Division of HIV/AIDS Prevention (DHAP)
Capacity Building Branch (CBB)

Capacity Building Assistance (CBA)Tracking System (CTS)

Community Base Organization (CBO) – Submit New CBA Request

Slide 1 – Title Slide

Welcome to the tutorial Community-Based Organization (CBO) Submit New CBA Request. This tutorial provides the Centers for Disease Control and Preventions (CDC) directly funded community-based organization step-by-step instructions for submitting a new CBA request using the **C**apacity Building Assistance **T**racking **S**ystem, also known as CTS.

Slide 2

Please take a moment to read the content of this slide before proceeding.

Slide 3

By the end of this tutorial, you will know how to:

- ✓ Access the CTS dashboard
- ✓ Add a new CBA request
- ✓ Identify the new CBA request details
- ✓ Select a CBA request topic
- ✓ Save a request for later
- ✓ Select a recipient organization(s) and a contact
- ✓ Add a new organization and contact
- ✓ Change a request point of contact
- ✓ Select a start date and delivery method
- ✓ Use the New Request page navigation buttons

Slide 4

Access the CTS Dashboard

To access the CTS *dashboard*, the CBO contact must have an active user account in CTS.

Use the following url to access the CBA Tracking System (CTS)

https://wwwn.cdc.gov/CTS

The CTS login landing page displays.

Enter your username and password and click the Login button. Accept the Terms and Conditions.

The CTS dashboard displays.

Slide 5

Add a New Request

From the CTS dashboard click the **Add** button in the Request New Technical Assistance (TA) box.

The Request New Technical Assistance (TA) dialog box displays prompting you to answer two questions: "**Have you talked with your CDC project officer about this technical request? ****" Respond Yes or No. **Note:** Responding NO does not prohibit you from submitting the new CBA request.

And **"Are you requesting TA for you CDC-funded activities? ****" Respond Yes or No

Click the **Proceed** button. The Request for a New Reactive TA page is displayed.

Slide 6

NOTE: If the response to the question **"Are you requesting TA for your CDC-funded activities? **"** is **No**, when the **Proceed** button is clicked, the system will displays the message: *If you are requesting TA to support HIV prevention activities not funded directly by CDC, please ask your CDC-funded health department to submit the TA request on your behalf. Contact information for CDC-funded health departments can be accessed by using the* click here *link.*

When the click here link is selected, the system displays the Health Department CTS User list. Select the desired state from the "State Listing". The system will display the corresponding CDC directly-funded health department name and contact information to submit the CBA request on your behalf.

Slide 7

The New Request Details

From the *Request for a New Reactive TA* page, the New Request number displays in the upper left corner of the page. **Please note** the request number you will need it for future access to the request. In this example the new request # is ###.

Also listed in the upper left corner of the page are the ***New Request Details.***

The New Request Details contains useful information regarding the reactive request as it moves through the CBA process in CTS. To access the New Request Details, click the expand icon. When a new CBA request is initially added in CTS, the new Request Details displays the following information:

Request # - *the unique number assigned to each request when initially added,* **Request Created Date** *– the system date and time when a request is added,* **Request Type** *– at current the CDC directly-funded health department can only submit Reactive type requests,* **Requestor** *– first and last name of health department CTS user,* **Requestor Organization** *– name of requestor associated organization,* **Point of Contact for request** *– by default the system assigns the requestor to this role, however… the requestor can change point of contact for request,* **Recipient Organization** *– set to the requestor organization name as initial system default; the term "multiple recipients" will*

display when two or more recipient organizations are selected on a request, **Region** *– geographical country location in which requestor organization resides,* **Request Status** *– displays the CTS state in which the request currently resides with the date & time stamp it arrived,* **Coordinator** *– name of CDC coordinator assigned to request,* **Project Officer** *– name of the CDC project officer assigned to request,* **PO Team Lead** *– name of CDC project officer's team lead,* **Regional Lead** *– name of CDC regional lead assigned to requestor,* **JWG Rep** *– name of CDC jurisdictional working group representative,* **JWG Team Lead** *– name of CDC jurisdictional working group team lead.*

During this tutorial, we will view the changes and additions made to information in the New Request Details.

To close the New Request Details, click the **collapse icon**

Please Note: To submit the CBA request all information on the Request for a New Reactive TA page is required.

**Describe the TA that you are requesting. ** **

We are requesting technical assistance on PrEP.

What would you like to accomplish as a result of this TA?
** (What aspect of your program do you want to strengthen or improve?)

We would like to strengthen our skills to educate and counsel clients, who are HIV negative and are at risk for acquiring HIV, to increase referrals about PrEP.

Slide 8

Select Request Topic Area

*Please select one topic for which you would like TA****

Please NOTE: If you have more than one topic area, select the most important/highest priority topic area for this request. You can submit another request for additional topic area.

As the mouse moves over a topic area, a brief description displays to assist you in selecting the appropriate topic area for the request.

When a topic area is selected the background color changes, and the title of the selected topic area displays beneath the section.

> In this example the selected topic area is *Prevention for HIV Negative Persons.*

Slide 9

Save Request for Later

Is this CBA request related to Ending the HIV Epidemic in the U.S. activities? ** *Yes or No*

Is this CBA request related to a cluster response? *Yes or No*

What type of audience will receive this TA? **

HIV Prevention staff.

Please Note: At any time, you can save the information you have provided and continue later by using the **SAVE** button at the bottom of the New Reactive Request page. From the "Save Confirmation dialog box" click **OK**.

The CTS dashboard displays. The request will remain in your "TA that Require My Response" list with a status of **Creating** which indicates a CBA request has been added in CTS but has not been submitted. When ready, click the **TA #** or the **View** link to complete the remainder of the New Reactive Request page.

Please Note: A quick way to access any CBA request that you have entered in CTS is to enter the TA number in the ***Enter TA Activity Number*** text field and click the **Open** button. The request is immediately opened to its current status Request Details page. In this example, because the current status is ***Creating,*** the system displays the *Request for New Reactive TA* page.

Slide 10

How to Select a Recipient Organization(s) and Assign a Contact

Any CDC directly funded Community-Based Organization can submit a request for new CBA service for their CBO or on behalf of a partner CBO or organization.

Identify the organization(s) that will receive the TA and their CDC program announcement numbers, if applicable. *** click inside the* selected recipient *textbox*.

To locate the desired organization, you can use the scroll bar to advance through the list or simply begin typing the organization name to display a list of resulting organization names. Make your selection.

The organization name will display in the selected recipient textbox. Click anywhere outside of the organization list. The selected organization displays in the *Recipient Organization* table.

Please note: if an organization is selected in error, click the **X** to the right of the organization name to remove it from the *Recipient Organization* table.

Each recipient organization must have an assigned contact. In this example, the selected recipient organization does not have an assigned contact. To assign a contact, click the *Assign Contact* link in the Recipient Organization table. The ***Assign Contacts*** dialog box displays. Locate the contact and click the **checkbox** in

the **Select** column and click **Save**. The selected individual's name displays in the Recipient Contact(s) field in the Recipient Organization table.

Slide 11

Add New Recipient Organization

If the desired partner, non-CDC funded, or indirectly funded partner organization does not display in the CTS organization list, you can add a new organization.

Please Note: Before adding a new organization in CTS, be sure you have checked for the organization name in as many ways as it may be display.

To add a new organization, click the **Add New Organization** button. The Add New Organization dialog box displays, provide the required information indicated by the red asterisk****** *Organization Name, Organization Type, Funding Type, City, State, and Zip Code*, then click **Save**.

The Recipient Organization table redisplays showing the newly added organization, and because the Organization Type is non-CDC funded organization, the Program Announcement # is not applicable.

However, for every recipient organization list in the table, a Recipient's Contact is required. Click the **Assign Contacts** link. Given this is a newly added organization, you must first add the new contact, in CTS. Click the **Add New Contact** button. The *Add a New Contact* dialog box displays. Add the required information indicated by the red asterisk****** *First Name, Last Name, State, Zip Code, eMail, and Phone*, then click **Save**.

The Assign Contacts dialog displays, and the newly added contact is selected, click the **Save** button.

The Add New Reactive Request page redisplays showing the Recipient Organization table and the newly added contact is displayed.

Slide 12

How to Change the Request Point of Contact

Before moving through the steps to change the request contact, let us look at the New Request Details. The ***Point of Contact for request:*** by system default, is set to the name of the currently logged in CBO CTS user who is the requestor for the request.

Please Note: When the requestor changes the request contact, that individual is assigned to the role of ***Point of Contact for request*** and will become the Recipient for the request. As the Recipient for the request, they are responsible for the review and approval of the needs statement and Action Plan when submitted by the CBA primary provider in CTS.

To change the request contact, click the ***Change Request Contact*** button.

The *Change Request Contact* dialog box is displayed.

Click the Organization Name **dropdown arrow**, to display the name of the recipient organizations listed on the request. Select the appropriate organization name. Click the Request Point of Contact **dropdown arrow** and select the contact.

Note: If the organization has multiple contacts, in CTS, all organization contact names will display for selection.

Click **Save**. Let us take another look at the New Request Details to confirm the newly assigned *Point of Contact for Request*.

Slide 13

Identify TA Begin Date and Delivery Method

There are two last questions to answer before the Request for New Reactive TA can be submitted in CTS.

When would you like the TA to begin? **

Click inside the date textbox, the calendar is displayed. Select the desired start date.

Please Note: The earliest start date is fifteen business days from the current date and the system excludes weekends and holidays. In this example, the earliest start date is September 22nd which excludes the Labor Day holiday on Monday, September 6th.

How would you like the TA to be delivered? **

Click the dropdown arrow and choose from in-person/onsite, telephone, email, webinar, teleconference, or other. If selecting other, a textbox displays allowing for the entry of the missing option.

Slide 14

New Request Page Navigation Buttons

There are four page navigation buttons **Submit, Save, Cancel and Delete Request.**

Slide 15

Submit – validates that all requested information has been provided. The new TA request is saved and routed for CDC review. When the **OK** button in the Success dialog box is selected the CTS dashboard is displayed.
If there is any missing information the system displays the Message from webpage dialog box, click **OK**. Scroll up through the form. A message in 'red' will display beneath the missing information.

Slide 16

Save – saves all information entered and/or selected thus far and displays the Success dialog box. When the **OK** button is selected the CTS dashboard is displayed.

Please Note: Until the newly added CBA request is submitted in CTS, the status is Creating, and it will remain in the TA that Require My Response list for future completion.

Slide 17

Page Navigation Buttons

Cancel – will immediately close the new request without saving any information that was entered or selected and return he user to the CTS dashboard.

Note: The request will remain in the TA That Require My Response list for access and completion with a status of *Creating*.

Slide 18

Delete Request – Will allow the health department CTS user to remove a new request while in the status Creating.

When the *Delete Request* button is selected, the Delete Request dialog box prompts the user to enter a comment and click the *Delete Request* button.

The confirm dialog box displays the **WARNING**: *Once activity is deleted it is no longer available in CTS. Are you sure you want to delete activity #XXXXX?* Click the *Yes* button.

The Request Deleted dialog box displays, to inform the user that the request has been deleted from CTS. Click the **OK** button.

Slide 19

The End – Community Based Organization (CBO) Submit New CBA Request, you may now close the browser.