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 <a href="mailto:CSTLTSSalesforceHlp@cdc.gov">CSTLTSSalesforceHlp@cdc.gov</a>. For programmatic questions or questions around existing TA requests, please contact your assigned Project Officer.

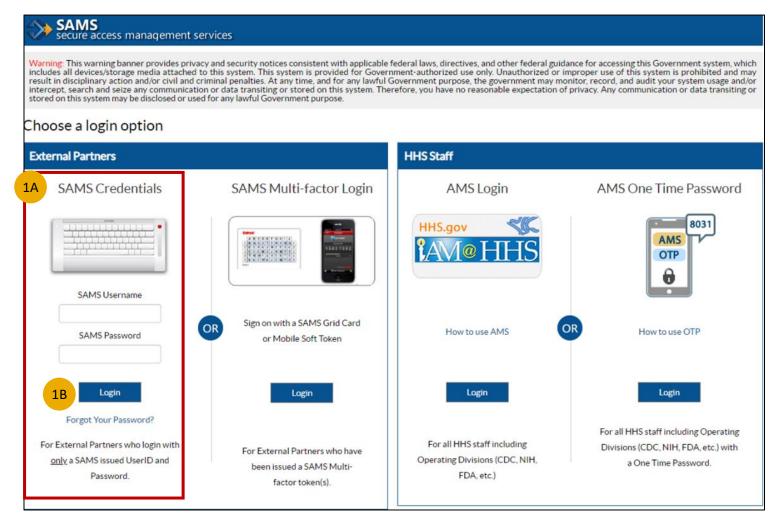
### 1. Accessing the TA Request Form

A. Go to the recipient portal at <a href="https://cdcmgtandsrvchub.my.site.com/">https://cdcmgtandsrvchub.my.site.com/</a>

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.



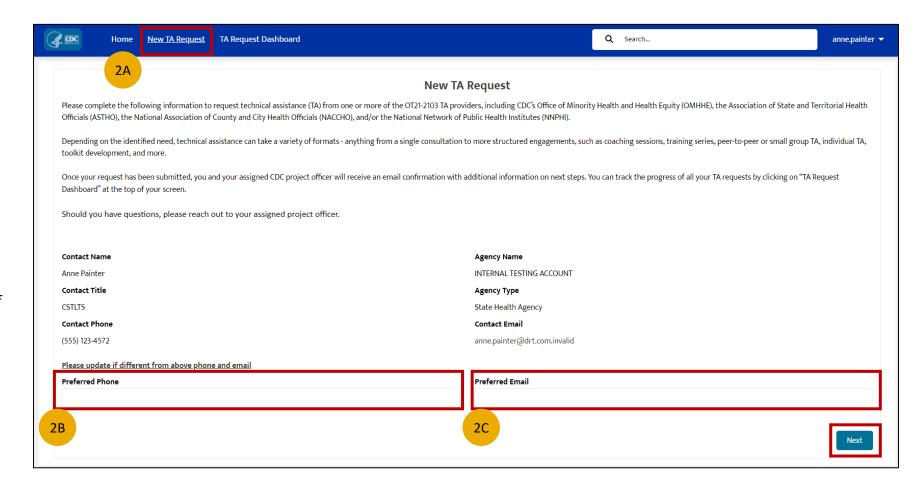
### 2. Initiating a New TA Request

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.

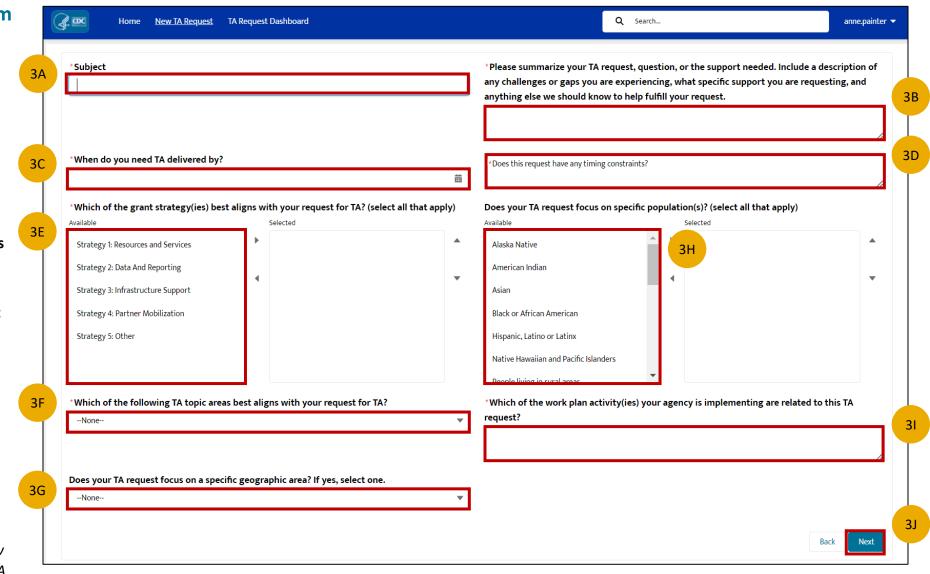


### 3. Completing your TA Request Form

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)
- \*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.



<sup>\*</sup> Denotes form fields that are required.

related to this TA

request?

•			•	•	
Required Field	Field Type	Additional Information about the Field	Optional Field	Field Type	Additional Information about the Field
*Subject	Free text	Provide a brief description of your request. This field is similar to the subject line of an email.	Does your TA request focus on specific	st Select all that apply	<ul> <li>Options include:</li> <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> <li>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.</li> </ul>
*TA Request Description	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.	population(s)?		
*When do you need TA delivered by?	Date	Select future date from the calendar popup.  Note: If you don't have an exact date, please pick an estimated date.  You cannot select a date that has already passed.			
*Does this request have any timing constraints?	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.			
*Which of the grant strategy(ies) best aligns with your request for TA?	Select all that apply	Options include:     Strategy 1: Resources and Services     Strategy 2: Data and Reporting     Strategy 3: Infrastructure Support     Strategy 4: Partner Mobilization     Strategy 5: Other			
*Which of the following TA topic areas best align with your request for TA?	Select one	<ul> <li>Options include:</li> <li>Identifying and/or applying best and promising practices for addressing COVID-19 disparities</li> <li>Strengthening capacity for grant activities</li> </ul>			
		<ul> <li>Advancing the science and practice of health equity</li> <li>Planning or implementing recipient-led evaluation activities</li> <li>Other</li> <li>If other, please specify.</li> </ul>	Does your TA request focus on a specific geographic area? If yes, select one.	Select one	<ul> <li>Options include:</li> <li>Rural</li> <li>Urban</li> <li>Note: This is an optional field. If your TA request relates to an</li> </ul>
*Which of the work plan activity(ies) your agency is implementing are	Free text	List the activity(ies) from your agency's workplan associated with this TA request			urban or rural area, indicate that here. If it is not specific to a geographic area, leave this field blank.

### 4. Reviewing your TA Request Form

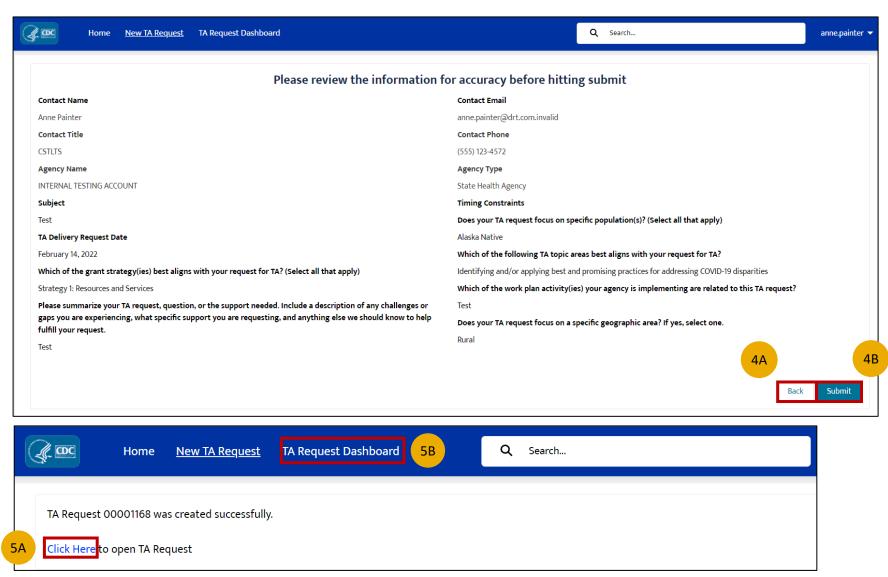
- A. Review the information in the TA request. If you need to change the entered data, click **Back** and make the necessary corrections.
- B. If the entered information is correct, click **Submit**.

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.**



### 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
Open	TA Ticket has been created and triaged to the applicable organization per the system assignment rules.
Assigned	A TA Provider from the applicable organization has claimed the TA Request.
In Progress	A TA Provider has initiated work on the TA Request.
Closed	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.

