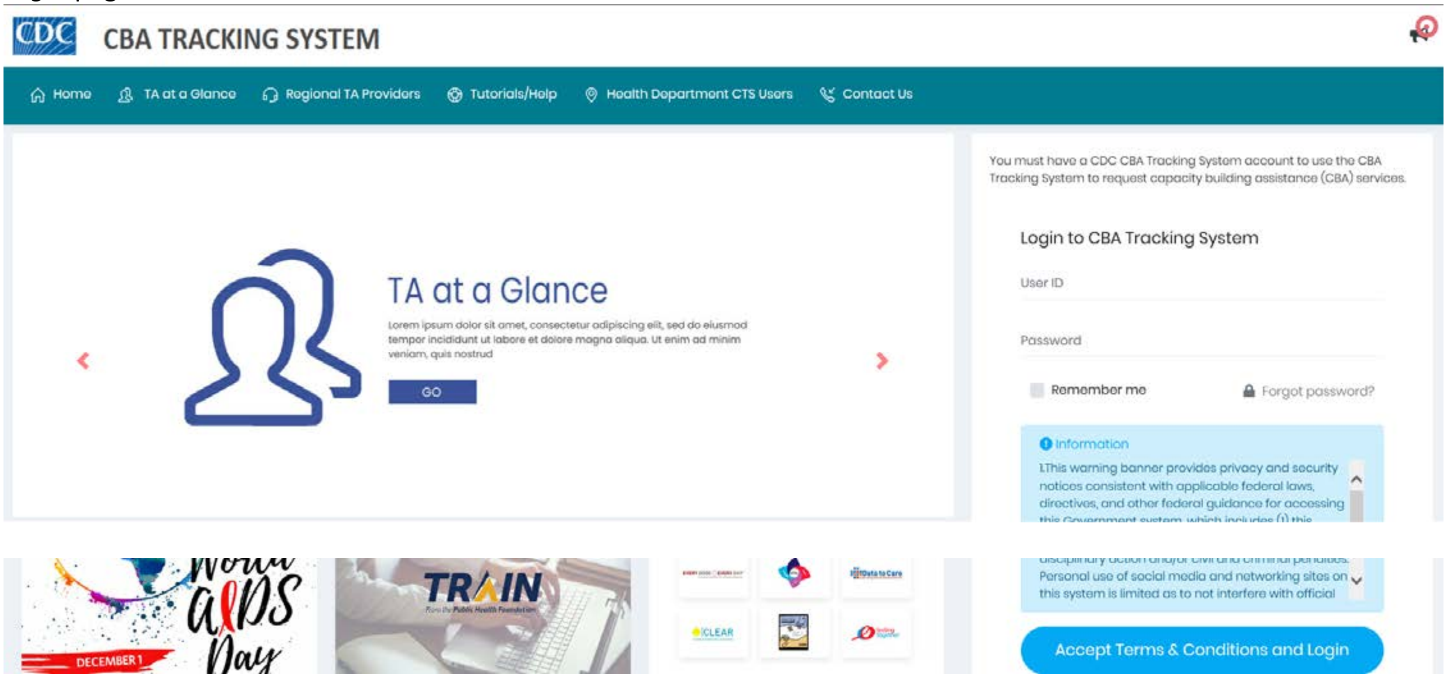
Requestor: Request New TA

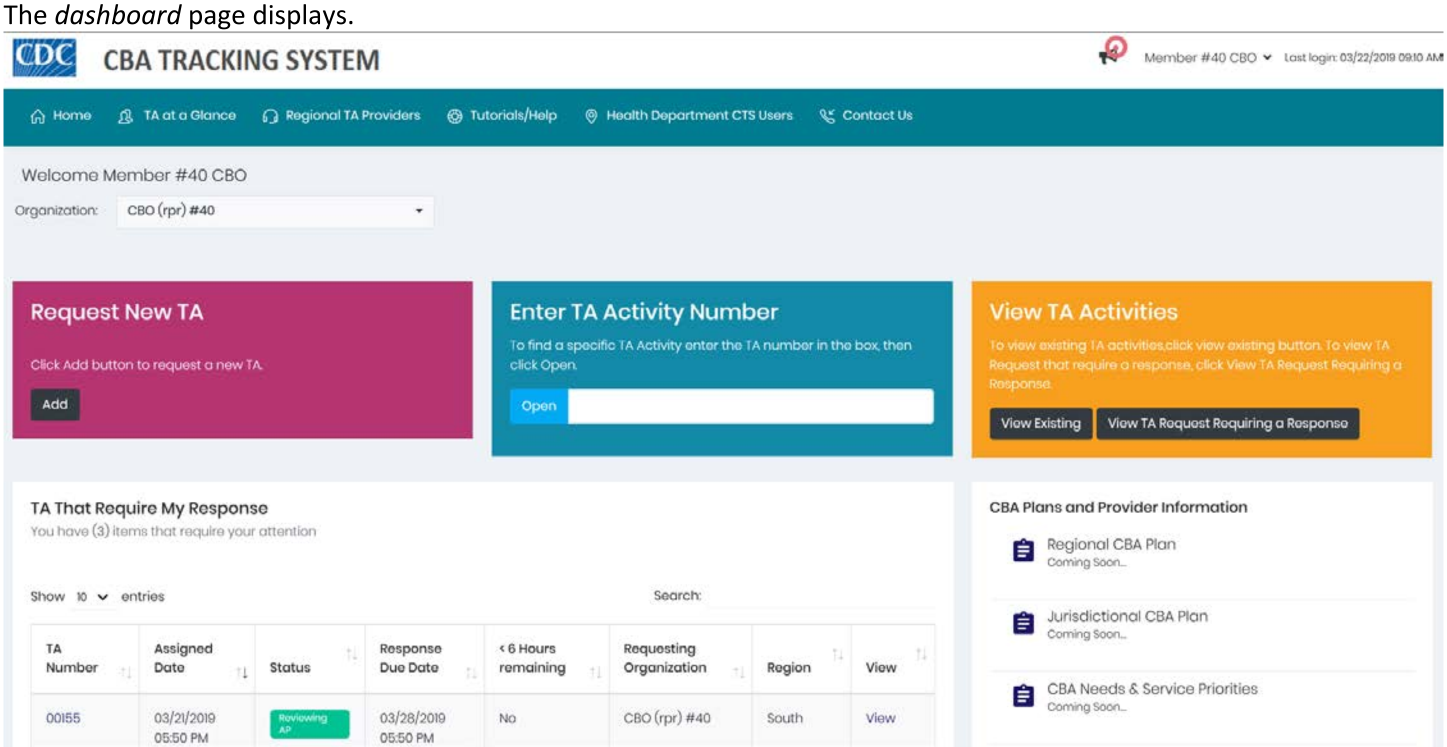
Login page



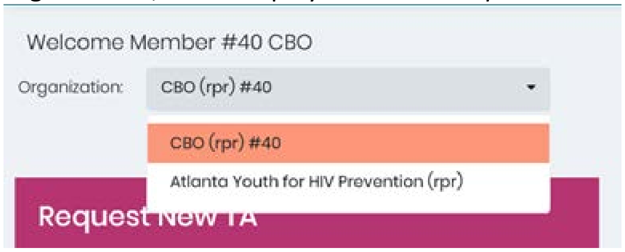
Note: The user needs to be logged in as one of the following user roles: *Health Department*, *CBO*, or *Project Officer*.

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

The *dashboard* page displays.

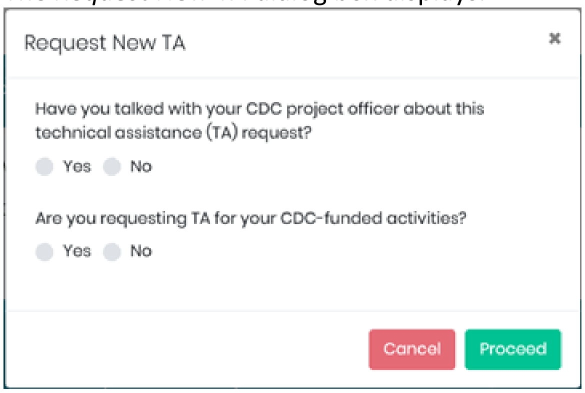


Note: The user's *primary organization* displays in the organization drop-down list. If the user is part of more than one organization, it will display when the *drop-down arrow* is clicked.



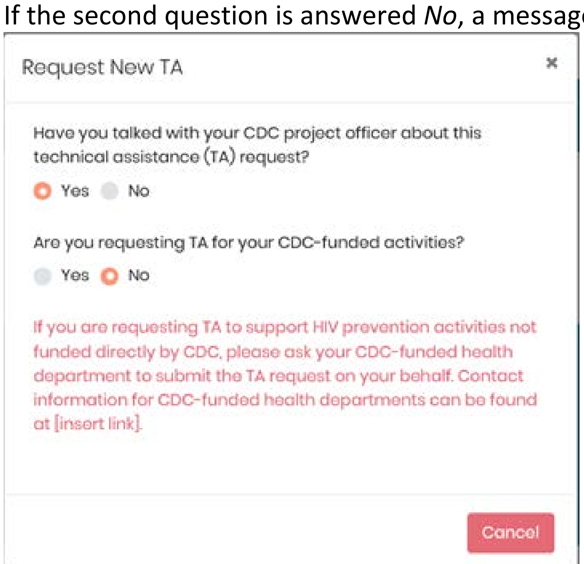
2. In the *Request New TA* box, click the **Add** button.

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.

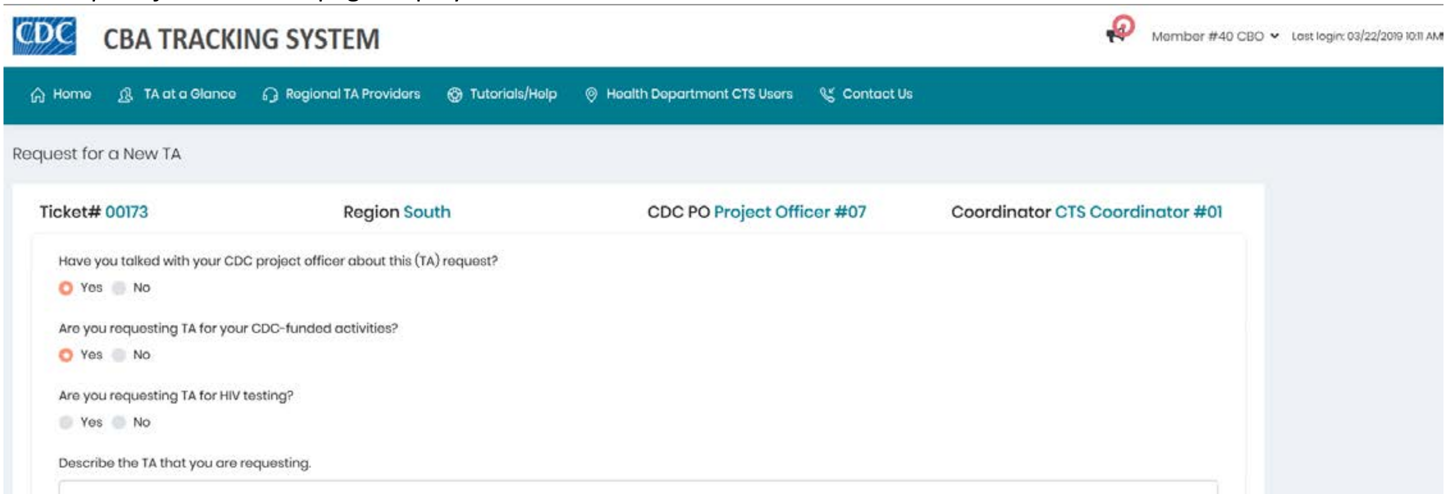


The request cannot be completed. The user will have to contact its *CDC-funded health department* for assistance with submitting the *TA request*.

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.



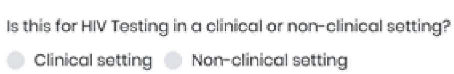
5. A ticket number is generated; make note of this number.

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.

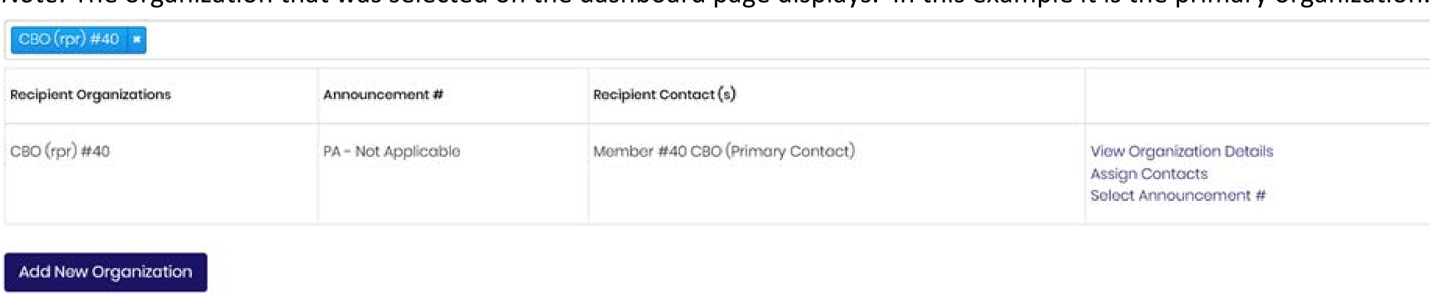
7. If the answer to the question, *Are you requesting TA for HIV testing?* is *Yes*, an additional question displays.



   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.



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

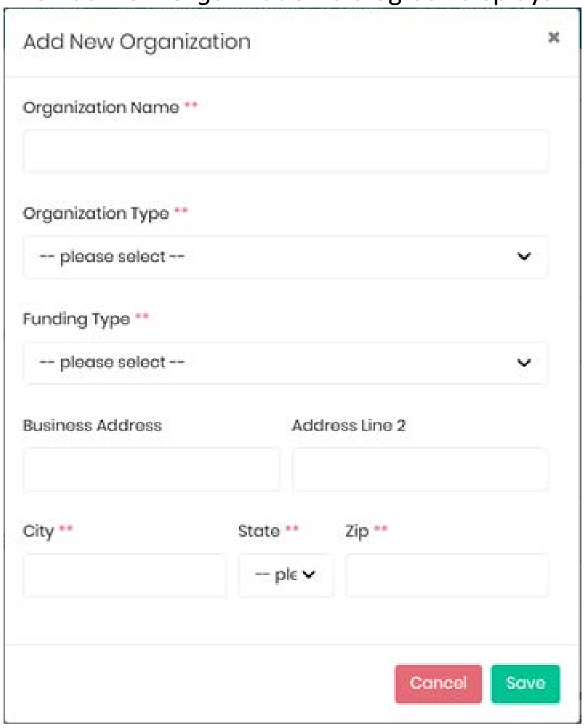
10. To select another organization from the list, begin typing in the organization field to bring the organization name to the top.
    a. Click outside of the organization field to close the list.

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**.

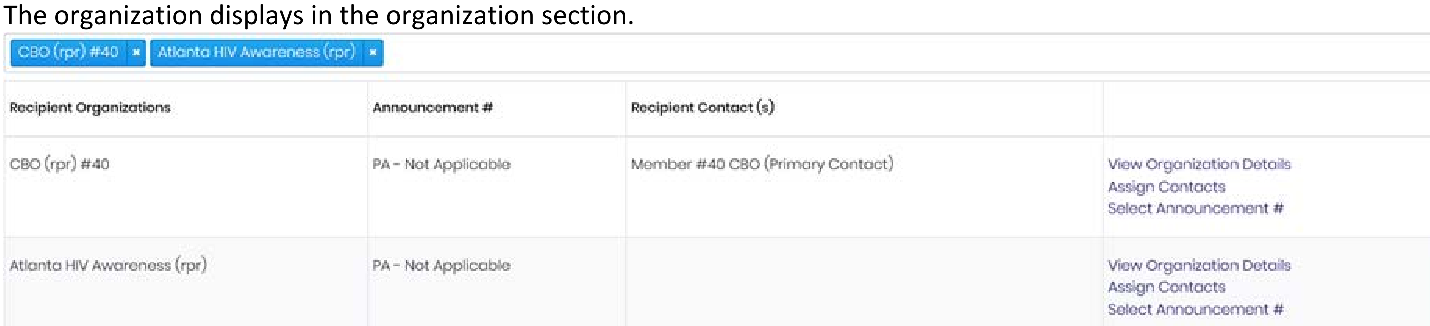
11. To add a new organization, click the **Add New Organization** button.

The *Add New Organization* dialog box displays.



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

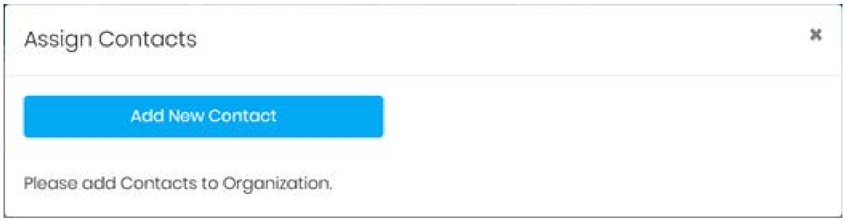
The organization displays in the organization section.


CBO (rpr) #40 × Atlanta HIV Awareness (rpr) ×

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 #

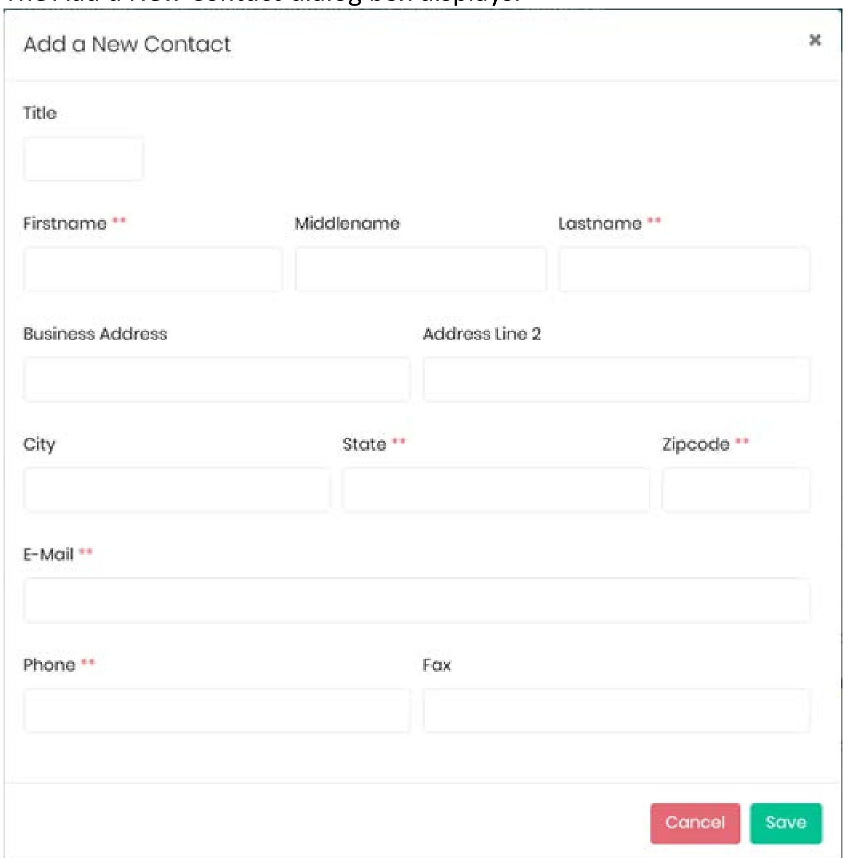
13. Click the **Assign Contacts** link in the last column of the table.

The *Assign Contact* dialog box displays.



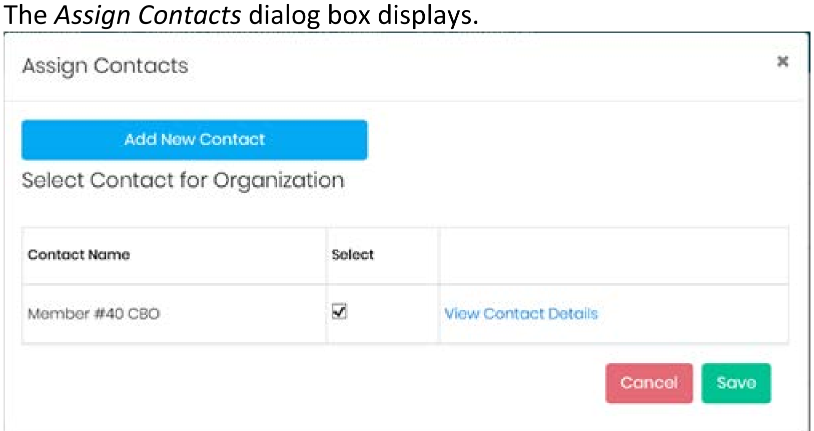
14. Click the **Add New Contact** button.

The *Add a New Contact* dialog box displays.



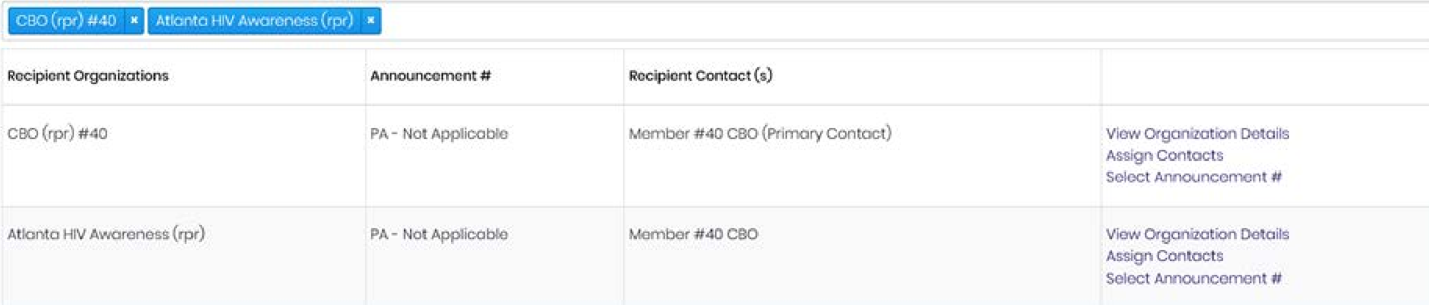
15. Enter the required information and click the **Save** button.

The *Assign Contacts* dialog box displays.



16. Click the **Save** button.

The contact is added to the organization section.



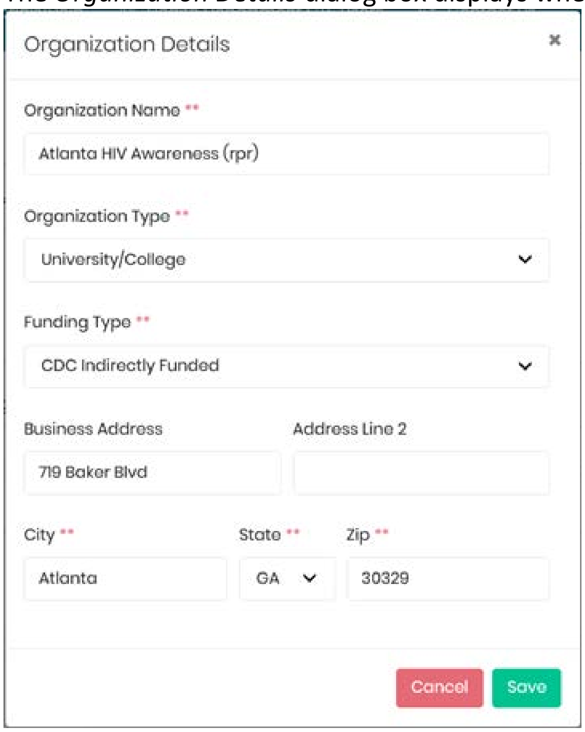
CBO (rpr) #40 × Atlanta HIV Awareness (rpr) ×

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 #

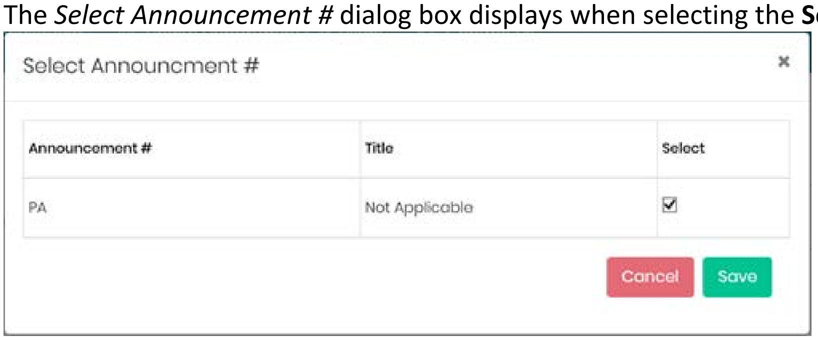
Organizations display three links: **View Organization Details**, **Assign Contacts**, **Select Announcement #**.

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.



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



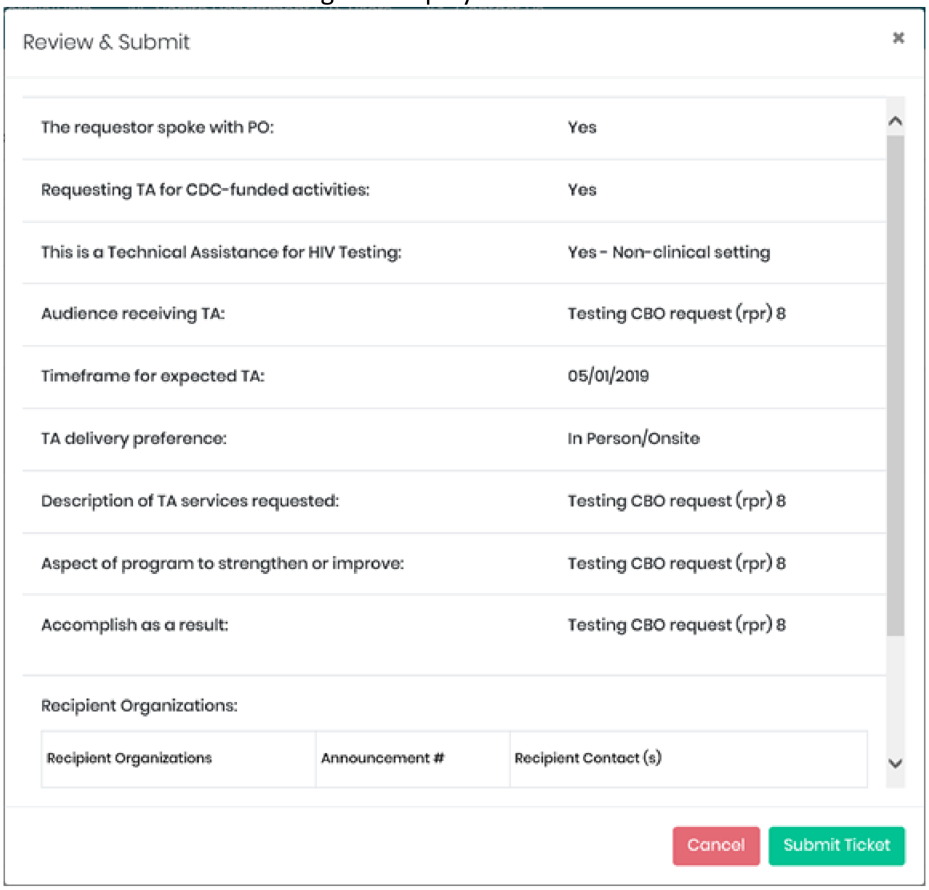
18. Click in the date field to select a date from the calendar or enter a date.

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.



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.

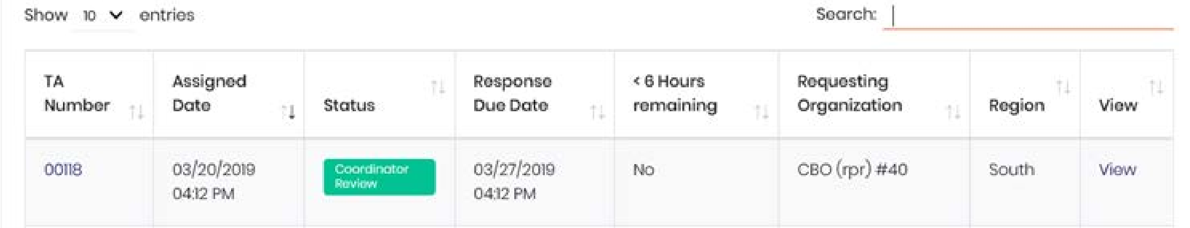
A *Success* message displays.

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.

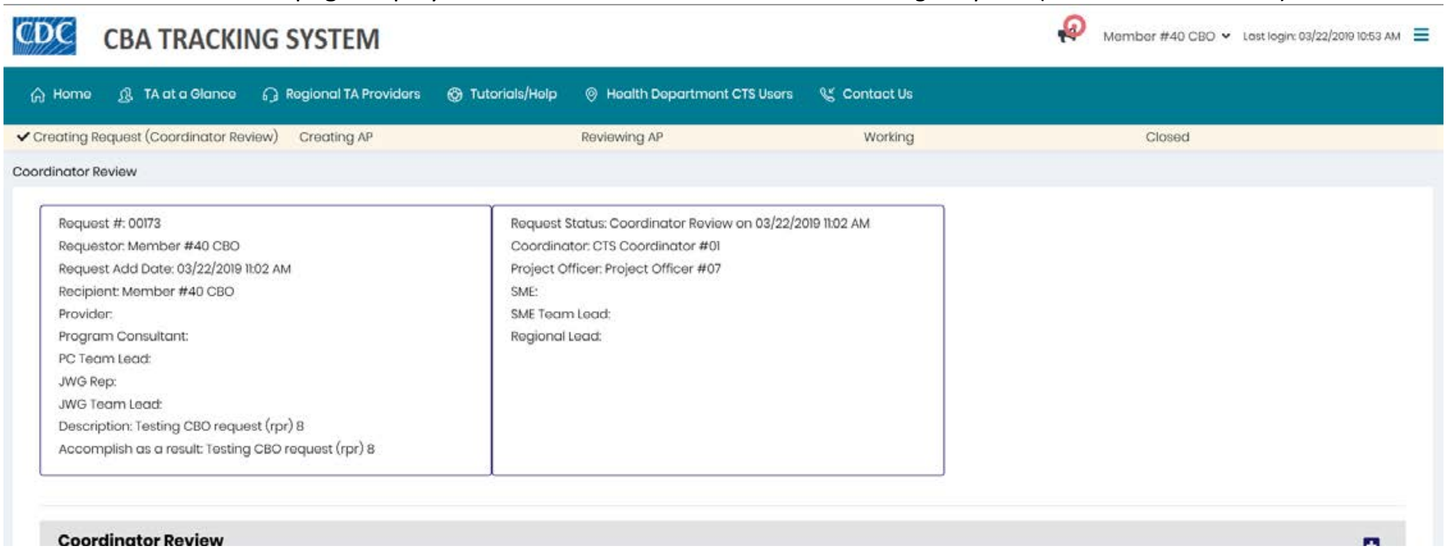


Show 10 entries Search:

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.

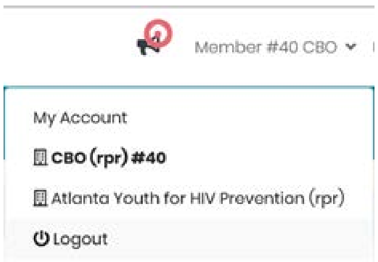
The *Coordinator Review* page displays. The status in the status bar is *Creating Request (Coordinator Review)*.



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.



28. Click **Logout**.

The *Logout* dialog box displays.

29. Click the **Yes** button.

The login page displays.

Login page