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# Data Capture for USAID NTD Projects

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## Program Workbook Instructions

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The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

## ENVISION Project Overview

ENVISION is a five-year project funded by the U.S. Agency for International Development (USAID) aimed at providing assistance to national neglected tropical disease (NTD) control programs for the control and elimination of seven targeted NTDs: lymphatic filariasis, onchocerciasis, schistosomiasis, three soil-transmitted helminths (roundworm, hookworm, whipworm) and trachoma. ENVISION's purpose is to contribute to the global goal of reducing the burden of targeted NTDs so that they are no longer a public health problem.

To this end, ENVISION will focus on the following intermediate result areas:

IR1: Increased MDA coverage among at-risk populations in endemic communities

IR2: Improved evidence-base for action to control and eliminate targeted NTDs

IR3: Strengthened environment for implementation of national integrated NTD control and elimination programs

ENVISION is implemented by RTI International in partnership with CBM International, The Carter Center, Helen Keller International, IMA World Health, Sightsavers International, Tulane University and World Vision. The period of performance for ENVISION is September 30, 2011 through September 29, 2016.

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ENVISION is global project led by RTI International in partnership with CBM International, The Carter Center, Helen Keller International, IMA World Health, Sightsavers International, Tulane University, and World Vision. ENVISION is funded by the US Agency for International Development project under cooperative agreement No. AID-OAA-A-11-00048. The period of performance for ENVISION is September 30, 2011 through September 29, 2016.

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## Acronyms and Abbreviations Used in M&E Forms

Ag	Antigenemia
ALB	Albendazole
CAA	Circulating Anodic Antigen test
CCA	Circulating Cathodic Antigen test
CDD	Community Drug Distributor
CWW	Children Without Worms
DEC	Diethylcarbamazine
DQA	Data Quality Assessment
DSA	Disease-specific assessment
EA	Enumeration Area
Epi	Epidemiological
EU	Evaluation Unit
GSK	GlaxoSmithKline
HH	Household
HRA	High-risk adults
ICT	Immunochromatographic Test
IEC	Information, Education, and Communication
ITI	International Trachoma Initiative
IU	Implementation Unit
IVM	Ivermectin (Generic name of Mectizan, manufactured by Merck)
J&J	Johnson and Johnson
KAP	Knowledge, Attitudes, and Practices
LF	Lymphatic filariasis
M	Not Mapped
M&E	Monitoring and Evaluation
MBD	Mebendazole
MDA	Mass Drug Administration
MDP	Mectizan Donation Program
Mf	Microfilariae
MoH	Ministry of Health
NS	Not mapped, but not suspected
NTD	Neglected Tropical Disease
Oncho	Onchocerciasis

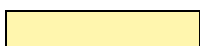
PBS	Population-Based Survey
PC(T)	Preventive Chemotherapy
PSAC	Pre-School Age Children
PZQ	Praziquantel
SAC	School Age Children
SAE	Serious Adverse Event
SAFE	Surgery, Antibiotics, Facial cleanliness, Environmental improvement
SAR	Semi-Annual Report
SC	Spot Check site
SCH	Schistosomiasis
SS	Sentinel Site
STH	Soil-transmitted Helminths
TAF	Technical Assistance Facility
TAS	Transmission Assessment Survey
TEO	Tetracycline Eye Ointment
Tetra	Tetracycline
TIPAC	Tool for Integrated Planning and Costing
TRA	Trachoma Rapid Assessment
Tx	Treatment
UIG	Ultimate Intervention Goal
USAID	United States Agency for International Development
USD	United States Dollar
WHO	World Health Organization
Zithro	Zithromax (Azithromycin - Generic name)

# General Instructions for the Program Workbook

This form should be used to report program-specific data, in order to capture country-level results achieved with USAID and other partners' support. Please complete each tab of the form. There are 15 tabs, namely:

- Status
- Country
- Geography
- Training
- Mapping
- M&E
- Drug Donations
- Other Donations
- Historical-calendar
- FY Tx-all funding
- SAEs
- Process
- Snapshot - National
- Snapshot – District
- Summary

1. **Pay attention to details:** Some tabs in this Workbook should be filled during Work Planning (blue-colored tabs/columns) and updated during semi-annual reporting periods, and some tabs should be filled in only during semi-annual reporting period (green colored tabs/columns). Please follow the instructions and pay close attention to details while filling out each tab. It is recommended that you print these instructions and have them beside you as you complete the form.



Automatically calculated; no manual entry necessary



Complete during Work-planning, update during semi-annual reporting periods



Complete during semi-annual reporting periods

2. **Do not add/remove columns or change any headers:** The sheets in the Workbook are protected. Please do not add/delete columns or alter column/row headers unless advised to do so. Sheets will not be validated when uploaded into the database if there are additions/deletions of columns or alteration of the headers. Do not leave a blank row between entries, as the online database will stop reading at the first blank row. Please note that an example is provided in the first row of each tab which shows what type of information is expected to be filled in each cell. Several cells in this form are equipped with data validation/verification measures. It is important to enter the information in the requested format. Failure to do so may prompt an error or disable users from entering non-valid data. Please communicate with the ENVISION M&E team if there is any problem entering data in data fields.
3. **Collaborate with MoH:** This Workbook should be prepared by *the sub-partner in close collaboration with the MoH counterparts*. It is important that the data presented in this form are generated together with the MoH disease program managers, and standardized with other national reports as much as possible. It is assumed in all the countries and districts where we work that the host government is a partner and contributing to activities through technical, financial, and/or in-kind inputs.

4. **Submit online:** After completion, this Workbook should be submitted online to the ENVISION M&E team via USAID's NTD database, managed by ENVISION or by emailing the Excel form during work planning and semi-annual reporting periods. After this form is approved by the ENVISION team, please notify the MoH NTD program representative to visit our database website and log in to approve the information presented in the "Summary Tab." Alternatively, the Summary page can be printed, signed, scanned, and sent to the M&E team to inform that the MoH NTD Program Focal Person approves the information presented in this form.
5. **Seek Assistance:** If you are in doubt about how to complete any section of this form, please request assistance from the ENVISION M&E team by emailing [NTDdatabase@rti.org](mailto:NTDdatabase@rti.org).

## Tip on freezing window panes

To help facilitate data entry, many of the worksheets have "frozen" panes applied to specific columns and rows. This allows you to continue to see table headings as you scroll through the spreadsheet. You can "unfreeze" panes and/or apply different frozen panes to any worksheet at any time.

The following steps refer to the M&E Tab as an example:

### To "unfreeze" window panes:

1. Go to the 'View' menu bar at the top of the screen and select 'Unfreeze Pane' from the 'Freeze Panes' drop-down menu. This will release the areas that are locked in position.

### To "freeze" window panes:

1. Make sure the headings are visible at the top of the spreadsheet and that the first column is showing at the left, as in the example below:

Type of assessment	Region	District	Assessment site name	Month assessment to be conducted	USAID-funded	Applicable disease	Baseline prevalence for disease-specific assessments (%)
<i>LF Transmission Assessment Survey (TAS)</i>	<i>Example Region</i>	<i>Example District</i>	<i>Example site name</i>	<i>August</i>	<i>1</i>	<i>LF</i>	<i>5.9%</i>

2. Select the cell just below the row you wish to keep locked in position and to the right of the column you want locked, or "frozen." In the example above, you are choosing to "freeze" the column headings and the example row at the top and the demographic information in the first three columns on the left. To do this, you are selecting the cell just below the example for the 'Assessment site name' column and to the right of the 'District' column (see red arrow and cell shaded pink above).
3. Go to the 'View' menu bar at the top of the screen and select 'Freeze Pane'. This will allow you to scroll down while keeping all headers in view and to scroll to the right while keeping region and district names in view.




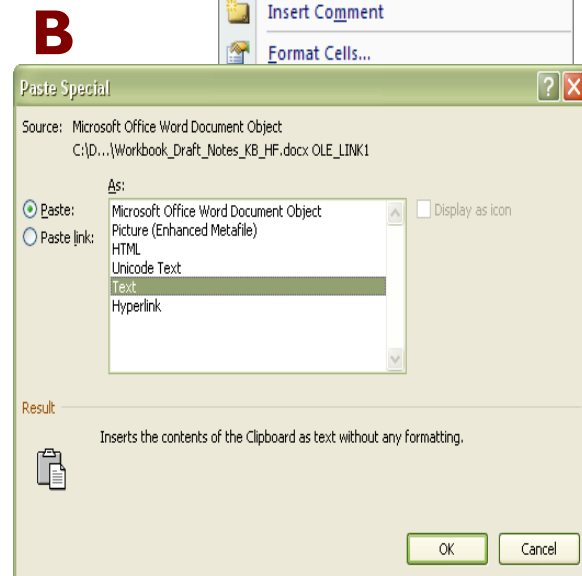
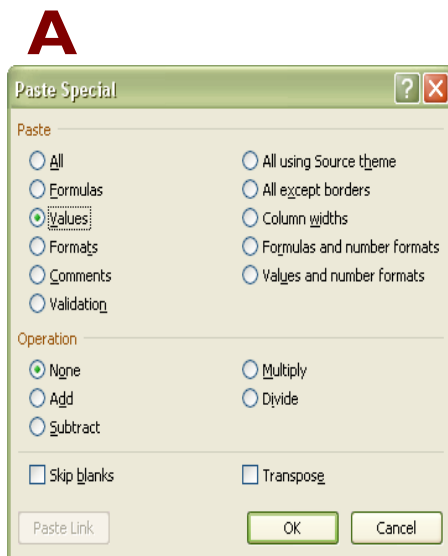
# Copy/Paste

## To "Copy/Paste" data into this workbook, please "Paste Special."

(Please note that traditional "Copy/Paste" commands will remove the validation and formulas embedded in the workbook.)

### To "Paste Special" follow these steps:

1. Right Click the area you want to paste into
2. Select Paste Special (one of two screens will pop up) 
3. If screen **A** pops up, select "Value" and click OK
4. If screen **B** pops up, select "Text" and click OK



## Status Tab

This tab is **NOT** required to be completed. However, it will help you keep track of your progress in the Program Workbook.

- ▶ **When to ENTER the following data: During Work planning**
- ▶ **When to UPDATE the following data: During reporting periods**

Header	Instructions
<b>Status</b>	Please select from the drop-down menu to indicate the status of each tab in the Program Workbook. These optional lists help you keep track of your progress completing the Program Workbook. These must be entered/updated manually; for example, select 'In progress' to indicate that you have not yet finished that tab, or 'Completed' when data entry is completed for that tab.
<b>Comments</b>	Enter overall comments for each tab of the Program Workbook.

# Country Information Tab

► **When to complete the following data: When applicable**

Header	Instructions
<b>Name</b>	Enter the name of the person completing the Workbook.
<b>Title</b>	Enter the professional title of the person completing the Workbook.
<b>Country name</b>	Enter the name of the Country for which the Workbook is being completed for.
<b>Project name</b>	From the drop-down menu, choose the USAID NTD project name. Indicate whether the project is ENVISION, END in Asia, END in Africa, USAID-supported APOC, or Other.
<b>Sub-partner name</b>	Enter the name of the sub-partner responsible for reporting the data.
<b>Date Workbook updated</b>	Enter the date this report is submitted/updated using the dd/mmm/yy format, e.g. 18-Nov-2012
<b>Reporting Period</b>	<p>From the drop-down menu, select the reporting period: work planning, first semi-annual report (capturing data from October-March), or second semi-annual report (capturing data from October-September). If updated Program data is received mid-year, “Mid-year data submission” may be selected. Data submitted for the October-September semi-annual report should accurately reflect the entire year's accomplishments.</p> <p>If updated data is received after the end of the fiscal year, select “2<sup>nd</sup> semi-annual report” as this should accurately reflect the entire year's accomplishments.</p>
<b>Year of Workbook</b>	<p>From the drop-down menu, select the year of Workbook</p> <p>FY12 (October 2011 - September 2012)</p> <p>FY13 (October 2012 - September 2013)</p> <p>FY14 (October 2013 - September 2014)</p> <p>FY15 (October 2014 - September 2015)</p> <p>FY16 (October 2015 - September 2016)</p>
<b>Comments</b>	Enter overall comments for the submission of Program Workbook.

## Geography Tab

These cells are provided for informational purposes; please note that these cells are locked. If there is a change in the number or names of districts or regions in the country due to merge and/or split of districts, please communicate this change to the ENVISION M&E team so that we can accommodate the change in this form as well as any historical data that is affected by redistricting. If a country has redistricted, the District Reconfiguration Form must be completed and sent to the ENVISION M&E team so that unique identifiers can be assigned to the newly formed districts. This should be done prior to completion/updating of the Program Workbook.

## Training Tab

During Work Planning, fill in all the trainings that are planned for the fiscal year with USAID funding in the columns that are blue. During the first semi-annual reporting period (March), enter the total number of people trained with USAID funding during the reporting period in the columns that are green. During the second semi-annual reporting period, update the previous entry to incorporate the total number of people trained during that entire fiscal year (October-September). Additionally, update the topic of training, number of training days, and location of the training, if anything changed from what was entered during Work Planning.

Please count one person in only one category. For example, a district supervisor may be trained as a 'trainer'. Then after training other people, she may supervise their work. In this case, count her only as a 'trainer'. Do not count her in both categories. Another person may have been trained as a trainer, and later in the same year, trained to conduct disease-specific assessments. In this case, select the most appropriate role and indicate in the comment that this person also participated in a separate training in another category.

Please also capture training data only in the categories provided, and do not delete or alter the categories. Please communicate with the ENVISION M&E team if you have any questions about the training categories provided.

### Training Group

<b>Trainers</b>	Training conducted for individuals who will serve as a trainer for NTD-related activities; typically these are individuals who will train other trainers, supervisors, health staff, drug distributors, survey/M&E personnel, or other individuals involved in NTD activities. Training may not be their full-time responsibility, but they have been selected by the program to receive additional training to become a trainer; in this case they should not be recorded as a supervisor.
<b>Central/Regional/Districts/School Supervisors</b>	Training conducted for individuals at the Central, Regional, District, Health Center, <u>or</u> School level who will serve a supervisory role for NTD-related activities. Their primary responsibility is to supervise NTD activities and they are not responsible for the actual distribution of drugs or conducting training (see Drug Distributors and Trainers).
<b>Drug Distributors</b>	Training conducted for individuals who distribute drugs as part of PCT. If a teacher is trained to distribute drugs, count them under the drug distributors category.
<b>M&amp;E</b>	Training conducted of personnel who will uniquely be responsible for aspects of Monitoring & Evaluation, including sentinel and spot check site surveys, epidemiological assessments, impact studies, drug coverage surveys, mapping, etc. In this case, they should not be recorded as a trainer or supervisor.
<b>Other</b>	Training conducted for other roles, such as doctors trained for SAE management, media personnel, etc. Please specify the category of training group under 'Other Training Group'.

## Type of Training Workshop

<b>New Personnel</b>	If trainings are targeted to train new personnel on NTDs, enter this type of training workshops under 'Training Workshops - New Personnel'.
<b>Refresher Personnel</b>	If trainings are targeted to re-train personnel who were previously trained on NTDs, enter this type of training workshops under 'Training Workshops - Refresher Training'. <u>(If national data is not disaggregated by new and refresher, include all trainees as "new" and include in a comment.)</u>

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Header	Instructions
<b>Was there any training conducted during this reporting period?</b>	From the drop-down option, please choose whether or not training was conducted during the reporting period. If training was not provided during the reporting period, the table should be left blank except for targeted training.

► **When to ENTER the following data: During Work planning**

► **When to UPDATE the following data: During reporting periods**

Column	Header	Instructions
<b>B</b>	<b>Training Group</b>	The training group categories are trainers, central/regional/district/school supervisors, drug distributors, M&E, or other. Please refer to the definitions of Training Group for details.
<b>C</b>	<b>Other Training Group</b>	For the other groups that do not fall into pre-defined training categories in the previous column, indicate the type of other training group. Please be sure to capture one person in only one training category.
<b>D</b>	<b>Type of Training</b>	The type of training workshops is a new training or refresher training. Please refer to the definitions of New Personnel Training and Refresher Training.
<b>E</b>	<b>Topic of Training</b>	Enter the topic of Training. The topic of training could be MDA implementation, supervision, reporting, drug management, disease-specific assessments, etc.
<b>F</b>	<b>Number of Training</b>	Enter the total number of training days for each category. Training days may vary for different training groups and can be indicated in the

	<b>Days</b>	form.
<b>G</b>	<b>Location of the Training</b>	Enter the location of training for each category. Trainings may occur in multiple locations and can be indicated in the form.
<b>H</b>	<b>Number Targeted to be Trained</b>	Enter the total number of people targeted to be trained with USAID support in each category.

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Column	Header	Instructions
<b>J</b>	<b>Number Trained: Total</b>	Enter the total number of people trained with USAID support during the reporting period: during the first semi-annual reporting period, enter the total number of people trained from October-March. During the second semi-annual reporting period, update the previous entry with the total number of people trained for the fiscal year (October-September). If the total trained substantially varies from what was targeted, please explain in the comments. Please note that the total number of people trained should equal the sum of total females trained and total males trained.
<b>K</b>	<b>Number Trained: Females</b>	Enter the total number of females trained with USAID support during the reporting period: during the first semi-annual report, enter the total number of females trained with USAID support from October-March. During the second semi-annual report, update the previous entry with the total number of females trained for the fiscal year (October-September). This should reflect the actual number of females trained with USAID support; please do not apply a percentage to the total trained.
<b>L</b>	<b>Number Trained: Males</b>	Enter the total number of males trained with USAID support during the reporting period: during the first semi-annual report, enter the total number of males trained with USAID support from October-March. During the second semi-annual report, update the previous entry with the total number of males trained for the fiscal year (October-September). This should reflect the actual number of males trained with USAID support; please do not apply a percentage to the total trained.

► **When to ENTER the following data: When applicable**

Column	Header	Instructions
<b>N</b>	<b>Comments</b>	Enter any comments relevant to the training information corresponding to each row and column.

## Mapping Tab

During Work Planning, please fill in all mapping targeted with ALL funding for the year in columns that are blue. During each reporting period, enter the results from USAID-supported mapping (columns in green), if available. In addition, please complete a Mapping Protocol and Report for all the mapping activities conducted with USAID support (additional templates will be provided).

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Header	Instructions
<b>Was there any mapping completed during this period?</b>	From the drop-down option, please choose whether or not mapping was completed during the reporting period.

► **When to ENTER the following data: During Work planning**

► **When to UPDATE the following data: During semi-annual reporting periods**

Column	Header	Instructions
<b>B</b>	<b>Type of mapping</b>	Select from the drop down menu to indicate whether the activity is mapping or re-mapping. For the districts where mapping is conducted for the very first time, please select 'Mapping.' 'Re-mapping' should be selected for districts where mapping was conducted previously and various reasons (such as errors in survey methodology or data collection techniques) require the district to be re-mapped.
<b>C</b>	<b>District or sub-district level mapping</b>	Select from the drop down menu to indicate whether it is district level mapping or sub-district level mapping.
<b>D</b>	<b>Region</b>	Once the district name has been entered, the region name will be pre-populated. Confirm the name of the region where mapping is targeted and/or conducted.
<b>E</b>	<b>District</b>	Enter the name of the district where mapping activity is targeted and/or conducted. You may type the name, copy/paste from the Geography tab, or select from the drop-down. Please note that once the district name is selected, the region name will pre-populate.
<b>G</b>	<b>Month of mapping</b>	From the drop down menu, choose the month when the mapping is planned. Update this information during the semi-annual reporting periods to reflect when mapping was implemented, if necessary.



<b>H</b>	<b>Year of mapping</b>	Enter a four-digit year to indicate the year of mapping.
<b>I</b>	<b>Funding source</b>	From the drop-down menu, indicate whether or not the assessment is USAID funded. If the assessment is USAID funded, indicate whether it is through ENVISION, END in Africa, END in Asia, USAID-supported APOC, or Other by selecting the appropriate code for Funding source.
<b>J</b>	<b>Partners</b>	Codes 1-15 may be assigned by the sub-partner to indicate partners (or combinations of partners) operating in a given district, including the government, other NGOs working with USAID support, and/or other NGOs working with non-USAID support. The definitions of codes are country-specific, and may be defined in “Comments” box on Status, Country, and/or Mapping tab.
<b>K</b>	<b>Applicable disease</b>	From the drop down menu, choose the applicable disease for the mapping: LF, Oncho, Schisto, STH, Trachoma – prevalence, Trachoma – Other, Loa loa. Please select 'Trachoma - Other' if it is Trachoma Rapid Assessment (TRA), modified TRA, or desk-review, and please specify the type of assessment in the 'Comments'. If coordinated or integrated mapping is completed for two diseases (Schisto and STH, etc.), please enter this information in multiple rows indicating each disease mapped, and explain the coordinated/integrated approach in 'Comments'.

► **When to ENTER the following data: During first semi-annual reporting**

► **When to UPDATE the following data: During second semi-annual reporting**

Columns	Header	Instructions
<b>M</b>	<b>Data collection for mapping completed (Yes/No)</b>	From the drop-down menu, indicate whether the mapping has been completed during the fiscal year in the district for applicable disease or not. If mapping has been completed, please be sure to update disease distribution codes for the applicable diseases in the Disease Workbook. If the mapping has not been conducted as targeted during the fiscal year, please provide a brief explanation in the 'Comments'.
<b>N</b>	<b>Mapping report submitted (Yes/No)</b>	From the drop-down menu, choose whether the Mapping report for USAID-funded mapping has been submitted to ENVISION. If not, indicate why in the comments and the preliminary results if available.
<b>O</b>	<b>Action-oriented conclusion</b>	From the drop-down menu, choose the action-oriented conclusion derived from the results of mapping. Results of mapping may show that a disease is endemic above treatment threshold; therefore MDA needs to be started at district-level or sub-district level (e.g. for trachoma). Results may show that a disease is below treatment threshold; therefore no MDA is needed, or no MDA is needed but

		other Surgery, Facial cleanliness, and Environmental improvement activities (SFE) are needed for trachoma. For other action-oriented conclusions, such as from trachoma rapid assessments (TRA), select 'Other (Please specify)' and specify the conclusion (Conduct prevalence survey, for example).
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► **When to ENTER the following data: When applicable**

Column	Header	Instructions
Q	Comments	Enter any comments relevant to the information corresponding to mapping in each row and column.

## M&E Tab

During Work Planning, please fill in all M&E activities targeted with ALL funding for the year in columns that are blue. Please note that information on mapping for all diseases should be included in the 'Mapping' tab in Program Workbook. During each reporting period, enter the results from USAID-supported M&E activities (columns in green), if available. In addition, please complete a protocol and report for disease-specific assessments conducted with USAID support (additional templates will be provided).

If there are multiple assessments planned for a district, enter the district name multiple times and choose the type of assessment planned for that district.

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Header	Instructions
<b>Was there any assessments completed during this period?</b>	From the drop-down option, please choose whether or not assessment was completed during the reporting period.

► **When to ENTER the following data: During Work planning**

► **When to UPDATE the following data: During semi-annual reporting periods**

Column	Header	Instructions
<b>B</b>	<b>Type of assessment</b>	<p>From the drop down menu, choose the type of assessment to be conducted.</p> <p>LF baseline sentinel site            LF baseline spot check            LF midterm sentinel site            LF midterm spot check            LF Pre-TAS sentinel site            LF Pre-TAS spot-check site            LF TAS: Stop MDA            LF TAS: Post-MDA Surveillance I            LF TAS: Post-MDA Surveillance II            Oncho epidemiological assessment            Schisto sentinel site            Schisto evaluation            STH sentinel site            STH evaluation            Trachoma impact survey            Post-MDA coverage survey            Post-MDA surveillance            KAP survey            Data Quality Assessment (DQA)            Other (Please Specify)</p>

		Please specify the 'Other' type of assessment in the 'Comments'. Please note that information on mapping for all diseases should be included in the 'Mapping' tab.
<b>C</b>	<b>Region</b>	Once the district name has been entered, the region name will be pre-populated. Confirm the name of the region where M&E activity is targeted and/or conducted.
<b>D</b>	<b>District</b>	Enter the name of the district where M&E activity is targeted and/or conducted. You may type the name, copy/paste from the Geography tab, or select from the drop-down. Please note that once the district name is selected, the region name will pre-populate.  If conducting a post-MDA coverage survey, KAP survey, DQA, or "other" in multiple districts and/or the specific districts aren't yet known, please leave Region and District blank and explain in comments.
<b>F</b>	<b>Assessment site name</b>	Enter the name of the site where M&E activity is targeted and/or conducted; for example, the name of the LF spot check site. Please enter one assessment site per row.  For EUs where combining IUs for LF TAS, please list each district on its own row, and indicate EU composition in comments.
<b>G</b>	<b>Month of assessment</b>	From the drop down menu, choose the month when the assessment is planned. Update this information during the semi-annual reporting periods.
<b>H</b>	<b>Year of assessment</b>	From the drop down menu, choose the year when the assessment is planned. Update this information during the semi-annual reporting periods.
<b>I</b>	<b>Funding source</b>	From the drop-down menu, indicate whether or not the assessment is USAID funded. If the assessment is USAID funded, indicate whether it is through ENVISION, END in Africa, END in Asia, USAID-supported APOC, or Other.
<b>J</b>	<b>Partners</b>	Codes 1-15 may be assigned by sub-partner to indicate partners (or combinations of partners) operating in a given district, including the government, other NGOs working with USAID support, and/or other NGOs working with non-USAID support. The definitions of codes are country-specific, and may be defined in "Comments" box on Status, Country, and/or M&E tab.
<b>K</b>	<b>Applicable disease</b>	From the drop down menu, choose the applicable disease for the assessment: LF, Oncho, Schisto, STH, or Trachoma. If coordinated or integrated assessment is completed for two diseases (Schisto and STH, LF and STH, etc.), enter this information in multiple rows indicating each disease assessed, as the assessment conclusions may

		differ for each disease. Please explain the integrated approach in comments. For assessments, such as post-MDA coverage survey, KAP survey, Data Quality Assessment, please leave this cell blank and indicate the diseases addressed in the 'Comments'.
<b>L</b>	<b>Baseline prevalence for disease-specific assessments (%)</b>	Enter the baseline prevalence as a percentage for the district where disease-specific assessment is planned to be conducted. Please note that this column should be left blank where it's not applicable, for example, baseline surveys, KAP survey, etc.
<b>M</b>	<b># of MDA rounds conducted prior to assessment (All Funding)</b>	Enter the total number of rounds of MDA conducted with ALL funding prior to the assessment.
<b>N</b>	<b>District-level reported coverage for previous rounds</b>	<p>Enter the reported epidemiologic coverage for all rounds of MDAs conducted with all funding prior to the assessment. For example, the reported coverage for previous rounds of MDA in a district for LF may be entered as: 2007 - 89.3%, 2008 - 91.2%, 2010 - 85.9%, etc. Please note that while calculating coverage, the denominator should vary by disease:</p> <p>LF-- Number of individuals living in endemic areas; typically entire population in endemic district  Oncho-- Number of individuals living in endemic areas  Schisto—Number of <u>SAC</u> living in endemic areas  STH—Number of <u>SAC</u> living in endemic areas  Trachoma—Number of individuals living in endemic areas; typically entire population in endemic district or sub-district, unless there is no transmission in urban areas</p> <p>Please note that this column should be left blank where it's not applicable, for example, baseline surveys, KAP survey, etc.</p>
<b>O</b>	<b>How results of assessment will be used</b>	Provide a brief explanation of how the results from the assessment will be used. For example, a trachoma impact survey might be conducted to determine if MDA can be stopped in a trachoma-endemic district.

► **When to ENTER the following data: During first semi-annual reporting**

► **When to UPDATE the following data: During second semi-annual reporting**

Columns	Header	Instructions
<b>Q</b>	<b>Data collection for assessment completed (Yes/No)</b>	From the drop-down menu, choose whether or not data collection for the targeted assessment has been completed. If the assessment has not been conducted as targeted during the reporting period, please provide a brief explanation in the Comments.

<b>R</b>	<b>Assessment report submitted (Yes/No)</b>	From the drop-down menu, choose whether the assessment report has been submitted to ENVISION. If not, indicate why in the comments and the preliminary results if available.
<b>S</b>	<b>Action-oriented conclusion</b>	<p>From the drop-down menu, choose the action-oriented conclusion derived from the results of M&amp;E assessment. Some examples of action-oriented conclusions based on assessments include:</p> <ul style="list-style-type: none"> <li>• Start MDA: LF baseline sentinel site, LF baseline spot check</li> <li>• Continue MDA (same frequency): Schisto evaluation, STH evaluation, LF Pre-TAS sentinel site, LF Pre-TAS spot-check site</li> <li>• Stop district level, continue sub-district level MDA: Trachoma impact survey</li> <li>• Stop MDA, start surveillance: LF TAS: Stop MDA, Trachoma impact survey</li> <li>• Stop MDA, continue other 'SFE' interventions: Trachoma impact survey</li> <li>• Increase frequency of MDA: Schisto evaluation; STH evaluation</li> <li>• Decrease frequency of MDA: Schisto evaluation; STH evaluation</li> <li>• Conduct TAS (LF): LF Pre-TAS sentinel site, LF Pre-TAS spot-check site</li> <li>• Continue surveillance: LF TAS: Post MDA Surveillance I, LF TAS: Post-MDA Surveillance II, Post-MDA surveillance</li> </ul> <p>For assessments such as Post-MDA coverage survey, KAP survey, Data Quality Assessment (DQA), please select 'Other (Please Specify)' and specify the action-oriented conclusion derived from the M&amp;E assessment in the same column.</p>

► **When to ENTER the following data: When applicable**

Column	Header	Instructions
<b>U</b>	<b>Comments</b>	Enter any comments relevant to the information corresponding to assessments in each row and column.

## Drug Donations Tab

Include drug donations from pharmaceutical companies as well as from other organizations such as governments, NGOs, private organizations, UNICEF, WHO, and bilateral donors. Please don't worry about including PZQ, DEC or ALB that was purchased using funds from USAID; we can utilize program records for these numbers.

Include only drugs which were **received in country during the reporting period** regardless of whether they were distributed during this period.

This tab is only for drugs to treat NTDs through PC. Other drugs, such as paracetamol and drugs for SAE management, should be included in the 'Other Donations' tab.

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Header		Instructions
<b>Were there any drug donations received in country during this reporting period?</b>		From the drop-down menu, indicate whether or not any drug donations were received in country during the reporting period. If drugs donated were not received during the reporting period, please select No and leave the entire table blank.
Column	Header	Instructions
<b>B</b>	<b>Donor Name</b>	From the drop-down menu, choose the appropriate donor. The donors could be Pfizer/ITI (Zithromax), GSK/WHO (Albendazole), Merck/MDP (Ivermectin), J&J/CWW (Albendazole, Mebendazole), Merck-Serono/WHO (Praziquantel), EISAI/WHO (DEC). Please specify if there is another donor. It will prompt you to a notification box that says 'It looks like you're adding a new donor name. If this is correct, continue. Otherwise use the drop down menu.' Confirm it is a new donor and press 'OK'.
<b>C</b>	<b>Drug</b>	From the drop-down menu, choose the Drug Name from ALB, DEC, IVM, MBD, PZQ, Tetra, Zithro (POS), and Zithro (Tablets).
<b>D</b>	<b>Number of Drugs Received</b>	Enter the total number of drugs received during the reporting period. For IVM, DEC, ALB, MBD, PZQ and Zithro (tablets), record the number of tablets received. For Zithro (POS), record the number of bottles received. For tetracycline, record the number of tubes received.
<b>E</b>	<b>Value in USD</b>	Enter the value of drugs in USD for any drugs NOT donated through major donation programs. Please don't worry about including PZQ, DEC or ALB that was purchased using funds from USAID; we can utilize program records for these numbers.

► **When to ENTER the following data: When applicable**

Column	Header	Instructions
<b>G</b>	<b>Comments</b>	Enter any comments relevant to the information corresponding to each row and column. Any drug-related issues may be addressed here, for example, stock-out, drug delays, clearance issues, etc.



## Other Donations Tab

Include any financial or in-kind donations made to the government NTD control program during the reporting period. Examples include funding for LF morbidity control and funding for other components of SAFE strategy. This information can be drawn from a completed TIPAC.

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Header	Instructions
<b>Were there any donations made during this period?</b>	From the drop-down menu, indicate whether or not there were any donations during the reporting period.

Column	Header	Instructions
<b>B</b>	<b>Donor Name</b>	Enter Donor Name.
<b>C</b>	<b>Description of Donation</b>	Enter description of donation; for example, trichiasis surgery materials, technical assistance and funding for coverage survey.

### Support for MDA Implementation

<b>D</b>	<b>Value (USD) in Districts Funded by USAID</b>	Enter the value of the donation in USD in districts funded by USAID.
<b>E</b>	<b>Value (USD) in Districts NOT Funded by USAID</b>	Enter the value of the donation in USD in districts not funded by USAID.
<b>F</b>	<b>Value (USD) of support for non-MDA activities</b>	Enter the value of donation in USD for non-MDA activities. Non-MDA activities include surgeries, situation analyses, development of Master Plan, etc.

► **When to ENTER the following data: When applicable**

Column	Header	Instructions
<b>G</b>	<b>Comments</b>	Enter any comments relevant to the information corresponding to each row and column.

## Historical-Calendar Tab

This historical tab intends to capture disease-specific historical treatment data by calendar year. This should be in line with the data that countries report to WHO. Historical calendar information is required to be completed only for 3 years prior to USAID support for MDA in a country.

- ▶ **When to ENTER the following data: During first Semi-Annual Report**
- ▶ **When to UPDATE the following data: During second Semi-Annual Report**

Column	Header	Instructions
<b>National NTD/disease-specific) program (including USAID funded)</b>		
<b>B</b>	<b>Disease Program</b>	Five NTDs (LF, Oncho, Schisto, STH, and Trachoma) are listed. Enter the treatment data for only the diseases endemic in your country.
<b>C</b>	<b>Calendar year</b>	Calendar year is listed starting in 2004 and ending at the current year. Enter the treatment data for only the calendar years when the disease was treated in your country. The calendar year should capture MDA that occurred between January and December, but may include results for MDA implemented early in the following year if it was carried over from late the previous year. For example, if treatment for schisto occurred in December 2009 and continued into January 2010, the treatment data for 2009 year should include all the treatment that occurred during that round of MDA, including the treatment that occurred in January 2010. This situation may be explained in a comment.
<b>D</b>	<b>Total number of districts treated</b>	Enter the total number of districts treated for each disease in each calendar year (with all funding). Take into consideration where two rounds/year have been implemented (for oncho and STH), and only count districts treated once.
<b>E</b>	<b>Total number of persons treated</b>	Enter the total number of persons treated for each disease in each calendar year (with all funding). Take into consideration where two rounds/year have been implemented (for oncho and STH), and only count persons treated once.
<b>F</b>	<b>Number of persons at risk in geographical area treated</b>	Enter the total number of persons at risk in the geographical area where treatment was provided.

<b>G</b>	<b>Epidemiologic Coverage in Geographical Areas Targeted (treated/at risk)</b>	Epidemiologic coverage is calculated as the total number of persons treated / total number of persons at risk in geographical areas treated *100. The formula is pre-set in the worksheet and this number will be automatically calculated, based on the information you entered above.
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**USAID-funded MDA**

<b>I</b>	<b>Total number of districts treated with USAID support</b>	Enter the total number of districts treated for each disease in each calendar year with USAID support. For the years when treatment was not provided with USAID support, the cells should be left blank. For example, if USAID started supporting NTD activities in your country in 2008, leave the cells prior to 2008 blank.
<b>J</b>	<b>Total Number of Persons treated with USAID support</b>	Enter the total number of persons treated for each disease in each calendar year with USAID support.

**► When to ENTER the following data: When applicable**

<b>Column</b>	<b>Header</b>	<b>Instructions</b>
<b>L</b>	<b>Comments</b>	Note any context or explanation for any information entered that applies to the disease or the year. This may include if a year was skipped, so that the MDA that took place in 2010 is counted as the 2009 MDA, etc.

## FY Treatment-All Funding Tab

This tab intends to capture disease-specific treatment data by US government fiscal year by all funding. (The USG fiscal year is defined as October-September.) In the Disease Workbook, results from non-USAID supported treatment are not required, and may not be entered. Therefore, this tab captures the total number of districts and persons treated by all funding at the national level. If treatment information is provided for non-USAID supported districts in the Disease Workbook, please note that the information in this tab should match what is reported in the Disease Workbook. If the information does not match (for example, not all district-level results are captured in the Disease Workbook), this should be explained in a comment.

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Column	Header	Instructions
<b>C</b>	<b>Total number of districts treated by all funding</b>	Enter the total number of districts treated for each disease during the reporting period with all funding. Take into consideration where two rounds/year have been implemented (for oncho and STH), and only count districts treated once.
<b>D</b>	<b>Total number of persons treated by all funding</b>	Enter the total number of persons treated for each disease during the reporting period with all funding. Take into consideration where two rounds/year have been implemented (for oncho and STH), and only count persons treated once.

► **When to ENTER the following data: When applicable**

Column	Header	Instructions
<b>F</b>	<b>Comments</b>	Enter any comments relevant to the information corresponding to each row and column.

## SAEs Tab

Record all Serious Adverse Events that occurred during the reporting period. Please note that according to WHO, a serious adverse event (SAE) is defined as an adverse event following treatment with a drug that results in any of the following:

- death
- life threatening condition
- in-patient hospitalization or prolongation of an existing hospitalization
- persistent or significant disability/incapacity
- congenital anomaly or birth defect
- cancer
- overdose (accidental or intentional).

Please note that in the event any SAEs are encountered during treatment, a Serious Adverse Events Report Form must be completed immediately and sent to the appropriate drug company and to WHO, and must be copied to appropriate project team (ENVISION, END in Africa, END in Asia). If SAEs occurred and appropriate pharmaceutical companies and WHO were informed, please email a copy of notification to the appropriate Project team.

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Header		Instructions
<b>Were there any SAEs reported in this period?</b>		From the drop-down menu, indicate whether or not there was any Serious Adverse Events (SAE) reported during the reporting period.
Column	Header	Instructions
<b>B</b>	<b>Region</b>	Once the district name has been entered, the region name will be pre-populated. Confirm the region name where SAE occurred.
<b>C</b>	<b>District</b>	Enter the district name where SAE occurred. You may type the name, copy/paste from the Geography tab, or select from the drop-down. Please note that once the district name is selected, the region name will pre-populate.
<b>D</b>	<b>Type of reaction</b>	Enter the type of reaction.
<b>E</b>	<b>Clinical Outcome</b>	Enter the clinical outcome of the SAE; for example, death, recovered, released from the hospital, etc.
<b>F</b>	<b>Was hospital care required?</b>	From the drop-down menu, Indicate whether or not hospital care was required for the SAE.
<b>G</b>	<b>Was the appropriate pharmaceutical donor?</b>	From the drop-down menu, indicate whether or not appropriate pharmaceutical donor was informed during the SAE.

<b>H</b>	<b>Was WHO informed?</b>	From the drop-down menu, indicate whether or not WHO was informed during the SAE.
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► **When to ENTER the following data: When applicable**

Column	Header	Instructions
<b>J</b>	<b>Comments</b>	Enter any comments relevant to the information corresponding to each row and column.

## Process Tab

This tab is intended to capture process indicators that reflect implementation of best practices for rolling-out national integrated NTD programs.

### Ministry's Elimination Targets

- ▶ **When to ENTER the following data: During first Semi-Annual Report**
- ▶ **When to UPDATE the following data: During second Semi-Annual Report**

Header	Instructions
<b>Ministry's target year for trachoma elimination</b>	Enter the year (4-digit format) when the Ministry is targeting to eliminate trachoma from the country. If trachoma is not endemic in the country, leave blank. If a target year has not been established, leave blank and indicate in the comments.
<b>Ministry's target year for LF elimination</b>	Enter the year (4-digit format) when the Ministry is targeting to eliminate LF from the country. If LF is not endemic in the country, leave blank. If a target year has not been established, leave blank and indicate in the comments.
<b>Ministry's target year for oncho elimination</b>	Enter the year (4-digit format) when the Ministry is targeting to eliminate oncho from the country. If oncho is not endemic in the country, leave blank. If a target year has not been established, leave blank and indicate in the comments.

## NTD-focused National Action

► When to ENTER the following data: **During first Semi-Annual Report**

► When to UPDATE the following data: **During second Semi-Annual Report**

Header	Instructions
<b>Situation Analysis has been conducted for NTDs</b>	From the drop-down menu, choose Yes/No to indicate whether or not a Situation Analysis for NTDs has been conducted in the country.
<b>Current multi-year National Plan of Action exists for NTDs (ex. Master Plan)</b>	From the drop-down menu, choose Yes/No to indicate whether or not a multi-year National Plan of Action for NTDs currently exists in the country. (This may also be called a Strategic Plan or a Master Plan.) If a National Plan of Action exists but has not yet been endorsed by the MOH, please select "no" and provide an explanation in the Comments.
<b>Current National Annual Work Plan exists (not specific to one donor)</b>	From the drop-down menu, choose Yes/No to indicate whether or not a national annual work plan for NTDs exists in the country for the current year. Please note that this does not refer to one donor specific annual work plan, but to a <u>national</u> annual work plan. If a draft National Annual Work Plan exists but has not yet been finalized, please select "no" and provide an explanation in the comments.
<b>Dedicated national NTD focal person appointed by the MoH</b>	From the drop-down menu, choose Yes/No to indicate whether or not a dedicated national NTD focal person has been appointed by the Ministry of Health (MoH).
<b>Central-level coordinating committee (such as Task Force or Steering Committee) established for NTDs</b>	From the drop-down menu, choose Yes/No to indicate whether or not a central-level coordinating committee (such as Task Force or Steering Committee) has been established for NTDs.
<b>National Integrated database for NTDs developed</b>	From the drop-down menu, choose Yes/No to indicate whether or not a national integrated database has been developed for NTDs. Please note that this does not refer to one donor-specific database, but to a <u>national</u> NTD database. If the development of a national integrated database for NTDs in process, please select 'No' and indicate in the comments.
<b>National NTD M&amp;E Plan developed</b>	From the drop-down menu, choose Yes/No to indicate whether or not a national NTD M&E plan has been developed. Please note that this does not refer to one donor-specific M&E plan, but to a <u>national</u> NTD M&E plan. If the development of a national NTD M&E plan is in process, please select 'No' and indicate in the comments.



## During this reporting period

► When to **ENTER** the following data: **During first Semi-Annual Report**

► When to **UPDATE** the following data: **During second Semi-Annual Report**

Header	Instructions
<b>Tool for Integrated Planning and Costing (TIPAC) completed for reporting year (or similar time period)</b>	From the drop-down menu, choose Yes/No to indicate whether or not the Tool for Integrated Planning and Costing (TIPAC) was completed for the reporting year or similar time period, such as the national fiscal year.
<b>At least one stakeholder meeting held during reporting year</b>	From the drop-down menu, choose Yes/No to indicate whether or not at least one stakeholder meeting for NTDs was held during the reporting year.
<b># times central-level coordinating committee met during reporting year</b>	From the drop-down menu, indicate how many times the central-level coordinating committee met during the reporting year (0-6). If the central-level coordinating committee met more than 6 times during reporting year, indicate so by selecting 'Other', and specify how many times they met. If there is not a central-level coordinating committee for NTDs, select 0.
<b># NTD guidelines strengthened at the country level through USAID support</b>	<p>From the drop-down menu, indicate how many NTD guidelines were strengthened at the country level through USAID support during the reporting year (0-6). If more than 6 NTD guidelines were strengthened during reporting year, indicate so by selecting 'Other', and specify how many NTD guidelines were strengthened. If there weren't any NTD guidelines strengthened at the country level through USAID support, select 0.</p> <p>Examples of NTD guidelines strengthened include development of national TAS implementation guidelines, guidelines for effective supply chain management, etc.</p>
<b># NTD policies strengthened at the country level through USAID support</b>	<p>From the drop-down menu, indicate how many NTD policies were strengthened at the country level through USAID support during the reporting year (0-6). If more than 6 NTD policies were strengthened during reporting year, indicate so by selecting 'Other', and specify how many NTD policies were strengthened. If there wasn't any NTD policies strengthened at the country level through USAID support, select 0.</p> <p>Examples of NTD policies strengthened include developing a policy to treat of PSAC and WCBA for STH, incorporating morbidity management into National Programme to Eliminate LF, etc.</p>

<p><b># NTD tools strengthened at the country level through USAID support</b></p>	<p>From the drop-down menu, indicate how many NTD tools were strengthened at the country level through USAID support during the reporting year (0-6). If more than 6 NTD tools were strengthened during reporting year, indicate so by selecting 'Other', and specify how many NTD tools were strengthened. If there wasn't any NTD tools strengthened at the country level through USAID support, select 0.</p> <p>Examples of NTD tools strengthened include adapting data collection and reporting tools to incorporate sex-disaggregated treatment data, tailoring national database template to country-specific data management and analysis needs, etc.</p>
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► **When to ENTER the following data: When applicable**

Header	Instructions
<p><b>Comments</b></p>	<p>Note any context or explanation for any information entered in the Process worksheet.</p>

## Snapshot of USAID National Support Tab

This tab intends to capture USAID support aggregated to the national level for all MDA and non-MDA activities. Please indicate whether USAID support (financial and/or technical) had an effect on the activities implemented in at least one area in the country during the reporting period.

### Activities implemented in at least one area of the country with technical and/or financial support from USAID

- ▶ **When to ENTER the following data: During first Semi-Annual Report**
- ▶ **When to UPDATE the following data: During second Semi-Annual Report**

Header	Instructions
<b>Strategic Planning</b>	From the drop-down options, indicate whether or not strategic planning was implemented with technical and/or financial support from USAID during the reporting period. Strategic planning may include national stakeholders meeting, technical planning meeting, annual review meeting, etc.
<b>Advocacy</b>	From the drop-down options, indicate whether or not advocacy was conducted with technical and/or financial support from USAID during the reporting period. Advocacy may include national/regional/district level advocacy meetings, etc.
<b>Mapping</b>	From the drop-down options, indicate whether or not mapping was conducted with technical and/or financial support from USAID during the reporting period. Mapping (coordinated or disease-specific) may be conducted for LF, oncho, schisto, STH, Trachoma, or Loa loa, either through a disease-specific, coordinated, or integrated approach.
<b>Drug logistics and supply chain management</b>	From the drop-down options, indicate whether or not drug logistics and supply chain management was implemented with technical and/or financial support from USAID during the reporting period. Drug logistics and supply chain management may include drug importation, drug transportation, drug storage, drug repackaging, etc.
<b>Social mobilization</b>	From the drop-down options, indicate whether or not social mobilization was conducted with technical and/or financial support from USAID during the reporting period. Social mobilization may include development and dissemination of IEC materials and messages, behavior change communication, etc.
<b>Pre-MDA registration</b>	From the drop-down options, indicate whether or not pre-MDA registration was implemented with technical and/or financial support from USAID during the reporting period. Pre-MDA registration refers to collecting census information in the targeted areas before drug distribution.

<b>Drug distribution</b>	From the drop-down options, indicate whether or not drug distribution was implemented with technical and/or financial support from USAID during the reporting period. Drug distribution may refer to MDA for LF, Oncho, Schisto, STH, and/or Trachoma.
<b>Morbidity control and surgeries</b>	From the drop-down options, indicate whether or not morbidity control and/or surgeries were implemented with technical and/or financial support from USAID during the reporting period. Morbidity control and surgeries may refer to hydrocele surgery, lymphoedema management, trichiasis surgery, morbidity management policy development, etc.
<b>Supervision</b>	From the drop-down options, indicate whether or not supervision was conducted with technical and/or financial support from USAID during the reporting period. Supervision may be during training, MDA, M&E activities, etc.
<b>Capacity development for NTD Control (Training and systems strengthening)</b>	From the drop-down options, indicate whether or not capacity development for NTD control was implemented with technical and/or financial support from USAID during the reporting period. Capacity development for NTD control may include trainings during MDA, M&E activities, etc. Attendance in national and international workshops that is aimed at capacity development should also be included. Capacity building for disease-specific items (such as a TAS for LF) should also be included.
<b>M&amp;E for NTD program activities</b>	From the drop-down options, indicate whether or not M&E for NTD program activities were implemented with technical and/or financial support from USAID during the reporting period. M&E activities may include disease-specific assessments (e.g. LF sentinel and/or spot check sites, TAS, Oncho assessment, STH and Schisto sentinel sites, Trachoma impact survey), MDA coverage survey, SAE monitoring, data collection, support for data management, etc.
<b>Was USAID support provided for any other activity not mentioned above?</b>	From the drop-down options, indicate whether or not any other activity not mentioned above was implemented with technical and/or financial support from USAID during the reporting period.
<b>If yes, please specify</b>	If you answered 'Yes' to the previous question, please list the activities that were supported with USAID fund during the reporting period.
<b>Comments</b>	Enter any relevant comment as applicable to the corresponding activities.

## Diseases addressed

Please indicate which diseases were addressed with USAID support during the reporting period through at least one of the activities mentioned above (i.e. strategic planning, advocacy, mapping, drug logistics and supply chain management, social mobilization, pre-MDA registration, drug distribution, morbidity control and surgeries, supervision, capacity development for integrated NTD control [training and systems strengthening], improved M&E for NTD program activities, or any other USAID supported activity).

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During second Semi-Annual Report**

Header	Instructions
<b>LF</b>	From the drop-down options, indicate whether or not any technical and/or financial support with USAID fund addressed LF during the reporting period. Please select NA if LF is not endemic in the country.
<b>ONCHO</b>	From the drop-down options, indicate whether or not any technical and/or financial support with USAID fund addressed Oncho during the reporting period. Please select NA if Oncho is not endemic in the country.
<b>Schisto</b>	From the drop-down options, indicate whether or not any technical and/or financial support with USAID fund addressed Schisto during the reporting period. Please select NA if Schisto is not endemic in the country.
<b>STH</b>	From the drop-down options, indicate whether or not any technical and/or financial support with USAID fund addressed STH during the reporting period. Please select NA if Trachoma is not endemic in the country.
<b>Trachoma</b>	From the drop-down options, indicate whether or not any technical and/or financial support with USAID fund addressed trachoma during the reporting period. Please select N/ if trachoma is not endemic in the country.
<b>Comments</b>	Enter any relevant comment to the corresponding diseases.

## Snapshot of USAID District Support Tab

This tab intends to capture USAID support by district level for all MDA and non-MDA activities. Please indicate whether USAID support (financial and/or technical) had an effect on activities in each district during the reporting period. This would include support for mapping, strategic planning, advocacy, mapping, training and capacity building, drug logistics and supply-chain management, social mobilization, pre-MDA registration, drug distribution through MDA, supervision, and/or monitoring and evaluation activities such as SAE monitoring and reporting, disease-specific assessments, data management, etc.

► **When to ENTER the following data: During first Semi-Annual Report**

► **When to UPDATE the following data: During reporting period, if anything changed**

Column	Header	Instructions
<b>B</b>	<b>Region</b>	This information will be pre-populated.
<b>C</b>	<b>District</b>	This information will be pre-populated.
<b>E</b>	<b>Funding source</b>	<p>Indicate whether USAID support (financial and/or technical) had an effect on activities in each district during the reporting period. This would include support for mapping, strategic planning, advocacy, training and capacity building, drug logistics and supply-chain management, social mobilization, pre-MDA registration, drug distribution through MDA, supervision, and/or monitoring and evaluation activities such as SAE monitoring and reporting, disease-specific assessments, data management, etc. USAID support should be categorized by the project providing support:</p> <p>0= The district is not funded with any support            1=USAID support provided through ENVISION            2=USAID support provided through END in Africa            3=USAID support provided through END in Asia            4=USAID support provided through USAID-supported APOC            5=USAID support provided through other mechanism; please specify in “comments”.            6 = Funding through government or other partners only (no USAID-support)</p> <p>Please note it is assumed in all the countries and districts where we work that the host government is a partner and contributing to activities through technical, financial, and/or in-kind inputs.</p>
<b>F</b>	<b>Partners</b>	Codes 1-15 may be assigned by sub-partner to indicate partners (or combinations of partners) operating in a given district, including the government, other NGOs working with USAID support, and/or other NGOs working with non-USAID support. The definitions of codes are country-specific, and may be defined in “Comments” box on Status, Country, and/or Snapshot-district tabs.

**► When to ENTER the following data: When applicable**

Column	Header	Instructions
<b>G</b>	<b>Comments</b>	Enter any relevant comment to the corresponding rows and columns.

## Summary Tab

The Summary tab is for informational purposes only. It is automatically calculated based on the entries in individual tabs. Some functions of Summary tab are:

- Data generated in this tab may be used to cross-check the entries in individual tabs.
- If Ministry of Health prefers not to or does not have the ability to indicate their approval for the data in USAID's NTD database, managed by ENVISION, the Summary tab may be printed, signed by MoH representative, scanned, and sent to ENVISION M&E team.
- Data generated in this tab may be used in summary reports used to plan, implement, monitor, evaluate, and report on the NTD activities conducted in the country.

Please note the following:

**Mapping:** Summary data for mapping table will only be generated if the following data fields are completed:

- Type of mapping
- Funding source (To calculate # districts mapped with USAID support only)
- Applicable disease
- Data collection for mapping completed (Only 'Yes' counted)

**M&E:** Summary data for M&E table will only be generated if the following data fields are completed:

- Type of assessment
- Funding source (To calculate # assessments conducted with USAID support only)
- Data collection for assessment completed (Only 'Yes' counted)

Please note that the calculation of TAS assessments does not take into consideration multiple IUs combined into EUs.



# Frequently Asked Questions (FAQs)

## Can you clarify the timing for specific periods, such as fiscal year, SAR 1 and SAR 2?

A fiscal year runs from October to September. For example, FY 2013 means the period between October 2012 and September 2013.

1st Semi-Annual Reporting period is between October to March. For example, 1st SAR for FY 2013 means the period between October 2012 and March 2013. All NTD-related activities (MDA, training, M&E assessments, mapping, etc.) completed during this period should be reported in the 1st SAR.

2nd Semi-Annual Reporting period is between October to September. For example, 2nd SAR for FY 2013 means the period between October 2012 and September 2013. All NTD related activities (MDA, training, M&E assessments, mapping, etc.) completed during this period should be reported in the 2nd SAR.

## Can you explain the process of Program Workbook submission for Work planning and semi-annual reporting periods?

The Program Workbook is completed for Work planning and updated for semi-annual reporting periods and mid-year data submission. The second semi-annual report should reflect the complete data for the fiscal year (October – September). Therefore, there will be one Program Workbook for each fiscal year, with data submitted during the different reporting periods.

## Can you clarify what data should be submitted when?

Please see the table below on the reporting period and expected deliverables

Reporting period	Required tabs in Program Workbook	Deadline
Work planning	Country, Training, Mapping, M&E	Varies by country
SAR 1: Oct-March	<ul style="list-style-type: none"> <li>- Update Country, Training, M&amp;E.</li> <li>- Complete remaining tabs.</li> </ul>	March 31 <sup>st</sup>
Mid-year	Update with any relevant data	Varies by country
SAR 2: Oct-Sept	Update all tabs	September 30 <sup>th</sup>

### **What is the purpose of 'Status' tab? Is it required to be completed?**

The Status tab is optional to be completed and is intended to help you keep track of progress completing the Program Workbook. General comments for the entire tab that will help explain the entries in each tab may also be entered in the 'Comments' column of 'Status' tab.

### **Why can't I make changes to the headers so that they are relevant to my country?**

For the purposes of planning, monitoring, evaluation and reporting across the USAID NTD projects and across time, it is helpful to have standard categories across all countries supported by USAID. Therefore, all sheets are protected so that users cannot make changes to headers and or add columns or rows unless advised to do so. The online database will validate the headers for it to be able to understand and accept the data entry. The database will not be able to process the change in the headers and/or the layout of the forms; therefore, data will not be uploaded.

### **How do we differentiate between the data fields that are required to be completed versus the optional data fields?**

All optional data fields are indicated in a comment bubble of each header. The phrases used are 'Optional for completion', or 'Required for USAID-funding; optional for non-USAID funding'. All data fields not marked optional are required to be completed.

### **Do we need to include non-USAID supported mapping and M&E assessments in the Mapping and M&E tabs?**

Mapping and M&E assessments help to provide a general understanding of progress and gaps in a country. Though non-USAID supported mapping and M&E assessments are not required to be included in the Program Workbook, providing this information is helpful to recognize the achievements made by the country and future needs which may be considered for USAID support.

### **Do we need to complete additional forms for USAID-funded mapping and M&E assessments? Why?**

Yes. USAID-funded mapping and M&E assessments should be recorded in additional forms (Mapping protocol and report and M&E assessment protocol and report). Since the Program Workbook does not capture specifics such as the survey design and sampling strategy, detailed

results, etc., it is important to have a more-detailed record both for the USAID project as well as the national program.

**The training categories provided in the ‘Training tab’ are different from the training categories used in my country. Can I change the training categories?**

No. For the purposes of planning, monitoring, evaluation and reporting across the USAID NTD projects and across time, it is helpful to have standard categories across all countries supported by USAID. The training categories provided (trainers, supervisors, drug distributors, M&E) are typical categories trained for NTDs across different countries. Please enter the training numbers in the categories provided. For the other groups that do not fall in pre-defined categories, the type of other training group can be defined under ‘Other training group’.

# Checklist for Submission and Quality Checks: Program Workbook

## During Work planning

- Country**  
Completed the Country Tab including the date Workbook updated.
- Training**  
Entered all the trainings that are planned for the fiscal year with USAID support (Columns E-H).
- Mapping**  
Entered all the M&E assessments that are planned for the fiscal year with all funding (Columns B-K).
- M&E**  
Entered all the M&E assessments that are planned for the fiscal year with all funding (Columns B-O).

## During Semi-Annual Reporting Period

If you respond 'yes' to any of the below questions, please provide a comment in the workbook.

- Country**  
Completed the Country Tab, including the date Workbook updated.
- Training**  
Updated Training form with all trainings that occurred in this reporting period/fiscal year.
  - Y**  **N** If answered "yes" to "Was there any training conducted during this period?" columns J-L must be completed.
  - Y**  **N** Were there substantial changes (major increase or decrease) in the number of people targeted between work plan and semi-annual report?
  - Y**  **N** Is the number total trained greater than the number targeted to be trained?
  - Y**  **N** Is the number trained not disaggregated by sex?
  - Y**  **N** Does the sum of the number of males and the number of females trained not equal the total number trained?
- Mapping**  
Updated all the Mapping activities that were completed during the reporting period/fiscal year, including the completion of data collection, report submission, and providing action-oriented conclusion.

- Y**  **N** Was region and district completed, but month of mapping, year of mapping, funding source, partner, or applicable disease not provided?
- Y**  **N** Was data collection completed and a report submitted but an action-oriented conclusion not provided?
- M&E**  
Updated all the M&E assessments that occurred in this reporting period/fiscal year including the completion of data collection, report submission, and providing action-oriented conclusion.
- Y**  **N** Was region and district completed, but month of assessment, year of assessment, funding source, partner, or applicable disease not provided?
- Y**  **N** Was data collection completed and a report submitted but an action-oriented conclusion not provided?
- Drug Donations**  
Entered drug donations during the reporting period.
- Y**  **N** Donor name, drug, number of drugs received, and value (if donor is “other”) not completed?
- Other Donations**  
Entered other donations during the reporting period.
- Y**  **N** Donor name, description of donation, and value of support for non-MDA activities not completed?
- Historical Calendar**  
Completed the historical calendar for the current year.
- FY Tx-All Funding**  
Entered treatment data by all funding for the reporting period/fiscal year.
- Y**  **N** If completing for 2<sup>nd</sup> SAR, total # of districts treated by all funding and total # of persons treated by all funding not filled?
- Y**  **N** Is the total number of districts treated by all funding less than the total number of districts treated with USAID funding for each disease, as reported in the Disease Workbook (at 2<sup>nd</sup> SAR)?
- Y**  **N** Is the total number of persons treated by all funding less than the total number of persons treated with USAID funding for each disease, as reported in the Disease Workbook (at 2<sup>nd</sup> SAR)?
- SAEs**  
Entered SAEs reported during the reporting period.
- Y**  **N** Completed columns B-H if any SAEs were reported
- Y**  **N** Were the appropriate pharmaceutical donor and/or WHO *not* informed?

**Process**

Entered Process tab as information pertinent with the current reporting period.

**Snapshot-National**

**Snapshot-District**

Entered Snapshot of USAID support for all districts during the reporting period.

**Y**  **N** Was column 'USAID-funded' not filled?

**Y**  **N** Was USAID-funded mapping, MDA, and/or M&E assessment not captured in Snapshot of USAID support? (e.g. districts with Funding code= 1,2,3,4, or 5 in Mapping tab, M&E tab, or disease tabs in Disease Workbook, but have Funding code= 0 for Snapshot of USAID support)