

# A Recipient Guide to Using the OT21-2103 TA Request System

This job aid will provide you with the basic navigation steps to initiate, submit, and track OT21-2103 Technical Assistance (TA) requests.

For technical issues with the TA Request Portal, please email [CSTLTSSalesforceHlp@cdc.gov](mailto:CSTLTSSalesforceHlp@cdc.gov). For programmatic questions or questions around existing TA requests, please contact your assigned Project Officer.

## 1. Accessing the TA Request Form

A. Go to the recipient portal at

<https://cdcmgtandsrvchub.my.site.com/>

*Note: You will be redirected to the SAMS log in page. If not automatically redirected, click the **Log in Using SAMS** option. Internet Explorer and Edge in Internet Explorer mode are not supported browser for the TA Request System. Visit [Supported Browsers and Devices for Lightning Experience](#) for more information on recommended browsers.*

B. Enter your SAMS credentials. You will then be redirected to the TA Request homepage.

*Note: If you do not know your password, click **Forgot Your Password** for support. For additional SAMS support, review the SAMS FAQs [here](#).*

The screenshot displays the SAMS (Secure Access Management Services) login interface. At the top, there is a warning banner regarding privacy and security. Below this, users are prompted to 'Choose a login option'. The interface is divided into two main sections: 'External Partners' and 'HHS Staff'.

**External Partners Login Options:**

- 1A SAMS Credentials:** This option is highlighted with a red box and a yellow circle labeled '1A'. It includes input fields for 'SAMS Username' and 'SAMS Password', a 'Login' button, and a 'Forgot Your Password?' link. A note below states: 'For External Partners who login with only a SAMS issued UserID and Password.'
- SAMS Multi-factor Login:** This option involves signing on with a SAMS Grid Card or Mobile Soft Token, also featuring a 'Login' button. A note below states: 'For External Partners who have been issued a SAMS Multi-factor token(s).'

**HHS Staff Login Options:**

- AMS Login:** This option features the HHS.gov logo and a 'Login' button. A note below states: 'For all HHS staff including Operating Divisions (CDC, NIH, FDA, etc.)'
- AMS One Time Password:** This option shows a mobile phone icon with 'AMS OTP' and a 'Login' button. A note below states: 'For all HHS staff including Operating Divisions (CDC, NIH, FDA, etc.) with a One Time Password.'

Vertical lines with 'OR' labels separate the options within each section.

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## 2. Initiating a New TA Request

From the OT21-2103 TA Request homepage

- A. Click **New TA Request** in the blue banner across the top of the screen to access the TA Request form.
- B. Review your contact information and update the **Preferred Phone** and **Preferred Email** if different than the pre-populated contact information.
- C. Click **Next**.

*Note: Please do not submit multiple interrelated TA Requests at the same time. Submit a single TA Request and wait until you work out the timing of any additional related TA Requests with your assigned TA Provider.*

Home **New TA Request** TA Request Dashboard

Search... anne.painter

### New TA Request

Please complete the following information to request technical assistance (TA) from one or more of the OT21-2103 TA providers, including CDC's Office of Minority Health and Health Equity (OMHHE), the Association of State and Territorial Health Officials (ASTHO), the National Association of County and City Health Officials (NACCHO), and/or the National Network of Public Health Institutes (NNPHI).

Depending on the identified need, technical assistance can take a variety of formats - anything from a single consultation to more structured engagements, such as coaching sessions, training series, peer-to-peer or small group TA, individual TA, toolkit development, and more.

Once your request has been submitted, you and your assigned CDC project officer will receive an email confirmation with additional information on next steps. You can track the progress of all your TA requests by clicking on "TA Request Dashboard" at the top of your screen.

Should you have questions, please reach out to your assigned project officer.

<b>Contact Name</b> Anne Painter	<b>Agency Name</b> INTERNAL TESTING ACCOUNT
<b>Contact Title</b> CSTLTS	<b>Agency Type</b> State Health Agency
<b>Contact Phone</b> (555) 123-4572	<b>Contact Email</b> anne.painter@drt.com.invalid

Please update if different from above phone and email

**Preferred Phone**

**Preferred Email**

**Next**

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## 3. Completing your TA Request Form

Complete the following fields A-I for the TA Request form. An overview of the form fields and response options are on page 4.

- A. **\*Subject**
- B. **\*TA Request Description**
- C. **\*When do you need TA delivered by?**
- D. **\*Does this request have any timing constraints?**
- E. **\*Which of the grant strategy(ies) best aligns with your request for TA? (Select all that apply)**
- F. **\*Which of the following TA topic areas best align with your request for TA?**
- G. **Does your TA request focus on a specific geographic area? If yes, select one.**
- H. **Does your TA request focus on specific population(s)? (Select all that apply)**
- I. **\*Which of the work plan activity(ies) your agency is implementing are related to this TA request?**
- J. Click **Next**.

*Note: You will have the opportunity to review information entered before submitting the TA Request.*

The screenshot shows the 'New TA Request' form in the CDC TA Request Dashboard. The form is divided into two columns. The left column contains fields for Subject, delivery date, grant strategies, TA topic areas, and geographic area. The right column contains a description field, timing constraints, population focus, and work plan activities. Red boxes highlight the required fields, and yellow callouts (3A-3J) point to each field. The 'Next' button is highlighted in red at the bottom right.

\* Denotes form fields that are required.

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Required Field	Field Type	Additional Information about the Field	Optional Field	Field Type	Additional Information about the Field
<b>*Subject</b>	Free text	Provide a brief description of your request. This field is similar to the subject line of an email.	<b>Does your TA request focus on specific population(s)?</b>	Select all that apply	Options include: <ul style="list-style-type: none"> <li>Alaska Native</li> <li>American Indian</li> <li>Asian</li> <li>Black or African American</li> <li>Hispanic, Latino or Latinx</li> <li>Native Hawaiian and Pacific Islanders</li> <li>People living in rural areas</li> <li>People experiencing homelessness</li> <li>People who are incarcerated</li> <li>People with disabilities</li> <li>People with substance use disorders</li> <li>Non-US-born persons</li> <li>Religious minority</li> <li>Adults aged 65 and over</li> <li>Lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons</li> <li>People living in other congregate housing (not legally bound)</li> <li>People experiencing poverty</li> <li>People experiencing mental illness</li> <li>Youth and young adults</li> <li>Other, please specify</li> </ul> <p><i>Note: This is an optional field. If your TA request relates to specific population(s), indicate that here. If it is not specific to population(s), leave this field blank.</i></p>
<b>*TA Request Description</b>	Free text	Summarize your TA request, question, or the support needed. Include a description of any challenges or gaps you are experiencing, the specific support you are requesting, and any other relevant information. Please complete this field as best you can, and TA Providers can help you with exploring options for assistance.	<b>Does your TA request focus on a specific geographic area? If yes, select one.</b>	Select one	Options include: <ul style="list-style-type: none"> <li>Rural</li> <li>Urban</li> </ul> <p><i>Note: This is an optional field. If your TA request relates to an urban or rural area, indicate that here. If it is not specific to a geographic area, leave this field blank.</i></p>
<b>*When do you need TA delivered by?</b>	Date	Select future date from the calendar popup. <i>Note: If you don't have an exact date, please pick an estimated date. You cannot select a date that has already passed.</i>			
<b>*Does this request have any timing constraints?</b>	Free text	Describe when the TA would be most helpful (e.g., within the next 2 months or by the end of April 2023). Explain any deadlines or other timing constraints related to this TA request.			
<b>*Which of the grant strategy(ies) best aligns with your request for TA?</b>	Select all that apply	Options include: <ul style="list-style-type: none"> <li>Strategy 1: Resources and Services</li> <li>Strategy 2: Data and Reporting</li> <li>Strategy 3: Infrastructure Support</li> <li>Strategy 4: Partner Mobilization</li> <li>Strategy 5: Other</li> </ul>			
<b>*Which of the following TA topic areas best align with your request for TA?</b>	Select one	Options include: <ul style="list-style-type: none"> <li>Identifying and/or applying best and promising practices for addressing COVID-19 disparities</li> <li>Strengthening capacity for grant activities</li> <li>Advancing the science and practice of health equity</li> <li>Planning or implementing recipient-led evaluation activities</li> <li>Other</li> </ul> <p>If other, please specify.</p>			
<b>*Which of the work plan activity(ies) your agency is implementing are related to this TA request?</b>	Free text	List the activity(ies) from your agency's workplan associated with this TA request			

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## 4. Reviewing your TA Request Form

A. Review the information in the TA request. If you need to change the entered data, click **Back** and make the necessary corrections.

B. If the entered information is correct, click **Submit**.

*Note: You will receive an automated email confirming you successfully submitted a new TA request with the provided details.*

## 5. Accessing your TA Request

On the next screen that appears, a TA Request number will be generated.

A. Click the **Click Here** link to open your TA Request.

B. You can also access your TA requests directly by clicking **TA Request Dashboard**.

Home [New TA Request](#) TA Request Dashboard  anne.painter

Please review the information for accuracy before hitting submit

<b>Contact Name</b> Anne Painter	<b>Contact Email</b> anne.painter@drt.com.invalid
<b>Contact Title</b> CSTLTS	<b>Contact Phone</b> (555) 123-4572
<b>Agency Name</b> INTERNAL TESTING ACCOUNT	<b>Agency Type</b> State Health Agency
<b>Subject</b> Test	<b>Timing Constraints</b> Alaska Native
<b>TA Delivery Request Date</b> February 14, 2022	<b>Does your TA request focus on specific population(s)? (Select all that apply)</b> Identifying and/or applying best and promising practices for addressing COVID-19 disparities
<b>Which of the grant strategy(ies) best aligns with your request for TA? (Select all that apply)</b> Strategy 1: Resources and Services	<b>Which of the following TA topic areas best aligns with your request for TA?</b> Test
<b>Please summarize your TA request, question, or the support needed. Include a description of any challenges or gaps you are experiencing, what specific support you are requesting, and anything else we should know to help fulfill your request.</b> Test	<b>Which of the work plan activity(ies) your agency is implementing are related to this TA request?</b> Rural
	<b>Does your TA request focus on a specific geographic area? If yes, select one.</b>

4A   4B

Home [New TA Request](#) [TA Request Dashboard](#)

TA Request 00001168 was created successfully.

5A [Click Here](#) to open TA Request 5B

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## 6. Viewing Progress of your TA Request Form

Your TA Request Dashboard has helpful information and details for previously submitted TA requests. You can view the status of your request and more on this page.

- A. The **TA request number** is a unique 8-digit reference field to assigned to help track each of your TA requests
- B. The **Status** field shows the current status of your request (Open, Assigned, In Progress, Closed).

Status	Definition
<b>Open</b>	TA Ticket has been created and triaged to the applicable organization per the system assignment rules.
<b>Assigned</b>	A TA Provider from the applicable organization has claimed the TA Request.
<b>In Progress</b>	A TA Provider has initiated work on the TA Request.
<b>Closed</b>	The TA Provider has completed the TA Request, and marked it as Closed in the system.

- C. The **TA Request Owner** field identifies the organization (and individual) leading the response to your TA request.

The screenshot displays the TA Request System interface for a specific request. At the top, the request is identified as 'TA Request Test'. Key fields are highlighted with red boxes and yellow callouts: 'TA Req. No.' (00001168, callout 6A), 'Status' (Open, callout 6B), and 'TA Request Owner' (NNPHI, callout 6C). The contact information for Anne Painter is also visible. The 'Details' sidebar on the right provides further context, including the account name 'INTERNAL TESTING ACCOUNT' and the date/time the request was opened. A feed at the bottom shows a recent update from the customer.