



Action Plan Approvals

Login page

 CBA TRACKING SYSTEM

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TA at a Glance

GO

You must have a CDC CBA Tracking System account to use the CBA Tracking System to request capacity building assistance (CBA) services.

CDC funding recipients will be able to access CTS using their current CRS log-in IDs and passwords.


Login to CBA Tracking System

User ID



Password

☐ Remember me [Reset password?](#)

Login



Welcome to CDC TRAIN




Note: For the *Action Plan Approval* process, approval decisions can be made in any order. One approver is not dependent upon another. Click **Ctrl + F** to search for a specific role in this document.

Program Consultant (PC)

1. Enter the *User ID* (PC in this example) and *Password* and click the **Login** button.
 - a. Click the **Accept Terms & Conditions** button.

The dashboard displays.

 CBA TRACKING SYSTEM

Program Consultant #07 Last login: 08/27/2019 01:19 PM

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Welcome Program Consultant #07

Organization: Centers for Disease Control and Prevention

Enter TA Activity Number

To find a specific TA Activity enter the TA number in the box, then click Open.

Open

View TA Activities

To view existing TA activities, click view existing button. To view TA Request that require a response, click View TA Request Requiring a Response.

[View Existing](#) [View TA Request Requiring a Response](#)

TA That Require My Response

You have (1) items that require your attention

Show 10 entries Search:

| TA Number | Assigned Date | Status | Response Due Date | < 6 Hours remaining | Requesting Organization | Region | View |
|-----------|---------------------|-------------|---------------------|---------------------|-------------------------|--------|------|
| TA00446 | 08/27/2019 11:25 AM | Incoming AP | 09/04/2019 11:25 AM | No | CBO (DF) - Georgia #07 | South | View |

Showing 1 to 1 of 1 entries

CBA Plans and Provider Information

[Regional CBA Plan](#)
Coming Soon...

[Jurisdictional CBA Plan](#)
Coming Soon...

[CBA Needs & Service Priorities](#)
Coming Soon...

[Regional TA Providers](#)
Coming Soon...

- In the *TA That Require My Response* section, locate the *TA number* and click the *TA number*, or the **View** link.

Note: The status is *Reviewing AP*.

The *Request Action Plan* Page displays.

CBA TRACKING SYSTEM Program Consultant #07 Last login: 8/27/2019 1:19:47 PM [I Want to...](#)

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Creating Request Creating AP **Reviewing AP** Working Closed

Request Action Plan

| | | |
|--|--|--|
| Request #: TA00448 Requestor: Member 01 #07 CBO Organization: CBO (DF) - Georgia #07 Point of Contact: Member 01 #07 CBO Organization: CBO (DF) - Georgia #07 Provider: Provider Organization - Georgia (South) #07 Recipient Organization: Multiple Recipients Program Consultant: Program Consultant #07 PC Team Lead: Program Consultant Team Lead #02 Description: Testing CBO request (rpr) 448 Accomplish as a result: Testing CBO request (rpr) 448c | Date Assigned: 8/26/2019 Request Add Date: 8/22/2019 Coordinator: CTS Coordinator #01 Project Officer: Project Officer #07 PO Team Lead: Project Officer Team Lead #02 SME: CTS #07 SME SME Team Lead: CTS #02 SME Team Lead Regional Lead: Regional Lead #02 JWG Rep: JWG Rep #07 JWG Team Lead: JWGTL Rep #02 | Actions View Request Detail Return to Action Plan Home Return to Request Home Return to Dashboard |
|--|--|--|

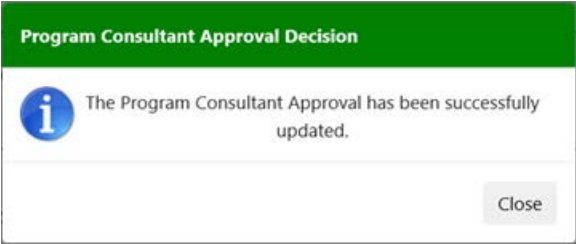
| SME | PC | PO | Requestor | Recipient |
|--|----|----|-----------|-----------|
| Show All Action Plan Approval Decision | | | | |
| SME (CTS #07 SME) Approval Decision | | | | |
| Program Consultant (Program Consultant #07) Approval Decision | | | | |
| <input type="radio"/> Program Consultant Approves the Action Plan | | | | |
| <input type="radio"/> Program Consultant Disapproves the Action Plan | | | | |
| <small>If you chose Disapproves the Action Plan the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting Disapproves the Action Plan.</small> | | | | |
| Enter your reason for approving or disapproving ** | | | | |
| <input type="text"/> | | | | |
| Save Program Consultant Approval Decision | | | | |
| Project Officer (Project Officer #07) Approval Decision | | | | |
| Requestor (Member 01 #07 CBO) Approval Decision | | | | |
| Recipient (Member 01 #07 CBO (IF)) Approval Decision | | | | |

The *Action Plan Approval Decision* section displays. The section expands based on the user logged in. In this example, it is the *Program Consultant*.

Note: A Yes or No will display next to *SME*, *PC*, *PO*, *Requestor*, and *Recipient* as each approver's approval decision is made on the *Action Plan*.

- Select a radio button to approve or disapprove the *Action Plan*.
- Enter a comment in the textbox provided.
- Click the **Save Program Consultant Approval Decision** button.

The *Program Consultant Approval Decision* message displays.



- 6. Click the **Close** button.

The answer *Yes* displays next *Program Consultant* under the request details header.

| SME | PC | Yes | PO | Requestor | Recipient |
|-----|----|-----|----|-----------|-----------|
|-----|----|-----|----|-----------|-----------|

The answer *Yes* also displays next to the section name if the *Action Plan* is approved. *Note:* The *Program Consultant's* comment does not display after saving the decision.

Program Consultant (Program Consultant #07) Approval Decision Yes

☒ Program Consultant Approves the Action Plan

☐ Program Consultant Disapproves the Action Plan

If you chose 'Disapproves the Action Plan' the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting 'Disapproves the Action Plan'.

Enter your reason for approving or disapproving **

Save Program Consultant Approval Decision

Note: If the *Program Consultant* does not approve the *Action Plan*, *No* displays next to the section name and under the request details header.

- 7. Scroll up and click the **Return to Dashboard** button. The dashboard page displays.

Subject Matter Expert (SME)

- 1. Enter the *SME User ID* and *Password* and click the **Login** button.
 - a. Click the **Accept Terms & Conditions** button.

The dashboard displays.

- 2. In the *TA That Require My Response* section, locate the *TA number* and click the *TA number*, or the **View** link.
Note: The status is *Reviewing AP*.

The *Request Action Plan* Page displays.

The *Action Plan Approval Decision* section displays. The section expands based on the user logged in. In this example, it is the *SME*.

[Show All Action Plan Approval Decision](#)

SME (CTS #07 SME) Approval Decision

☐ SME Approves the Action Plan

☐ SME Disapproves the Action Plan

If you chose 'Disapproves the Action Plan' the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting 'Disapproves the Action Plan'.

Enter your reason for approving or disapproving **


Save SME Approval Decision

Note: A Yes or No will display next to SME, PC, PO, Requestor, and Recipient as each approver's approval decision is made on the Action Plan.

3. Select a radio button to approve or disapprove the Action Plan.
4. Enter a comment in the textbox provided.
5. Click the **Save SME Approval Decision** button.

The SME Approval Decision message displays.

SME Approval Decision

 The SME Approval has been successfully updated.

Close

6. Click the **Close** button.

The answer Yes displays next SME under the request details header.

| | | | | | | |
|-----|-----|----|-----|----|-----------|-----------|
| SME | Yes | PC | Yes | PO | Requestor | Recipient |
|-----|-----|----|-----|----|-----------|-----------|

The answer Yes also displays next to the section name if the Action Plan is approved. **Note:** The Program Consultant's comment does not display after saving the decision.

[Show All Action Plan Approval Decision](#)

SME (CTS #07 SME) Approval Decision Yes

☒ SME Approves the Action Plan

☐ SME Disapproves the Action Plan

If you chose 'Disapproves the Action Plan' the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting 'Disapproves the Action Plan'.

Enter your reason for approving or disapproving **

Save SME Approval Decision

Note: If the SME does not approve the Action Plan, No displays next to the section name and under the request details header.

7. Scroll up and click the **Return to Dashboard** button. The dashboard page displays.

Project Officers (PO)

1. Enter the *Project Officer User ID* and *Password* and click the **Login** button.
 - a. Click the **Accept Terms & Conditions** button.

The dashboard displays.

2. In the *TA That Require My Response* section, locate the *TA number* and click the *TA number*, or the **View** link.
Note: The status is *Reviewing AP*.

The *Request Action Plan* Page displays.

The *Action Plan Approval Decision* section displays. The section expands based on the user logged in. In this example, it is the *Project Officer*.

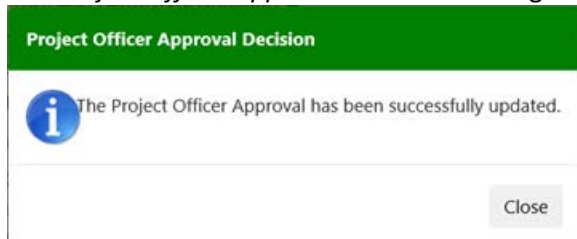


The screenshot shows a web form titled "Project Officer (Project Officer #07) Approval Decision". It contains two radio buttons: "Project Officer Approves the Action Plan" and "Project Officer Disapproves the Action Plan". Below the radio buttons is a paragraph of text explaining the consequences of disapproval: "If you chose 'Disapproves the Action Plan' the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting 'Disapproves the Action Plan'." Below this text is a text input field with the placeholder "Enter your reason for approving or disapproving **". At the bottom of the form is a dark button labeled "Save Project Officer Approval Decision".

Note: A Yes or No will display next to *SME, PC, PO, Requestor*, and *Recipient* as each approver's approval decision is made on the *Action Plan*.

3. Select a radio button to approve or disapprove the Action Plan.
4. Enter a comment in the textbox provided.
5. Click the **Save Project Officer Approval Decision** button.

The *Project Officer Approval Decision* message displays.



The screenshot shows a green header bar with the text "Project Officer Approval Decision". Below the header is a white box containing an information icon (a blue circle with a white 'i') and the text "The Project Officer Approval has been successfully updated." At the bottom right of the white box is a button labeled "Close".

6. Click the **Close** button.

The answer *Yes* displays next *Project Officer* under the request details header.

SME **Yes**

PC **Yes**

PO **Yes**

Requestor

Recipient

The answer **Yes** also displays next to the section name if the *Action Plan* is approved. *Note: The Program Consultant's comment does not display after saving the decision.*

Project Officer (Project Officer #07) Approval Decision **Yes**

☒ Project Officer Approves the Action Plan

☐ Project Officer Disapproves the Action Plan

If you chose 'Disapproves the Action Plan' the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting 'Disapproves the Action Plan'.

Enter your reason for approving or disapproving **

Save Project Officer Approval Decision

Note: If the Project Officer does not approve the Action Plan, No displays next to the section name and under the request details header.

7. Scroll up and click the **Return to Dashboard** button. The dashboard page displays.

Requestor

1. Enter the *Requestor User ID* and *Password* and click the **Login** button.
 - a. Click the **Accept Terms & Conditions** button.

The dashboard displays.

2. In the *TA That Require My Response* section, locate the *TA number* and click the *TA number*, or the **View** link.
Note: The status is Reviewing AP.

The *Request Action Plan* Page displays.

The *Action Plan Approval Decision* section displays. The section expands based on the user logged in. In this example, it is the *Requestor*.

Requestor (Member #40 CBO) Approval Decision

☐ Requestor Approves the Action Plan

☐ Requestor Disapproves the Action Plan

If you chose 'Disapproves the Action Plan' the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting 'Disapproves the Action Plan'.

Enter your reason for approving or disapproving **

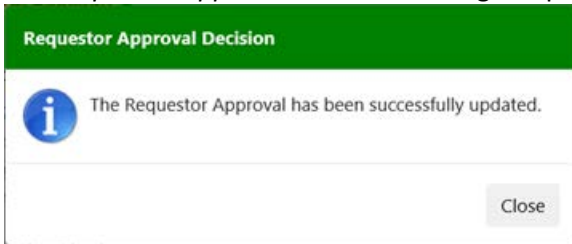
Save Requestor Approval Decision

Note: A Yes or No will display next to SME, PC, PO, Requestor, and Recipient as each approver's approval decision is made on the Action Plan.

3. Select a radio button to approve or disapprove the Action Plan.

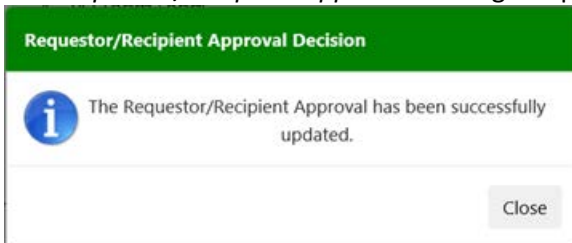
4. Enter a comment in the textbox provided.
5. Click the **Save Requestor Approval Decision** button.

The *Requestor Approval Decision* message displays.



Note: If the *Requestor* and the *Recipient* are the same, the approval decision message shows that the *Requestor* has made the approval decision for both roles.

The *Requestor/Recipient Approval* message displays.



6. Click the **Close** button.

The answer *Yes* displays next *Requestor* under the request details header.

| | | | | |
|----------------|---------------|---------------|----------------------|-----------|
| SME Yes | PC Yes | PO Yes | Requestor Yes | Recipient |
|----------------|---------------|---------------|----------------------|-----------|

The answer *Yes* also displays next to the section name if the *Action Plan* is approved. *Note:* The *Program Consultant's* comment does not display after saving the decision.

Requestor (Member 01 #07 CBO) Approval Decision **Yes**

☒ Requestor Approves the Action Plan

☐ Requestor Disapproves the Action Plan

If you choose Disapproves the Action Plan the application will return the request to 'Creating Action Plan' status, once the SME, PC, PO, Requestor, and the Recipient have weighed in. This action will return the request to the Provider for revisions. If you would like to stop the request from returning to the Provider, please contact the SME, PC, or PO before selecting 'Disapproves the Action Plan'.

 Enter your reason for approving or disapproving **

Save Requestor Approval Decision

Note: If the *Requestor* does not approve the *Action Plan*, *No* displays next to the section name and under the request details header.

7. Scroll up and click the **Return to Dashboard** button. The dashboard page displays.

Recipient

Non-Funded Recipients

Non-Funded Recipients receive an email with a link to a web page.

1. Click the link in the email.

A web page opens displaying the approval decision options.



2. Select a radio button to approve or disapprove the Action Plan.
3. Enter a comment in the textbox provided.
4. Click the **Save Recipient Approval Decision** button.
5. Click the **x** in the upper right corner of the page to close the web page.

Directly Funded and Indirectly Funded Recipients

1. Enter the *Requestor User ID* and *Password* and click the **Login** button.
 - a. Click the **Accept Terms & Conditions** button.

The dashboard displays.

2. In the *TA That Require My Response* section, locate the *TA number* and click the *TA number*, or the **View** link.
Note: The status is *Reviewing AP*.

The *Request Action Plan* Page displays.

The *Action Plan Approval Decision* section displays. The section expands based on the user logged in. In this example, it is the *Requestor*.

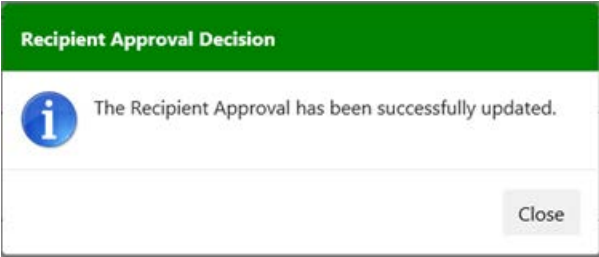


Note: A Yes or No will display next to *SME*, *PC*, *PO*, *Requestor*, and *Recipient* as each approver's approval decision is made on the *Action Plan*.

3. Select a radio button to approve or disapprove the Action Plan.

- Enter a comment in the textbox provided.
- Click the **Save Recipient Approval Decision** button.

The *Recipient Approval Decision* message displays.

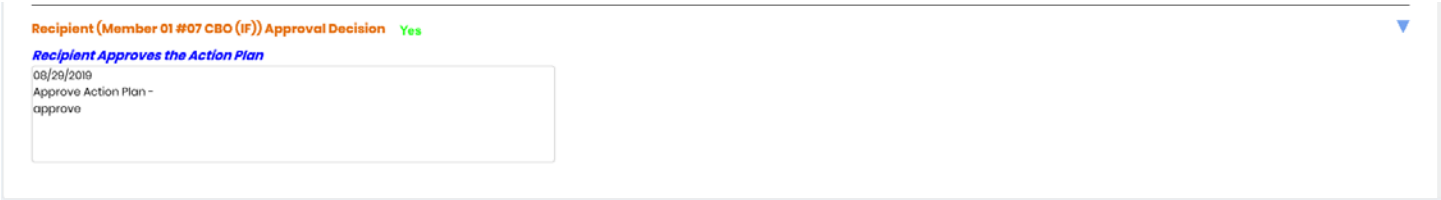


- Click the **Close** button.

The answer *Yes* displays next *Recipient* under the request details header.

| | | | | | | | | | |
|-----|-----|----|-----|----|-----|-----------|-----|-----------|-----|
| SME | Yes | PC | Yes | PO | Yes | Requestor | Yes | Recipient | Yes |
|-----|-----|----|-----|----|-----|-----------|-----|-----------|-----|

The answer *Yes* also displays next to the section name if the *Action Plan* is approved. *Note:* The *Recipient's* comment does not display after saving the decision. When the last approver approves the *Action Plan*, the message on the screenshot below display.



Note: If the *Recipient* does not approve the *Action Plan*, *No* displays next to the section name and under the request details header.

After all *Action Plan* approvers have been approved the *Action Plan*, the request moves to *Working* status.

