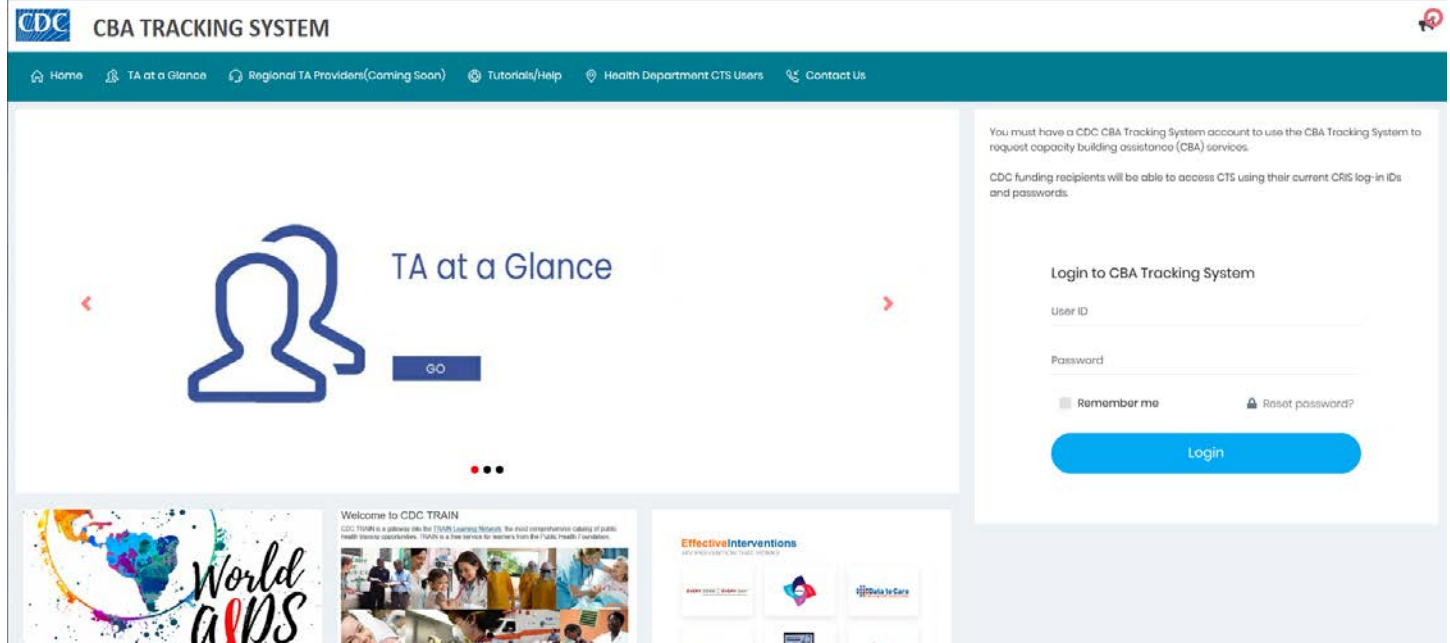


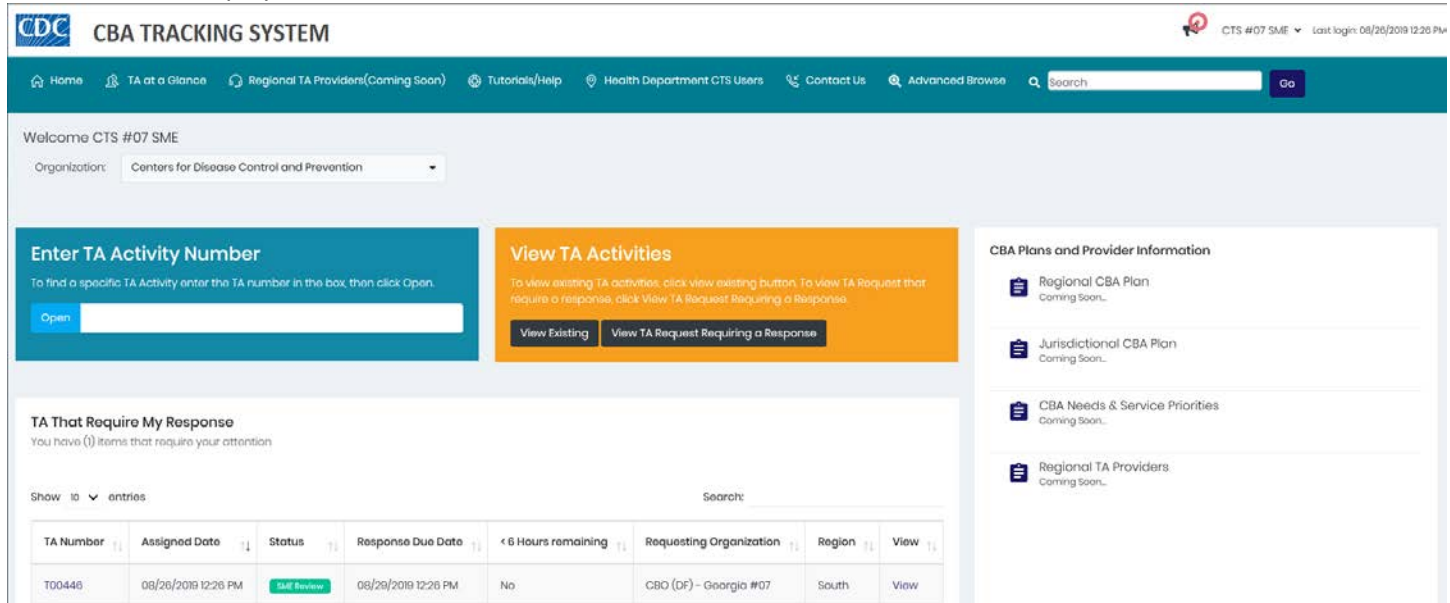
Subject Matter Expert (SME) Review

Login page



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 *SME Review*.

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

CBA TRACKING SYSTEM

Home | TA at a Glance | Regional TA Providers(Coming Soon) | Tutorial/Help | Health Department CTS Users | Contact Us | Advanced Browse | Search

Creating Request (SME Review) | Creating AP | Reviewing AP | Working | Closed

SME Review

Request #: T00446
 Requestor : Member 01 #07 CBO
 Organization: CBO (DF) - Georgia #07 (P517-1704)
 Request Add Date: 08/22/2019 02:32 PM
 Recipient Organization: Multiple Recipients
 Provider:
 Program Consultant:
 PC Team Lead:
 JWG Rep: JWG Rep #07
 JWG Team Lead: JWGTL Rep #02
 Description: Testing CBO request (rpr) 446 **Edit**
 Accomplish as a result: Testing CBO request (rpr) 446c

Region: South
Request Status: SME Review on 08/26/2019 12:26 PM
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

Actions

- Approve
- Decline
- Refer Request
- Link To Resource
- Tracks, Content Areas, HIP Interventions & PHS
- Return To Coordinator

Coordinator Review +

SME Review +

Contact Log +

3. To edit the request description, click the **Edit** button next to the *Description*.

The *Edit Request Description* dialog box displays.

Edit Request Description [X]

Description as entered by Requestor

Testing CBO request (rpr) 2

Additional Description (from Coordinator)

Additional Description (from SME) **

Cancel Save

4. Enter an additional description in the textbox provider.

5. Click the **Save** button.

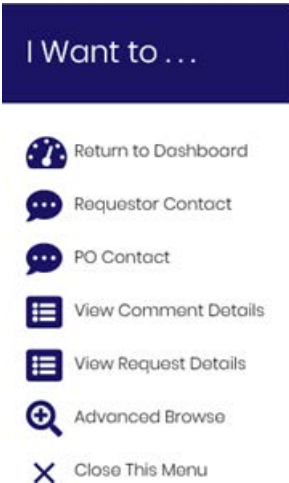
The additional description displays under the original description.

Description: Testing CBO request (rpr) 6 [Edit](#)
additional comment
-- (CBA Coordinator - 03/20/2019)
SME additional comment
-- (SME - 03/20/2019)
Accomplish as a result: Testing CBO request (rpr) 6

6. To contact the *Requestor* or *Project Officer*, click the **I Want to...** menu next the Last Login timestamp.

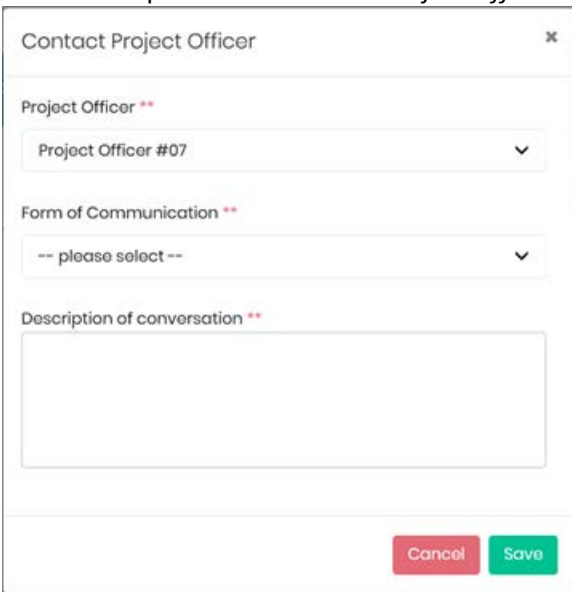


The *I Want to...* menu displays.



If one of the contacts is selected, the contact dialog box displays.

In this example it is the *Contact Project Officer* dialog box.



7. Select an option from the communication drop-down list, enter a comment and click the **Save** button.

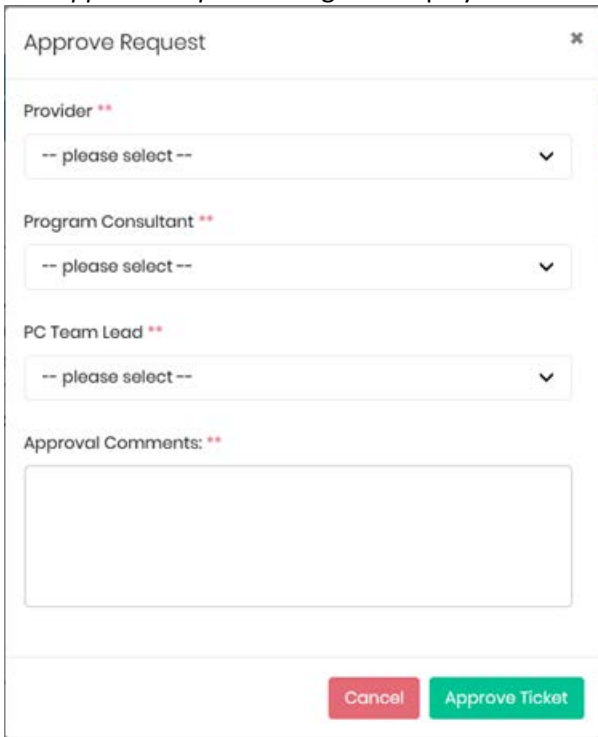
The dialog box closes and the comment displays in the *Contact Log*.

Contact	Contacted By	Contacted With	Form of Communication	Description of conversation	Contacted Date
Contact Requestor	CTS Coordinator #01	Member #40 CBO	Email	comment	03/19/2019 03:26 PM
Contact PO	CTS #07 SME	Project Officer #07	Phone	PO comment	03/19/2019 03:45 PM

[Return to Dashboard](#)
[Request Details](#)

8. Under the *Actions* header, click the **Approve** button.

The *Approve Request* dialog box displays.

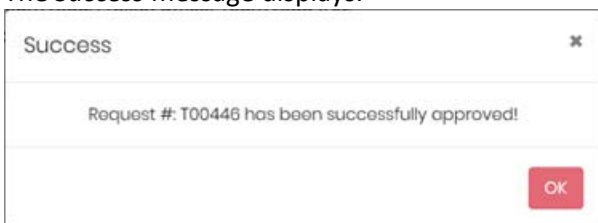


9. Select a name from the drop-down list under each header. *Note: After a Provider is selected, the Program Consultant and PC Team Lead auto-populate.*

10. Enter an approval comment in the textbox provided.

11. Click the **Approve Ticket** button.

The *Success* message displays.



12. Click the **OK** button.

The page refreshes displaying the *Request Home* page; the status in the status bar is *Creating AP (Initial Contact)*.

CDC CBA TRACKING SYSTEM CTS #07 SME Last login: 08/26/2019 12:26 PM I want to...

Home TA at a Glance Regional TA Providers (Coming Soon) Tutorials/Help Health Department CTS Users Contact Us Advanced Browse Search Go

✓ Creating AP (Initial Contact)

Request Home

Request #: T00446 Requestor: Member 01 #07 CBO Organization: CBO (DF) - Georgia #07 (PS17-1704) Request Add Date: 08/22/2019 02:32 PM Recipient Organization: Multiple Recipients Provider: Provider Organization - Georgia (South) #07 Program Consultant: Program Consultant #07 PC Team Lead: Program Consultant Team Lead #02 JWG Rep: JWG Rep #07 JWG Team Lead: JWGL Rep #02 Description: Testing CBO request (rpr) 446 Accomplish as a result: Testing CBO request (rpr) 446c	Region: South Request Status: Creating AP (Initial Contact) on 08/26/2019 12:33 PM 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
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Coordinator Review +

SME Review -

Provider: Provider Organization - Georgia (South) #07 Date Assigned: 08/26/2019 12:26 PM
 Program Consultant: Program Consultant #07
 PC Team Lead: Program Consultant Team Lead #02
 SME Review Status: Request Approved (Request# TA00446) ←

The *SME Review* section expands displaying the approval information. *Note:* The request number updates to *TA#####* instead of *T#####*.

13. Click the *TA#####* request number.

The *Provider Initial Contact* page displays. The status in the status bar is *Creating AP (Initial Contact)*.

CDC CBA TRACKING SYSTEM CTS #07 SME Last login: 8/26/2019 12:26:50 PM I want to...

Home TA at a Glance Regional TA Providers (Coming Soon...) Tutorials/Help Health Department CTS Users Advanced Browse Search Go

Creating Request ✓ Creating AP (Initial Contact) Reviewing AP Working Closed

Provider Initial Contact

Request #: TA00446 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) 446 Accomplish as a result: Testing CBO request (rpr) 446c	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: JWGL Rep #02
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Actions

- View Request Detail
- View/Add Comments
- Request Contacts
- Return to Dashboard

Initial Contact Date **
 Contact Type **
 Contact Name **

Note: The *Initial Contact* section is read-only to anyone other than the provider assigned. This information will be provided by the assigned *Provider*.

14. To view the request details, click the **View Request Details** button.

The *CBA Request Information* page displays.

Request Details Print Return

[Requestor/Recipient Info](#) [Provider Approval Triage Information](#) [Provider Action\(s\)](#) [Action Plan](#) [Completion Information](#) [Comments Information](#)

CBA Request Information

Request #: TA00446
Request Status: Initial Contact
Delivery Mechanism: Technical Assistance (TA)
Add Date: 8/26/2019 **Submit Date:** 8/26/2019
Need Date: 10/3/2019 **Go Live Date:**

Requestor/Recipient Info Top

Point of Contact
Point of Contact Org: CBO (DF) - Georgia #07
Point of Contact: Member 01 #07 CBO **Email:** cbo07@email.com **Phone:** (770) 555-1207

Requestor Details
Requestor: Member 01 #07 CBO **Email:** cbo07@email.com **Phone:** (770) 555-1207
Requesting Org: CBO (DF) - Georgia #07 **City:** Atlanta **State:** GA

Recipient Details
Organization: CBO (DF) - Georgia #07 **City:** Atlanta **State:** GA
Org Announcement: PS17-1704: CBO - Comprehensive High-Impact HIV Prevention Projects for Young Men of Color Who Have Sex with Men and Young Transgender Persons of Color
Organization Type: CBO **Funding Type:** CDC Directly Funded
Org Jurisdiction:
Contact: Member 01 #07 CBO **Email:** cbo07@email.com **Phone:** (770) 555-1207

Organization: CBO Partner (IF) - Georgia #07 **City:** Atlanta **State:** GA
Org Announcement: PS17-1704: CBO - Comprehensive High-Impact HIV Prevention Projects for Young Men of Color Who Have Sex with Men and Young Transgender Persons of Color
Organization Type: CBO **Funding Type:** CDC Indirectly Funded
Org Jurisdiction:
Contact: Member 01 #07 CBO (IF) **Email:** cboif07@email.com **Phone:** (404) 555-1207

General Request Details Top

15. After viewing the details, click the **Return** button in the top banner. The *Request Details* page displays.

16. To view or add a comment, click the **View/Add Comments** button.

The *Request Comments* page displays. *Note:* The **View/Edit/Approve Action Plan** button under *Actions*.

CDC CBA TRACKING SYSTEM CTS #07 SME Last login: 8/26/2019 12:26:50 PM I Want to...

[Home](#) [TA at a Glance](#) [Regional TA Providers \(Coming Soon...\)](#) [Tutorials/Help](#) [Health Department CTS Users](#) [Advanced Browse](#)

Creating Request ✓ Creating AP (Initial Contact) Reviewing AP Working Closed

Request Comments

<p>Request #: TA00446 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) 446 Accomplish as a result: Testing CBO request (rpr) 446c</p>	<p>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</p>
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Number of comments to display per page

Comment Details	Comment	Available Actions	
-----------------	---------	-------------------	--

Actions

-
-
-
-

17. To add a comment, scroll to the bottom of the page and click the **Add Comment** button.

The comment textbox displays.

Please enter your new comment

Spell Check Info

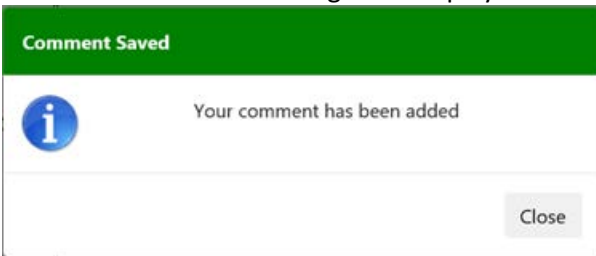
Display comment to only CDC users

Allow deletion of comment

- 18. Add a comment.
 - a. If desired, check the *Display comments to only CDC users* checkbox.
 - b. If desired, check the *Allow deletion of comment* checkbox.

Click the **Save Comment** button.

The *Comment Saved* message box displays.



Click the **Close** button.

The new comment displays in the comments section.

Number of comments to display per page

Comment Details	Comment	Available Actions
Date: 3/12/2019 3:13 PM From: CTS #07 SME Type: General Comment	Adding a comment (rpr).	Delete Comment
Date: 3/12/2019 2:50 PM From: CTS #07 SME Type: Ticket Provider Assigned	CTS #07 SME assigned Provider on 03/12/2019 02:50 PM	

- 19. To view contacts assigned to the request, click the **Request Contacts** button.

The *Request Contacts* page displays.

Request Contacts

Request #: TA00446 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) 446 Accomplish as a result: Testing CBO request (rpr) 446c	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: JWGL Rep #02
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- Actions**
- [View Request Detail](#)
 - [View/Add Comments](#)
 - [Request Contacts](#)
 - [Return to Dashboard](#)

Request Contacts			
CDC Contacts			
Position	Name	Email	Phone
CBA Coordinator	CTS Coordinator #01	CTSC01@email.cdc	(678) 552 - 1201
Program Consultant	Program Consultant #07	pcons7@gmail.gov	(678) 555 - 1207
Program Consultant Team Lead	Program Consultant Team Lead #02	pconst10@email.gov	(678) 556 - 1202
Project Officer	Project Officer #07	poff07@email.gov	(678) 550 - 1207
Project Officer Team Lead	Project Officer Team Lead #02	poff02@email.gov	(678) 551 - 1202
Subject Matter Expert	CTS #07 SME	sme07@email.gov	(678) 555 - 0007
Subject Matter Expert Team Lead	CTS #02 SME Team Lead	smet102@email.gov	(678) 555 - 0102
JWG	JWG Rep #07	jwgrep07@email.gov	(678) 555 - 9010
JWG Team Lead	JWGL Rep #02	jwgrepTL2@email.gov	(678) 555 - 9007
Regional Lead	Regional Lead #02	regtl2@email.gov	(678) 555 - 8002

Provider Contact			
Provider Organization - Georgia (South) #07			
Organization	Name	Email	Phone
CBO (DF) - Georgia #07	Member 01 #07 CBO	cbo07@email.com	(770) 555 - 1207

Point of Contact			
Organization	Name	Email	Phone
CBO (DF) - Georgia #07	Member 01 #07 CBO	cbo07@email.com	(770) 555 - 1207

Recipient Organization(s) Contacts			
Organization	Name	Email	Phone
CBO (DF) - Georgia #07	Member 01 #07 CBO	cbo07@email.com	(770) 555 - 1207
CBO Partner (IF) - Georgia #07	Member 01 #07 CBO (IF)	cboif07@email.com	(404) 555 - 1207

Requesting Organization Contact			
Organization	Name	Email	Phone
CBO (DF) - Georgia #07	Member 01 #07 CBO	cbo07@email.com	(770) 555 - 1207

- [Send to MS Word](#)
- [Return to Request Home](#) [Return to Dashboard](#)

20. Click the **Return to Dashboard** button.

The dashboard page displays. The request is removed from the *TA That Require My Response* section.



Welcome CTS #07 SME

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.

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.

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...

TA That Require My Response

You don't have any items that require your attention