

Requestor: Request New TA

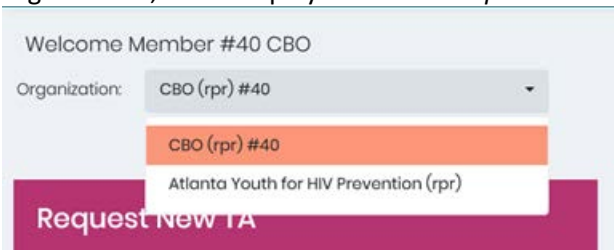
Login page

Note: The user needs to be logged in as one of the following user roles: *Health Department, CBO, or Project Officer.*

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

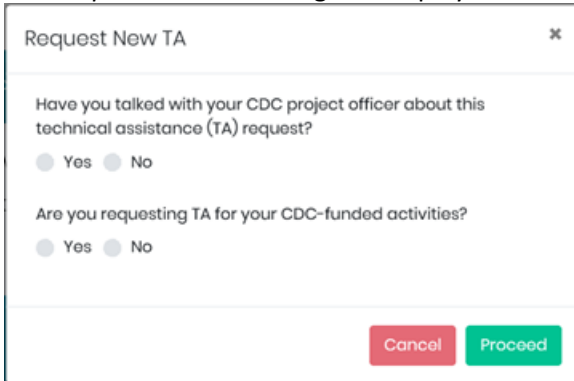
The *dashboard* page displays.

Note: The user's *primary organization* displays in the organization drop-down list. If the user is part of more than one organization, it will display when the *drop-down arrow* is clicked.



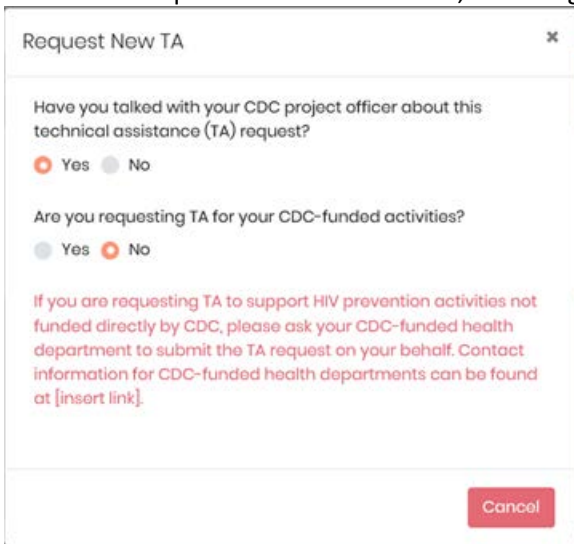
2. In the *Request New TA* box, click the **Add** button.

The *Request New TA* dialog box displays.



Note: If a *CBO* or a *Project Officer* requests a new *TA*, two questions display to be answered. For a *Health Department* user, only the first question will display.

If the second question is answered *No*, a message displays when the **Proceed** button is clicked.



The request cannot be completed. The user will have to contact its *CDC-funded health department* for assistance with submitting the *TA request*.

3. Answer each question. The first question can be answered *No*; this will not prevent the request process from moving forward.
4. Click the **Proceed** button.

The *Request for a New TA* page displays.

5. A ticket number is generated; make note of this number.
6. If the answer to the second question is changed to No, the *Confirm* dialog box displays.

Confirm dialog box.

- a. If the answer remains *No* and the *Yes* button is clicked, the process stops, and the request is deleted.
7. If the answer to the question, *Are you requesting TA for HIV testing?* is *Yes*, an additional question displays.
Is this for HIV Testing in a clinical or non-clinical setting?
 Clinical setting Non-clinical setting
 - a. Select an answer.
8. Enter an answer to each of the questions where a textbox is provided.

Note: The organization that was selected on the dashboard page displays. In this example it is the primary organization.

CBO (rpr) #40			
Recipient Organizations	Announcement #	Recipient Contact (s)	
CBO (rpr) #40	PA - Not Applicable	Member #40 CBO (Primary Contact)	View Organization Details Assign Contacts Select Announcement #

[Add New Organization](#)

9. To delete the organization, click the **x** next to the organization name.

10. To select another organization from the list, begin typing in the organization field to bring the organization name to the top.
 - a. Click outside of the organization field to close the list.

If an additional organization was selected, both organizations display in the organization section.

Note: For the April 1, 2019 release, if the *recipient organization* is different than the *requestor organization*, both organizations must be added, and the **recipient organization must be listed second**.

11. To add a new organization, click the **Add New Organization** button.

The *Add New Organization* dialog box displays.

The dialog box titled "Add New Organization" includes the following fields:

- Organization Name ** (text input)
- Organization Type ** (dropdown menu, currently showing "-- please select --")
- Funding Type ** (dropdown menu, currently showing "-- please select --")
- Business Address (text input)
- Address Line 2 (text input)
- City ** (text input)
- State ** (dropdown menu, currently showing "-- ple")
- Zip ** (text input)

Buttons: Cancel (red), Save (green)

12. Enter the required information and click the **Save** button.

The organization displays in the organization section.

Recipient Organizations	Announcement #	Recipient Contact (s)	
CBO (rpr) #40	PA - Not Applicable	Member #40 CBO (Primary Contact)	View Organization Details Assign Contacts Select Announcement #
Atlanta HIV Awareness (rpr)	PA - Not Applicable		View Organization Details Assign Contacts Select Announcement #

13. Click the **Assign Contacts** link in the last column of the table.

The *Assign Contact* dialog box displays.



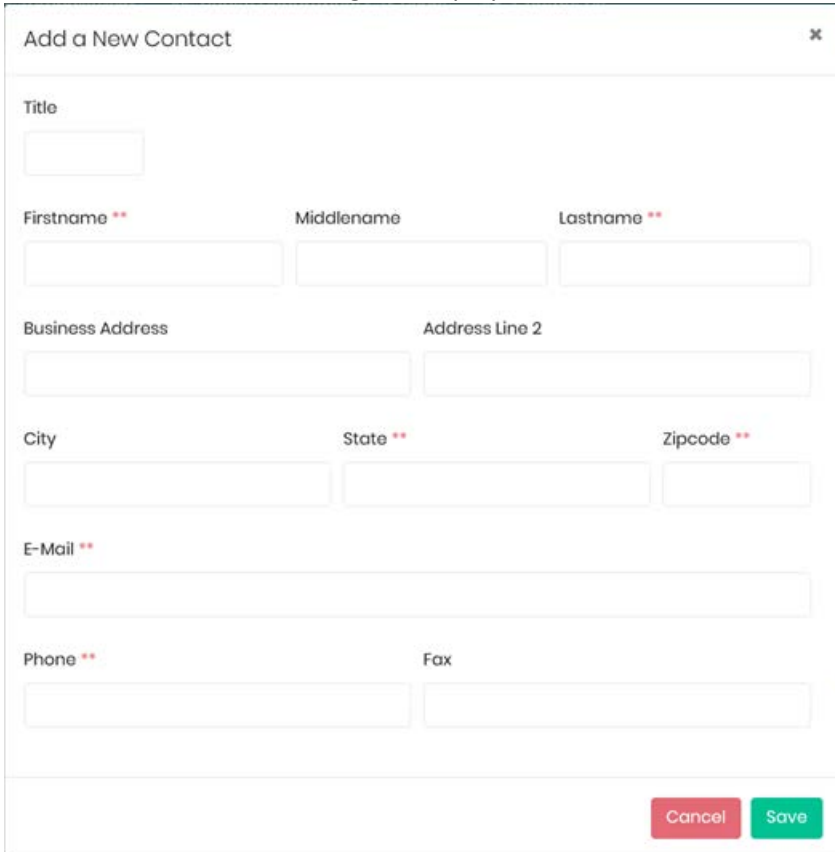
Assign Contacts ✕

[Add New Contact](#)

Please add Contacts to Organization.

14. Click the **Add New Contact** button.

The *Add a New Contact* dialog box displays.



Add a New Contact ✕

Title

Firstname ** Middlename Lastname **

Business Address Address Line 2

City State ** Zipcode **

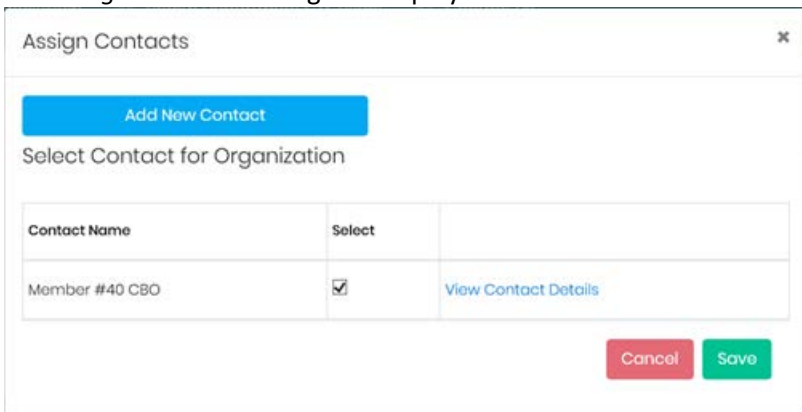
E-Mail **

Phone ** Fax

[Cancel](#) [Save](#)

15. Enter the required information and click the **Save** button.

The *Assign Contacts* dialog box displays.



Assign Contacts ✕

[Add New Contact](#)

Select Contact for Organization

Contact Name	Select	
Member #40 CBO	<input checked="" type="checkbox"/>	View Contact Details

[Cancel](#) [Save](#)

16. Click the **Save** button.

The contact is added to the organization section.

Recipient Organizations	Announcement #	Recipient Contact (s)	
CBO (rpr) #40	PA - Not Applicable	Member #40 CBO (Primary Contact)	View Organization Details Assign Contacts Select Announcement #
Atlanta HIV Awareness (rpr)	PA - Not Applicable	Member #40 CBO	View Organization Details Assign Contacts Select Announcement #

Organizations display three links: **View Organization Details, Assign Contacts, Select Announcement #.**

17. To view or edit information about the organization or the announcement number, click the corresponding link:

The *Organization Details* dialog box displays when selecting the **View Organization Details** link.

Organization Details ✕

Organization Name **

Organization Type **

Funding Type **

Business Address Address Line 2

City ** State ** Zip **

The *Select Announcement #* dialog box displays when selecting the **Select Announcement #** link.

Select Announcement # ✕

Announcement #	Title	Select
PA	Not Applicable	<input checked="" type="checkbox"/>

18. Click in the date field to select a date from the calendar or enter a date.

19. Select an option from the *drop-down list* to the question, *How would you like the TA to be delivered?*

Note: The request can be saved even if the information provided for this page is incomplete. Return later to complete the request.

20. Click the **Review & Submit** button.

The *Review & Submit* dialog box displays.

Review & Submit		
The requestor spoke with PO:	Yes	
Requesting TA for CDC-funded activities:	Yes	
This is a Technical Assistance for HIV Testing:	Yes - Non-clinical setting	
Audience receiving TA:	Testing CBO request (rpr) 8	
Timeframe for expected TA:	05/01/2019	
TA delivery preference:	In Person/Onsite	
Description of TA services requested:	Testing CBO request (rpr) 8	
Aspect of program to strengthen or improve:	Testing CBO request (rpr) 8	
Accomplish as a result:	Testing CBO request (rpr) 8	
Recipient Organizations:		
Recipient Organizations	Announcement #	Recipient Contact (s)

Cancel Submit Ticket

21. Review the information displaying in the *Review & Submit* dialog box.

a. If the information is incorrect, click the **Cancel** button, edit the information and then submit the request.

22. Click the **Submit Ticket** button. The dialog box closes.

A *Success* message displays.

Success

Ticket has been submitted successfully!

OK

23. Click the **OK** button. The box closes and the dashboard displays.

24. In the *View TA Activities* box, click the **View Existing** button.

The requests display in the *Existing TA Activities* section.

Note: Requests can be located by searching on any information listed under the column headers.

Show 10 entries Search: _____

TA Number	Assigned Date	Status	Response Due Date	< 6 Hours remaining	Requesting Organization	Region	View
00118	03/20/2019 04:12 PM	Coordinator Review	03/27/2019 04:12 PM	No	CBO (rpr) #40	South	View

25. Locate the *TA number*, the status is *Coordinator Review*, and click the *TA number*, or the **View** link.

The *Coordinator Review* page displays. The status in the status bar is *Creating Request (Coordinator Review)*.

The screenshot shows the CDC CBA TRACKING SYSTEM interface. At the top, there is a navigation bar with links for Home, TA at a Glance, Regional TA Providers, Tutorials/Help, Health Department CTS Users, and Contact Us. Below the navigation bar, there is a status bar with tabs for Creating Request (Coordinator Review), Creating AP, Reviewing AP, Working, and Closed. The main content area displays the details for a Coordinator Review request. The request information is organized into two columns. The left column contains: Request #: 00173, Requestor: Member #40 CBO, Request Add Date: 03/22/2019 11:02 AM, Recipient: Member #40 CBO, Provider: Program Consultant, PC Team Lead, JWG Rep, JWG Team Lead, Description: Testing CBO request (rpr) 8, and Accomplish as a result: Testing CBO request (rpr) 8. The right column contains: Request Status: Coordinator Review on 03/22/2019 11:02 AM, Coordinator: CTS Coordinator #01, Project Officer: Project Officer #07, SME, SME Team Lead, and Regional Lead. At the bottom of the page, there is a header for 'Coordinator Review'.

26. Make note of the *Coordinator's name*, and the *Project Officer's name*.

27. At the top right of the page, click the *drop-down arrow* next to the login name.

The user account information box displays.

The screenshot shows the user account information box. At the top, there is a user profile icon and the text 'Member #40 CBO'. Below this, there is a list of account information: My Account, CBO (rpr) #40, Atlanta Youth for HIV Prevention (rpr), and Logout.

28. Click **Logout**.

The *Logout* dialog box displays.

The screenshot shows the Logout dialog box. It has a title 'Logout' with a lock icon. Below the title, there is a question: 'Are you sure you want to log-off?'. At the bottom, there are two buttons: 'Yes' (blue) and 'No' (red).

29. Click the **Yes** button.

The login page displays.

Login page

The screenshot shows the login page for the CDC CBA Tracking System. At the top left is the CDC logo and the text "CBA TRACKING SYSTEM". A navigation bar contains links for Home, TA at a Glance, Regional TA Providers, Tutorials/Help, Health Department CTS Users, and Contact Us. The main content area features a "TA at a Glance" section with a person icon, a "GO" button, and placeholder text. To the right is a login form with fields for "User ID" and "Password", a "Remember me" checkbox, and a "Forgot password?" link. Below the form are two information banners: one about privacy and security notices, and another about social media use. At the bottom left are promotional banners for World AIDS Day and TRAIN. At the bottom right is a blue "Accept Terms & Conditions and Login" button.