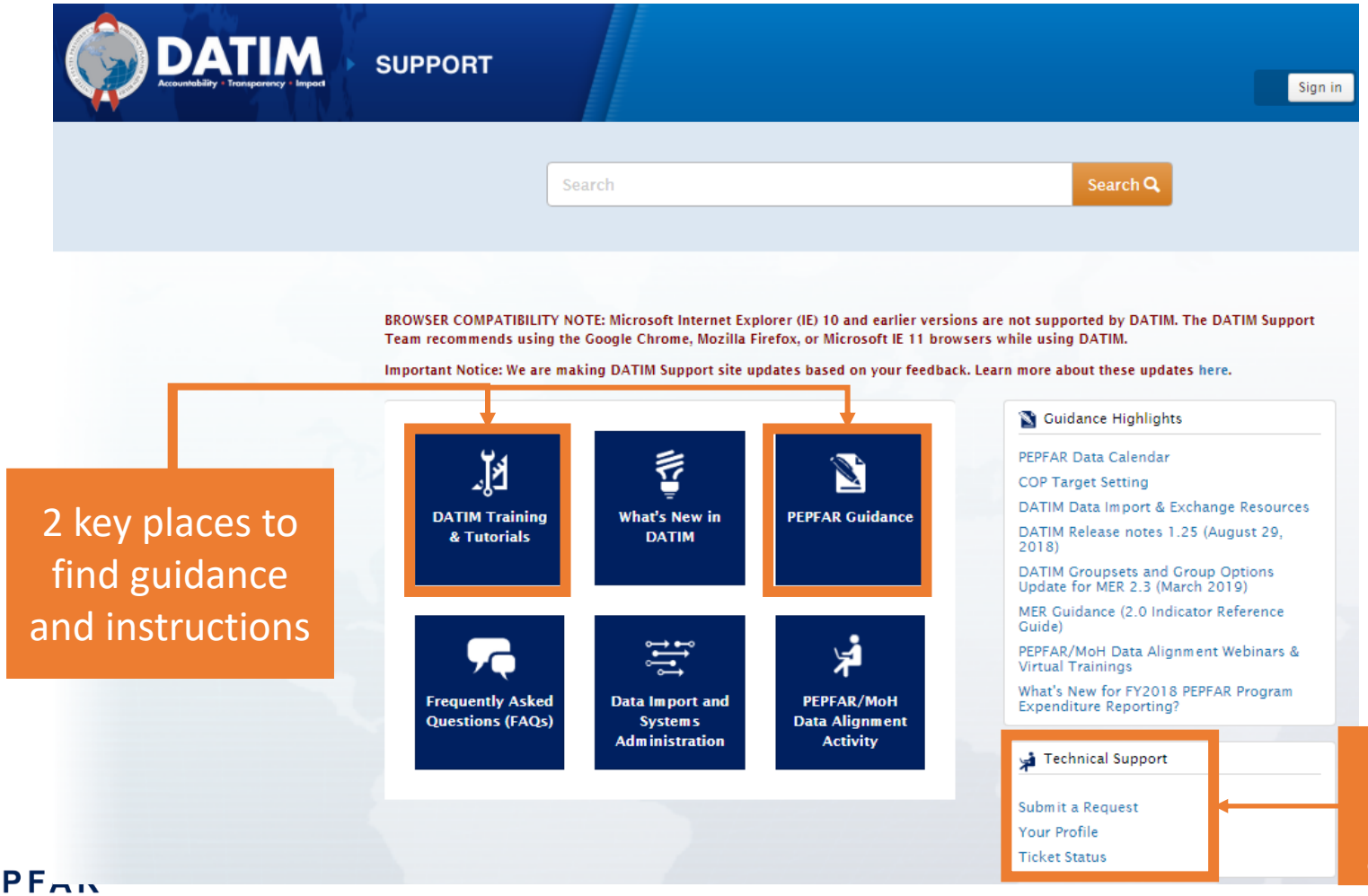
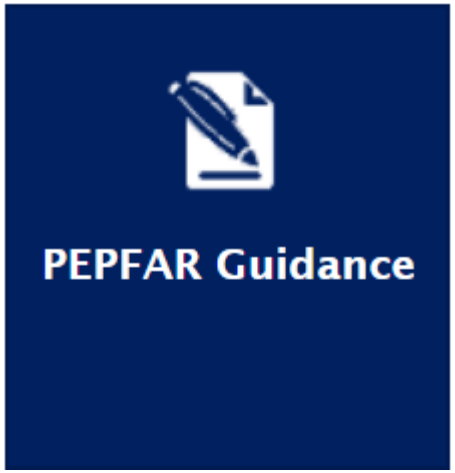
Guidance and Instructions

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



What guidance and instructions are available?



- What's new for COP20/FY2021 PEPFAR Program Expenditure Reporting?
- Expenditure Reporting Template
- Checklists for Reviewing Expenditure Reporting Data
- PEPFAR Financial Classifications Reference Guide
- Monitoring PEPFAR Program Expenditures

- COP20/FY2021 Expenditure Reporting Webinar
- COP20/FY2021 Instructions for IP Users
- COP20/FY2021 Instructions for Agency Users
- DATIM4U for ER
- DATIM Data Approval Level Statuses and Actions

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

First Look at the ER Template

The template contains three tabs:

- Instructions (no data entry)
  - Provides background and information about the template and reporting requirement
- Metadata and Error Checks (data entry)
  - This tab contains two separate components:
    - The Metadata is where implementing mechanisms provide identifying information about themselves
    - The Error Checks section is where the template will identify certain errors that partners should correct prior to submission
- Expenditure Template (data entry)
  - This is where all interventions will be categorized and all expenditures will be reported

Process for Filling out the ER Template

1. Enter Metadata
   - Identify information about the IP and the contracted project
2. Enter FY21 PEPFAR program expenditures
   - Categorize interventions and enter expenditure data
3. Review for Errors and Revise Data as Necessary
   - Review and verify data entered in step 2
4. Upload to DATIM and Submit
   - Upload the ER template to DATIM via the ERB app and submit the mechanism for approval via the Data Approval app

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Enter Metadata

Tab: Metadata and Error Checks

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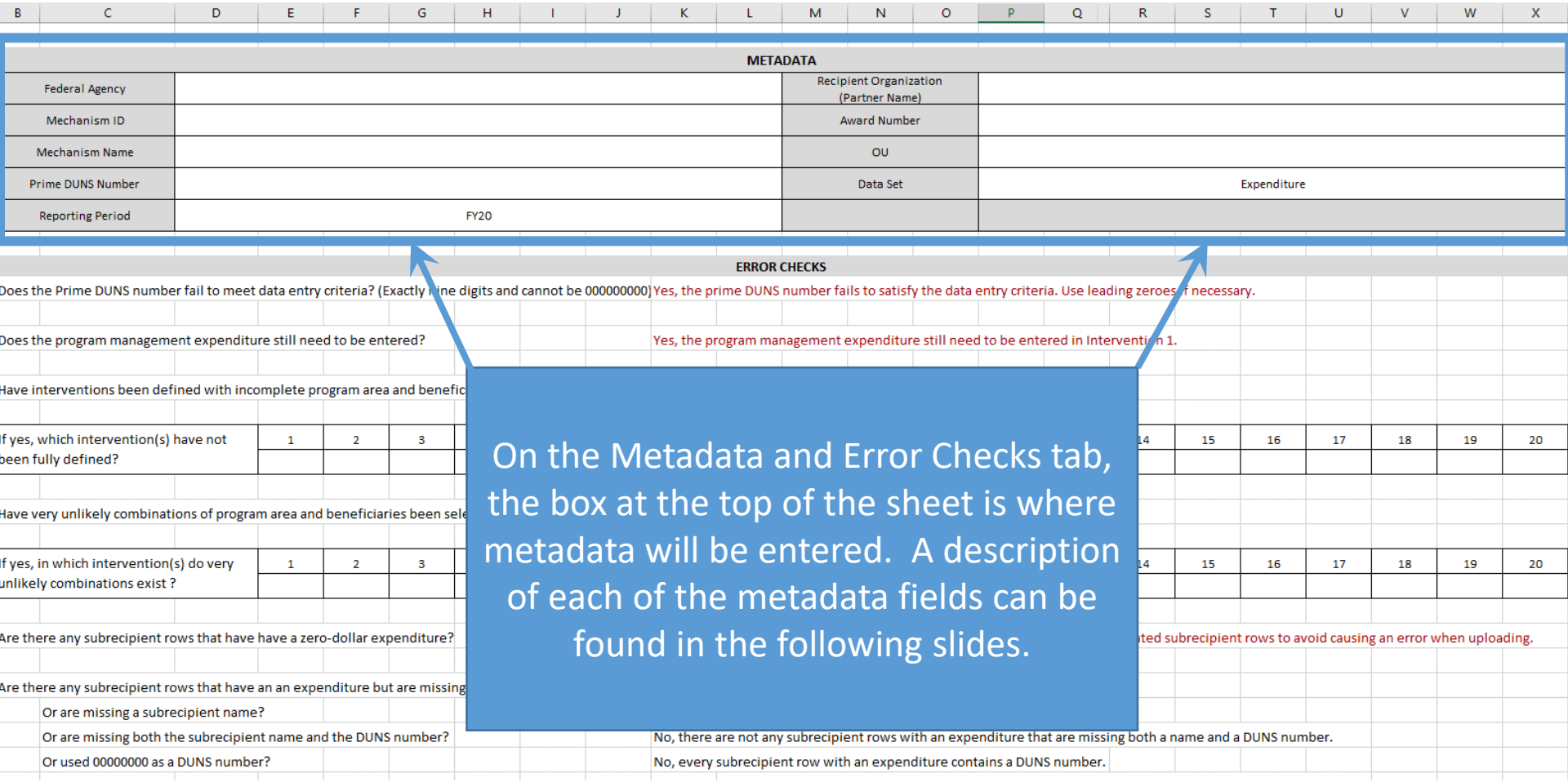
Metadata and Error Checks Tab



METADATA			
Federal Agency		Recipient Organization (Partner Name)	
Mechanism ID		Award Number	
Mechanism Name		OU	
Prime DUNS Number		Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS	
Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 000000000)	Yes, the prime DUNS number fails to satisfy the data entry criteria. Use leading zeroes if necessary.
Does the program management expenditure still need to be entered?	Yes, the program management expenditure still need to be entered in Intervention 1.
Have interventions been defined with incomplete program area and benefic	
If yes, which intervention(s) have not been fully defined?	1 2 3 … 14 15 16 17 18 19 20
Have very unlikely combinations of program area and beneficiaries been sele	
If yes, in which intervention(s) do very unlikely combinations exist ?	1 2 3 … 14 15 16 17 18 19 20
Are there any subrecipient rows that have have a zero-dollar expenditure?	…ted subrecipient rows to avoid causing an error when uploading.
Are there any subrecipient rows that have an an expenditure but are missing	
Or are missing a subrecipient name?	
Or are missing both the subrecipient name and the DUNS number?	No, there are not any subrecipient rows with an expenditure that are missing both a name and a DUNS number.
Or used 00000000 as a DUNS number?	No, every subrecipient row with an expenditure contains a DUNS number.

On the Metadata and Error Checks tab, the box at the top of the sheet is where metadata will be entered. A description of each of the metadata fields can be found in the following slides.

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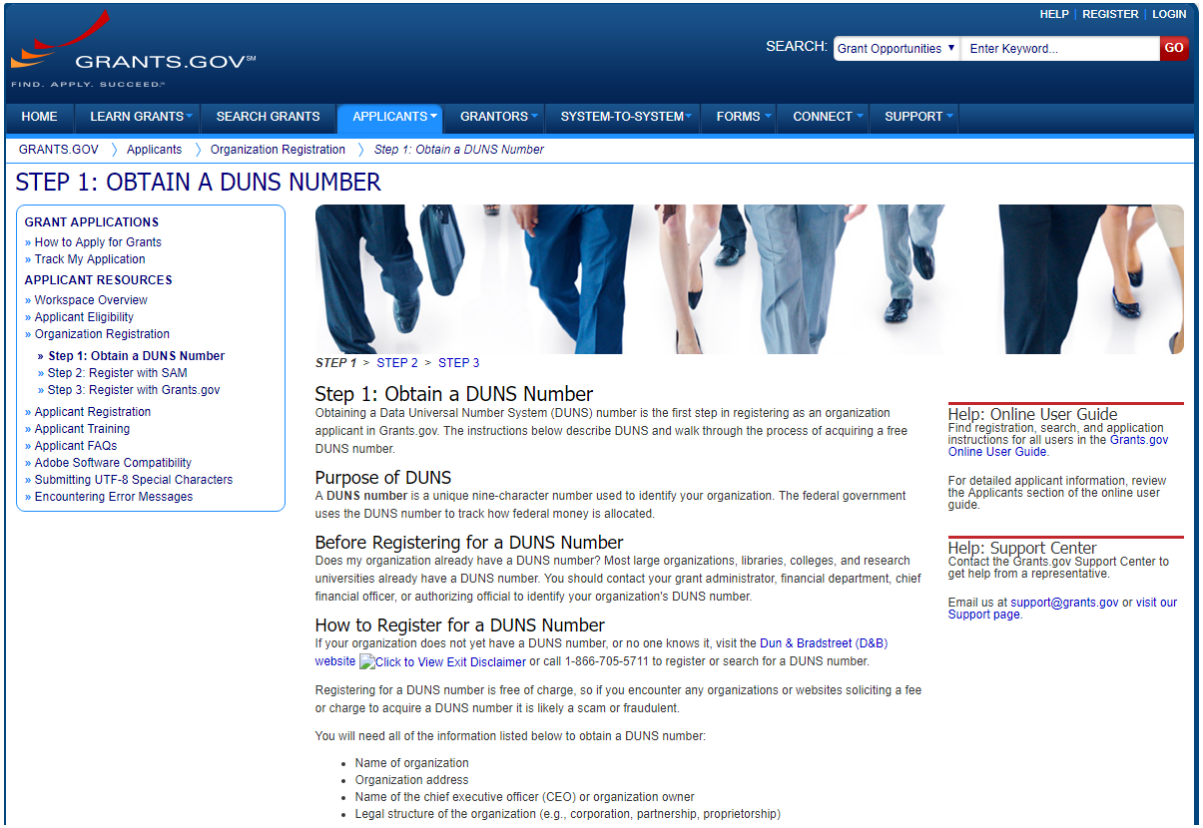
DUNS Number

- The Data Universal Numbering System (DUNS) is required for all entities bidding on and receiving federal government awards, contracts, or grants.

To learn more about why DUNS numbers are required: www.grants.gov

To search for your DUNS number by organization name: http://fedgov.dnb.com

To search for your DUNS number by Award number: https://www.usaspending.gov



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Fields on Metadata and Error Checks Tab

Row & Column Name	Cell Reference	Description
Federal Agency	D3	• Definition: The federal agency that issued the award for the implementing mechanism. • Instructions: Please select the appropriate agency from the drop down list.
Mechanism ID	D4	• Definition: The PEPFAR mechanism ID associated with this particular Award and OU. • The Mechanism ID in the template has to match the Mechanism ID in DATIM for which the template is being uploaded. • Instructions: Please enter a 4-6 digit numeric value here.
Mechanism Name	D5	• Definition: The mechanism name for this particular Award and OU. • Instructions: Please enter the name of the mechanism here.
Prime DUNS Number	D6	• Definition: The Data Universal Numbering System (DUNS) number is a unique nine-digit identification number provided by the company Dun & Bradstreet. A DUNS number is required for all entities bidding on and receiving federal government contracts. • The DUNS number in the template also has to match the valid DUNS number in Facts Info for the template's mechanism. • Instructions: Please enter the nine digit numeric DUNS number that corresponds to the prime partner's organization.
Reporting Period	D7	• Definition: The period of time on which the template is reporting. • Instructions: This field will be prepopulated since all mechanisms will be reporting on FY20 expenditures in this cycle. No data entry is required.

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Note: IPs that need to confirm or obtain any of the organizational metadata such as Mechanism ID or Award Number can contact their Agency AOR/COR/Project Officer for assistance.

Fields on Metadata and Error Checks Tab

Row & Column Name	Cell Reference	Description
Recipient Organization (Partner Name)	P3	• Definition: The name of the partner's organization. • Instructions: Please enter the name of the partner's organization here.
Award Number	P4	• Definition: The agency-issued identifying number for this particular award. • The Award number in the template also has to match the valid Award number in Facts Info for the template's mechanism. • Instructions: Please enter the award number here.
OU	P5	• Definition: The PEPFAR Operating Unit (OU) in which this mechanism works. • Instructions: Please select the appropriate OU from the dropdown list.
Data Set	P6	• Definition: The data set is the type of financial data captured in the template. This could be either expenditure or budget. • Instructions: This field will be prepopulated. For this reporting cycle, all mechanisms will be reporting on expenditures, so "Expenditure" will be prepopulated here. No data entry is required.

Enter Expenditures

Tab: Expenditure Template

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Expenditure Reporting Template

	A	B	C	D	E	F	G	H	I	J	K
1											
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6	Categorization of Intervention 7	Categorization of Intervention 8
3	**Notes**			*Program Management*							
4	**Program Area**			PM: IM Program Management-NSD							
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated							
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7	Expenditures against Intervention 8
7	Personnel: Salaries- Health Care Workers- Clinical			NA							
8	Personnel: Salaries- Health Care Workers- Ancillary			NA							
9	Personnel: Salaries- Other Staff										
10	Fringe Benefits										
11	Travel: International Travel										
12	Travel: Domestic Travel										
13	Equipment: Health Equipment										
14	Equipment: Non-Health Equipment										
15	Supplies: Pharmaceutical			NA							
16	Supplies: Health- Non Pharmaceutical			NA							
17	Supplies: Other Supplies										
18	Contractual: Contracted Health Care Workers- Clinical			NA							
19	Contractual: Contracted Health Care Workers- Ancillary			NA							
20	Contractual: Contracted Interventions			NA							
21	Contractual: Other Contracts										
22	Construction										
23	Training										
24	Subrecipient Total			NA	$0	$0	$0	$0	$0	$0	$0
25	Other: Financial Support for Beneficiaries										
26	Other: Other										
27	Indirect Charges										
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**
29											

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Prime partner and subrecipient expenditure reporting process in FY21

- In FY21, there will be one template submitted for each prime partner and one template submitted for each subrecipient
- Both prime partners and subrecipients will report expenditures by intervention with full cost category detail for each intervention
- There will be one and only one template for expenditure reporting in FY21: prime partners will use the same template as subrecipients, and thus the following template instructions apply to both prime partners and subrecipients

Step by Step Instructions for Entering Expenditure Data into the Expenditure Reporting Template

- ❑ Step 1: Select program, sub-program, and service delivery or non-service delivery
- ❑ Step 2: Select beneficiary and sub beneficiary
- ❑ Step 3: Enter expenditures by sub cost categories for each intervention
- ❑ Step 4: If applicable: enter subrecipient names, DUNS, and expenditures by intervention

Step 1: Select Program Area

	A	B	C	D	E	F	G	H	I	J
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6	Categorization of Intervention 7
3	**Notes**			*Program Management*						
4	**Program Area**			PM: IM Program Management-NSD	C&T: HIV Drugs-SD					
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated						
6	**Cost Category**			Program management expenditures			Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7
7	Personnel: Salaries- Health Care Workers- Clinical			NA						
8	Personnel: Salaries- Health Care Workers- Ancillary			NA						
9	Personnel: Salaries- Other Staff									
10	Fringe Benefits									
11	Travel: International Travel									
12	Travel: Domestic Travel									
13	Equipment: Health Equipment									
14	Equipment: Non-Health Equipment									
15	Supplies: Pharmaceutical			NA						
16	Supplies: Health- Non Pharmaceutical			NA						
17	Supplies: Other Supplies									
18	Contractual: Contracted Health Care Workers- Clinical			NA						
19	Contractual: Contracted Health Care Workers- Ancillary			NA						
20	Contractual: Contracted Interventions			NA						
21	Contractual: Other Contracts									
22	Construction									
23	Training									
24	Subrecipient Total			NA	$0					
25	Other: Financial Support for Beneficiaries									
26	Other: Other									
27	Indirect Charges									
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$0**	**$0**					
29										
30	**Number of Subrecipients (0-100)**			1						
31										
32										
33		Subrecipient name	Subrecipient DUNS		Expenditures against Intervention 2					
34	Sub 1			NA						

C&T: HIV Drugs-SD
C&T: HIV Drugs-NSD
C&T: Not Disaggregat
C&T: Not Disaggregat
HTS: Facility-based tes
HTS: Facility-based tes
HTS: Community-base
HTS: Community-base

Select the Program: Subprogram-Service delivery (or non) combination from the drop down list.

Do not paste values into these cells; use the program area drop down list. If the value in this cell does not exactly match one of the options on the drop down list, IPs should not upload the template since a template with this error will **not** constitute a valid upload in DATIM, i.e., validation will fail.

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Step 1: Select Program

- The complete list of the unique combination options on the program dropdown list is shown here
- Please note the following abbreviations that are used on this list:
  - C&T= Care and Treatment
  - HTS= Testing
  - PREV= Prevention
  - SE= Socioeconomic
  - ASP= Above Site Programs
  - SD= service delivery
  - NSD= non service delivery

- C&T: HIV Clinical Services-SD
- C&T: HIV Clinical Services-NSD
- C&T: HIV Laboratory Services-SD
- C&T: HIV Laboratory Services-NSD
- C&T: HIV Drugs-SD
- C&T: HIV Drugs-NSD
- C&T: Not Disaggregated-SD
- C&T: Not Disaggregated-NSD
- HTS: Facility-based testing-SD
- HTS: Facility-based testing-NSD
- HTS: Community-based testing-SD
- HTS: Community-based testing-NSD
- HTS: Not Disaggregated-SD
- HTS: Not Disaggregated-NSD
- PREV: Comm. mobilization, behavior & norms change-SD
- PREV: Comm. mobilization, behavior & norms change-NSD
- PREV: VMMC-SD
- PREV: VMMC-NSD
- PREV: PrEP-SD
- PREV: PrEP-NSD
- PREV: Medication assisted treatment-SD
- PREV: Medication assisted treatment-NSD
- PREV: Condom & Lubricant Programming-SD
- PREV: Condom & Lubricant Programming-NSD
- PREV: Not Disaggregated-SD
- PREV: Not Disaggregated-NSD
- PREV: Primary prevention of HIV and sexual violence-SD
- PREV: Primary prevention of HIV and sexual violence-NSD
- SE: Case Management-SD
- SE: Case Management-NSD
- SE: Economic strengthening-SD
- SE: Economic strengthening-NSD
- SE: Education assistance-SD
- SE: Education assistance-NSD
- SE: Psychosocial support-SD
- SE: Psychosocial support-NSD
- SE: Legal, human rights & protection- SD
- SE: Legal, human rights & protection-NSD
- SE: Not Disaggregated-SD
- SE: Not Disaggregated-NSD
- SE: Food and nutrition-SD
- SE: Food and nutrition-NSD
- ASP: Procurement & supply chain management-NSD
- ASP: HMIS, surveillance, & research-NSD
- ASP: Human resources for health-NSD
- ASP: Laboratory systems strengthening-NSD
- ASP: Public financial management strengthening-NSD
- ASP: Policy, planning, coordination & management of disease control programs-NSD
- ASP: Laws, regulations & policy environment-NSD
- ASP: Not Disaggregated-NSD
- ASP: Injection Safety-NSD
- ASP: Blood supply safety-NSD
- PM: IM Program Management-NSD
- PM: IM Closeout costs-NSD

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Step 1: Select Program

	A	B	C	D	E	F	G	H	I	J
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6	Categorization of Intervention 7
3	**Notes**			*Program Management*						
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD					
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated						
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7
7	Personnel: Salaries- Health Care Workers- Clinical			NA						
8	Personnel: Salaries- Health Care Workers- Ancillary			NA						
9	Personnel: Salaries- Other Staff									
10	Fringe Benefits									
11	Travel: International Travel									
12	Travel: Domestic Travel									
13	Equipment: Health Equipment									
14	Equipment: Non-Health Equipment									
15	Supplies: Pharmaceutical			NA						
16	Supplies: Health- Non Pharmaceutical			NA						
17	Supplies: Other Supplies									
18	Contractual: Contracted Health Care Workers- Clinical			NA						
19	Contractual: Contracted Health Care Workers- Ancillary			NA						
20	Contractual: Contracted Interventions			NA						
21	Contractual: Other Contracts									
22	Construction									
23	Training									
24	Subrecipient Total			NA	$0					
25	Other: Financial Support for Beneficiaries									
26	Other: Other									
27	Indirect Charges									
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$0**	**$0**					
29										
30	**Number of Subrecipients (0-100)**			1						
31										
32										
33		Subrecipient name	Subrecipient DUNS		Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7
34	Sub 1			NA						

After selecting the program area from the drop down list, the beneficiary cell will turn red.

This is because each intervention must be defined by a program area and a beneficiary. Once the beneficiary is selected, the box will become white again.

Step 2: Select Beneficiary

	A	B	C	D	E	F	G	H	I	J
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6	Categorization of Intervention 7
3	**Notes**			*Program Management*						
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD					
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated						
6	**Cost Category**			Program management expenditures		tures against	Expenditures against vention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7
7	Personnel: Salaries- Health Care Workers- Clinical			NA						
8	Personnel: Salaries- Health Care Workers- Ancillary			NA						
9	Personnel: Salaries- Other Staff									
10	Fringe Benefits									
11	Travel: International Travel									
12	Travel: Domestic Travel									
13	Equipment: Health Equipment									
14	Equipment: Non-Health Equipment									
15	Supplies: Pharmaceutical			NA						
16	Supplies: Health- Non Pharmaceutical			NA						
17	Supplies: Other Supplies									
18	Contractual: Contracted Health Care Workers- Clinical			NA						
19	Contractual: Contracted Health Care Workers- Ancillary			NA						
20	Contractual: Contracted Interventions			NA						
21	Contractual: Other Contracts									
22	Construction									
23	Training									
24	Subrecipient Total			NA	$0					
25	Other: Financial Support for Beneficiaries									
26	Other: Other									
27	Indirect Charges									
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$0**	**$0**					
29										
30	**Number of Subrecipients (0-100)**			1						
31										
32										
33		Subrecipient name	Subrecipient DUNS		Expenditures against Intervention 2	E				against on 7
34	Sub 1			NA						

Non-Targeted Pop: Ac
Non-Targeted Pop: Yo
Non-Targeted Pop: Ch
Non-Targeted Pop: N
Females: Adult wome
Females: Young wome
Females: Girls
Females: Not disaggre

Select the Beneficiary: Sub beneficiary combination from the drop down list.

Do not paste values into these cells; use the beneficiary drop down list. If the value in this cell does not exactly match one of the options on the drop down list, IPs should not upload the template since a template with this error will **not** constitute a valid upload in DATIM, i.e., validation will fail.

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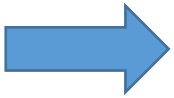
Step 2: Select Beneficiary

- The complete list of the unique combination options on the beneficiary dropdown list is shown here
- Please note the following abbreviations that are used on this list:
  - Pop(s) = Population(s)
  - OVC = Orphans & vulnerable children



- Non-Targeted Pop: Adults
- Non-Targeted Pop: Young people & adolescents
- Non-Targeted Pop: Children
- Non-Targeted Pop: Not disaggregated
- Females: Adult women
- Females: Young women & adolescent females
- Females: Girls
- Females: Not disaggregated
- Males: Adult men
- Males: Young men & adolescent males
- Males: Boys
- Males: Not disaggregated
- Key Pops: Men having sex with men
- Key Pops: Transgender
- Key Pops: Sex workers
- Key Pops: People who inject drugs
- Key Pops: Not disaggregated
- Key Pops: People in prisons
- Pregnant & Breastfeeding Women: Not disaggregated
- Priority Pops: Military & other uniformed services
- Priority Pops: Mobile Pops
- Priority Pops: Displaced persons
- Priority Pops: Clients of sex workers
- Priority Pops: Not disaggregated
- OVC: Orphans & vulnerable children
- OVC: Care givers
- OVC: Not disaggregated

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Step 2: Select Beneficiary

	A	B	C	D	E	F	G	H	I	J
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6	Categorization of Intervention 7
3	**Notes**			*Program Management*						
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD					
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females					
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7
7	Personnel: Salaries- Health Care Workers- Clinical			NA						
8	Personnel: Salaries- Health Care Workers- Ancillary			NA						
9	Personnel: Salaries- Other Staff									
10	Fringe Benefits									
11	Travel: International Travel									
12	Travel: Domestic Travel									
13	Equipment: Health Equipment									
14	Equipment: Non-Health Equipment									
15	Supplies: Pharmaceutical			NA						
16	Supplies: Health- Non Pharmaceutical			NA						
17	Supplies: Other Supplies									
18	Contractual: Contracted Health Care Workers- Clinical			NA						
19	Contractual: Contracted Health Care Workers- Ancillary			NA						
20	Contractual: Contracted Interventions			NA						
21	Contractual: Other Contracts									
22	Construction									
23	Training									
24	Subrecipient Total			NA	$0	$0	$0	$0	$0	$0
25	Other: Financial Support for Beneficiaries									
26	Other: Other									
27	Indirect Charges									
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**
29										
30	**Number of Subrecipients (0-100)**			1						
31										
32										
33		Subrecipient name	Subrecipient DUNS		Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7
34	Sub 1			NA						

Once the beneficiary has been selected from the drop down list, the beneficiary cell will turn white again.

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Step 2: Program Management

		Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6	Categorization of Intervention 7	Categorization of Intervention 8
Notes		*Program Management*							
Program Area		PM: IM Program Management-NSD							
Beneficiary		Non-Targeted Pop: Not disaggregated							
Cost Category		Program management expenditures	Expenditures against Intervention 2	Exp					enditures against Intervention 8
Personnel: Salaries- Health Care Workers- Clinical		NA							
Personnel: Salaries- Health Care Workers- Ancillary		NA							
Personnel: Salaries- Other Staff									
Fringe Benefits									
Travel: International Travel									
Travel: Domestic Travel									
Equipment: Health Equipment									
Equipment: Non-Health Equipment									
Supplies: Pharmaceutical									
Supplies: Health- Non Pharmaceutical									
Supplies: Other Supplies									
Contractual: Contracted Health Care Work									
Contractual: Contracted Health Care Work									
Contractual: Contracted Interventions									
Contractual: Other Contracts									
Construction									
Training									
Subrecipient Total				$0	$0	$0	$0	$0	$0
Other: Financial Support for Beneficiaries									
Other: Other									
Indirect Charges									
Total Expenditures per Intervention (Sum o				**$0**	**$0**	**$0**	**$0**	**$0**	**$0**
Number of Subrecipients (0-100)		1							

	Subrecipient name	Subrecipient DUNS		Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7	Expenditures against Intervention 8
Sub 1			NA							

The first intervention has been populated as program management in the blank template.

All IMs will have some expenditures for program management. If additional program management interventions are required, please enter them in interventions 2 through 35.

The default beneficiary is Non-targeted Pop: Not disaggregated. However, users can change the beneficiary.

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Step 2 OPTIONAL: Notes

	A	B	C	D	E	F	G	H	I	J
1										
2				Program Management	Categoriz… n of Inter…					Categorization of Intervention 7
3		**Notes**		*Program Management*						
4		**Program Area**		PM: IM Program Management-NSD	SE: Econo… ic strengthening-SD					
5		**Beneficiary**		Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females					
6		**Cost Category**		Program management expenditures	Expenditures against Intervention 2					Expenditures against Intervention 7
7		Personnel: Salaries- Health Care Workers- Clinical		NA						
8		Personnel: Salaries- Health Care Workers- Ancillary		NA						
9		Personnel: Salaries- Other Staff								
10		Fringe Benefits								
11		Travel: International Travel								
12		Travel: Domestic Travel								
13		Equipment: Health Equipment								
14		Equipment: Non-Health Equipment								
15		Supplies: Pharmaceutical		NA						
16		Supplies: Health- Non Pharmaceutical		NA						
17		Supplies: Other Supplies								
18		Contractual: Contracted Health Care Workers- Clinical		NA						
19		Contractual: Contracted Health Care Workers- Ancillary		NA						
20		Contractual: Contracted Interventions		NA						
21		Contractual: Other Contracts								
22		Construction								
23		Training								
24		Subrecipient Total		NA	$0	$0	$0	$0	$0	$0
25		Other: Financial Support for Beneficiaries								
26		Other: Other								
27		Indirect Charges								
28		**Total Expenditures per Intervention (Sum of Cost Categories)**		**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**
29										
30		**Number of Subrecipients (0-100)**		1						
31										
32										
33		Subrecipient name	Subrecipient DUNS		Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6	Expenditures against Intervention 7
34	Sub 1			NA						

OPTIONAL free text entry. If it is useful, use this row to provide budget and projected expenditure explanations for each intervention.

This field is optional and will not be imported into DATIM or included in any analysis. It is for reference only and is meant to assist in the data entry process.

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Step 3: Enter Expenditure by Sub Cost Category

	A	B	C	D	E	F	G	H
1								
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5
3	**Notes**			*Program Management*				
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD	SE: Education assistance-SD
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females	Females: Young women & adol	Females: Young women &	Females: Young women & nt females
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Exp		ures against ention 5
7	Personnel: Salaries- Health Care Workers- Clinical			NA				
8	Personnel: Salaries- Health Care Workers- Ancillary			NA				
9	Personnel: Salaries- Other Staff			$315,057	$296,253			,459
10	Fringe Benefits			$78,192	$75,480			,048
11	Travel: International Travel			$15,700				
12	Travel: Domestic Travel			$24,800	$35,817	$12,548	$5,480	
13	Equipment: Health Equipment							
14	Equipment: Non-Health Equipment			$10,000				
15	Supplies: Pharmaceutical			NA				
16	Supplies: Health- Non Pharmaceutical			NA				
17	Supplies: Other Supplies			$16,850	$36,891	$15,987	$3,450	
18	Contractual: Contracted Health Care Workers- Clinical			NA				
19	Contractual: Contracted Health Care Workers- Ancillary			NA			$40,000	$250,999
20	Contractual: Contracted Interventions			NA				
21	Contractual: Other Contracts			$9,985				
22	Construction							
23	Training						$154,805	$23,499
24	Subrecipient Total			NA	$0	$0	$0	$0
25	Other: Financial Support for Beneficiaries				$450,000			
26	Other: Other							
27	Indirect Charges			$320,458				
28	**Total Expenditures per Intervention (Sum of Cost Categorie**			**$791,042**	**$894,441**	**$109,751**	**$263,201**	**$364,005**

For each intervention, enter expenditures into the appropriate sub cost categories.

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Appropriate Sub Categories for Program Management Interventions

- If Program Management is selected as the Program Area in interventions 2 through 35, certain cost categories are not applicable for data entry.
  - These cost categories are:
    - Personnel: Salaries – Health Care Workers - Clinical
    - Personnel: Salaries – Health Care Workers – Ancillary
    - Supplies: Pharmaceuticals
    - Supplies: Health – Non Pharmaceuticals
    - Contractual: Contracted Health Care workers – Clinical
    - Contractual: Contracted Health Care workers – Ancillary
    - Contractual: Contracted Interventions
    - Subrecipient
- If Program Management is not selected as the Program Area in an intervention, the Indirect Charges cost category is not appropriate for data entry.

The template will not prevent you from entering into these cost categories, however upon upload to DATIM, the error will be flagged and the template will fail to validate.

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Indirect Charges in Interventions 2-35

- Just as certain cost categories are not available for Program Management interventions, one cost category - Indirect Charges – is ONLY available for Program Management interventions.
- Indirect charges may be entered in intervention 1, which defaults to Program Management, or it may be entered in interventions 2-35 for any intervention with a Program Area of Program Management.
- If indirect charges are entered against an intervention with a Program Area other than Program Management (e.g., C&T or Socioeconomic), the template will not prevent you from entering into these cost categories, however upon upload to DATIM, the error will be flagged and the template will fail to validate.

Step 3: Enter Expenditure by Sub Cost Category

	A	B	C	D	E	F	G	H
1								
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5
3	**Notes**			*Program Management*				
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD	SE: Education assistance-SD
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolesc females	Females: Young	Females: Young	Females: Young omen & adolescent females
6	**Cost Category**			Program management expenditures	Expenditures agai Intervention 2			xpenditures against Intervention 5
7	Personnel: Salaries- Health Care Workers- Clinical			NA				
8	Personnel: Salaries- Health Care Workers- Ancillary			NA				
9	Personnel: Salaries- Other Staff			$315,057	$296,253			$73,459
10	Fringe Benefits			$78,192	$75,480			$16,048
11	Travel: International Travel			$15,700				
12	Travel: Domestic Travel			$24,800	$35,817			
13	Equipment: Health Equipment							
14	Equipment: Non-Health Equipment			$10,000				
15	Supplies: Pharmaceutical			NA				
16	Supplies: Health- Non Pharmaceutical			NA				
17	Supplies: Other Supplies			$16,850	$36,891			
18	Contractual: Contracted Health Care Workers- Clinical			NA				
19	Contractual: Contracted Health Care Workers- Ancillary			NA				$250,999
20	Contractual: Contracted Interventions			NA				
21	Contractual: Other Contracts			$9,985				
22	Construction							
23	Training							$23,499
24	Subrecipient Total			NA	$0			$0
25	Other: Financial Support for Beneficiaries				$450,000			
26	Other: Other							
27	Indirect Charges							
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$470,584**	**$894,441**	**$109,751**	**$263,201**	**$364,005**

Expenditure for health care workers, pharmaceuticals, and health supplies – non pharmaceutical, and contracted interventions should be incurred as part of a technical intervention and not under program management. These cells are therefore NA (not applicable) for Program Management.

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Step 3: Enter Expenditure by Sub Cost Category

	A	B	C	D	E	F	G	H
1								
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5
3	**Notes**			*Program Management*				
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD	SE: Education assistance-SD
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures ag Intervention		against on 5
7	Personnel: Salaries- Health Care Workers- Clinical			NA				
8	Personnel: Salaries- Health Care Workers- Ancillary			NA				
9	Personnel: Salaries- Other Staff			$315,057	$296,253	$65,808		9
10	Fringe Benefits			$78,192	$75,480	$15,408		8
11	Travel: International Travel			$15,700				
12	Travel: Domestic Travel			$24,800	$35,817	$12,548		
13	Equipment: Health Equipment							
14	Equipment: Non-Health Equipment			$10,000				
15	Supplies: Pharmaceutical			NA				
16	Supplies: Health- Non Pharmaceutical			NA				
17	Supplies: Other Supplies			$16,850	$36,891	$15,987		
18	Contractual: Contracted Health Care Workers- Clinical			NA				
19	Contractual: Contracted Health Care Workers- Ancillary			NA				99
20	Contractual: Contracted Interventions			NA				
21	Contractual: Other Contracts			$9,985				
22	Construction							
23	Training						$154,805	$23,499
24	Subrecipient Total			NA	$0	$0	$0	$0
25	Other: Financial Support for Beneficiaries							
26	Other: Other							
27	Indirect Charges					$320,458		
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$470,584**	**$444,441**	**$430,209**	**$263,201**	**$364,005**
29								
30	**Number of Subrecipients (0-100)**			1				
31								
32								
33		Subrecipient name	Subrecipient DUNS		Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5
34	Sub 1			NA				

Data entry is not required for any intervention's sub cost category where there is no FY20 expenditure; these lines can be left blank.

Total Expenditure by Intervention

	A	B	C	D	E	F	G	H
1								
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5
3	**Notes**			*Program Management*				
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD	SE: Education assistance-SD
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5
7	Personnel: Salaries- Health Care Workers- Clinical			NA				
8	Personnel: Salaries- Health Care Workers- Ancillary			NA				
9	Personnel: Salaries- Other Staff			$315,057	$296,253	$65,808	$48,408	$73,459
10	Fringe Benefits			$78,192	$75,480	$15,408	$11,058	$16,048
11	Travel: International Travel			$15,700				
12	Travel: Domestic Travel			$24,800				
13	Equipment: Health Equipment							
14	Equipment: Non-Health Equipment			$10,000				
15	Supplies: Pharmaceutical			NA				
16	Supplies: Health- Non Pharmaceutical			NA				
17	Supplies: Other Supplies			$16,850				
18	Contractual: Contracted Health Care Workers- Clinical			NA				
19	Contractual: Contracted Health Care Workers- Ancillary			NA			$40,000	$250,999
20	Contractual: Contracted Interventions			NA				
21	Contractual: Other Contracts			$9,985				
22	Construction							
23	Training						$154,805	$23,499
24	Subrecipient Total			NA	$0	$0	$0	$0
25	Other: Financial Support for Beneficiaries							
26	Other: Other							
27	Indirect Charges					$320,4[illegible]		
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$470,584**	**$444,441**	**$430,209**	**$263,201**	**$364,005**

Total expenditure for each intervention is calculated here as expenditures are entered. This may assist in data entry.

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Total Expenditure by Sub Cost Category

	A	B	C	AK	AL	AM	AN
1							
2				Categorization of Intervention 34	Categorization of Intervention 35		
3	**Notes**						
4	**Program Area**						
5	**Beneficiary**						
6	**Cost Category**			Expenditures against Intervention 34	Expenditures against Intervention 35	TOTAL	% Total
7	Personnel: Salaries- Health Care Workers- Clinical					$0	0%
8	Personnel: Salaries- Health Care Workers- Ancillary					$0	0%
9	Personnel: Salaries- Other Staff					$798,985	41%
10	Fringe Benefits					$196,186	10%
11	Travel: International Travel					$15,700	1%
12	Travel: Domestic Travel					$78,645	4%
13	Equipment: Health Equipment					$0	0%
14	Equipment: Non-Health Equipment					$10,000	1%
15	Supplies: Pharmaceutical					$0	0%
16	Supplies: Health- Non Pharmaceutical					$0	0%
17	Supplies: Other Supplies					$73,178	4%
18	Contractual: Contracted Health Care Workers- Clinical					$0	0%
19	Contractual: Contracted Health Care Workers- Ancillary					$290,999	15%
20	Contractual: Contracted Interventions					$0	0%
21	Contractual: Other Contracts					$9,985	1%
22	Construction					$0	0%
23	Training					$178,304	9%
24	Subrecipient Total			$0	$0	$0	0%
25	Other: Financial Support for Beneficiaries					$0	0%
26	Other: Other					$0	0%
27	Indirect Charges					$320,458	16%
28	**Total Expenditures per Intervention (Sum of Cost Categories)**			**$0**	**$0**	**$1,972,440**	**100%**

Total expenditure for each sub object class and its % of the total is calculated in column X and Y of the expenditure template tab as the expenditure is entered. This may assist in data entry.

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Fields on the Expenditure Template Tab

Row & Column Name	Cell Reference	Description
Notes	D3-AL3	• Instructions: OPTIONAL free text entry. If it is useful, use this row to provide expenditure explanations for each intervention, or to keep track of the intervention's total budget. This field is optional and will not be imported into DATIM or included in any analysis. It is for reference only and is meant to assist in the data entry process.
Program Area	D4-AL4	• A program is a distinct organization of resources directed toward a specific strategic objective, or a set of activities that achieve a common outcome. Each program is further disaggregated into subprograms and whether it is service delivery or non service delivery. When the activities cannot be disaggregated, funds may be classified under the major program, not disaggregated. • Instructions: Please select a Program Area from the drop down menu. The value in this cell must be selected from the drop-down menu; do not paste any value into this cell. IPs should not upload the template if there is not an exact match, since a template with this error will **not** constitute a valid upload in DATIM, i.e., **validation will fail**.
Beneficiary	D5-AL5	• Definition: Beneficiary is the targeted population that is intended to benefit from specific activities (e.g., the intended recipients of the PEPFAR programs). Individuals might belong to more than one category; however, what needs to be classified is expenditure according to the primary objective of the program. • Instructions: Please select the Beneficiary from the drop down menu. The value in this cell must be selected from the drop-down menu; do not paste any value into this cell. IPs should not upload the template if there is not an exact match, since a template with this error will **not** constitute a valid upload in DATIM, i.e., **validation will fail**.

Note: For more information on PEPFAR Financial Classifications, please refer to the PEPFAR Financial Classification Reference Guide on DATIM Support https://datim.zendesk.com.

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Fields on the Expenditure Template Tab

Row & Column Name	Cell Reference	Description
Personnel: Salaries- Health Care Workers- Clinical	E7-AL7	• Definition: Direct costs of IP employee salaries and wages, excluding benefits, for clinical healthcare workers. • Instructions: Please enter Personnel: Salaries- Health Care Workers- Clinical expenditures here. Please enter only non-negative integers.
Personnel: Salaries- Health Care Workers- Ancillary	D8-AL8	• Definition: Direct costs of IP employee salaries and wages, excluding benefits, for ancillary healthcare workers. • Instructions: Please enter Personnel: Salaries- Health Care Workers- Ancillary expenditures here. Please enter only non-negative integers.
Personnel: Salaries- Other Staff	D9-AL9	• Definition: Direct costs of staff salaries and wages, excluding fringe benefits, for IP employees who are not classified as healthcare workers. • Instructions: Please enter Personnel: Salaries- Other Staff expenditures here. Please enter only non-negative integers.
Fringe Benefits	D10-AL10	• Definition: Direct costs of employee fringe benefits unless treated as part of an approved indirect cost rate. The cost of benefits paid to the IP's personnel on the Federal award, including the cost of employer's share. • Instructions: Please enter your Fringe Benefits expenditures here. Please enter only non-negative integers.

Fields on the Expenditure Template Tab

Row & Column Name	Cell Reference	Description
Travel: International Travel	D11-AL11	• Definition: Direct costs of travel, including lodging, meals, incidentals, and air and ground transport by IP personnel outside of or to/from the country of implementation • Instructions: Please enter your Travel: International Travel expenditures here. Please enter only non-negative integers.
Travel: Domestic Travel	D12-AL12	• Definition: Direct costs of travel, including lodging, meals, incidentals, and air and ground transport by IP personnel within the benefitting country. • Instructions: Please enter your Travel: Domestic Travel expenditures here. Please enter only non-negative integers.
Equipment: Health Equipment	D13-AL13	• Definition: Direct costs (purchase or lease) of equipment, nonexpendable, tangible personal property having a useful life of more than one year and an acquisition cost that equals or exceeds the lesser of the capitalization level established by the IP for financial statement purposes, or $5,000, used for surgical procedures, or to diagnose, cure, treat, or prevent disease. • Instructions: Please enter Equipment: Health Equipment expenditures here. Please enter only non-negative integers.

Fields on the Expenditure Template Tab

Row & Column Name	Cell Reference	Description
Equipment: Non-Health Equipment	D14-AL14	• Definition: Direct costs (purchase or lease) of equipment, nonexpendable, tangible personal property having a useful life of more than one year and an acquisition cost that equals or exceeds the lesser of the capitalization level established by the IP for financial statement purposes, or $5,000 which is not classified as health equipment. • Instructions: Please enter Equipment: Non- Health Equipment expenditures here. Please enter only non-negative integers.
Supplies: Pharmaceutical	E15-AL15	• Definition: Direct costs of medications used cure, treat, or prevent disease • Instructions: Please enter Supplies: Pharmaceutical expenditures here. Please enter only non-negative integers.
Supplies: Health- Non Pharmaceutical	E16-AL16	• Definition: Direct costs of supplies used for the health procedures and the prevention, diagnosis, treatment of disease. • Instructions: Please enter Supplies: Health – Non Pharmaceutical expenditures here. Please enter only non-negative integers.
Supplies: Other Supplies	D17-AL17	• Definition: Direct costs of office and other consumable supplies with a per-unit cost of less than $5,000. • Instructions: Please enter Supplies: Other Supplies expenditures here. Please enter only non-negative integers.

Fields on the Expenditure Template Tab

Row & Column Name	Cell Reference	Description
Contractual: Contracted Health Care Workers- Clinical	E18-AL18	• Definition: Direct costs of (a) contract(s) for clinical healthcare workers, who are not employed by the IP, but contracted to perform clinical healthcare services. • Instructions: Please enter Contractual: Contracted Health Care Workers- Clinical expenditures here. Please enter only non-negative integers.
Contractual: Contracted Health Care Workers- Ancillary	E19-AL19	• Definition: Direct costs of (a) contract(s) for ancillary healthcare workers, who are not employed by the IP, but contracted to perform clinical healthcare services. • Instructions: Please enter Contractual: Contracted Health Care Workers- Ancillary expenditures here. Please enter only non-negative integers.
Contractual: Contracted Interventions	E20-AL20	• Definition: Direct cost of an award to provide a "package" of programmatic goods or services. • Instructions: Please enter Contractual: Contracted Interventions expenditures here. Please enter only non-negative integers.
Contractual: Other Contracts	D21-AL21	• Definition: Direct costs of (a) contract(s) for individuals and entities for non services delivery purposes, usually managerial, administrative, operational support, or technical. • Instructions: Please enter Contractual: Other Contracts expenditures here. Please enter only non-negative integers.
Construction	D22-AL22	• Definition: Direct costs for construction or renovation. • Instructions: Please enter Construction expenditures here. Please enter only non-negative integers.

Fields on the Expenditure Template Tab

Row & Column Name	Cell Reference	Description
Other: Financial Support for Beneficiaries	D25-AL25	• Definition: Direct costs of financial support for beneficiaries. • Instructions: Please enter Other: Financial Support for Beneficiaries expenditures here. Please enter only non-negative integers.
Other: Other	D26-AL26	• Definition: Direct costs that do not fit any of the aforementioned direct cost categories. • Instructions: Please enter Other: Other expenditures here. Please enter only non-negative integers.
Indirect Charges	D27	• Definition: Indirect costs which were not charged as direct; costs not easily assignable to specific awards and activities because a direct relationship to cost objectives cannot be shown or would be arbitrary. • Instructions: Please enter the value of Indirect Charges; do not enter a rate. Please enter only non-negative integers.
Total Budget per Intervention	D28-AL28	• Definition: All PEPFAR funds expenditure for the Implementing Partner for FY21. • Instructions: Total budget for each intervention is calculated here as expenditures are entered. No data entry is required.

Review for Template Errors

Tab: Metadata and Error Checks

Error Checks in the Template: Overview

The template will check for certain errors. If it finds errors, they will be identified in the "Error Checks" section on the Metadata and Error Checks tab.

Federal Agency	
Mechanism ID	
Mechanism Name	
Prime DUNS Number	
Reporting Period	FY20

Expenditure

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	Yes, the prime DUNS number fails to satisfy the data entry criteria. Use leading zeroes if necessary.
Does the program management expenditure still need to be entered?	Yes, the program management expenditure still need to be entered in Intervention 1.
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been fully defined.

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Have very unlikely combinations of program area and beneficiaries been selected?	No, there are not any very unlikely combinations that have been selected.

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Are there any subrecipient rows that have have a zero-dollar expenditure?	Yes, 1 row(s) have a zero-dollar expenditure. Assign an expenditure to all indicated subrecipient rows to avoid causing an error when uploading.
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	No, every subrecipient row with an expenditure contains a DUNS number.
Or are missing a subrecipient name?	No, every subrecipient row with an expenditure contains a name.
Or are missing both the subrecipient name and the DUNS number?	No, there are not any subrecipient rows with an expenditure that are missing both a name and a DUNS number.
Or used 00000000 as a DUNS number?	No, every subrecipient row with an expenditure contains a DUNS number.
	Note: Every subrecipient must have a valid name and DUNS number. TBD subrecipients are not permitted.
	Each DUNS number must be exactly 9 digits, including leading zeroes.
Is there any data entered outside of the subrecipient rows that were specified?	No, there is no data that was entered outside of the specified subrecipient rows.

Subrecipient rows created:	1
First row that should be empty:	35
Cells expected to be blank:	3663
Count of blank cells after last row:	3663
Non-blank cells after last row:	0

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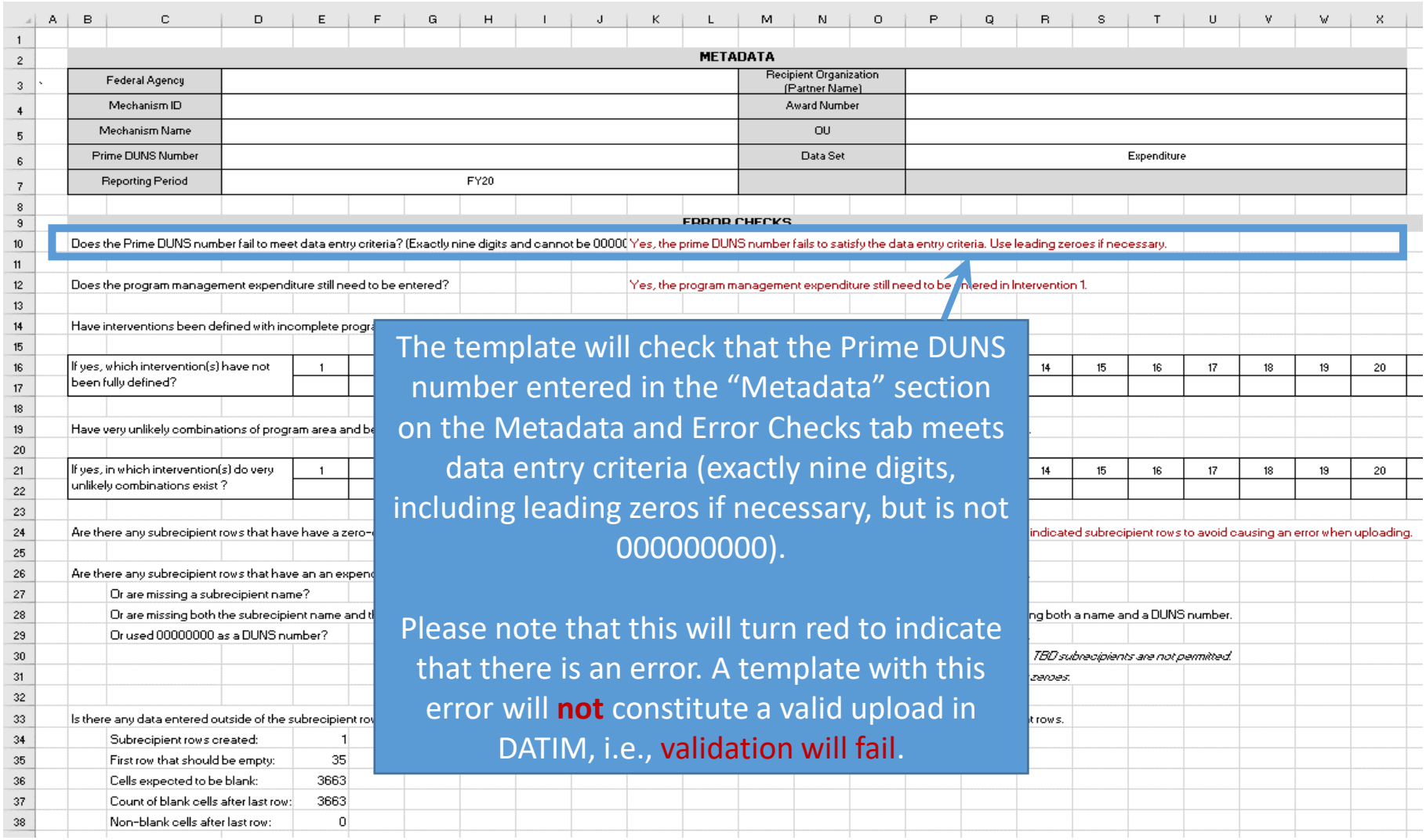
Error Checks in the Template: Prime DUNS Number



METADATA

Federal Agency		Recipient Organization (Partner Name)	
Mechanism ID		Award Number	
Mechanism Name		OU	
Prime DUNS Number		Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000 — Yes, the prime DUNS number fails to satisfy the data entry criteria. Use leading zeroes if necessary.

Does the program management expenditure still need to be entered? — Yes, the program management expenditure still need to be entered in Intervention 1.

Have interventions been defined with incomplete progra

If yes, which intervention(s) have not been fully defined? 1 … 14 15 16 17 18 19 20

Have very unlikely combinations of program area and be

If yes, in which intervention(s) do very unlikely combinations exist ? 1 … 14 15 16 17 18 19 20

Are there any subrecipient rows that have have a zero- … indicated subrecipient rows to avoid causing an error when uploading.

Are there any subrecipient rows that have an an expend

Or are missing a subrecipient name?

Or are missing both the subrecipient name and t … ng both a name and a DUNS number.

Or used 00000000 as a DUNS number?

TBD subrecipients are not permitted.

zeroes.

Is there any data entered outside of the subrecipient ro … t rows.

Subrecipient rows created:	1
First row that should be empty:	35
Cells expected to be blank:	3663
Count of blank cells after last row:	3663
Non-blank cells after last row:	0

The template will check that the Prime DUNS number entered in the "Metadata" section on the Metadata and Error Checks tab meets data entry criteria (exactly nine digits, including leading zeros if necessary, but is not 000000000).

Please note that this will turn red to indicate that there is an error. A template with this error will **not** constitute a valid upload in DATIM, i.e., validation will fail.

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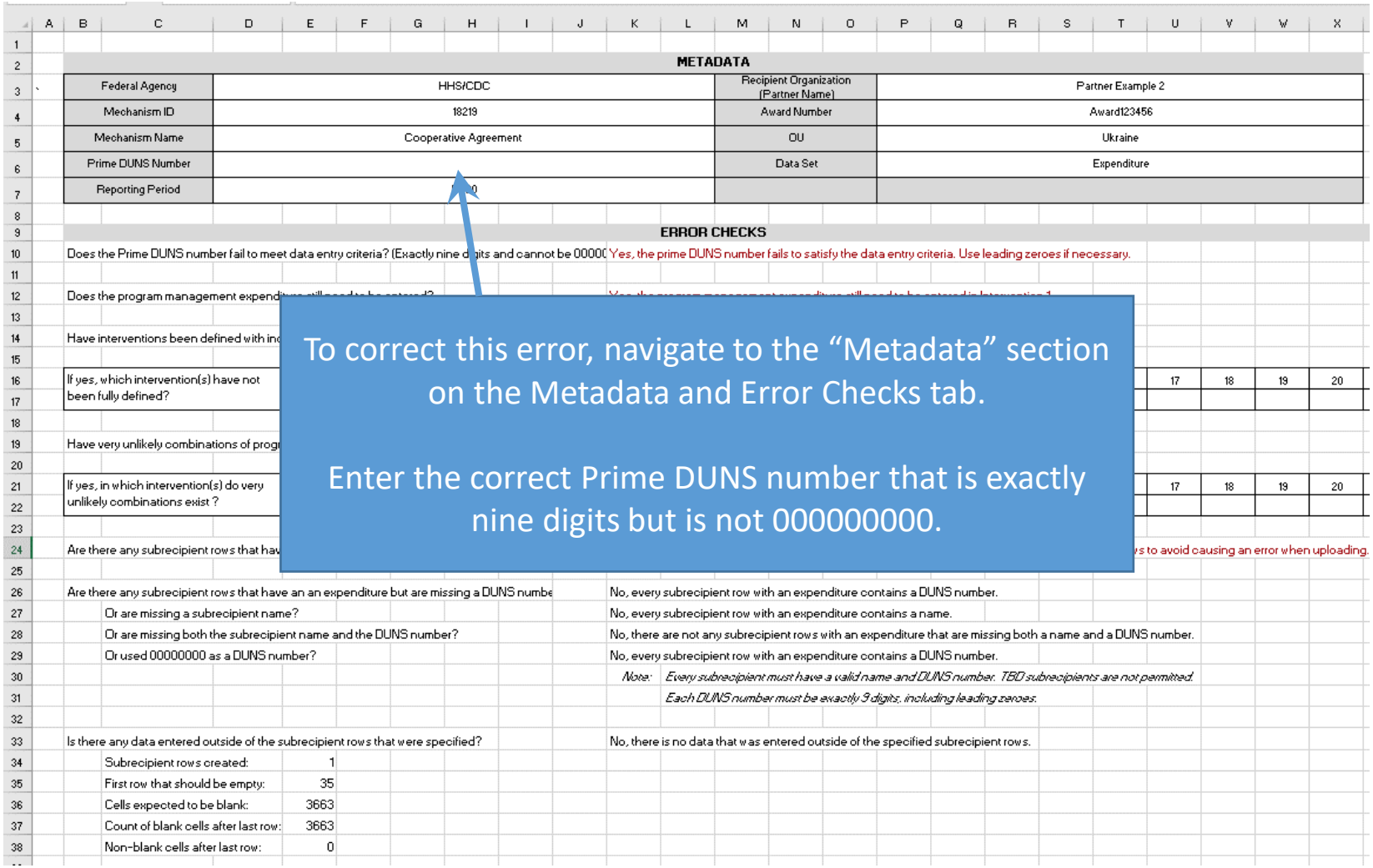
Error Checks in the Template: Prime DUNS Number



METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number		Data Set	Expenditure
Reporting Period			

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	Yes, the prime DUNS number fails to satisfy the data entry criteria. Use leading zeroes if necessary.
Does the program management expend	
Have interventions been defined with in	
If yes, which intervention(s) have not been fully defined?	
Have very unlikely combinations of prog	
If yes, in which intervention(s) do very unlikely combinations exist ?	
Are there any subrecipient rows that hav	s to avoid causing an error when uploading.
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	No, every subrecipient row with an expenditure contains a DUNS number.
Or are missing a subrecipient name?	No, every subrecipient row with an expenditure contains a name.
Or are missing both the subrecipient name and the DUNS number?	No, there are not any subrecipient rows with an expenditure that are missing both a name and a DUNS number.
Or used 00000000 as a DUNS number?	No, every subrecipient row with an expenditure contains a DUNS number.
	Note: Every subrecipient must have a valid name and DUNS number. TBD subrecipients are not permitted.
	Each DUNS number must be exactly 9 digits, including leading zeroes.
Is there any data entered outside of the subrecipient rows that were specified?	No, there is no data that was entered outside of the specified subrecipient rows.

Subrecipient rows created:	1
First row that should be empty:	35
Cells expected to be blank:	3663
Count of blank cells after last row:	3663
Non-blank cells after last row:	0

To correct this error, navigate to the "Metadata" section on the Metadata and Error Checks tab.

Enter the correct Prime DUNS number that is exactly nine digits but is not 000000000.

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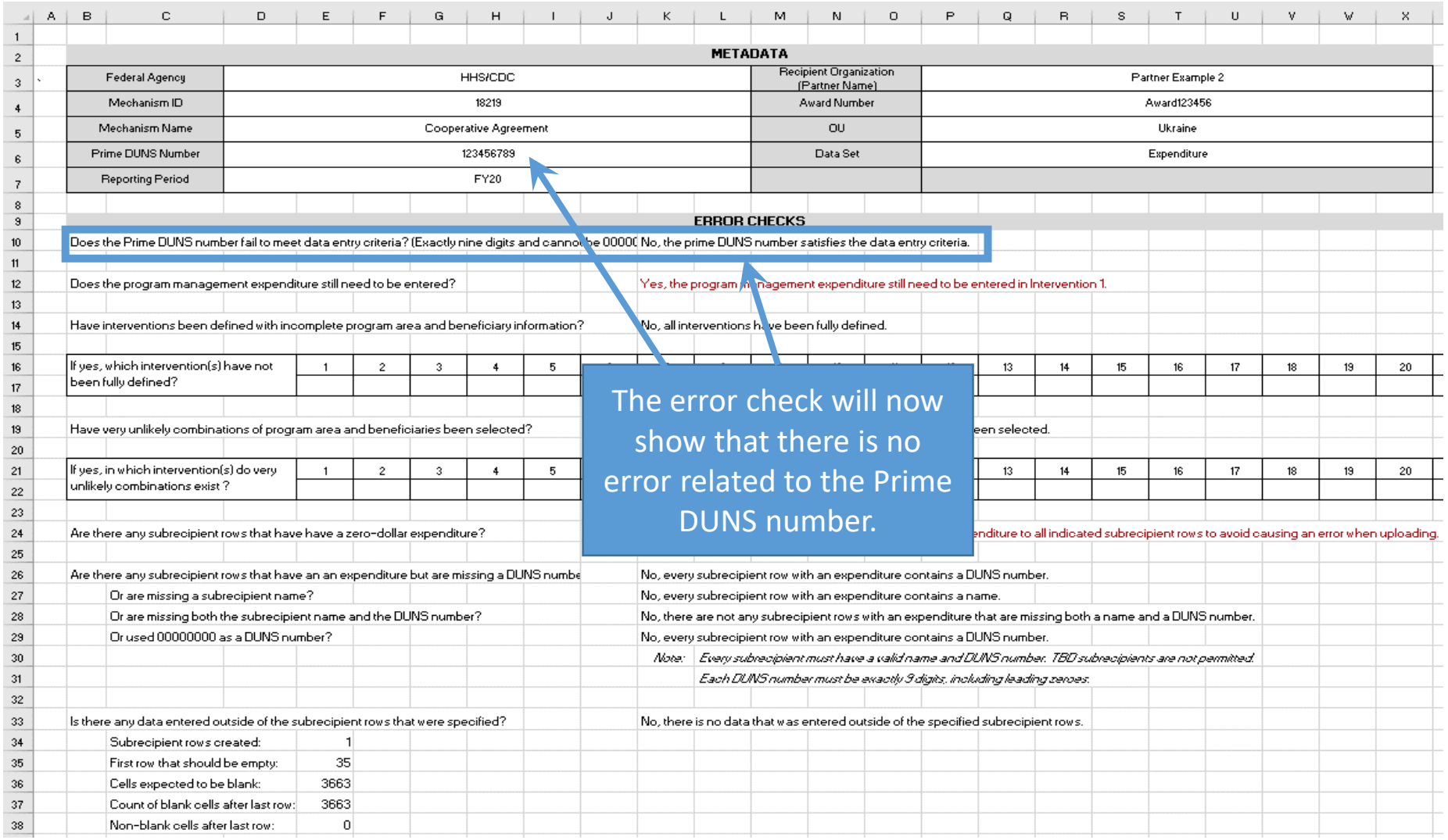
Error Checks in the Template: Prime DUNS Number



METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number	123456789	Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry criteria.
Does the program management expenditure still need to be entered?	Yes, the program management expenditure still need to be entered in Intervention 1.
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been fully defined.

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	13	14	15	16	17	18	19	20

Have very unlikely combinations of program area and beneficiaries been selected?	een selected.

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	13	14	15	16	17	18	19	20

Are there any subrecipient rows that have have a zero-dollar expenditure?	enditure to all indicated subrecipient rows to avoid causing an error when uploading.
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	No, every subrecipient row with an expenditure contains a DUNS number.
Or are missing a subrecipient name?	No, every subrecipient row with an expenditure contains a name.
Or are missing both the subrecipient name and the DUNS number?	No, there are not any subrecipient rows with an expenditure that are missing both a name and a DUNS number.
Or used 00000000 as a DUNS number?	No, every subrecipient row with an expenditure contains a DUNS number.
	Note: Every subrecipient must have a valid name and DUNS number. TBD subrecipients are not permitted.
	Each DUNS number must be exactly 9 digits, including leading zeroes.
Is there any data entered outside of the subrecipient rows that were specified?	No, there is no data that was entered outside of the specified subrecipient rows.

Subrecipient rows created:	1
First row that should be empty:	35
Cells expected to be blank:	3663
Count of blank cells after last row:	3663
Non-blank cells after last row:	0

The error check will now show that there is no error related to the Prime DUNS number.

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Error Checks in the Template: Program Management Costs

METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number	123456789	Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry criteria.
Does the program management expenditure still need to be entered?	Yes, the program management expenditure still need to be entered in Intervention 1.
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been fully defined.
Have very unlikely combinations of program area and beneficiaries been selected?	No, there are not a
Are there any subrecipient rows that have have a zero-dollar expenditure?	Yes, 1 row(s) have
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	No, every subrecip
Or are missing a subrecipient name?	No, every subrecip
Or are missing both the subrecipient name and the DUNS number?	No, there are not a
Or used 00000000 as a DUNS number?	No, every subrecip
	Note: Every su
	Each DU
Is there any data entered outside of the subrecipient rows that were specified?	No, there is no data

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	6	7	8

Subrecipient rows created:	1
First row that should be empty:	35
Cells expected to be blank:	3663
Count of blank cells after last row:	3663
Non-blank cells after last row:	0

The template will check that some program management expenditures has been entered in Intervention 1 on the expenditure Template tab.

Nearly all mechanisms are expected to report program management expenditures. Please note that this will turn red to indicate that there is an error.

Error Checks in the Template: Program Management Costs

		Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5
3	**Notes**	*Program Management*				
4	**Program Area**	PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD	SE: Education assistance-SD
5	**Beneficiary**	Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent female	Females: Young women & adolescent	Females: Young women & adolescent	Females: Young women & adolescent females
6	**Cost Category**	Program management expenditures	Expenditures Intervention			penditures against Intervention 5
7	Personnel: Salaries- Health Care Workers- Clinical	NA				
8	Personnel: Salaries- Health Care Workers- Ancillary	NA				
9	Personnel: Salaries- Other Staff	$315,057	$296,25			$73,459
10	Fringe Benefits	$78,192	$75,48			$16,048
11	Travel: International Travel	$15,700				
12	Travel: Domestic Travel	$24,800				
13	Equipment: Health Equipment					
14	Equipment: Non-Health Equipment	$10,000				
15	Supplies: Pharmaceutical	NA				
16	Supplies: Health- Non Pharmaceutical	NA				
17	Supplies: Other Supplies	$16,850	$36,89			
18	Contractual: Contracted Health Care Workers- Clinical	NA				
19	Contractual: Contracted Health Care Workers- Ancillary	NA				$250,999
20	Contractual: Contracted Interventions	NA				
21	Contractual: Other Contracts	$9,985				
22	Construction					
23	Training				$154,805	$23,499
24	Subrecipient Total	NA	$0	$0	$0	$0
25	Other: Financial Support for Beneficiaries					
26	Other: Other					
27	Indirect Charges	$320,458		$320,458		
28	**Total Expenditures per Intervention (Sum of Cost Categories)**	**$791,042**	**$444,441**	**$430,209**	**$263,201**	**$364,005**

To correct this error, first return to the Expenditure Template tab.

As we saw on the Metadata and Error Checks tab, Intervention 1 has no expenditures entered.

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Error Checks in the Template: Program Management Costs

METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number	123456789	Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry criteria.
Does the program management expenditure still need to be entered?	No, the program management expenditure has been entered.
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been fully defined.

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Have very unlikely combinations of program area and beneficiaries been selected?	No, there are not any very unlikely combinations that have been selected.

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	6	7	8	14	15	16	17	18	19	20

Are there any subrecipient rows that have have a zero-dollar expenditure?	No, every subrecipient h
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	No, every subrecipient r…er.
Or are missing a subrecipient name?	No, every subrecipient r…
Or are missing both the subrecipient name and the DUNS number?	No, there are not any su…ssing both a name and a DUNS number.
Or used 00000000 as a DUNS number?	No, every subrecipient r…er.
	Note: Every subrec…er. TBD subrecipients are not permitted. Each DUNS r…ng zeroes.
Is there any data entered outside of the subrecipient rows that were specified?	No, there is no data tha…ent rows.

Subrecipient rows created:	0
First row that should be empty:	34
Cells expected to be blank:	3700
Count of blank cells after last row:	3700
Non-blank cells after last row:	0

The error check will now show that there is no error related to program management costs.

Error Checks in the Template: Interventions Have Been Fully Defined

METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number	123456789	Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry criteria.
Does the program management expenditure still need to be entered?	No, the program management expenditure has been entered.
Have interventions been defined with incomplete program area and beneficiary information?	Yes, there are intervention(s) that have not been fully defined. This will cause an error when uploading.

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
		X		X		X														

Have very unlikely combinations of program area and beneficiaries been selected? No, there are not any very unlikely combinations that have been selected.

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	18	19	20

Are there any subrecipient rows that have have a zero-dollar expenditure?

Are there any subrecipient rows that have an an expenditure but are missing a DU

Or are missing a subrecipient name?

Or are missing both the subrecipient name and the DUNS number?

Or used 00000000 as a DUNS number?

Is there any data entered outside of the subrecipient rows that were specified?

Subrecipient rows created:	0
First row that should be empty:	34
Cells expected to be blank:	3700
Count of blank cells after last row:	3700
Non-blank cells after last row:	0

The template will also check that interventions have been fully defined. This means that for any intervention that has expenditures, a program area and beneficiary has been selected.

Each intervention that has not been fully defined will be identified here by its number. A template with this error will **not** constitute a valid upload in DATIM, i.e., validation will fail.

Error Checks in the Template: Interventions Have Been Fully Defined

		Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6
Notes		*Program Management*					
Program Area		PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD		SE: Education assistance-SD	
Beneficiary		Non-Targeted Pop: Not disaggregated		Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females	
Cost Category		Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6
Personnel: Salaries- Health Care Workers- Clinical		NA					
Personnel: Salaries- Health Care Workers- Ancillary		NA					
Personnel: Salaries- Other Staff		$315,057	$296,253	$65,808	$48,408	$73,459	$29,372
Fringe Benefits		$78,192	$75,480	$15,408	$11,058	$16,048	
Travel: International Travel		$15,700					
Travel: Domestic Travel					$5,480		
Equipment: Health Equipment							
Equipment: Non-Health Equipment							
Supplies: Pharmaceutical							
Supplies: Health- Non Pharmaceutical							
Supplies: Other Supplies					$3,450		
Contractual: Contracted Health Care Workers- Clinical							
Contractual: Contracted Health Care Workers- Ancillary					$40,000	$250,999	
Contractual: Contracted Interventions							
Contractual: Other Contracts							
Construction							
Training					$154,805	$23,499	
Subrecipient Total					$0	$0	$0
Other: Financial Support for Beneficiaries							
Other: Other							
Indirect Charges							
Total Expenditures per Intervention (Sum of Cost Categories)					**$263,201**	**$364,005**	**$29,372**

To correct this error, first return to the Expenditure Template tab. As we saw on the on the Metadata and Error Checks tab, Interventions 2, 4, and 6 have not been fully defined. This will also be indicated in red on the Expenditure Template tab.

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Error Checks in the Template: Interventions Have Been Fully Defined

	A	B	C	D	E	F	G	H	I
1									
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5	Categorization of Intervention 6
3	**Notes**			*Program Management*					
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD	SE: Education assistance-SD	
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females	
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5	Expenditures against Intervention 6
7	Personnel: Salaries- Health Care Workers- Clinical			NA					
8	Personnel: Salaries- Health Care Workers- Ancillary			NA					
9	Personnel: Salaries- Other Staff			$315,057	$296,253	$65,808	$48,408	$73,459	
10	Fringe Benefits			$78,192	$75,480	$15,408	$11,058	$16,048	
11	Travel: International Travel								
12	Travel: Domestic Travel								
13	Equipment: Health Equipment								
14	Equipment: Non-Health Equipment								
15	Supplies: Pharmaceutical								
16	Supplies: Health- Non Pharmaceutical								
17	Supplies: Other Supplies								
18	Contractual: Contracted Health Care Workers- Clinical								
19	Contractual: Contracted Health Care Workers- Ancillary							$250,999	
20	Contractual: Contracted Interventions								
21	Contractual: Other Contracts								
22	Construction								
23	Training							$23,499	
24	Subrecipient Total							$0	$0
25	Other: Financial Support for Beneficiaries								
26	Other: Other								
27	Indirect Charges								
28	**Total Expenditures per Intervention (Sum of Cost Categorie**			**$791,042**	**$444,441**	**$430,209**	**$263,201**	**$364,005**	**$0**

To correct this error, select a beneficiary for Intervention 2, select a program area and beneficiary for Intervention 4, and delete the erroneous fringe benefits amount in Intervention 6. If the amount in Intervention 6 represented actual expenditures, this error can also be corrected by identifying a program area and beneficiary for that intervention.

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Error Checks in the Template: Interventions Have Been Fully Defined

METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number	123456789	Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry criteria.
Does the program management expenditure still need to be entered?	No, the program management expenditure has been entered.
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been fully defined.

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Have very unlikely combinations of program area and beneficiaries been selected?	No, there are not any very unlikely combinations that have been selected.

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Are there any subrecipient rows that have have a zero-dollar expenditure?

Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe
- Or are missing a subrecipient name?
- Or are missing both the subrecipient name and the DUNS number?
- Or used 00000000 as a DUNS number?

Is there any data entered outside of the subrecipient rows that were specified?

Subrecipient rows created:	0
First row that should be empty:	34
Cells expected to be blank:	3700
Count of blank cells after last row:	3700
Non-blank cells after last row:	0

On the Metadata and Error Checks tab, the error check will now show that there is no error related to defining interventions.

Error Checks in the Template: Very Unlikely Combinations

METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number	123456789	Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry criteria.
Does the program management expenditure still need to be entered?	No, the program management expenditure has been entered.
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been fully defined.

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Have very unlikely combinations of program area and beneficiaries been selected?	Yes, very unlikely combinations have been selected. This will produce a warning when uploading.

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
				X																

Are there any subrecipient rows that have have a zero-dollar expenditure?	
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	
Or are missing a subrecipient name?	
Or are missing both the subrecipient name and the DUNS number?	
Or used 00000000 as a DUNS number?	
Is there any data entered outside of the subrecipient rows that were specified?	
Subrecipient rows created:	0
First row that should be empty:	34
Cells expected to be blank:	3700
Count of blank cells after last row:	3700
Non-blank cells after last row:	0

The template will also check that interventions have not been defined with very unlikely combinations of program area and beneficiaries.

For example, if your program area is “PREV: VMMC-SD,” a very unlikely beneficiary combination would be “Females: Adult women.” Each intervention that has a very unlikely combination will be identified here by its number.

Error Checks in the Template: Very Unlikely Combinations

	A	B	C	D	E	F	G
1							
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4
3	**Notes**			*Program Management*			
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females	Females: Young women & adolescent females	Non-Targeted Pop: Not disaggregated
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4
7	Personnel: Salaries- Health Care Workers- Clinical			NA			
8	Personnel: Salaries- Health Care Workers- Ancillary			NA			
9	Personnel: Salaries- Other Staff			$315,057	$296,253	$65,808	$48,408
10	Fringe Benefits			$78,192	$		
11	Travel: International Travel			$15,700			
12	Travel: Domestic Travel			$24,800	$		
13	Equipment: Health Equipment						
14	Equipment: Non-Health Equipment			$10,000			
15	Supplies: Pharmaceutical			NA			
16	Supplies: Health- Non Pharmaceutical			NA			
17	Supplies: Other Supplies			$16,850	$		
18	Contractual: Contracted Health Care Workers- Clinical			NA			
19	Contractual: Contracted Health Care Workers- Ancillary			NA			
20	Contractual: Contracted Interventions			NA			
21	Contractual: Other Contracts			$9,985			
22	Construction						
23	Training						
24	Subrecipient Total			NA			
25	Other: Financial Support for Beneficiaries						
26	Other: Other						
27	Indirect Charges			$320,458			
28	**Total Expenditures per Intervention (Sum of Cost Categorie**			**$791,042**	$4		

To correct this error, first return to the Expenditure Template tab.

As we saw on the Metadata and Error Checks tab, Intervention 4 contained a very unlikely combination. This will also be indicated in red on the Expenditure Template tab.

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Error Checks in the Template: Very Unlikely Combinations

	A	B	C	D	E	F	G	H
1								
2				Program Management	Categorization of Intervention 2	Categorization of Intervention 3	Categorization of Intervention 4	Categorization of Intervention 5
3	**Notes**			*Program Management*				
4	**Program Area**			PM: IM Program Management-NSD	SE: Economic strengthening-SD	SE: Psychosocial support-SD	SE: Case Management-SD	SE: Education assistance-SD
5	**Beneficiary**			Non-Targeted Pop: Not disaggregated	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & adolescent females	Females: Young women & olescent females
6	**Cost Category**			Program management expenditures	Expenditures against Intervention 2	Expenditures against Intervention 3	Expenditures against Intervention 4	Expenditures against Intervention 5
7	Personnel: Salaries- Health Care Workers- Clinical			NA				
8	Personnel: Salaries- Health Care Workers- Ancillary			NA				
9	Personnel: Salaries- Other Staff			$315,057	$296,253	$65,808		
10	Fringe Benefits			$78,192	$75,480	$15,408		
11	Travel: International Travel			$15,700				
12	Travel: Domestic Travel			$24,800	$35,817	$12,548		
13	Equipment: Health Equipment							
14	Equipment: Non-Health Equipment			$10,000				
15	Supplies: Pharmaceutical			NA				
16	Supplies: Health- Non Pharmaceutical			NA				
17	Supplies: Other Supplies			$16,850	$36,891	$15,987		
18	Contractual: Contracted Health Care Workers- Clinical			NA				
19	Contractual: Contracted Health Care Workers- Ancillary			NA				
20	Contractual: Contracted Interventions			NA				
21	Contractual: Other Contracts			$9,985				
22	Construction							
23	Training							
24	Subrecipient Total			NA	$0	$0		
25	Other: Financial Support for Beneficiaries							
26	Other: Other							
27	Indirect Charges			$320,458		$320,458		
28	**Total Expenditures per Intervention (Sum of Cost Categorie**			**$791,042**	**$444,441**	**$430,209**	**$263,201**	**$364,005**

To correct this error, select a beneficiary that is not a very unlikely combination. Once the correct beneficiary is selected, the cell will become white again.

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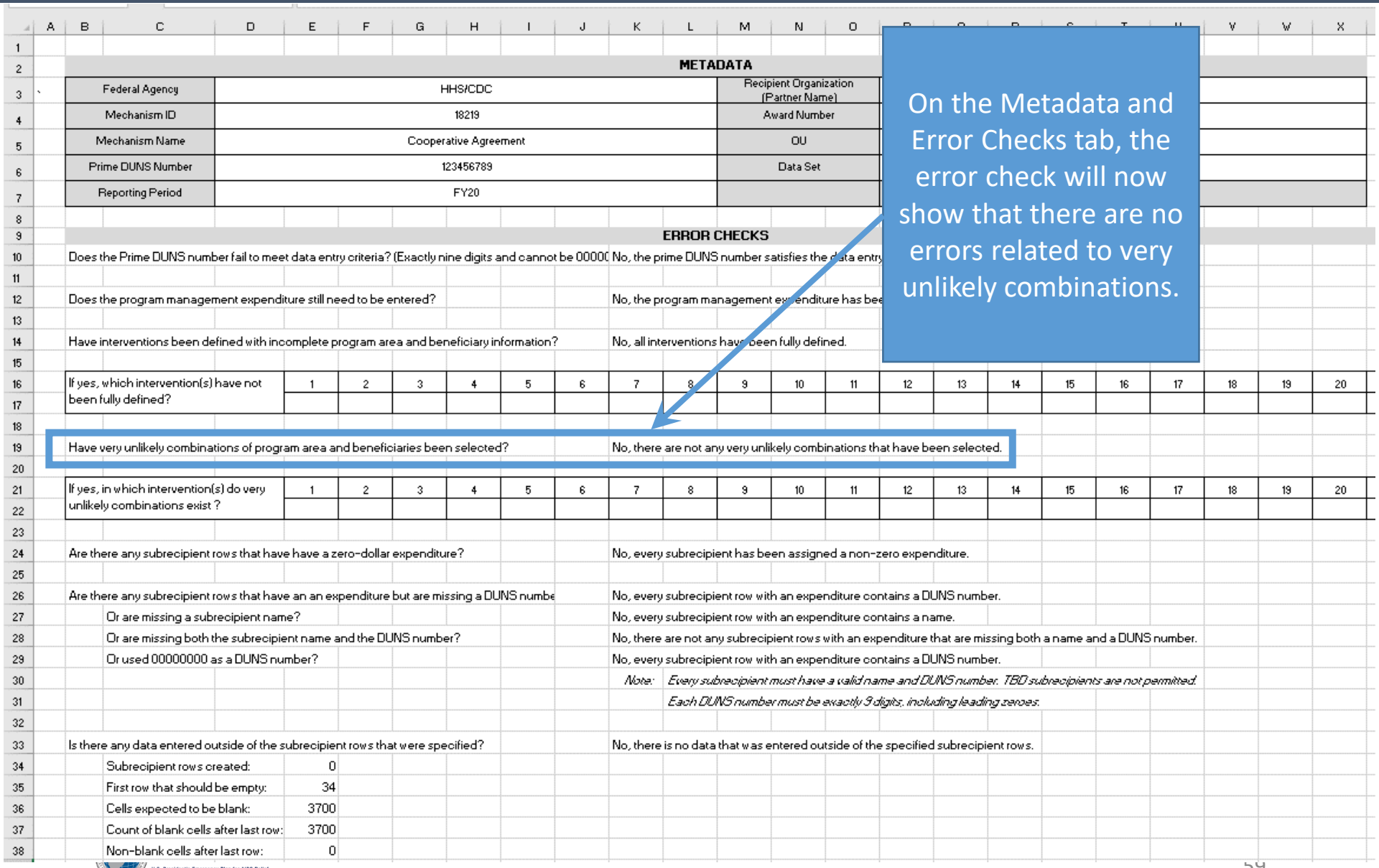
Error Checks in the Template: Very Unlikely Combinations



METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	
Mechanism ID	18219	Award Number	
Mechanism Name	Cooperative Agreement	OU	
Prime DUNS Number	123456789	Data Set	
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry
Does the program management expenditure still need to be entered?	No, the program management expenditure has bee
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been fully defined.

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Have very unlikely combinations of program area and beneficiaries been selected?	No, there are not any very unlikely combinations that have been selected.

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Are there any subrecipient rows that have have a zero-dollar expenditure?	No, every subrecipient has been assigned a non-zero expenditure.
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	No, every subrecipient row with an expenditure contains a DUNS number.
Or are missing a subrecipient name?	No, every subrecipient row with an expenditure contains a name.
Or are missing both the subrecipient name and the DUNS number?	No, there are not any subrecipient rows with an expenditure that are missing both a name and a DUNS number.
Or used 00000000 as a DUNS number?	No, every subrecipient row with an expenditure contains a DUNS number.
	Note: Every subrecipient must have a valid name and DUNS number. TBD subrecipients are not permitted.
	Each DUNS number must be exactly 9 digits, including leading zeroes.
Is there any data entered outside of the subrecipient rows that were specified?	No, there is no data that was entered outside of the specified subrecipient rows.

Subrecipient rows created:	0
First row that should be empty:	34
Cells expected to be blank:	3700
Count of blank cells after last row:	3700
Non-blank cells after last row:	0

On the Metadata and Error Checks tab, the error check will now show that there are no errors related to very unlikely combinations.

Complete List of Very Unlikely Intervention Combinations: Prevention Program Area: VMMC

PROGRAM AREA	BENEFICAIRY
PREV: VMMC-SD	Non-Targeted Pop: Adults
PREV: VMMC-SD	Non-Targeted Pop: Young people & adolescents
PREV: VMMC-SD	Non-Targeted Pop: Children
PREV: VMMC-SD	Non-Targeted Pop: Not disaggregated
PREV: VMMC-SD	Females: Adult women
PREV: VMMC-SD	Females: Young women & adolescent females
PREV: VMMC-SD	Females: Girls
PREV: VMMC-SD	Females: Not disaggregated
PREV: VMMC-SD	Key Pops: Transgender
PREV: VMMC-SD	Key Pops: Sex workers
PREV: VMMC-SD	Key Pops: People who inject drugs
PREV: VMMC-SD	Key Pops: Not disaggregated
PREV: VMMC-SD	Key Pops: People in prisons
PREV: VMMC-SD	Priority Pops: Not disaggregated
PREV: VMMC-SD	Pregnant & Breastfeeding Women: Not disaggregated
PREV: VMMC-SD	OVC: Orphans & vulnerable children
PREV: VMMC-SD	OVC: Care givers
PREV: VMMC-SD	OVC: Not disaggregated
PREV: VMMC-NSD	Non-Targeted Pop: Adults
PREV: VMMC-NSD	Non-Targeted Pop: Young people & adolescents
PREV: VMMC-NSD	Non-Targeted Pop: Children
PREV: VMMC-NSD	Non-Targeted Pop: Not disaggregated
PREV: VMMC-NSD	Females: Adult women
PREV: VMMC-NSD	Females: Young women & adolescent females
PREV: VMMC-NSD	Females: Girls
PREV: VMMC-NSD	Females: Not disaggregated
PREV: VMMC-NSD	Key Pops: Transgender
PREV: VMMC-NSD	Key Pops: Sex workers
PREV: VMMC-NSD	Key Pops: People who inject drugs
PREV: VMMC-NSD	Key Pops: Not disaggregated
PREV: VMMC-NSD	Key Pops: People in prisons
PREV: VMMC-NSD	Pregnant & Breastfeeding Women: Not disaggregated
PREV: VMMC-NSD	Priority Pops: Not disaggregated
PREV: VMMC-NSD	OVC: Orphans & vulnerable children
PREV: VMMC-NSD	OVC: Care givers
PREV: VMMC-NSD	OVC: Not disaggregated

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Complete List of Very Unlikely Intervention Combinations: Prevention Program Area: Medication assisted treatment

PROGRAM AREA	BENEFICIARY	PROGRAM AREA	BENEFICIARY
PREV: Medication assisted treatment-SD	Non-Targeted Pop: Not disaggregated	PREV: Medication assisted treatment-NSD	Non-Targeted Pop: Not disaggregated
PREV: Medication assisted treatment-SD	Non-Targeted Pop: Adults	PREV: Medication assisted treatment-NSD	Non-Targeted Pop: Adults
PREV: Medication assisted treatment-SD	Non-Targeted Pop: Young people & adolescents	PREV: Medication assisted treatment-NSD	Non-Targeted Pop: Young people & adolescents
PREV: Medication assisted treatment-SD	Non-Targeted Pop: Children	PREV: Medication assisted treatment-NSD	Non-Targeted Pop: Children
PREV: Medication assisted treatment-SD	Females: Adult women	PREV: Medication assisted treatment-NSD	Females: Adult women
PREV: Medication assisted treatment-SD	Females: Young women & adolescent females	PREV: Medication assisted treatment-NSD	Females: Young women & adolescent females
PREV: Medication assisted treatment-SD	Females: Girls	PREV: Medication assisted treatment-NSD	Females: Girls
PREV: Medication assisted treatment-SD	Females: Not disaggregated	PREV: Medication assisted treatment-NSD	Females: Not disaggregated
PREV: Medication assisted treatment-SD	Males: Adult men	PREV: Medication assisted treatment-NSD	Males: Adult men
PREV: Medication assisted treatment-SD	Males: Young men & adolescent males	PREV: Medication assisted treatment-NSD	Males: Young men & adolescent males
PREV: Medication assisted treatment-SD	Males: Boys	PREV: Medication assisted treatment-NSD	Males: Boys
PREV: Medication assisted treatment-SD	Males: Not disaggregated	PREV: Medication assisted treatment-NSD	Males: Not disaggregated
PREV: Medication assisted treatment-SD	Key Pops: Men having sex with men	PREV: Medication assisted treatment-NSD	Key Pops: Men having sex with men
PREV: Medication assisted treatment-SD	Key Pops: Transgender	PREV: Medication assisted treatment-NSD	Key Pops: Transgender
PREV: Medication assisted treatment-SD	Key Pops: Sex workers	PREV: Medication assisted treatment-NSD	Key Pops: Sex workers
PREV: Medication assisted treatment-SD	Key Pops: Not disaggregated	PREV: Medication assisted treatment-NSD	Key Pops: Not disaggregated
PREV: Medication assisted treatment-SD	Pregnant & Breastfeeding Women: Not disaggregated	PREV: Medication assisted treatment-NSD	Pregnant & Breastfeeding Women: Not disaggregated
PREV: Medication assisted treatment-SD	Priority Pops: People in prisons	PREV: Medication assisted treatment-NSD	Priority Pops: People in prisons
PREV: Medication assisted treatment-SD	Priority Pops: Military & other uniformed services	PREV: Medication assisted treatment-NSD	Priority Pops: Military & other uniformed services
PREV: Medication assisted treatment-SD	Priority Pops: Mobile Pops	PREV: Medication assisted treatment-NSD	Priority Pops: Mobile Pops
PREV: Medication assisted treatment-SD	Priority Pops: Displaced persons	PREV: Medication assisted treatment-NSD	Priority Pops: Displaced persons
PREV: Medication assisted treatment-SD	Priority Pops: Clients of sex workers	PREV: Medication assisted treatment-NSD	Priority Pops: Clients of sex workers
PREV: Medication assisted treatment-SD	Priority Pops: Not disaggregated	PREV: Medication assisted treatment-NSD	Priority Pops: Not disaggregated
PREV: Medication assisted treatment-SD	OVC: Orphans & vulnerable children	PREV: Medication assisted treatment-NSD	OVC: Orphans & vulnerable children
PREV: Medication assisted treatment-SD	OVC: Care givers	PREV: Medication assisted treatment-NSD	OVC: Care givers
PREV: Medication assisted treatment-SD	OVC: Not disaggregated	PREV: Medication assisted treatment-NSD	OVC: Not disaggregated

Complete List of Very Unlikely Intervention Combinations: Socio-economic Program Area

PROGRAM AREA	BENEFICIARY
SE: Case Management-SD	Non-Targeted Pop: Not disaggregated
SE: Case Management-NSD	Non-Targeted Pop: Not disaggregated
SE: Economic strengthening-SD	Non-Targeted Pop: Not disaggregated
SE: Economic strengthening-NSD	Non-Targeted Pop: Not disaggregated
SE: Education assistance-SD	Non-Targeted Pop: Not disaggregated
SE: Education assistance-NSD	Non-Targeted Pop: Not disaggregated

Error Checks in the Template: Subrecipient Rows

METADATA

Federal Agency	HHS/CDC	Recipient Organization (Partner Name)	Partner Example 2
Mechanism ID	18219	Award Number	Award123456
Mechanism Name	Cooperative Agreement	OU	Ukraine
Prime DUNS Number	123456789	Data Set	Expenditure
Reporting Period	FY20		

ERROR CHECKS

Does the Prime DUNS number fail to meet data entry criteria? (Exactly nine digits and cannot be 00000	No, the prime DUNS number satisfies the data entry criteria.
Does the program management expenditure still need to be entered?	No, the program management exp
Have interventions been defined with incomplete program area and beneficiary information?	No, all interventions have been ful

If yes, which intervention(s) have not been fully defined?	1	2	3	4	5	6	7	8	9	18	19	20

Have very unlikely combinations of program area and beneficiaries been selected?	No, there are not any very unlikely

If yes, in which intervention(s) do very unlikely combinations exist ?	1	2	3	4	5	6	7	8	9	18	19	20

Are there any subrecipient rows that have have a zero-dollar expenditure?	No, every subrecipient has been a
Are there any subrecipient rows that have an an expenditure but are missing a DUNS numbe	No, every subrecipient row with an
Or are missing a subrecipient name?	No, every subrecipient row with a
Or are missing both the subrecipient name and the DUNS number?	No, there are not any subrecipient
Or used 00000000 as a DUNS number?	No, every subrecipient row with an

Note: Every subrecipient must have a valid name and DUNS number. TBD subrecipients are not permitted.
Each DUNS number must be exactly 9 digits, including leading zeroes.

Is there any data entered outside of the subrecipient rows that were specified?	Yes, there are 3 value(s) that must be deleted.
Subrecipient rows created:	2
First row that should be empty:	36
Cells expected to be blank:	3626
Count of blank cells after last row:	3623
Non-blank cells after last row:	3

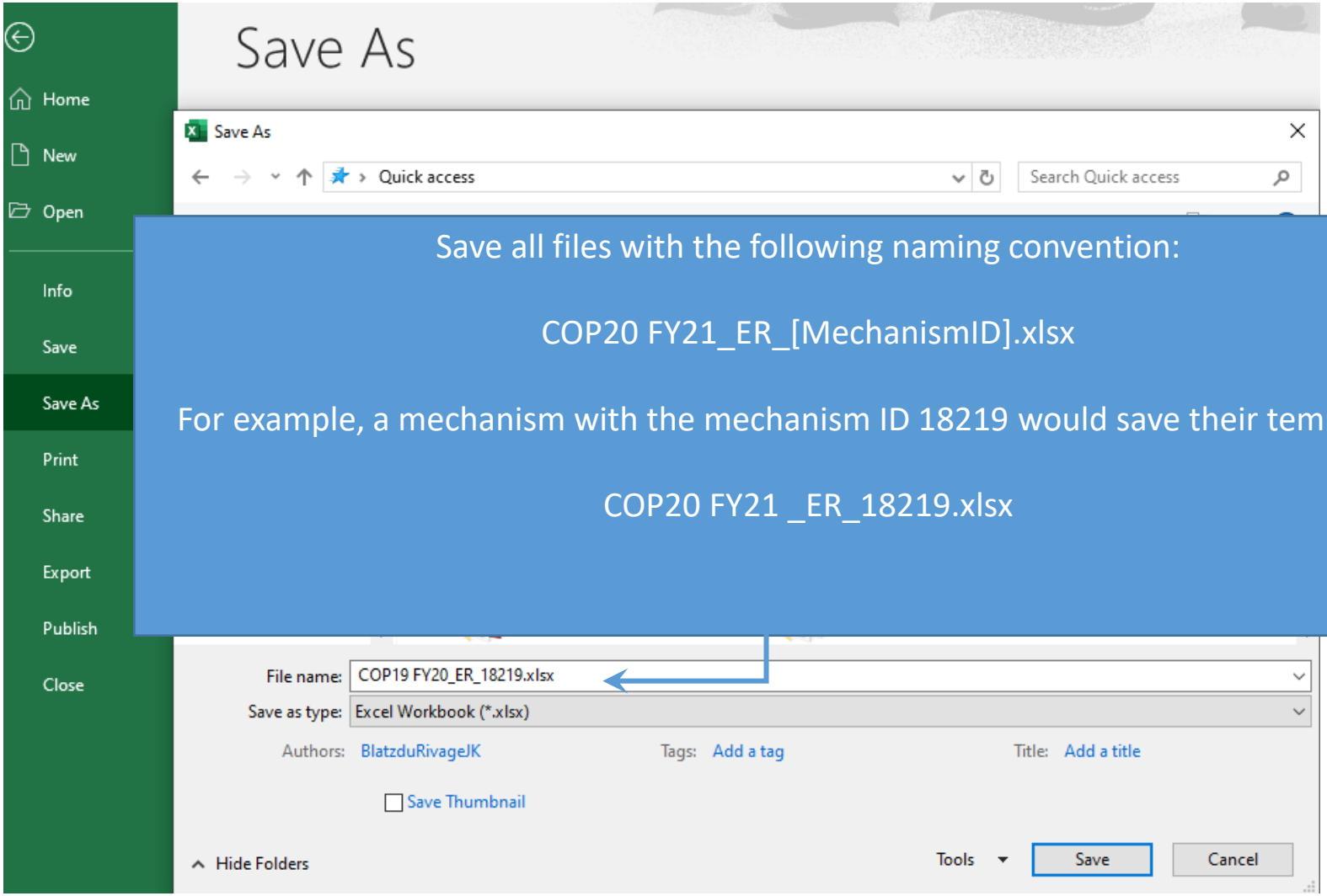
The template will check that all subrecipient data is entered within the designated subrecipient rows on the Expenditure Template tab. Please note that this will turn red to indicate that there is an error. A template with this error will **not** constitute a valid upload in DATIM, i.e., validation will fail.

Fields on the Metadata and Error Checks Tab

Row & Column Name	Cell Reference	Description
Does the Prime DUNS number fail to meet data entry criteria?	K10	• This will check that the Prime DUNS number entered in the "Metadata" section on the Metadata and Error Checks tab is exactly nine digits but is not 000000000. IPs should not upload the template if there is not an exact match, since a template with this error will **not** constitute a valid upload in DATIM, i.e., **validation will fail**.
Do program management budget still need to be entered?	K12	• This will check that amounts have been entered in intervention 1 for program management expenditures. Nearly all mechanisms are expected to have program management expenditures, the few exceptions should be confirmed with USG Agency staff (AOR/COR/Project Officer) before ignoring this error.
Have interventions been defined with incomplete program area and beneficiary information?	K14	• This will check if all interventions have both a program, sub-program and service delivery or non combination and a beneficiary and sub beneficiary combination selected. • If certain interventions are missing either program or beneficiary or both, this error check will identify the number of the intervention(s) that require further information. IPs should not upload the template if there is not an exact match, since a template with this error will **not** constitute a valid upload in DATIM, i.e., **validation will fail**.
Have very unlikely combinations of program area and beneficiaries been selected?	K19	• This will check if any interventions have a program area and beneficiary combination that is very unlikely given programmatic guidelines, for example if PREV: VMMC – SD is selected in combination with Females: Adult women. If certain interventions have very unlikely combinations, this error check will identify the number of the intervention(s) that require revision.

Upload to DATIM and Submit

Save ER Template for Upload



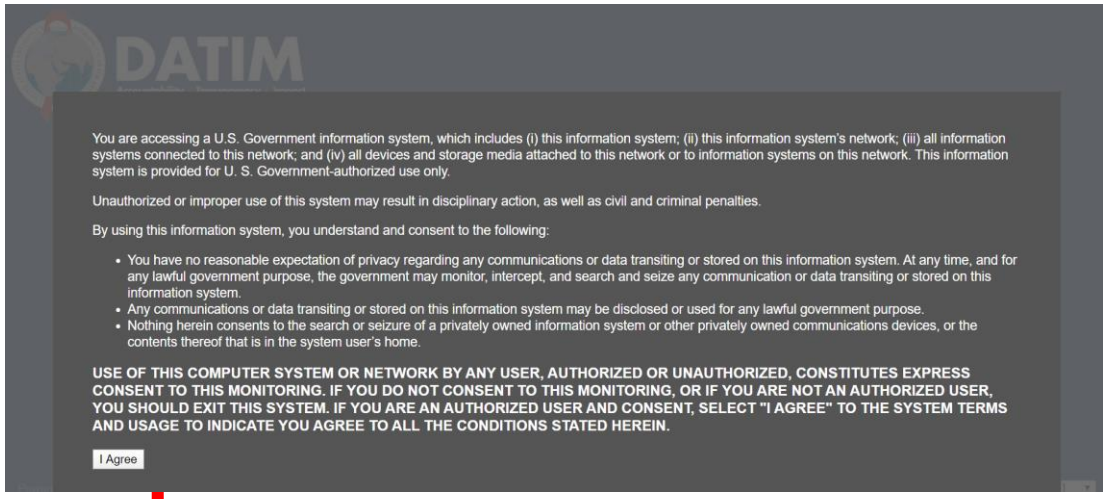
Save all files with the following naming convention:

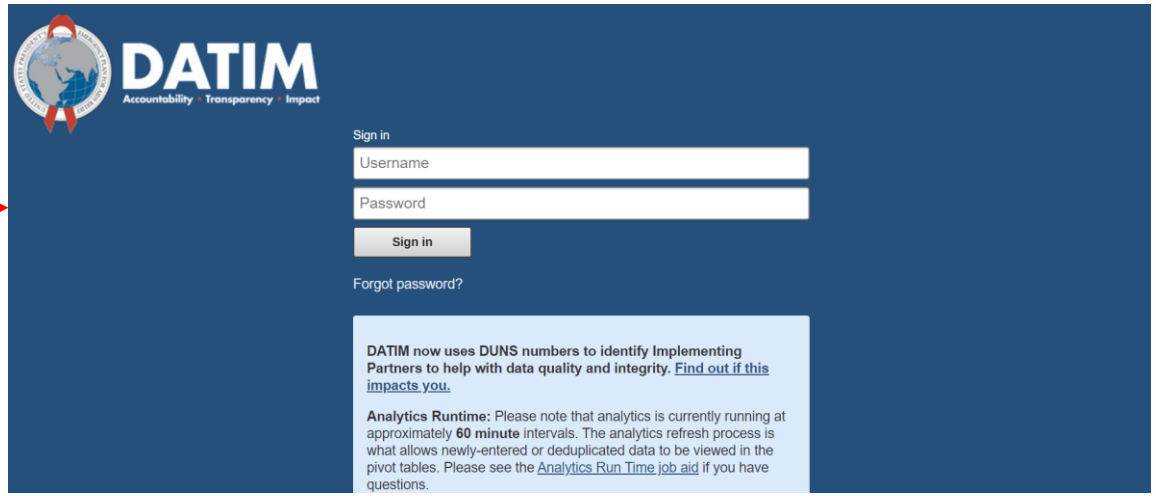
COP20 FY21_ER_[MechanismID].xlsx

For example, a mechanism with the mechanism ID 18219 would save their template as:

COP20 FY21 _ER_18219.xlsx

DATIM Upload: Log in to DATIM–https://www.datim.org





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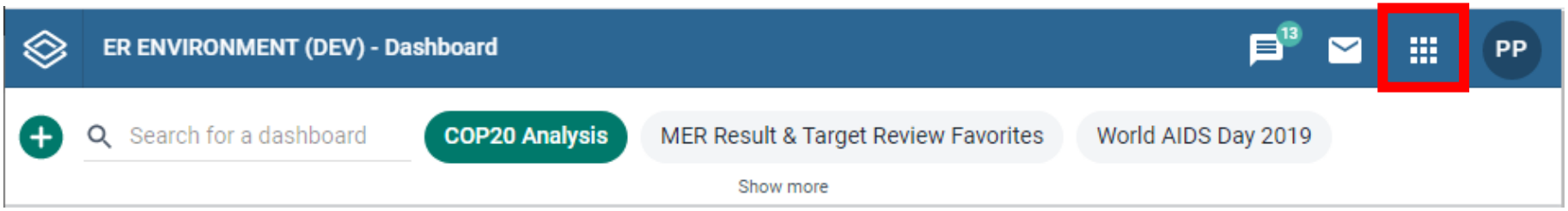
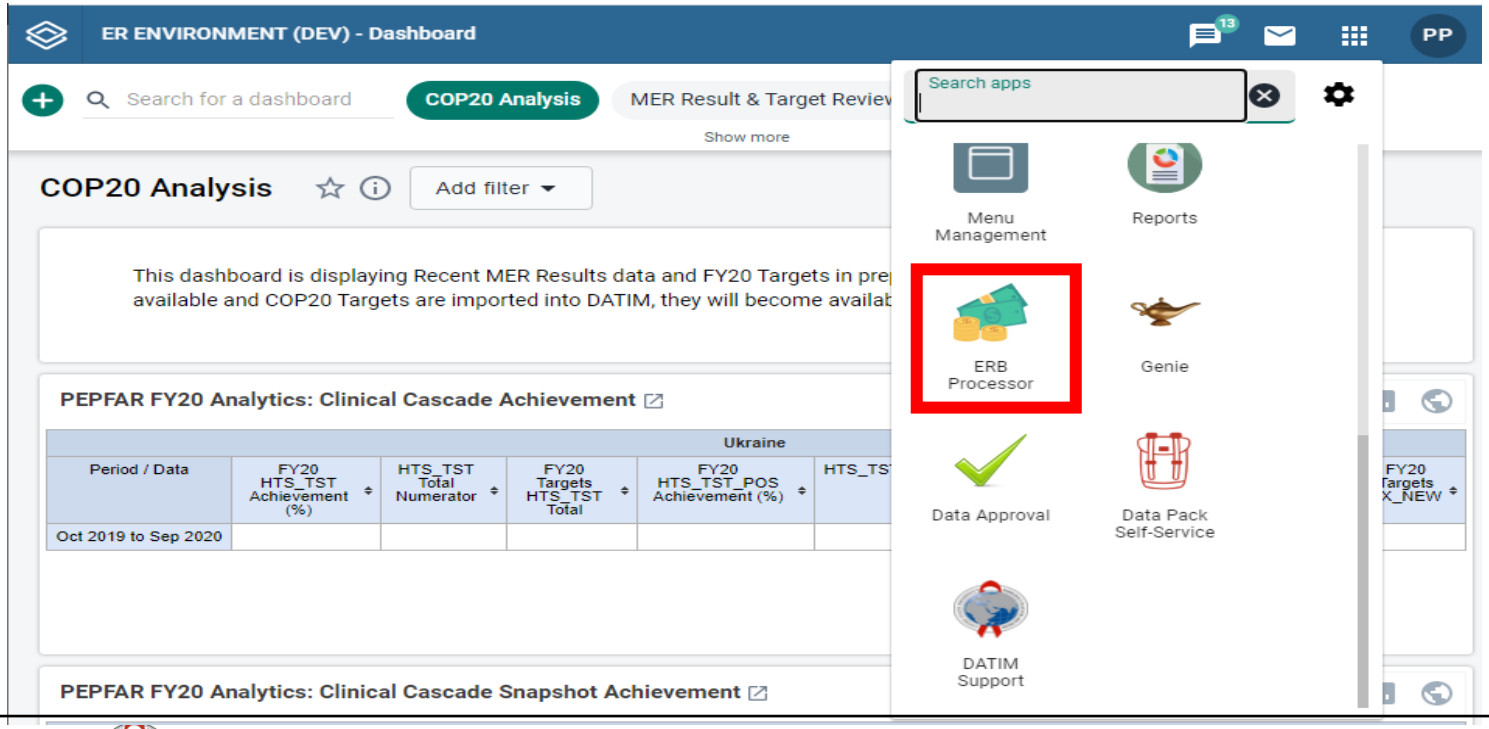
Navigate to ERB Processor App

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

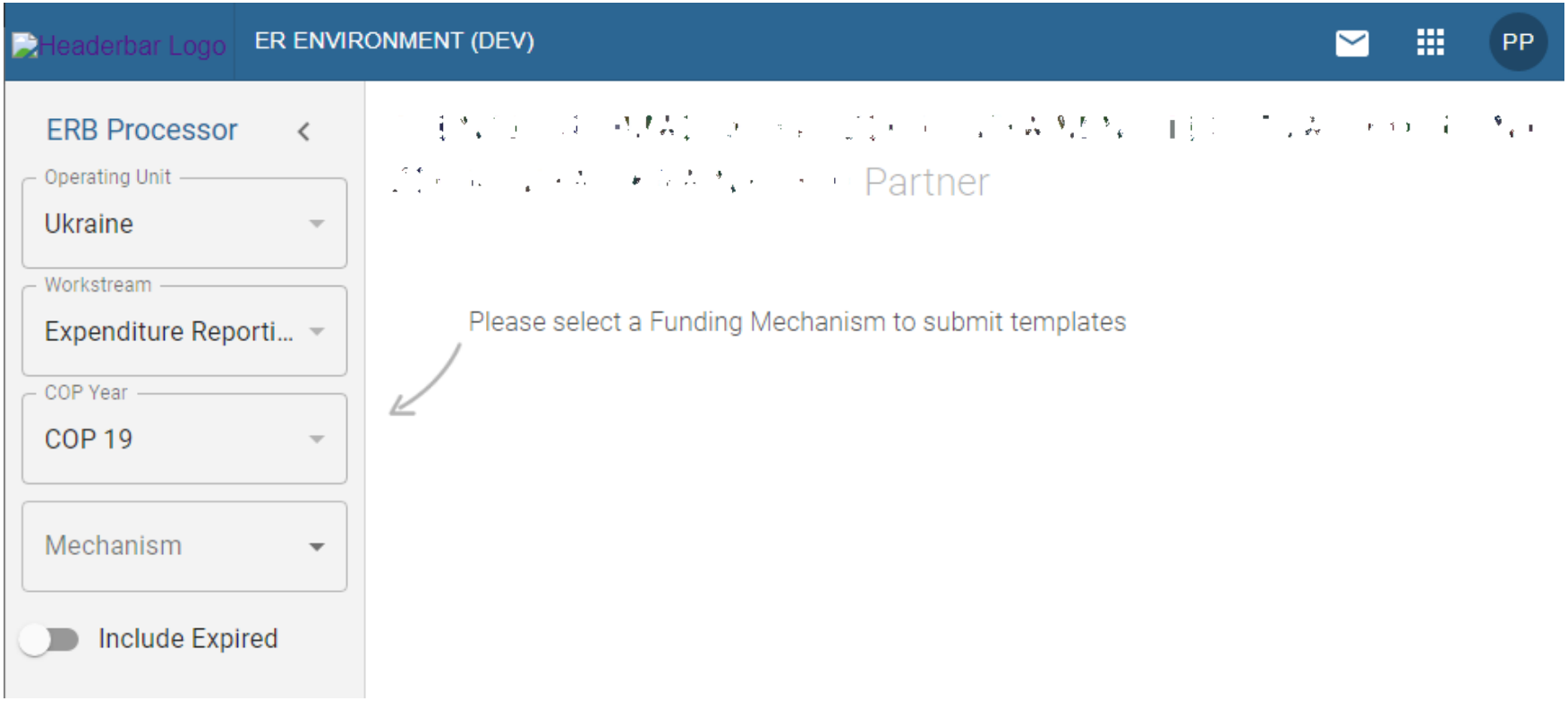


Within the apps menu, select the ERB Processor app



DATIM Upload: ERB Processor Page

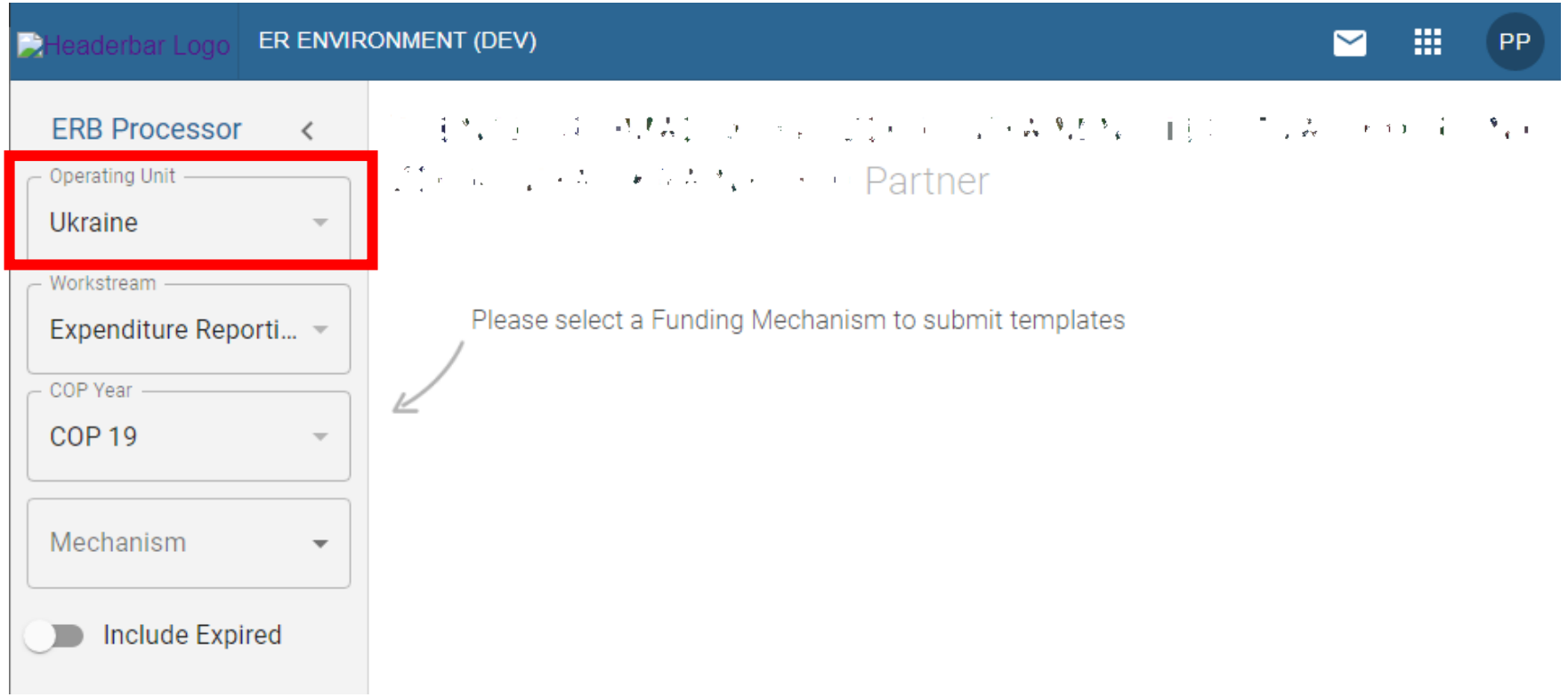
After selecting ERB Processor app, the data entry page will appear:



NOTE: Expenditure is reported at the OU level, regardless of whether the IP is only working in one SNU or multiple SNU; please make sure the OU is selected.

Verify OU

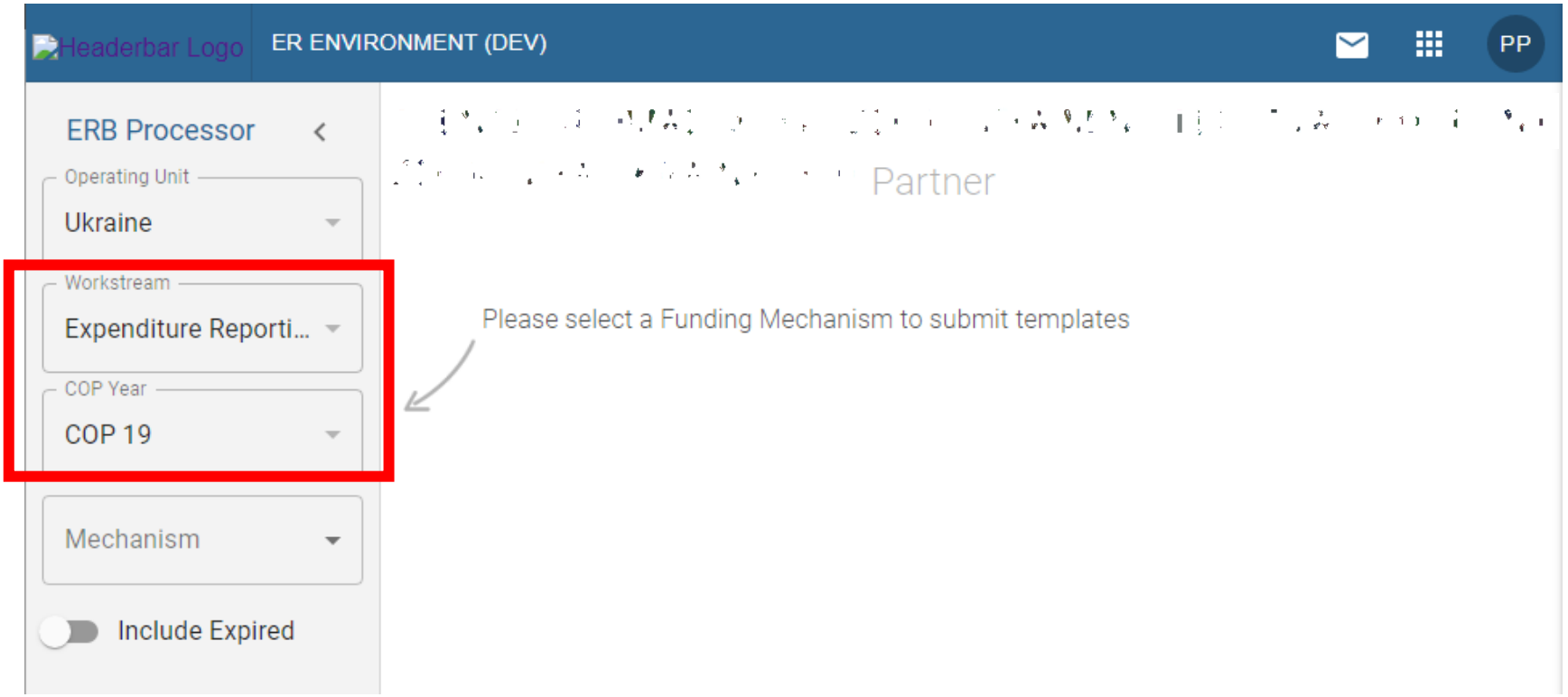
Begin by verifying the Operating Unit is correct



NOTE: Expenditure is reported at the OU level, regardless of whether the IP is only working in one SNU or multiple SNU; please make sure the OU is selected.

Verify Workstream and COP Year

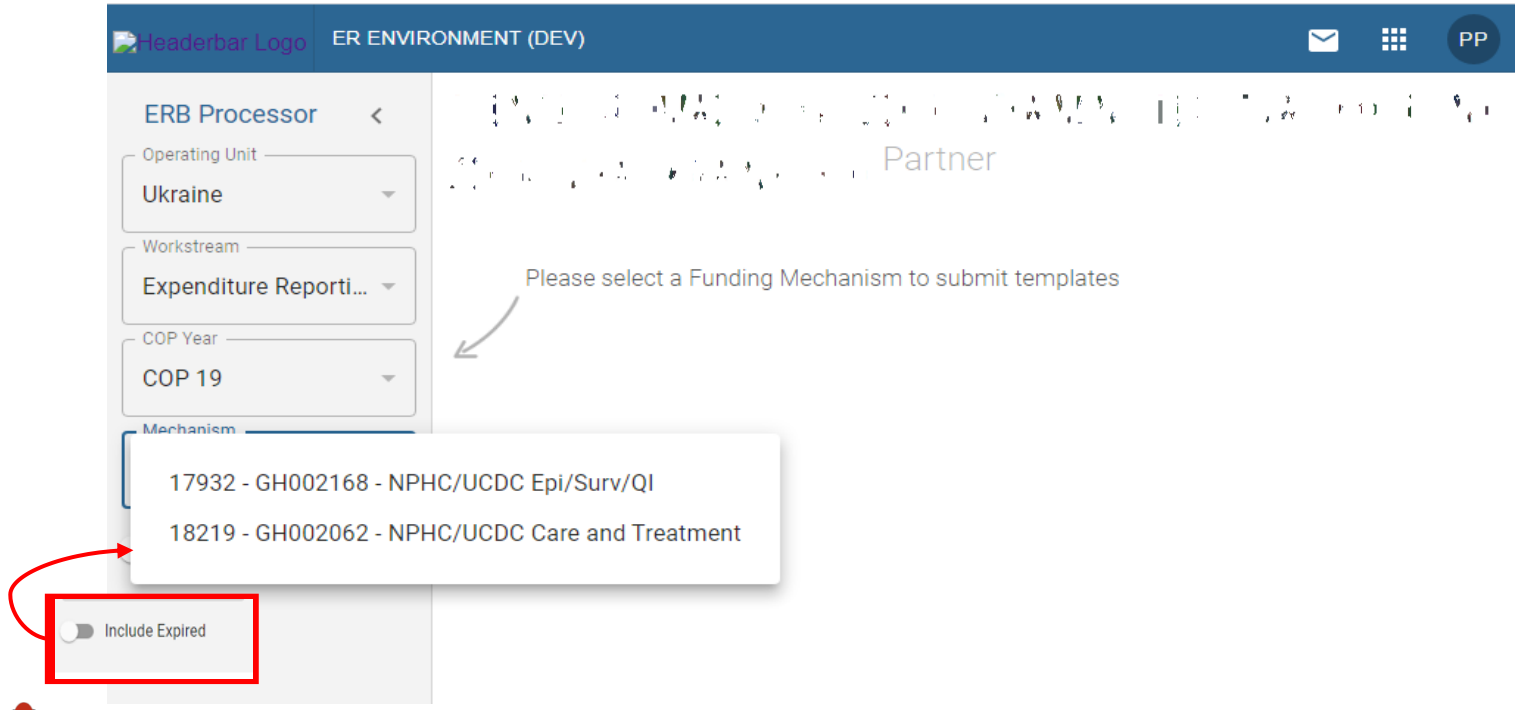
Verify the Workstream is “Expenditure Reporting” and COP Year is “COP 19”



NOTE: If you select an earlier reporting period (e.g., COP 18), you will not be able to submit your expenditure reporting template in the Data Approval app, as the only option for data approval for this first ER reporting period in DATIM is COP 19.

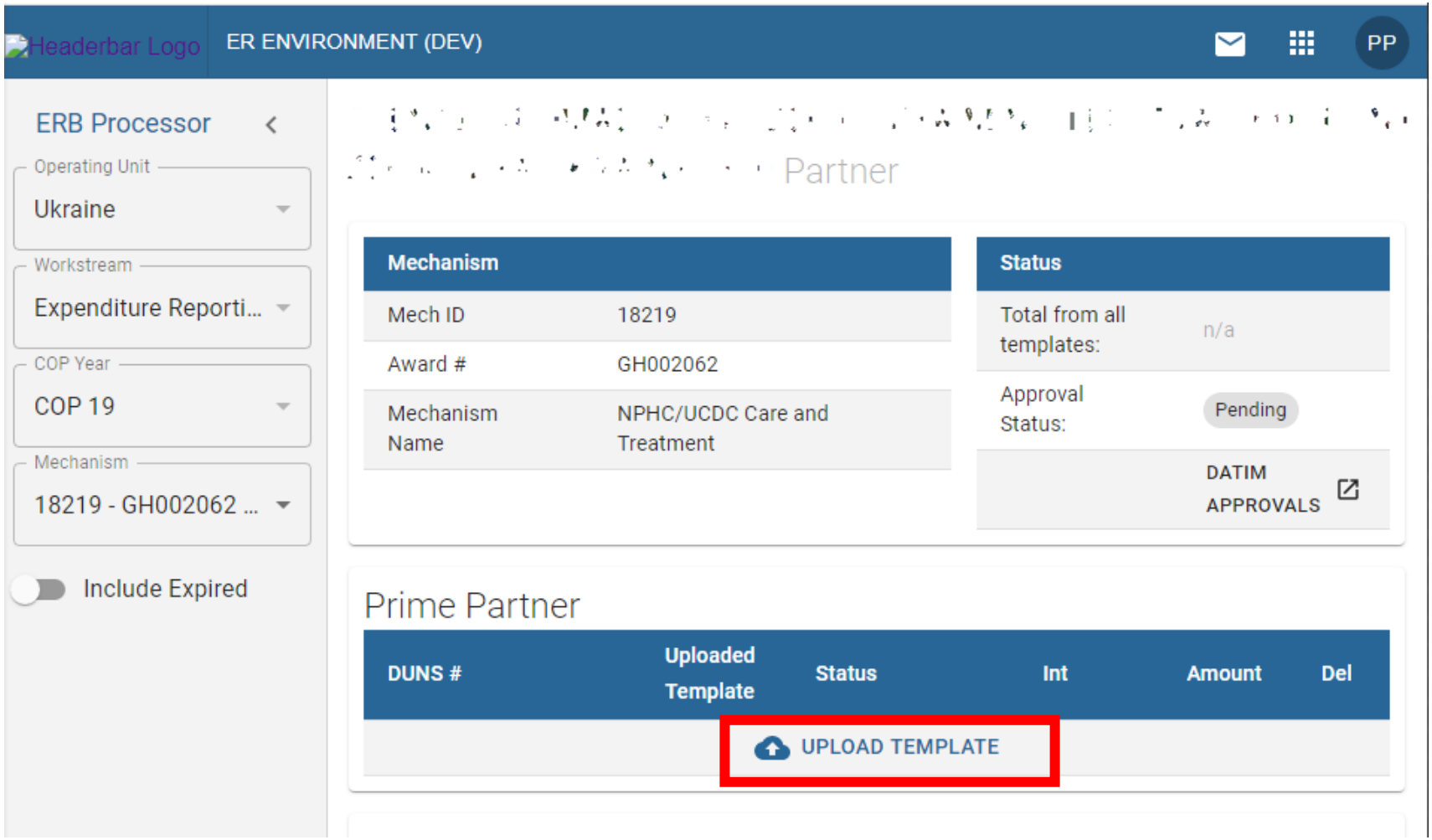
Select Mechanism

- Select the dropdown in the Mechanism box and verify that the correct funding mechanism is there
- If you do not see your mechanism on the drop-down list because it is an expired mechanism for which you need to report close-out or other costs, select to include expired mechanisms using the outlined toggle switch below
- If you do not see your mechanism on the drop-down list for any other reason, please submit a request via DATIM Support www.datim.zendesk.com
- If you do not know which mechanism to report against, please contact your Agency POC



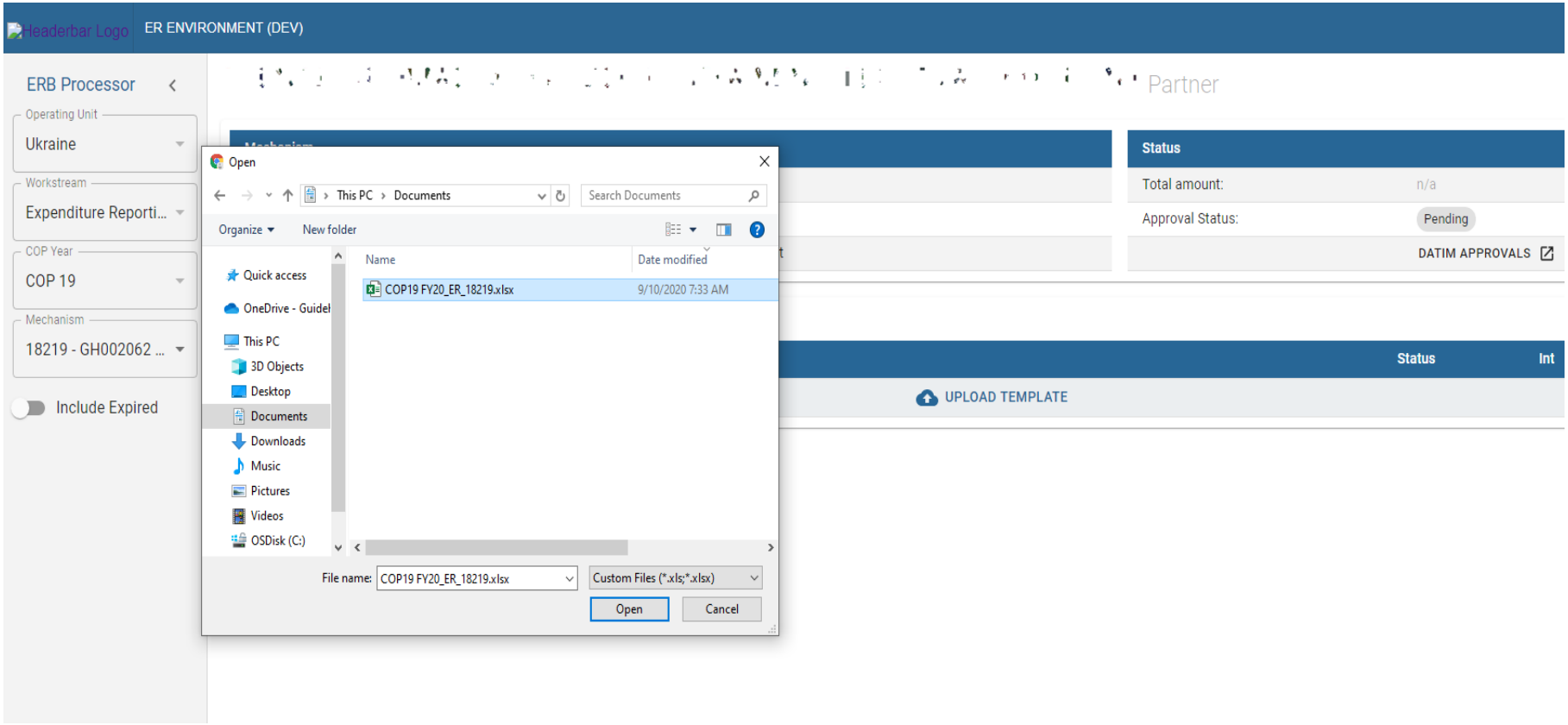
Selecting Template File to Upload

Click the Upload Template icon in the Prime Partner upload field



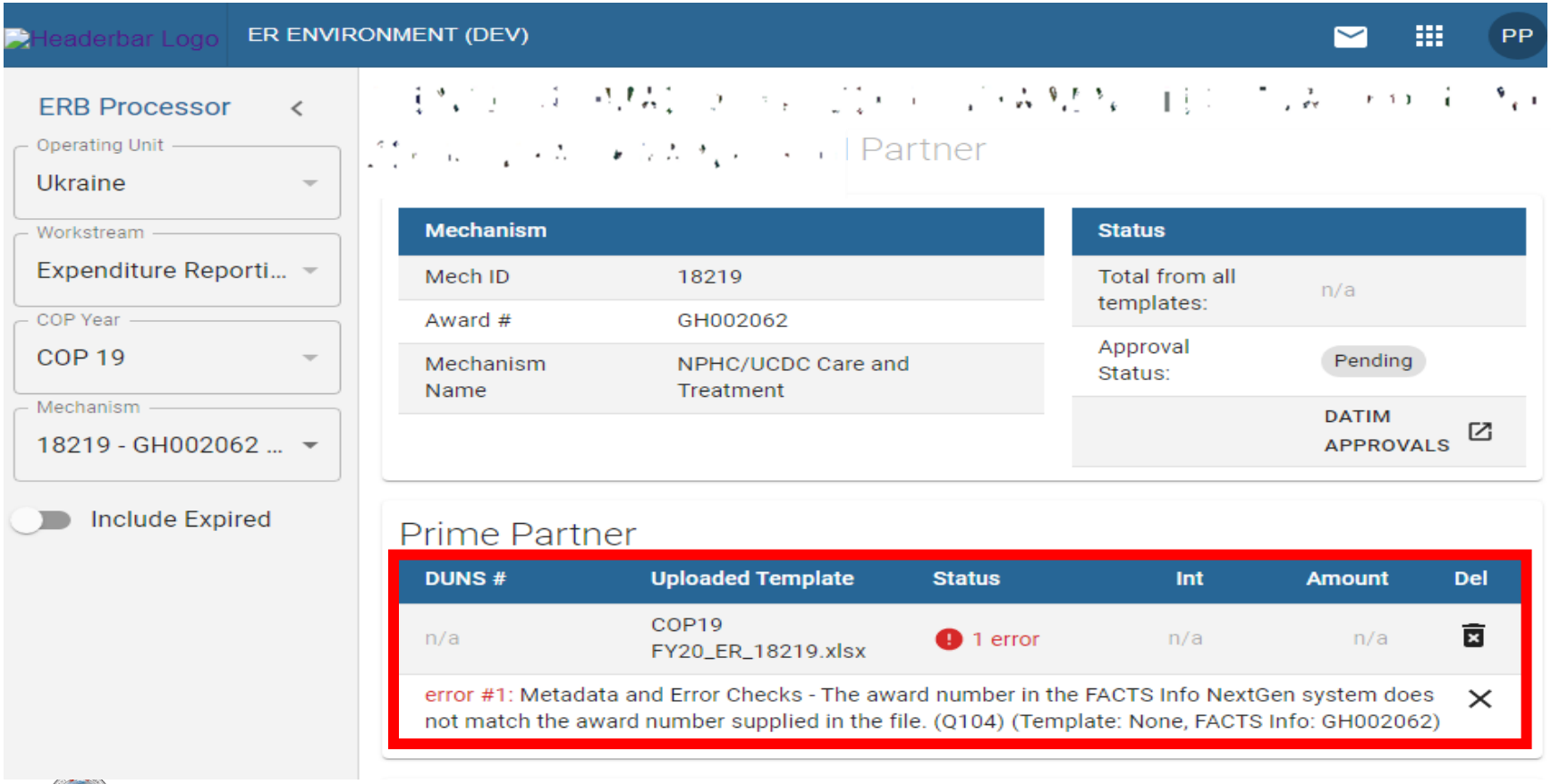
Selecting Template File to Upload

- Select the template document and wait for file to upload



Invalid File

- If the template is invalid, the Status field will be flagged with a **red "error"** status and exclamation point icon. Click the status to reveal the error message regarding the error(s) that caused the upload to fail DATIM's validation check
- IPs should not submit invalid templates. Invalid files must be deleted, corrected, and re-uploaded



DATIM Validation Checks

IPs should not submit templates which have not been validated in DATIM. Instead,

1. Delete the invalid file
2. Review the error message that will alert you to the error(s) that caused the file to fail DATIM's validation check
3. Make the appropriate revisions to the template
   - Check for template errors reviewed in slides 44-77
   - Refer to "DATIM Error Message and Resolutions", which can be found at https://datim.zendesk.com
4. Upload the revised file. DATIM will re-run validation checks
5. Review the Status field and confirm validation
6. Submit in Data Approval app

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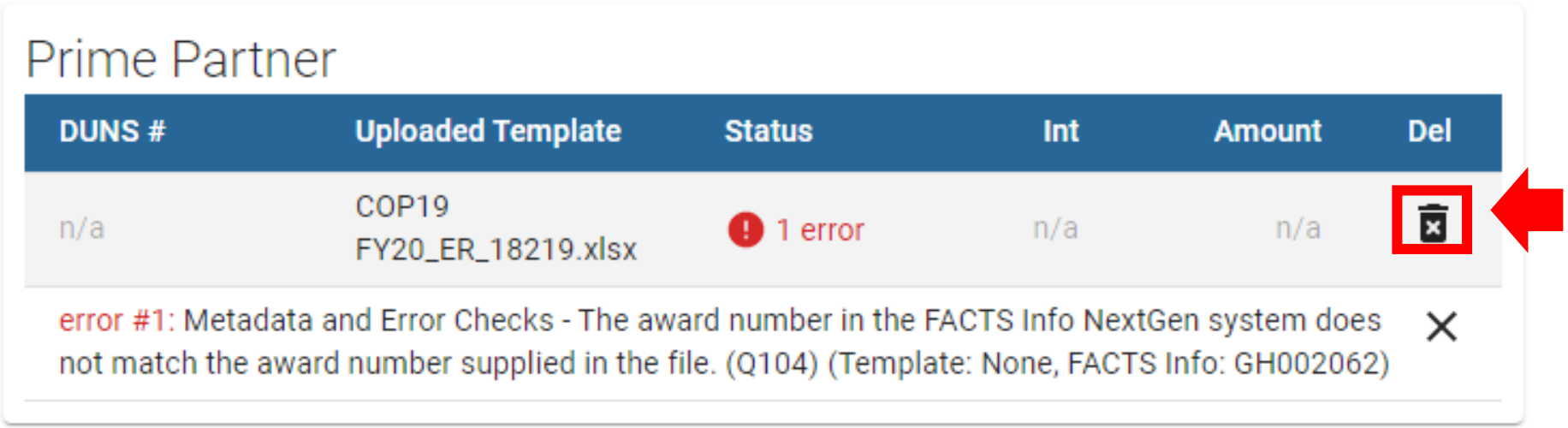
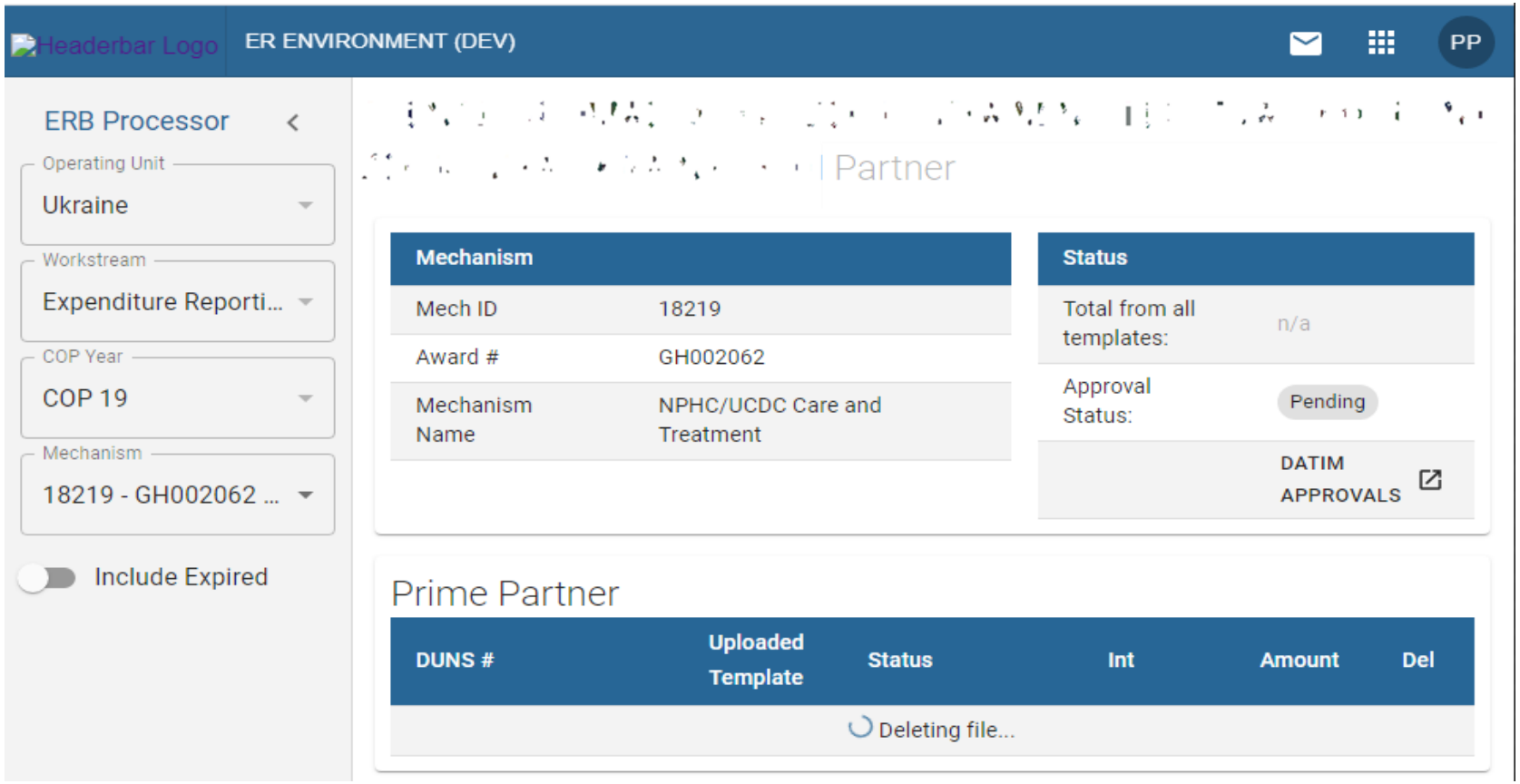
Delete an Invalid File

To delete the invalid file, select the trash bin icon on the right side of the Prime Partner upload field



Delete an Invalid File

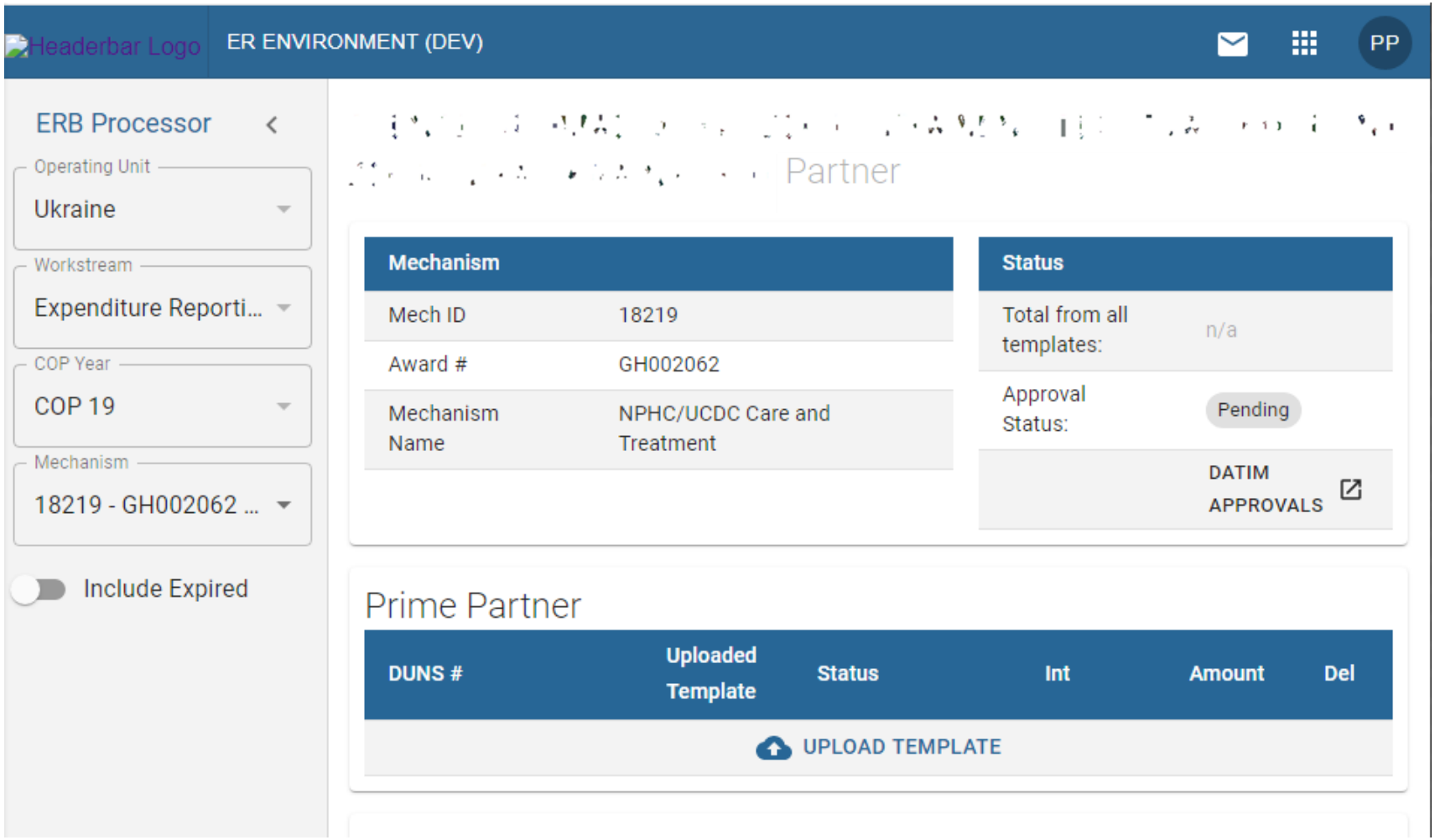
Once you have selected the trash bin icon, it will delete the file. This may take a moment



NOTE: To use the same file name when re-uploading a template, simply delete the existing file and refresh the page before uploading a new template.

Delete an Invalid File

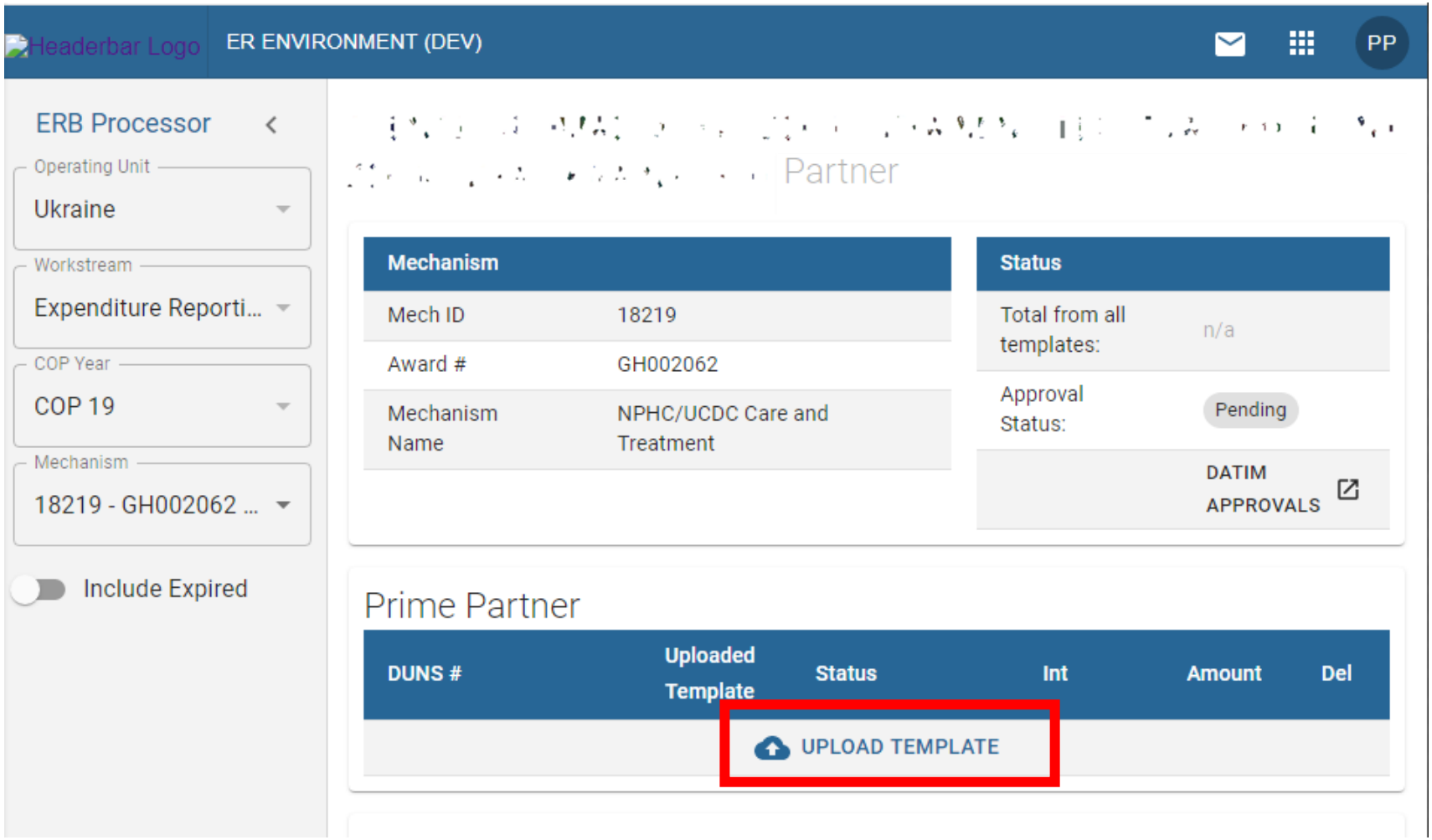
The file will now be cleared and a new file can be uploaded



NOTE: To use the same file name when re-uploading a template, simply delete the existing file and refresh the page before uploading a new template.

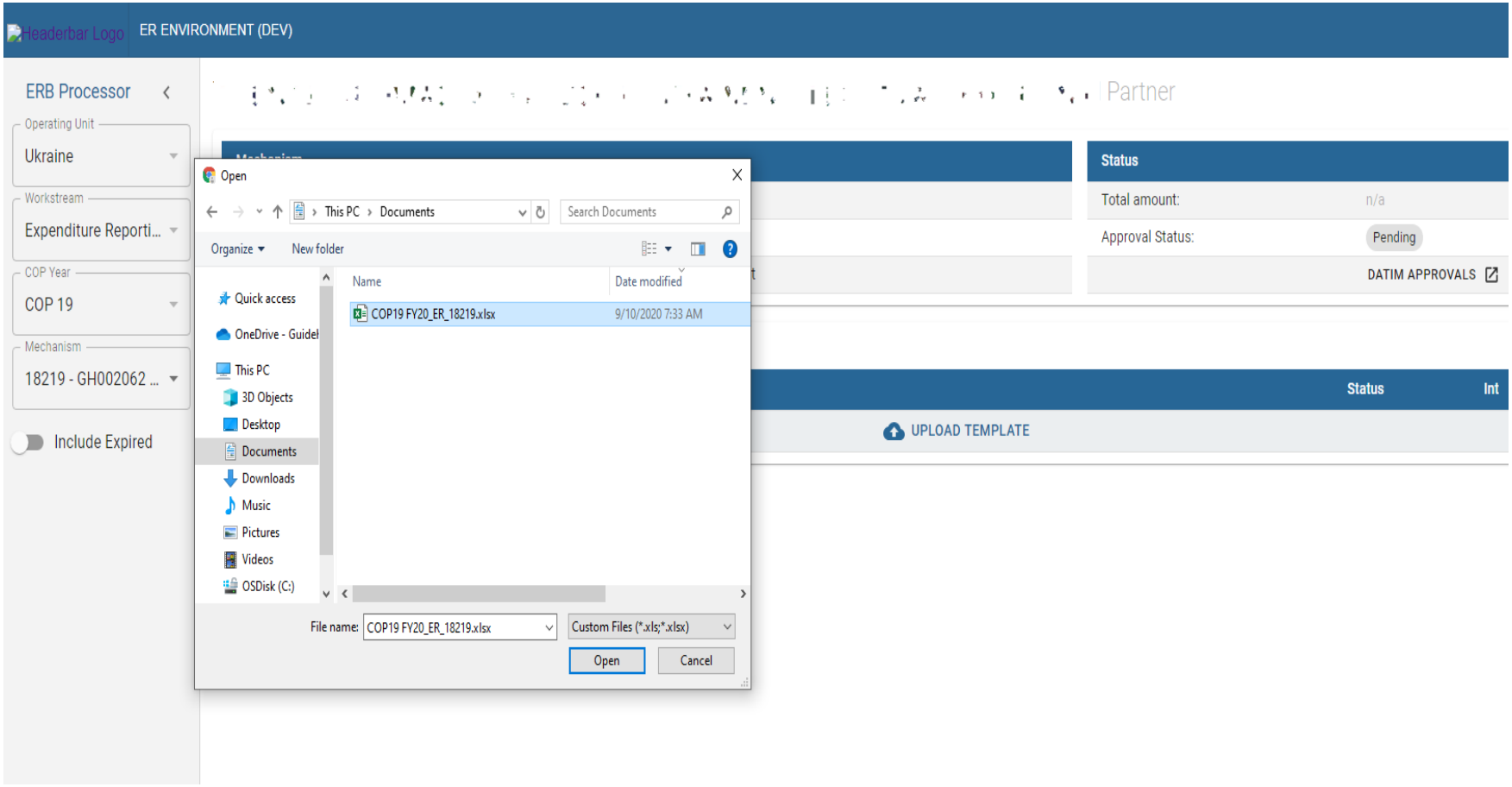
Select (Revised) Template File to Upload

Click the Upload Template icon in the Prime Partner upload field



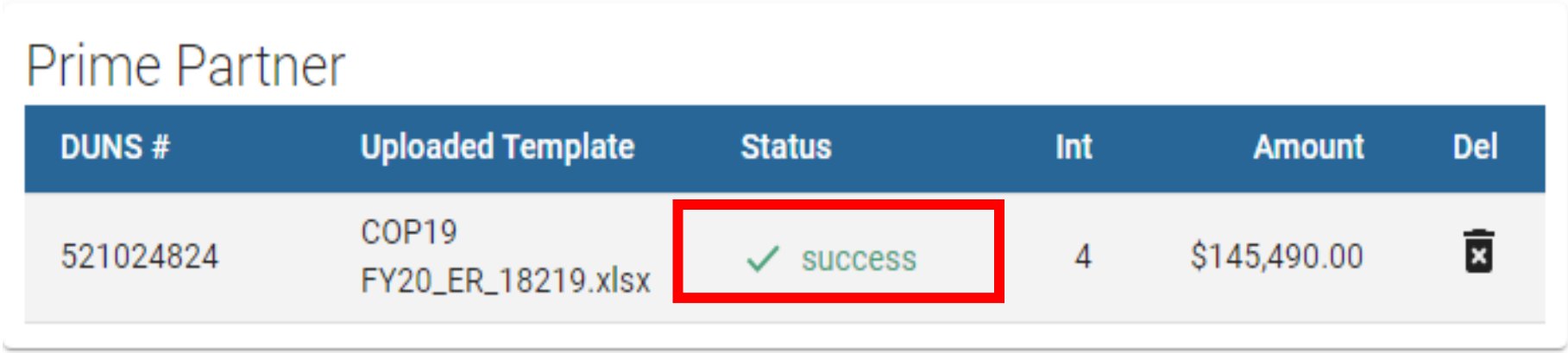
Select (Revised) Template File to Upload

Select the template document and upload the file



Review Status Field for a Valid File

- Before proceeding with submission, review the Status field for errors and warnings
- A full list of DATIM Error Messages and Resolutions is available on DATIM Support
- The number of interventions and total expenditures reported will be indicated for the user to check against
- A **green "success"** status and check mark icon with will also appear in the Status field to indicate that the file is valid
- The file is now ready for submission in the Data Approval app



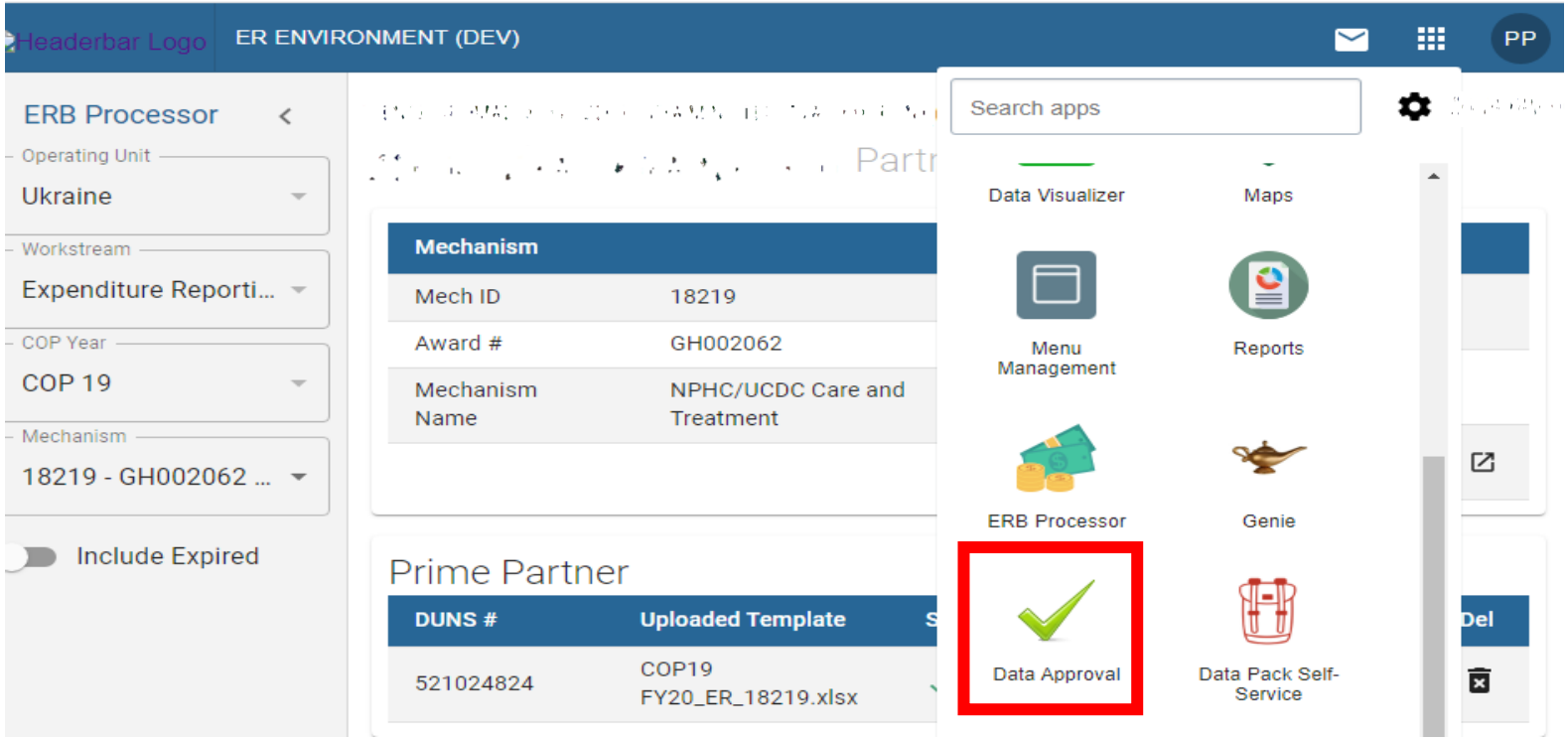
Prime Partner

DUNS #	Uploaded Template	Status	Int	Amount	Del
521024824	COP19 FY20_ER_18219.xlsx	✓ success	4	$145,490.00	

DATIM Submission: Navigate to Data Approval App

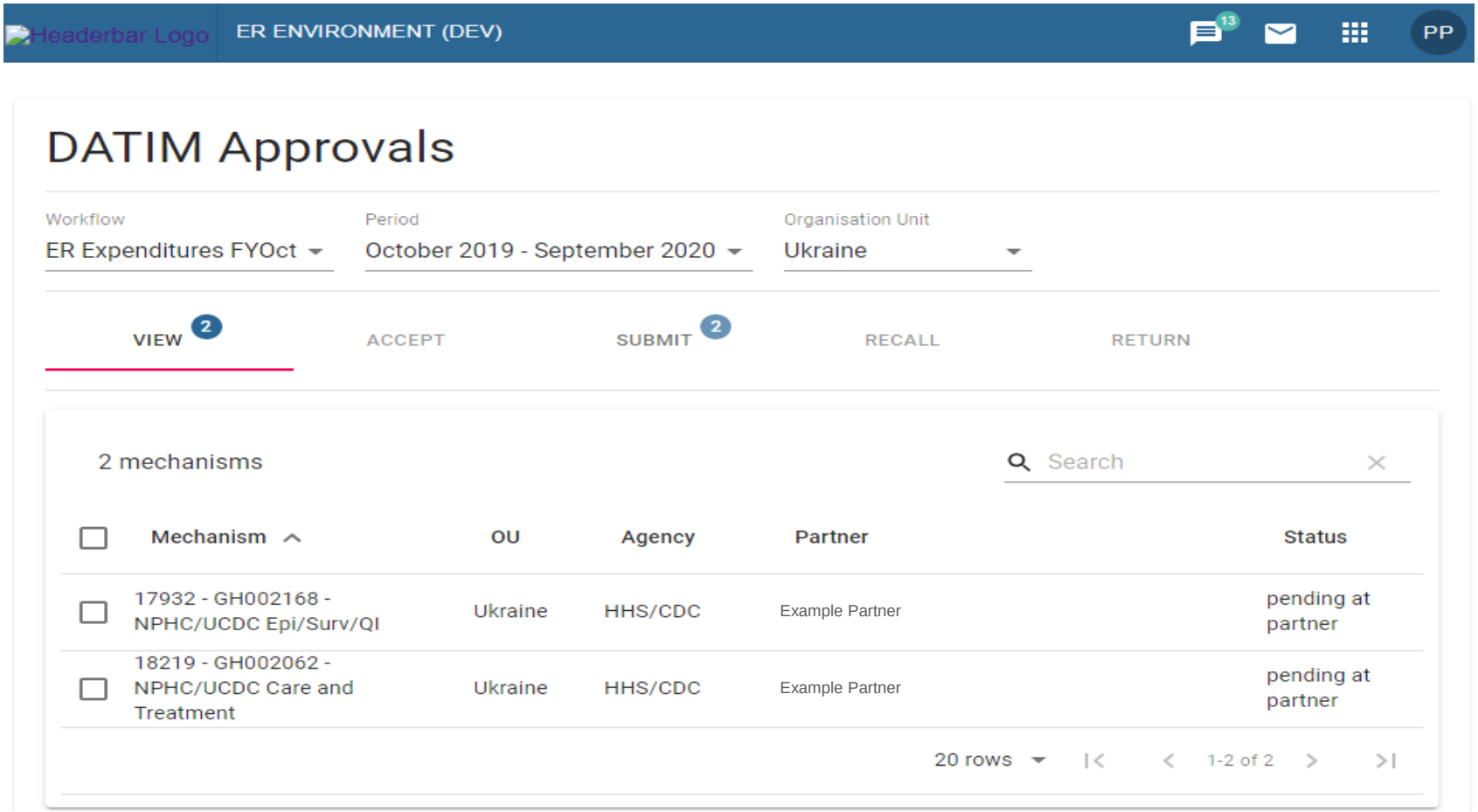
On the top right hand corner of the screen, select the apps menu

Within the apps menu, select the Data Approval app



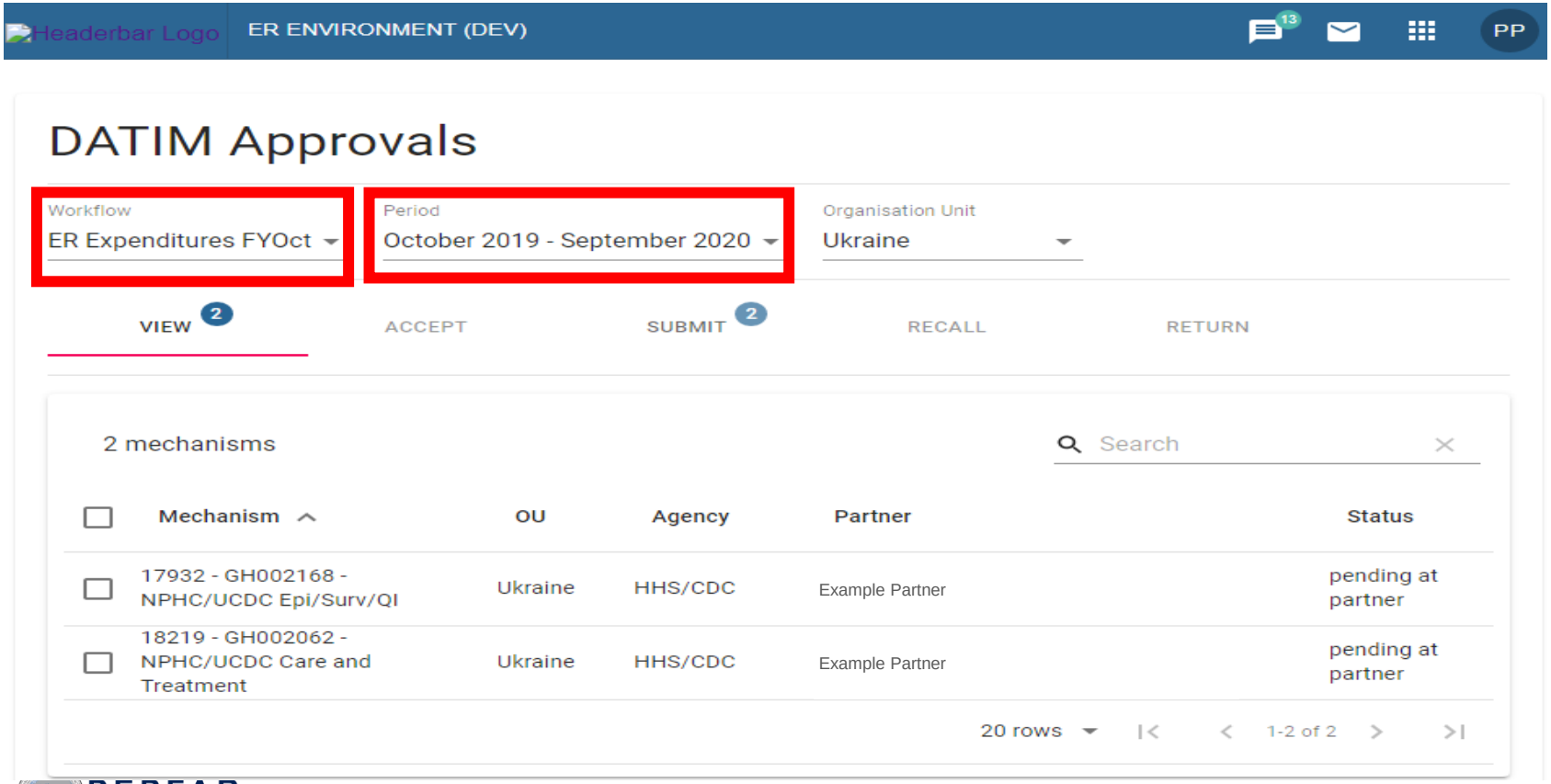
DATIM Submission: Data Approval Page

After selecting the Data Approval app, you will see this page:



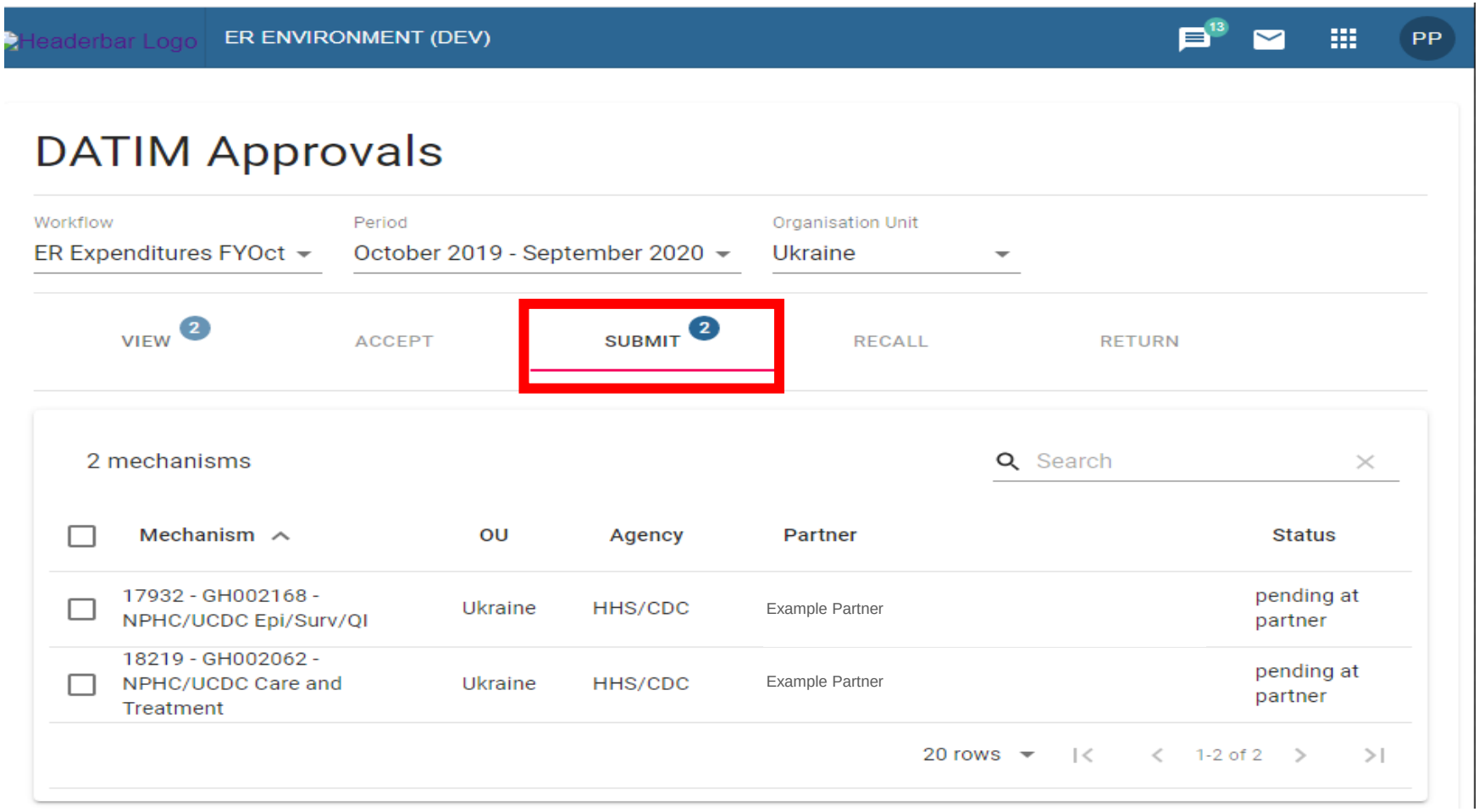
DATIM Submission: Verify Workflow and Period

- Begin by ensuring that the correct workflow and period are selected from the drop-down lists
- For Workflow, the selection should be “ER Expenditures FYOct”
- For Period, the selection should be “October 2019 -September 2020”



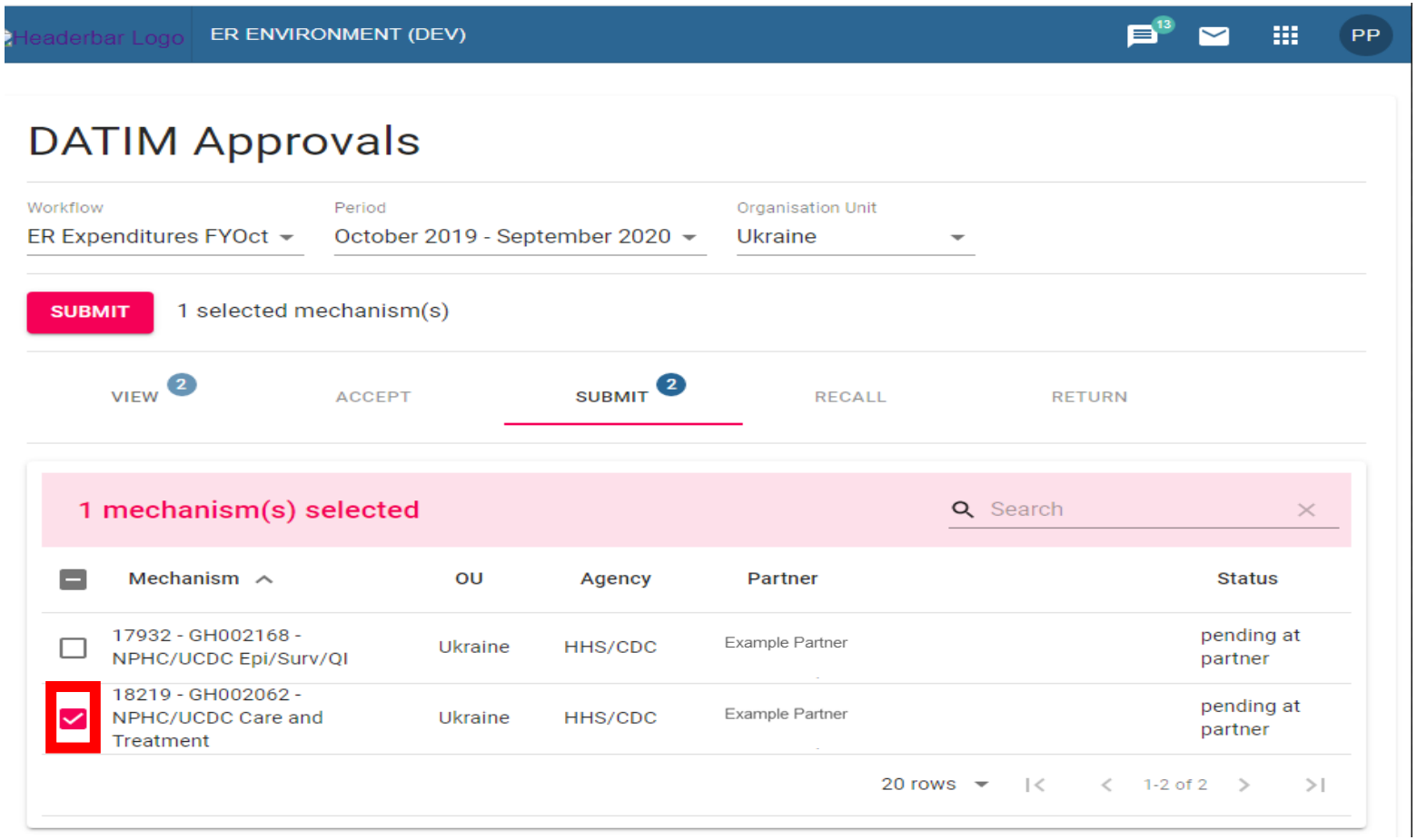
DATIM Submission: Click the Submit Tab

Click the Submit tab to see the funding mechanisms for which you have the option to submit expenditure data



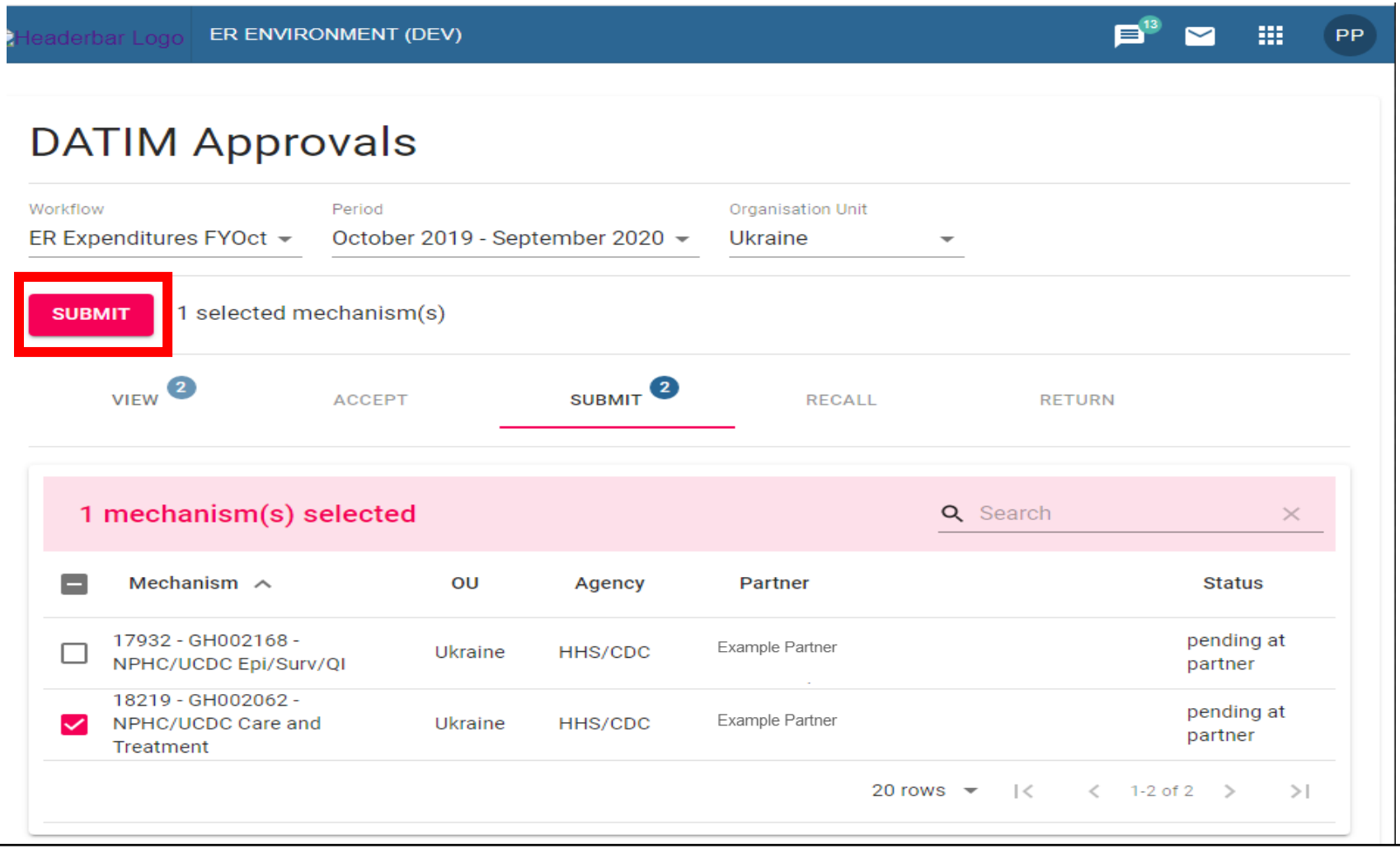
DATIM Submission: Select Mechanism to Submit

Select the Funding Mechanism for which you would like to submit PEPFAR expenditure template by checking the box directly to the left of the mechanism.



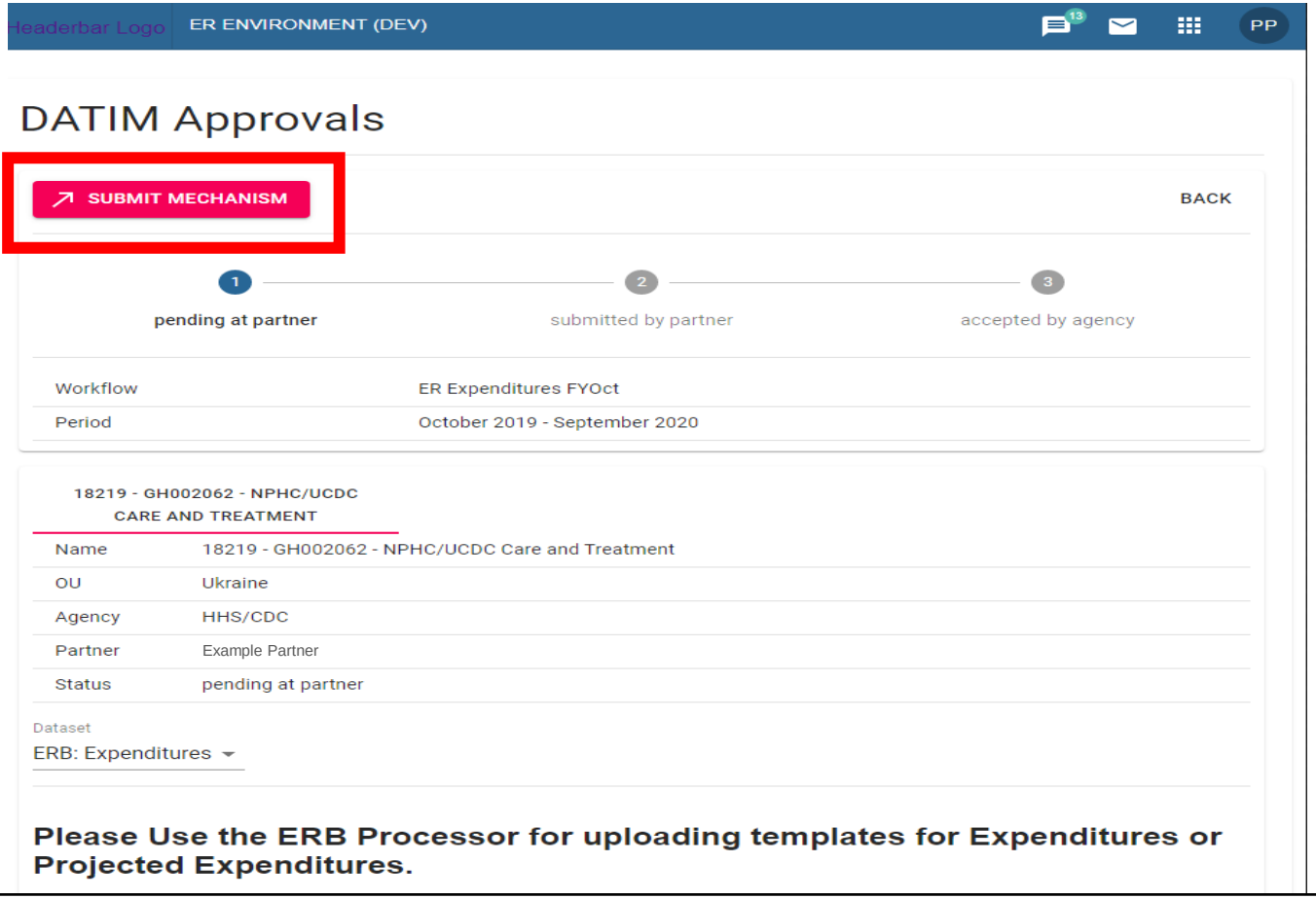
DATIM Submission: Select Proceed

Once the mechanism is selected in the Submit tab, select Submit



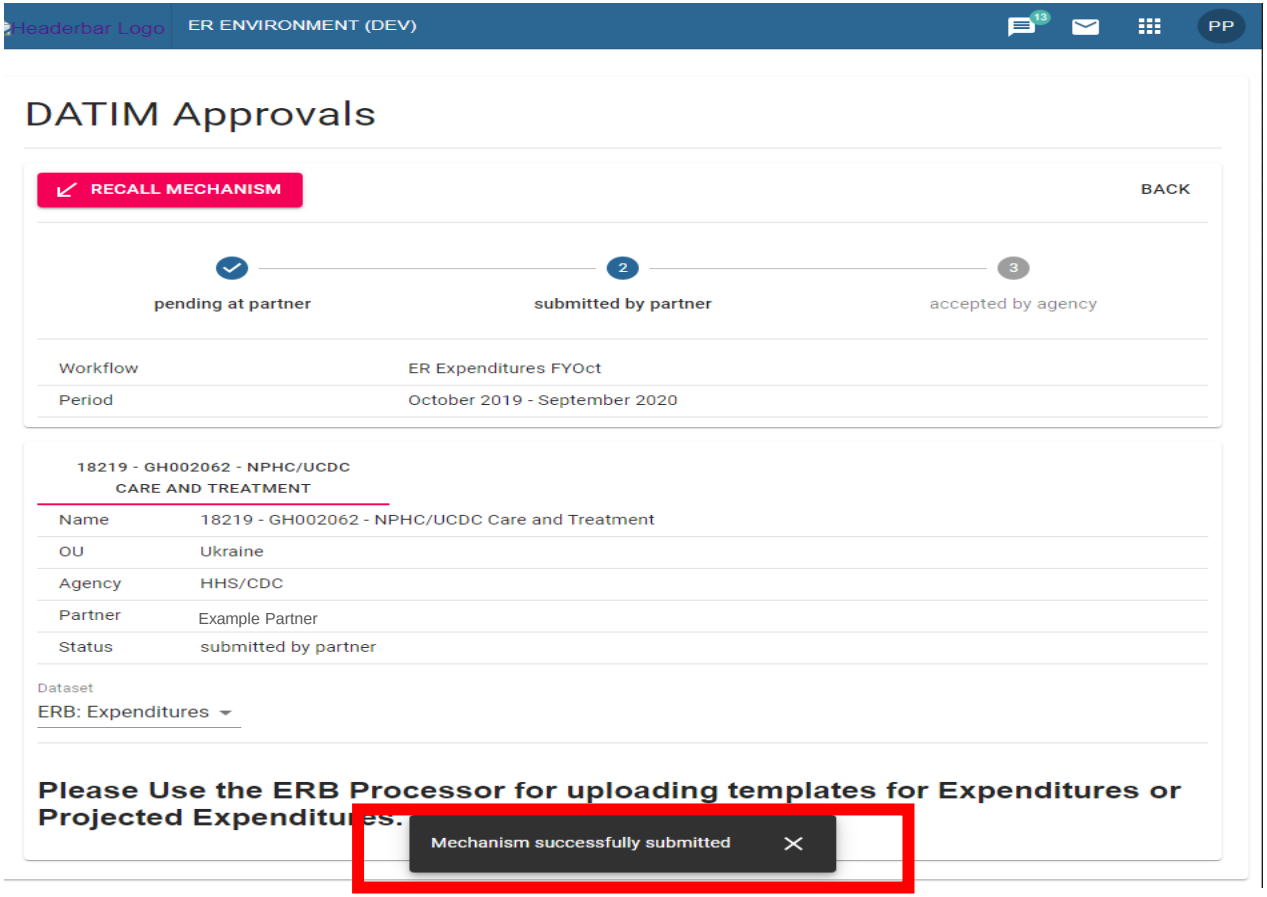
DATIM Submission: Select Submit 1 Mechanism(s)

- After selecting Submit, you will proceed to the approvals page
- Select “Submit Mechanism” to submit your expenditure data



DATIM Submission: Verify Submission Successful

- Verify that the submission was successful
- If the submission was successful, a black message box will appear at the bottom of the page

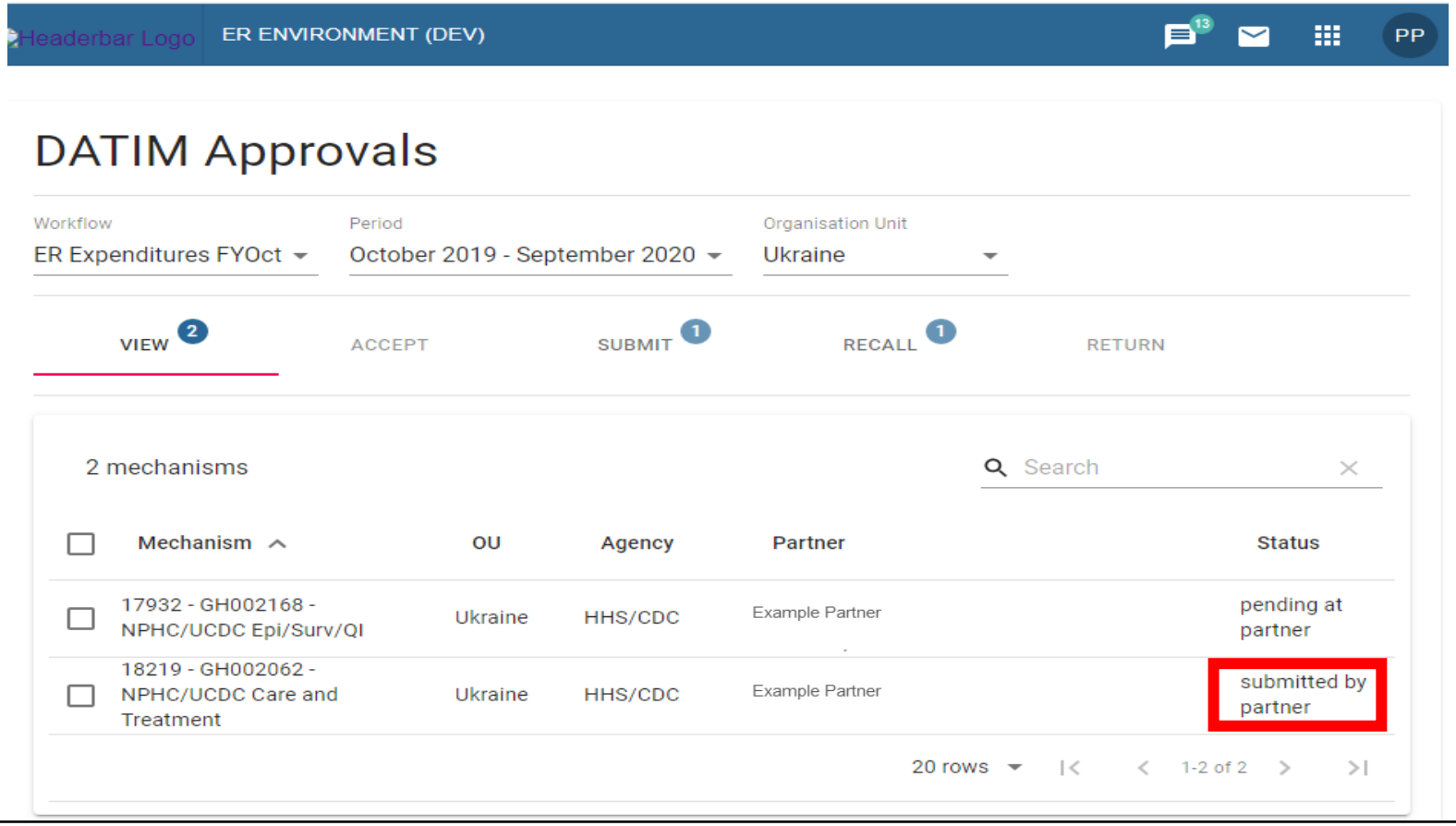


Reviewer Checks: Overview

- Once the FY20 ER template has been successfully uploaded to DATIM and submitted by the IP, it will be reviewed by the Agency AOR/COR/Project Officer (Agency reviewer)
- The Agency reviewer will check for:
  - Errors or blanks in the metadata, such as incorrect Award number
  - Program management expenditure not entered when expected – including indirect costs, if applicable
  - Interventions not aligned to COP strategy or IP work plans
  - Expenditures that do not seem to be aligned to the intervention definition
  - Expenditures that are less than or in excess of expectations
- If the reviewer notes any of the above or other potential errors, he/she may contact the IP for further explanation or to require or suggest revisions prior to approving the ER template. In this case, the IP may be asked to upload a revised template.

View Submitted Mechanisms

- If you need to check the status of Implementing Mechanisms in the future, go to the Data Approval app's View tab
- You can see the status of each mechanism here

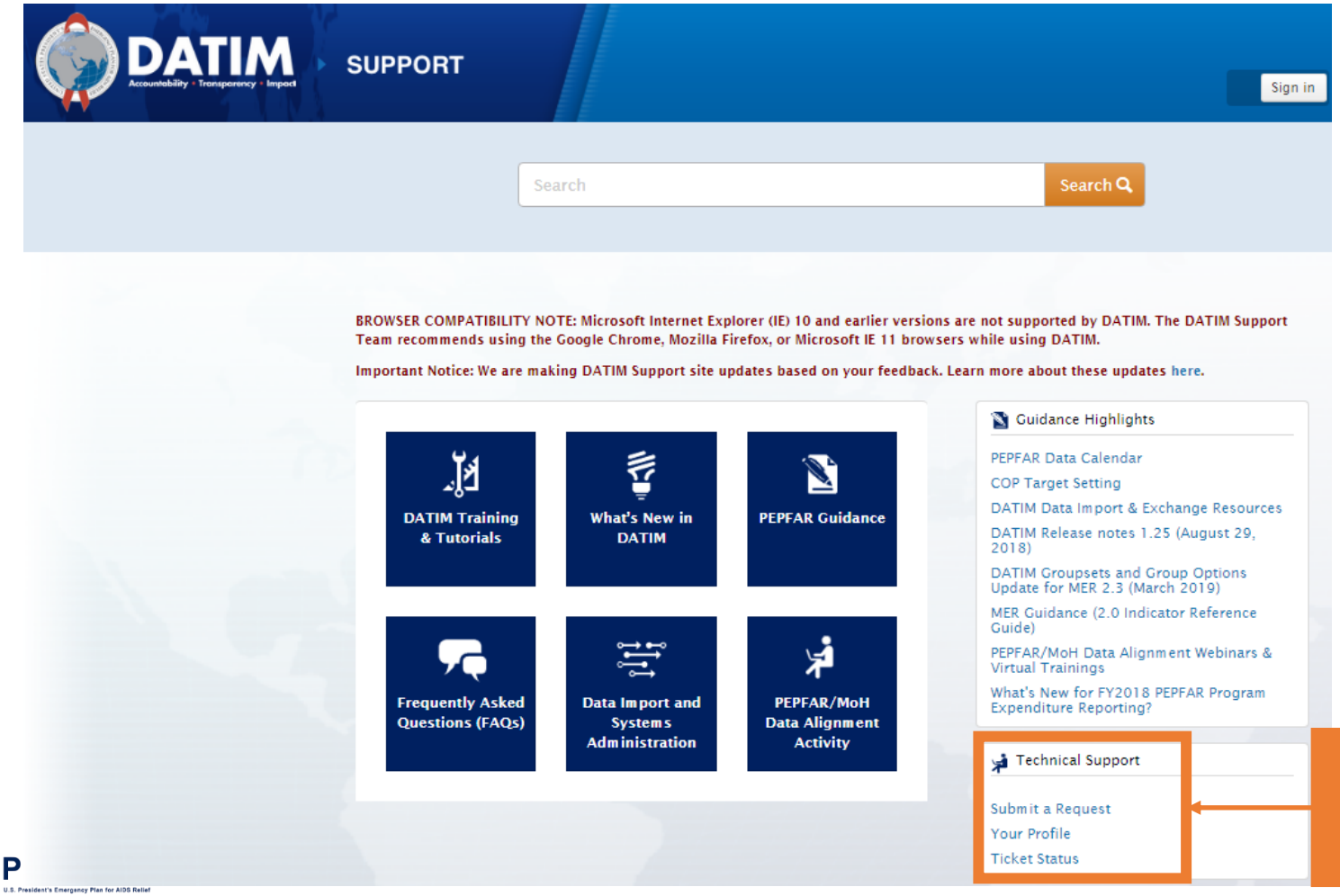


Technical Support in DATIM

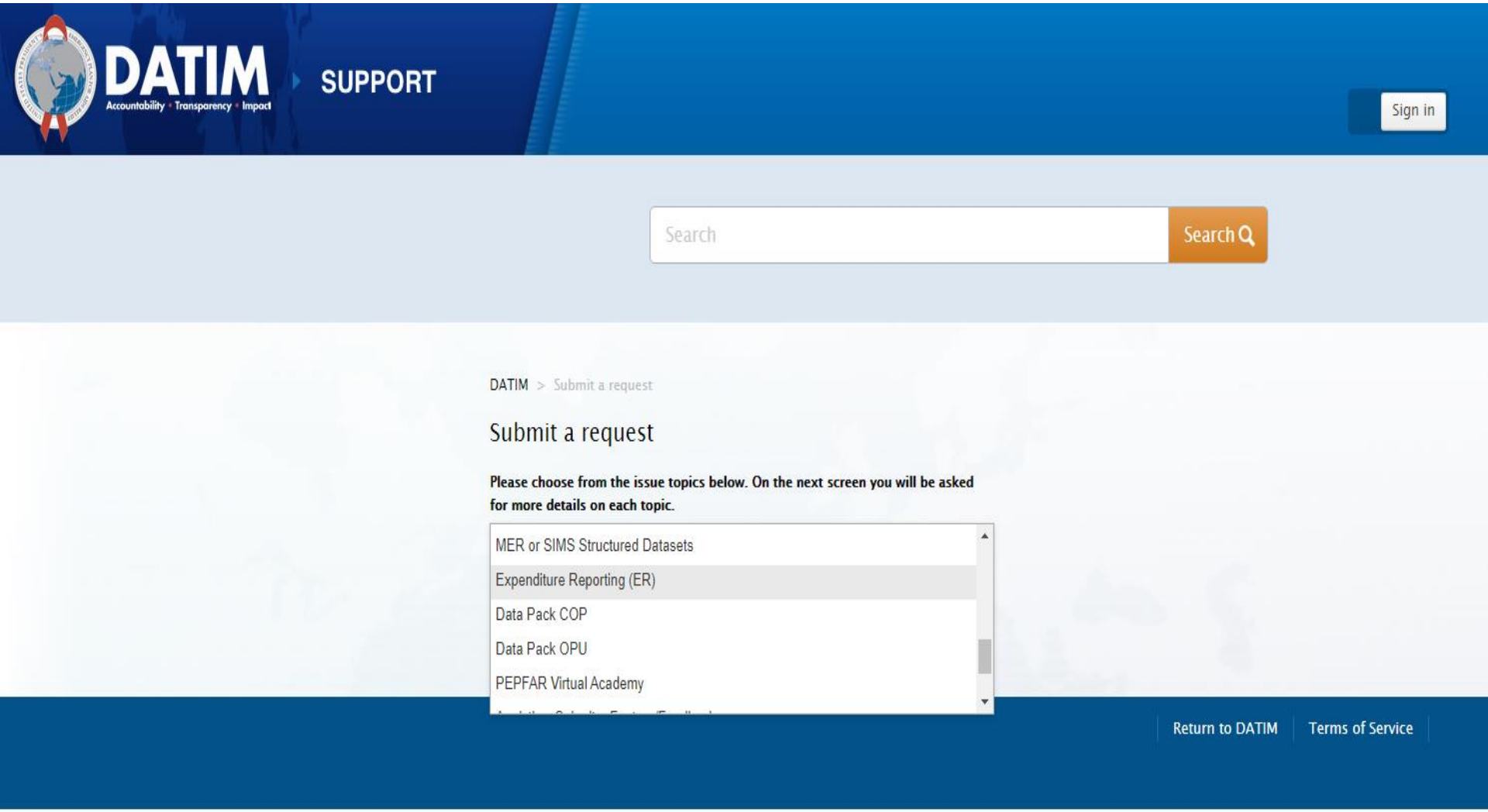
PEPFAR
U.S. President's Emergency Plan for AIDS Relief

Technical Support for DATIM

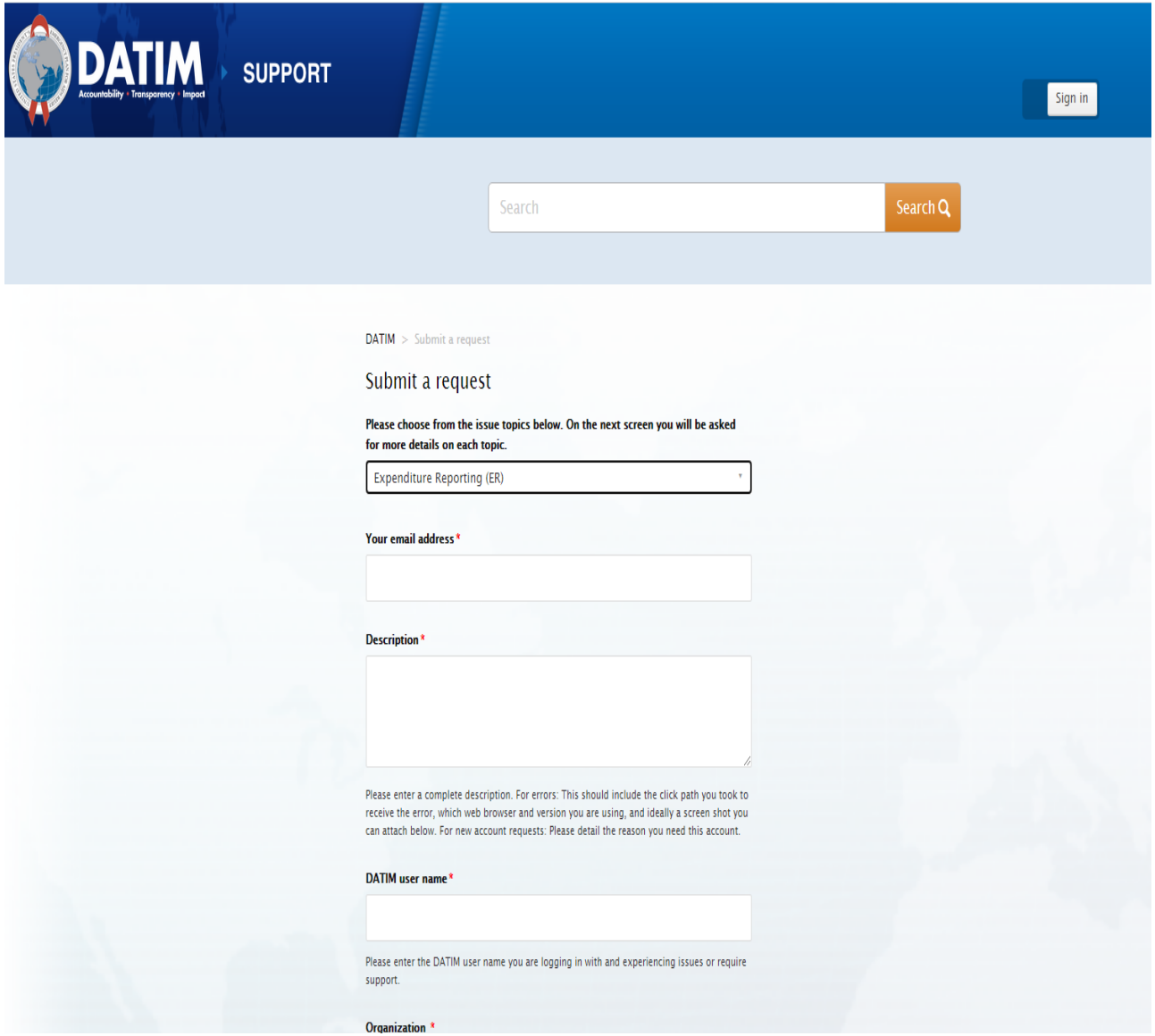
- Users who have questions or problems in DATIM can submit a request for technical support in the box highlighted below, on the DATIM Support page: https://datim.zendesk.com.



Submit a Request



Submit a Request



Thank You!

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