



April 20, 2018

CTIMS FLA Carl Perkins Worksheet & Application Guidebook

CareerTech Information

Creating and Submitting the Agreement

Oklahoma Department of Career and
Technology Education

*career***tech**



Roles for the Agreement Process:

FLA Local Finance Coordinator



FLA State Initiative Coordinator



FLA State Initiative Supervisor

After the **Worksheet** is approved through the FLA State Initiative Supervisor level, the **Perkins users** will receive an email from the ODCTE FLA office with the CTIMS approval notification.

Starting the Agreement Process

Objective: This section will take you through the FLA **Agreement Process** in CTIMS. The **Agreement** is the working copy of the **Budget Line** Items in the **Worksheet**. It contains the OCAS codes and details of planned expenditures. Only the **Agreement** can be changed once the **Worksheet** is fully approved by ODCTE staff.

Role: Local Finance Coordinator

Step 1: Using Internet Explorer version 11 or higher, sign in using your email and CTIMS password at <https://ctims.okcareertech.org/CTBDSWeb/>

Note: CTIMS is currently not compatible with other browsers.

Step 2: Verify that you are signed on with the role of a **FLA-Local Finance Coordinator** in the top right corner or use the dropdown arrow to select the correct role.



Step 3: Click the **+** (plus) sign next to **Grants** on the left side navigation panel.

Creating and Submitting the Agreement

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

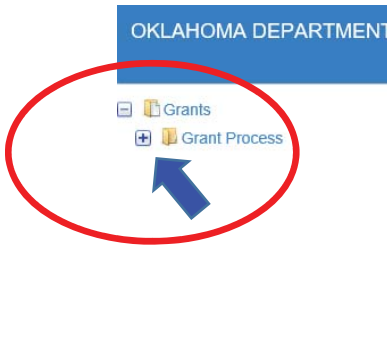
 Grants



Dashboard

Field	Details
Name	OK DEPT OF CAREER &
Short Name	ODOC&TE
Organization Code	601000000
Organization Type	ODCTE District
Organization Status	Active

Step 4: Click the + (plus) sign next to Grant Process.

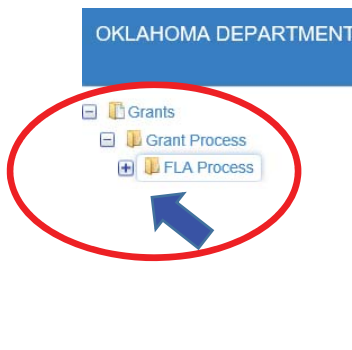


OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

Field	Details
Name	OK DEPT OF CAREER & T
Short Name	ODOC&TE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active

Step 5: Click the + (plus) sign next to FLA Process.

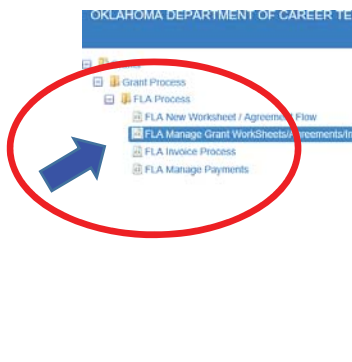


OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

Field	Details
Name	OK DEPT OF CAREER & T
Short Name	ODOC&TE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active

Step 6: Select FLA Manage Grant Worksheets / Agreements / Invoice / Follow-up.



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FLA-Local Finance Coordinator

Dashboard | FLA Manage Grant Worksheets/Agreements/Invoice/Follow-up

FLA Grant Fund Worksheets List

Fiscal Calendar Year: 2016-2017 | Grant Fund Type: FLA

Organization Type: Comprehensive Schools Districts | Organization: Enter the first three characters of any |

Organization District: | Program Initiative: --Select--

Approval Function Type: All

Filter on Status: All | Search

Save changes | Cancel changes

Provider Name	Worksheet Stage	Worksheet Submission Date	Worksheet
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Step 7: Complete the **FLA Manage Grant Worksheets / Agreements / Invoice / Follow-up** form. **The tagged numbers on the screen shot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization login credentials.

Note: The red asterisks* represents a required field.

1. Verify **Fiscal Calendar Year** to make sure correct year is showing*.
2. Verify **Grant Fund Type** is set to FLA*.
3. Select your correct **Organization Type** from the dropdown menu.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your *Organization* name or if you need to select a different *Organization District*.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as All.
8. **Filter on Status** will remain as All.
9. Select the **Search** button to search for any outstanding Worksheets/Applications that need your approval.

The screenshot shows the 'FLA Grant Fund Worksheets List' form within the Oklahoma Department of Career Tech Education system. The form includes several dropdown menus and a search button, each with a red circle and a number indicating a step in the process:

- 1:** Fiscal Calendar Year* (2016-2017)
- 2:** Grant Fund Type* (FLA)
- 3:** Organization Type* (Colleges)
- 4:** Organization* (Enter the first three characters of any word that is in)
- 5:** Organization District*
- 6:** Program Initiative* (-Select-)
- 7:** Approval Function Type* (All)
- 8:** Filter on Status* (All)
- 9:** Search button

At the bottom of the form, there are buttons for 'Save changes' and 'Cancel changes', and a table header with columns: 'A... Provider Name', 'Worksheet Stage', 'Worksheet Submission Date', 'Worksheet', and 'Agreement'.

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Step 8: After clicking the **Search** button, the **Agreement** column will display “New.” Select the new agreement by clicking on the blue word “New”.

The screenshot shows the 'FLA Grant Fund Worksheets List' interface. The 'Agreement' column for the selected row (Sample School System) displays the word 'New' in blue. A red circle highlights this word, and a blue arrow points to it. The interface includes search filters for Fiscal Calendar Year, Organization Type, and Organization District, along with a 'Search' button.

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Step 9 FLA Grant Agreement: Open the **Budget Line Items** section by clicking on the + (plus) sign.

The screenshot shows the 'FLA Grant Agreement' interface. The 'Budget Line Items' section is expanded, showing a table of budget line items. A red circle highlights the plus sign next to 'Budget Line Items', and a blue arrow points to it. The table lists items such as Technology, Professional Development, and Coordinator's Salary & Benefits.

Budget Line #	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Action
	Technology	1	\$14,596.00	Cost Per Each	\$14,596.00	\$0.00	Approved
	Professional Development	1	\$4,828.67	Cost Per Each	\$4,828.67	\$0.00	Approved
	Coordinator's Salary & Benefits	1	\$38,587.33	Cost Per Each	\$38,587.33	\$0.00	Approved
					\$58,012.00	\$0.00	

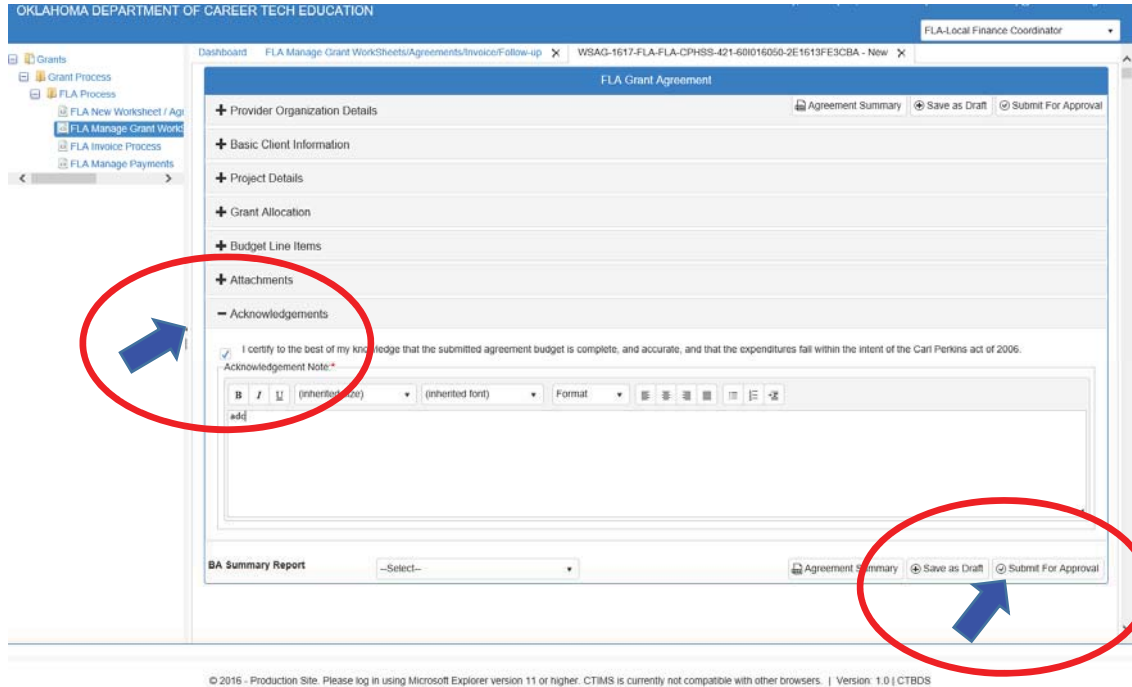
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Step 10 FLA Grant Agreement – OCAS Codes: Open the Budget Line Items section. For each of the line items, enter the OCAS coding in the order of **Function-Object-Program** Code (e.g. 1000-100-330). As you begin typing the OCAS code, a dropdown list of OCAS codes will display. Select the valid OCAS code for each budget item. After entering all OCAS codes, click on the **Save as Draft** button.

The screenshot displays the 'FLA Grant Agreement' interface. The 'Budget Line Items' section is expanded, showing a table with three rows of budget items. A red circle highlights the 'Save as Draft' button in the top right corner, and another red circle highlights the 'Budget Line Items' section header. A blue arrow points to the 'Save as Draft' button, and another blue arrow points to the 'Budget Line Items' section header.

Budget Line(OCAS CODE) Program - Function - Object	Agreement Line Desc	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Action
330-1000-100	Technology	1	\$14,096.00	Cost Per Each	\$14,096.00	\$14,096.00	Approved
330-2000-100	Professional Development	1	\$4,828.67	Cost Per Each	\$4,828.67	\$4,828.67	Approved
330-2110-100	Coordinators Salary & Benefits	1	\$38,587.33	Cost Per Each	\$38,587.33	\$38,587.33	Approved

Step 11 FLA Grant Agreement – Acknowledgements: Scroll down the page to the **Acknowledgement** tab. Click the certify box and put in an **Acknowledgment** note (required). Click on **Submit for Approval**. The **Agreement** will now go to the **FLA State Initiative Coordinator** and **FLA State Initiative Supervisor** for approval.



Role: FLA State Initiative Coordinator, and

Role: FLA State Initiative Supervisor

Steps 1-11 are the same for these roles as for the FLA Local Finance Coordinator above. The review and approval/rejection process continues using the steps above for the **FLA State Initiative Coordinator** and the **FLA State Initiative Supervisor**. After the **Agreement** is approved by the **FLA State Initiative Supervisor** and the **ODCTE Finance Reviewer**, the **Local Finance Coordinator** can begin submitting **Invoices**.