# TA Provider Upload Jurisdictional CBA Plan

*Note:* The user must be logged in as a *TA Provider* and be the *Lead TA Provider* on the jurisdictional CBA plan final draft.

• If a jurisdictional CBA plan needs to be deleted, contact the CTS Coordinator.

CDC	C	BA TRA	CKING SYS	TEM							Member	01 #25 Provider 👻 L	ast login: 06/23/2020 10×
©Home	BTA at a	Glance	G CBA Provider In	formation	CBA Plant	Information	©Tutorials/Help	©Health Depc	irtment CTS Users	SContact Us	QAdvanced Browse	Q Search	Go
elcome Mer Organization				(South) #25	Regional ( (Coming Sou								
	Organization: Provider Organization - South Carolina (South) #2 Request New Technical Assistance (TA) Click Add button to request a new TA.					<u>xnal CBA Pian</u> ◀ Is & Service an)	Stivity Numl	<b>Def</b>	then click Open.	To view exist			
ere are no TA Tr			to show										
now 1,000 ¥ er	ntries										Sea	rch:	
TA Number	t.	Assigned	Date	Status		Response Due	Date	< 6 Hours rema	ining	Requesting Or	ganization	T. Region	11 View
							No data av	vailable in table					
nowing 0 to 0 of	0 entries												
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1. Place the mouse pointer over the CBA Plans Information menu and click the Jurisdictional CBA Plan link.

	CDA III	ACKING SYSTEM						Member	01 #25 Provider ¥ Last	login: 06/23/2020
Home	्रिTA at a Glance	CBA Provider Information	CBA Plans Information	@Tutorials/Help	©Health Departr	ment CTS Users	SContact Us	QAdvanced Browse	Q Search	
sdictior	nal CBA Plan Informa	tion								
JCBA F	Plan Announcement # :	Select	V JCBA Plan	Year:	Select		~			
S	elect JCBA Plan where I	am the Lead Provider								
List of	Jurisdictional Health	Departments:								
cior or	danisario don carrio data	bopara nonto :								
Show 1	100 🗸 entries				Search	ĸ				
	Jurisdiction Organizations	Assignments	Stat	us II		< 6 hours remaining	Actions			
		Assignments	Stat	us Tř			Actions			
Healt	Organizations	Plan Year: 1 Announcement #: 18-1802a	Not Received	us T2						
Healt	Organizations	Plan Yoar : 1 Announcement #: 18-1802a Lead Provider Organization : Provide	Not Received	us Tł						
Healt	Organizations	Plan Year: 1 Announcement #: 18-1802a	Not Received	us Tł						
Healt	Organizations	Plan Year : 1 Announcement #: 18-1802a Lead Provider Organization : Provide Organization - South Carolina (South	Not Received	us 12						
Healt	Organizations	Plan Year : 1 Announcement #: 18-1802a Laad Providor Organization : Provide Organization - South Corolina (South HDC: Mambar 02 #25 HDC	Not Received	us Ti						
Healt	Organizations	Plan Yoar: 1 Annouincement #: 18-1802a Load Provider Organization : Provide Organization - South Carolina (South HDC: Member 02 #25 HDC JWG: JWG Rop #04	Not Received	us						
Healt Carol	Organizations	Plan Yoar: 1 Announcement #:18-1802a Load Provider Organization: Provida Organization - South Carolina (South HDC: Mambar 02 #35 HDC JWG: JWG Rap #04 Project Officer Project Officer #25	Not Received	us Tł						
Healt Carol	Organizations 1	Plan Yaor: 1 Announcement #:18-1802a Load Provider Organization: Provide Organization - South Carolina (South HDC: Member 22 #25 HDC JWG: JWG Rep #04 Project Officer Project Officer #25 Regional Lead: Regional Lead #01	Not Roceived	us Ti			Add JCBA Plan			

The CBA Plan Information paged displays.

# Narrow Display Results

- To narrow the display of jurisdictional CBA plans on the page, select a *JCBA Plan Announcement #* from the drop-down list. To further narrow the results, select a *JCBA Plan Year* from the drop-down list.
- Or click the checkbox *Select JCBA Plan* that require my response to narrow the results.

2. Locate the JCBA plan in the list; verify the status is *Not Received* and click the **Add JCBA Plan** link in the *Actions* column.

The Add New JCBA Plan dialog box displays.

Add New JCBA Plan	×
HDC JCBA Plan Approver's Name : Member 02 #26 HDC	
HDC JCBA Plan Approver's Title : JCP Health Dept Contact	
HDC JCBA Plan Approver's Email : hd26a@email.com	
HDC JCBA Plan Approver's Phone : 5125511226	
Lead Jurisdictional JCBA Plan Provider : Provider Organization - South Carolina (South) #25	
JCBA Plan Year : 1	
Plan Year Start Date : 06/17/2020 Plan Year End Date : 06/17/2021	
CBA Plan Input Type :	
Upload unapproved JCBA Plan Input JCBA Plan Data	

3. Under the CBA Plan Input Type header, click the **Upload unapproved JCBA Plan** radio button.

#### The JCBA Plan Meeting Date calendar display.

Add New JCBA Plan	×
HDC JCBA Plan Approver's Name : Member 02 #26 HDC	
HDC JCBA Plan Approver's Title : JCP Health Dept Contact	
HDC JCBA Plan Approver's Email : hd26a@email.com	
HDC JCBA Plan Approver's Phone : 5125511226	
Lead Jurisdictional JCBA Plan Provider : Provider Organization (South) #25	n - South Carolina
JCBA Plan Year : 1	
Plan Year Start Date : 06/17/2020 Plan Year End Date	: 06/17/2021
CBA Plan Input Type :	
🗿 Upload unapproved JCBA Plan 🍵 Input JCBA Plan Da	ta
Upload Start Date : 06/17/2020 Upload End Date : 0	07/17/2020
JCBA Plan Meeting Date	
mm/dd/yyyy	
	Proceed Close

4. Enter the date that you met with the health department contact (HDC).

## 5. Click the **Proceed** button.

The Jurisdictional CBA Plan Upload page displays.

CBA TRACKING SYS	TEM					Member 01 #25	Provider 👻 Last login	n: 6/23/2020 10:42:05 AM
e 🤱 TA at a Glance 🎧 CBA	Provider Information	G CBA Plans Information	Tutorials/Help	Health Department CTS Users	🕊 Contact Us	Q Advanced Browse	Q Search.	Gol
Jurisdictional CBA Plan Uploc	ıd							
Instructions for importing Jurisdia • Salect Provider organization • Click browse and locate the • Click Load Excel Document • Click Upload Jurisdictional C Show/Hide Instructions	you want to upload Jur Excel file to be process	isdictional CBA Plan for from t	he dropdown					
Announcement No	18-1802b Jurisdiction	nal CBA Plan - for uploading p	lan with errors					
HD Organization	Health Department	- 1948 - 1921						
	nour reoperation	- Texas #28						
Lead Provider Organization		- Texas #28 on - South Carolina (South) #	25					
			25					
Lead Provider Organization			25					

*Note:* The instructions for importing a jurisdictional CBA plan from Excel displays at the top of the page. Click the **Show/Hide Instructions** button to hide the instructions.

The information from the jurisdictional CBA plan auto-populates the fields on the page, as does the *JCBA Plan Meeting Date* that was entered in the dialog box.

## 6. Click the **Browse...** button.

#### The File Explorer window displays.

י א <u>מי</u> אין	S 2019 → Release Number 3.0 CBA Plans → Test D	ocuments → Upload	files 🗸 🗸	G	Search Upload files	i	
ganize 👻 New folde	er					•	(
^	Name	Date modified	Туре	Size			
Quick access	🖬 1.1.11 Issue Collaborator Settings.docx	4/27/2020 6:11 PM	Microsoft Word D		48 KB		
Desktop 🖈	FINAL 2_AL-Jurisdictional-Plan-CBA Orig	6/18/2020 7:38 AM	Microsoft Excel W		27 KB		
🚆 Documents 🖈	FINAL 2020_AL-Jurisdictional-Plan-CBA	6/11/2020 2:58 PM	Microsoft Excel W		30 KB		
👆 Downloads 🛛 🖈	FINAL 2020_AZ-Jurisdictional-Plan-CBA	6/18/2020 9:02 AM	Microsoft Excel W		30 KB		
Nictures 🛷	FINAL 2020_CA-Jurisdictional-Plan-CBA	6/12/2020 2:32 PM	Microsoft Excel W		27 KB		
Monthly-Stat 🖈	📧 FINAL 2020_CA-Jurisdictional-Plan-CBA	6/18/2020 9:00 AM	Microsoft Excel W		30 KB		
Email	😰 FINAL 2020_CHI-Jurisdictional-Plan-CBA	6/18/2020 8:59 AM	Microsoft Excel W		30 KB		
Test-Docs-for-U	😰 FINAL 2020_CO-Jurisdictional-Plan-CBA	6/18/2020 8:58 AM	Microsoft Excel W		30 KB		
UAT	😰 FINAL 2020_DE-Jurisdictional-Plan-CBA	6/11/2020 3:15 PM	Microsoft Excel W		30 KB		
	🖬 FINAL 2020_FL1-Jurisdictional-Plan-CBA	6/12/2020 4:03 PM	Microsoft Excel W		27 KB		
Unapproved Upl	🖬 FINAL 2020_GA-Jurisdictional-Plan-CBA	6/18/2020 8:57 AM	Microsoft Excel W		30 KB		
This PC	📳 FINAL 2020_HW-Jurisdictional-Plan-CBA	6/18/2020 9:03 AM	Microsoft Excel W		30 KB		
	FINAL 2020_IA-Jurisdictional-Plan-CBA O	6/18/2020 9:03 AM	Microsoft Excel W		30 KB		
File na	ame:			~	All Files (*.*)		

7. Select an Excel file from a File Explorer folder and click the **Open** button.

# 8. Click the Load Excel Document button.

The JCBA Plan Details page displays in the background. The Unapproved Jurisdictional CBA Plan message displays in the foreground.

	BA TRAC	KING SYSTEM					Mamb	ar 01 #25 Provider	<ul> <li>Lost login 06/26/2020</li> </ul>
Home STA at	a Clance	CBA Provider Information	C CBA Plans Infor	mation ©Tutoric	als/Help ©Health Department CTS Use	rs Contact Us	QAdvanced Browse	Q Search	
BA Plan Details									
lurisdiction Organizatio	on Announceme	artment - South Carolina #25 nt : 18-1802a ganization - South Carolina (S	Plan Ye	an Status : Creating ar : 1 pporting Documents Up	logiot-No	Actions	Add JCBA	Plan Issue	
ICBA Plan Meet Date :0 ICBA Plan Received Da	6/25/2020 to :		No. of I JCBA P	sues Added : 12	led Unapproved JCBA Plan		Complete	UCBA Plan	
IDC Approval Date : IWG Approval Date :				oprover : JWG Rep #04			Return to JCBA Plan Dashboard		
PO Approval Date : Regional Lead Approva	i Dato :		Rogio JCBA	Unapproved Juriso			View Pic	n Dotails	
			JCBA		uploaded successfully. You have issues that pleted (Please resolve incomplete issues)		View Plan Co	nment Details	
ICBA Plan Issues					ок				=
ihow 10 🗸 entries							Sec	rch:	
Issue Number 👘	Priority 🔒	Coordinator Name	Recipient Type	Request Type	Lead Provider Organization	11 Co	mpleted	to II V	View Issue Details
SC0014	14	Tost Usor 14	Health Deparment	Training	Provider Organization - South Carolina (	South) #25	No 06/25/2020	12:06 PM	Viow
SC0013	13	Tost Usor 13	Health Deparment	Training	Provider Organization - South Carolina (	South) #25	No 06/25/2020	12:06 PM	View

9. Click the **OK** button.

#### The issues display in the JCBA Plan Issues list.

ow 10 🗸 entries							Search:	
Issue Number	Priority 斗	Coordinator Name	Recipient Type	Request Type	Lead Provider Organization	Completed	Add Date	View Issue Dotails
SC0014	14	Test User 14	Health Deparment	Training	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	View
SC0013	13	Test User 13	Health Deparment	Training	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	View
SC0012	12	Tost Usor 12	Health Deparment	TA	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	Viow
SCOON	11	Test User 11	Health Deparment	ТА	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	View
SC0008	8	Test User 8	Health Deparment	ТА	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	View
SC0007	7	Test Usor 7	Health Deparment	TA	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	View
SC0006	6	Test Usor 6	Health Deparment	ТА	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	Viow
SC0005	5	Test Usor 5	Health Deparment	ТА	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	Viow
SC0004	4	Test Usor 4	Health Deparment	TA	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	Viow
SC0003	3	Test User 3	Health Deparment	TA	Provider Organization - South Carolina (South) #25	No	06/25/2020 12:06 PM	View

*Note:* The issues are listed as incomplete (No in the *Complete* column).

10. To complete an issue, select an issue in the list and click the issue number in the **Issue Number** column or the **View** link in the *View Issue Details* column.

The New JCBA Issue page for the announcement that was uploaded displays.

CDC	CBA TR	ACKING SYSTEM					Rember	01 #25 Provider 👻 Last	login: 06/25/2020 1158 AM
GHome	A at a Glance	Q CBA Provider Information	CBA Plans Information	@Tutorials/Help	Health Department CTS Users	Contact Us	QAdvanced Browse	Q Search	Go
New JCBA	ssue for Announcer	ment #:18-1802a							
Issue Nu	imber:SC 0014								
Priority	Number: 14								
Issue Co	oordinator								
ple	ase select	8	Yest U	sor 14					
Issue Co	oordinator Email								
Testu	ser14@email.com								
Recipier	nt Type : **								
Healt	h Department	•	•						
Request	туре:**		Sub Track	s ; **					
Traini	ng	2	Provent	ion for HIV-Negative Pers	ions 🗸				
Interver	ntion :								
Safe i	n the City (SITC)								

Issue Collaborator		
New England AETC =		
Collaborator Organizations	Is 1904 Collaborator Provider?	Yes/No
New England AETC		No
Plan Year start date : 06/16/2020	Plan Year end date : 08/18/2021	
Proposed start date : **	Proposed end date : **	
11/01/2020	11/30/2020	
Problem Narrative: ** (Maximum 800 Characters)		
Expected Results : ** (Maximum 800 Characters)  • Increased percentage of persons with HIV in Ohio who a Additional Comments : (Maximum 800 Characters)	are medically adherent, resulting in a decrease in community viral load. Rela	ted to the Treat strategy of EtHE plan.
Increased percentage of persons with HIV in Ohio who a		tod to the Treat strategy of EBHE plan.

# 11. Make changes as needed, or leave the issue as it is.

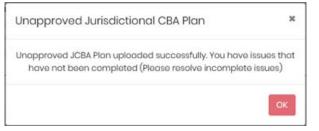
# 12. Click the Save Issue button.

# The *Issue Save* message displays.

Issue Save		ж
	Issue Saved Sucessfully	
		ок

13. Click the **OK** button.

#### The Unapproved Jurisdictional CBA Plan message displays.



*Note:* This message displays each time an issue is saved or deleted until all issues are completed.

### 14. Click the **OK** button.

In the Completed column, Yes displays for the issue that was completed.

CBA Plan Issues								-
now 10 🗸 entries							Search:	
Issue Number	Priority 1	Coordinator Name	Recipient Type	Request Type	Lead Provider Organization	Completed 1	Add Date	View Issue Details
SC0014	14	Test User 14	Health Deparment	Training	Provider Organization - South Carolina (South) #25	Yos	06/25/2020 0til PM	View

15. To delete an issue, click the **Delete Issue** button at the bottom of the New JCBA Issue page.

## The Confirm message displays.

Confirm			×
	Do you want to delete this issue?		
		Yes	No

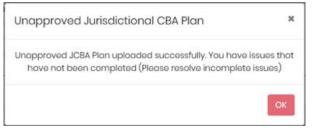
### 16.Click the **Yes** button.

#### The Issue Deleted message displays.



17. Click the **OK** button.

### The Unapproved Jurisdictional CBA Plan message displays.



#### 18. Click the **OK** button.

19. Complete or delete the remaining issues as needed.

When the last issue is completed, a *Confirm* message displays.

Confirm		×
	Do you want to add more issues?	
		Yes No

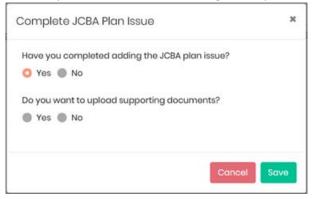
20. Click the **Yes** button to add another issue, or the **No** button if no more issues need to be added. In this example, *No* was selected.

The Complete JCBA Plan Issue dialog box displays.

Complete JCBA Plan Issue	×
Have you completed adding the JCBA plan issue?	
Cancel	Save

#### 21. Select the Yes radio button.

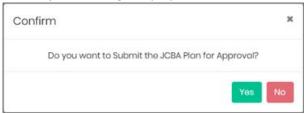
The Complete JCBA Plan Issue dialog box expands to display another question.



22. Select the **Yes** radio button to upload supporting documents, or the **No** radio button if no supporting documents are being uploaded. In this example, *No* was selected.

23. Click the **Save** button.

#### The Confirm message displays.



# 24. Click the Yes button.

### The Confirm message displays.

Confirm	×
Your JCBA Plan has been Submitted for Approval	
	ок

# 25. Click the **OK** button.

### The Confirm message displays.



26. Click the JCBA Plan Dashboard button.

#### The Jurisdictional CBA Plan Information page displays.

C	CDA TRA	ACKING SYSTEM						Member	01 #25 Provider 👻 Last log	gi i ooj zoj 2020 104	
Home B	TA at a Glance	CBA Provider Information	CBA Plans Information	©Tutorials/He	ip ©Health De	partment CTS Users	SContact Us	QAdvanced Browse	Q Search	Go	
sdictional CE	3A Plan Informa	tion									
JCBA Plan An	nouncement #:	Select	✓ JCE	A Plan Year :	Select	1. 192	~				
😰 Select J	CBA Plan where I	am the Lead Provider									
List of Juriso	dictional Health	Departments :									
Show 100 🗸	entries				S	earch:					
Jurisdiction	Organizations	Assignments		Status	Due Date by	< 6 hours remaining	Actions				
	irtment – Texas	Plan Year (1	Not R	Not Received			Add JCBA Plan				
#26	Announcement #: 18-1802b Lead Provider Organization : Provid - South Carolina (South) #25	er Organization									
		HDC: Member 02 #26 HDC JWG: JWG Rep #04									
	Project Officer: Project Officer #28 Regional Lead: Regional Lead #01										
Health Department - South Carolina #25		Plan Year : 1	Creo	ng on 06/22/2020 Complete JCBA Plan							
	Announcement #: 18-1802 Lead Provider Organization : Provid - South Carolina (South) #25	er Organization				Pilli					
Health Department - South Corolina #25	Plan Year : 1		Pending Approval HDC on 08/23/2020								
	Announcement #: 18-1802a										
	Lead Provider Organization : Provid - South Carolina (South) #25	er Organization									
	HDC: Member 02 #25 HDC										
	JWG: JWG Rop #04										
	Project Officer: Project Officer #25										
	Regional Lead: Regional Lead #01										
Showing 1 to 5	of 5 entries						Previous 1 Next				

*Note:* You may have to scroll down the page to see the JCBA plan just created.

• The status is *Pending Approval HDC*. The link in the *Actions* column is updated to **View CBA Plan Details**.