



April 20, 2018

CTIMS FLA Carl Perkins Worksheet & Application Guidebook

CareerTech Information

Requesting a CTIMS Agreement Budget
Adjustment

Oklahoma Department of Career and
Technology Education

*career***tech**



FLA Budget Adjustment Process

Do I Need a Change Request or a Budget Adjustment?

Change Request – To edit/change a **Worksheet**, or budget before it has been approved by the ODCTE staff, use the **Change Request Process**. This can only be started by the **FLA Local Initiative Coordinator**, followed by approval by the **Local Finance Coordinator** and the **Local Superintendent/CEO/President**.

Budget Adjustment – To make budget changes on an **Agreement** after it has been approved by the ODCTE staff, use the **Budget Adjustment Process**. The can only be performed by the **FLA Local Finance Coordinator**.

Requesting a Budget Adjustment

The **Agreement** is a working copy of the finalized **Worksheet Budget Section**. You must go through the **Budget Adjustment Process** in the **Agreement** to make any budget changes, and only after the **Agreement** is fully approved. In the **Budget Adjustment Process** you can only edit the **Units, Unit Cost, and Req Unit Type**. Editing the **Description** is not allowed.

TIP: A **Change Request** can also be done in the **Invoicing** phase if changes are needed after a rejection.

Roles for the Budget Adjustment Process:

FLA Local Finance Coordinator



State Initiative Coordinator



State Initiative Supervisor

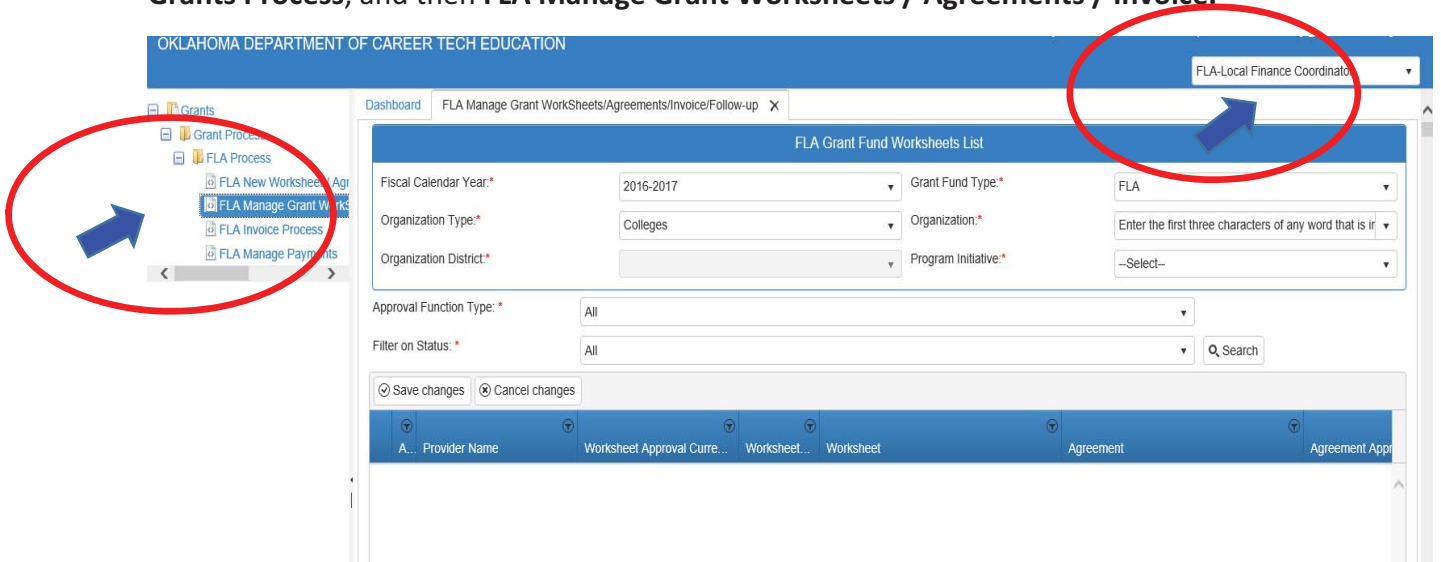
Process: FLA Change Request

After the **Worksheet** and the **Agreement** are approved, you must go through the **Budget Adjustment Process** to make any changes to the **Agreement**.

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

Note: CTIMS is currently not compatible with other browsers.

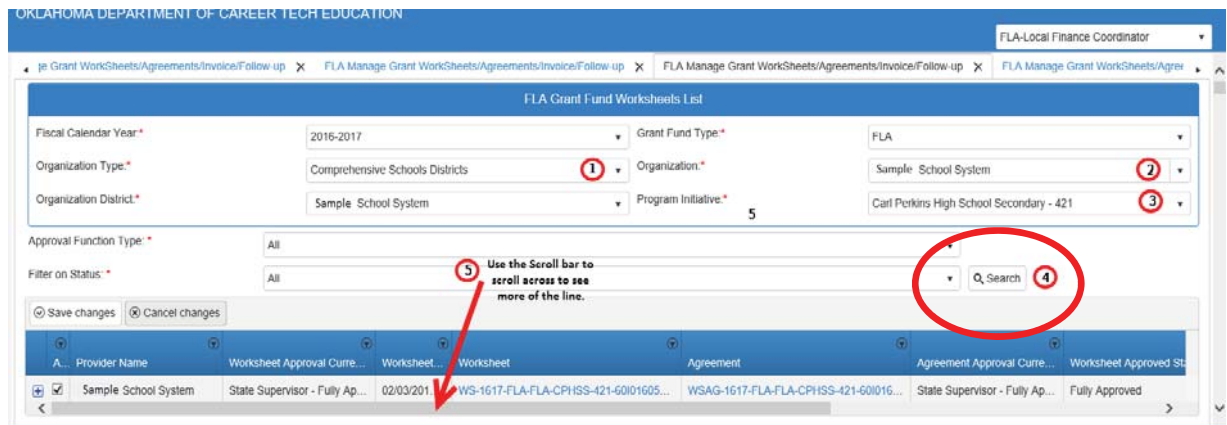
Step 2: Verify that you are logged in with the role of a **FLA-Local Finance Coordinator** in the top right corner. Select the **+** (plus) sign next to **Grants**, choose **Grants Process**, and then **FLA Manage Grant Worksheets / Agreements / Invoice**.



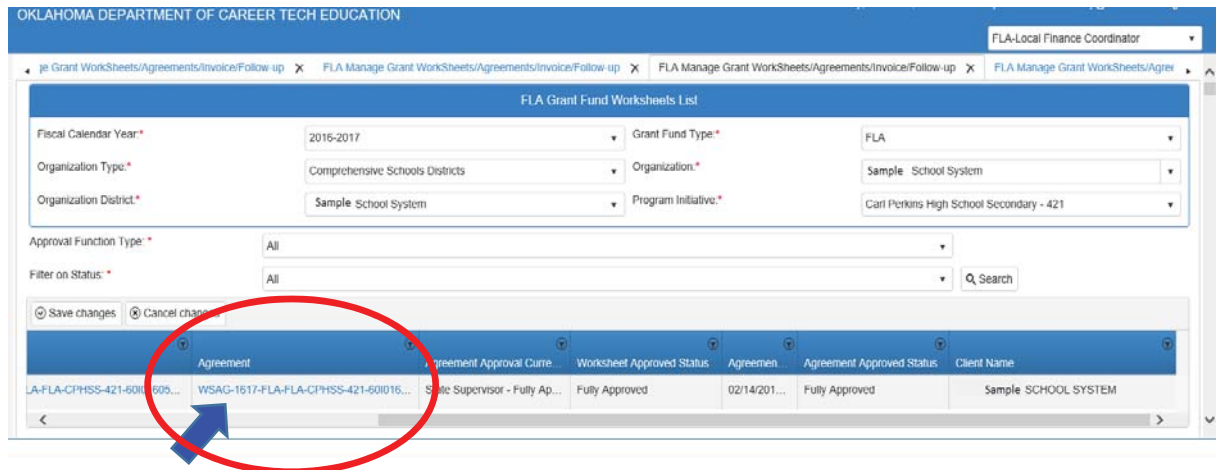
Step 3: Complete the **FLA Manage Grant Worksheets / Agreements / Invoice** form. The tagged numbers on the screen shot correspond to the instruction steps below.

Note: The red asterisks* represents a required field.

1. Select your correct **Organization Type** from the dropdown menu.
2. Select your **Organization** by typing in the first three characters of the name.
3. Select a **Program Initiative** *.
4. Select the **Search** button to search for any outstanding **Worksheets** that need your approval.
5. To see the status of the **Worksheet**, use the scroll bar to scroll to the right.



Step 4: In the **Budget Adjustment Process**, you will change the **Agreement**, not the **Worksheet**. Select the number under the **Agreement** column.



Requesting a Budget Adjustment

Step 5: Select **Budget Adjustment Process**. The following message is displayed, “This record is fully approved. You are not authorized to change data within this record.” You cannot change the **Agreement** without going through the **Budget Adjustment Process**. Select **Budget Adjustment Process** to continue.

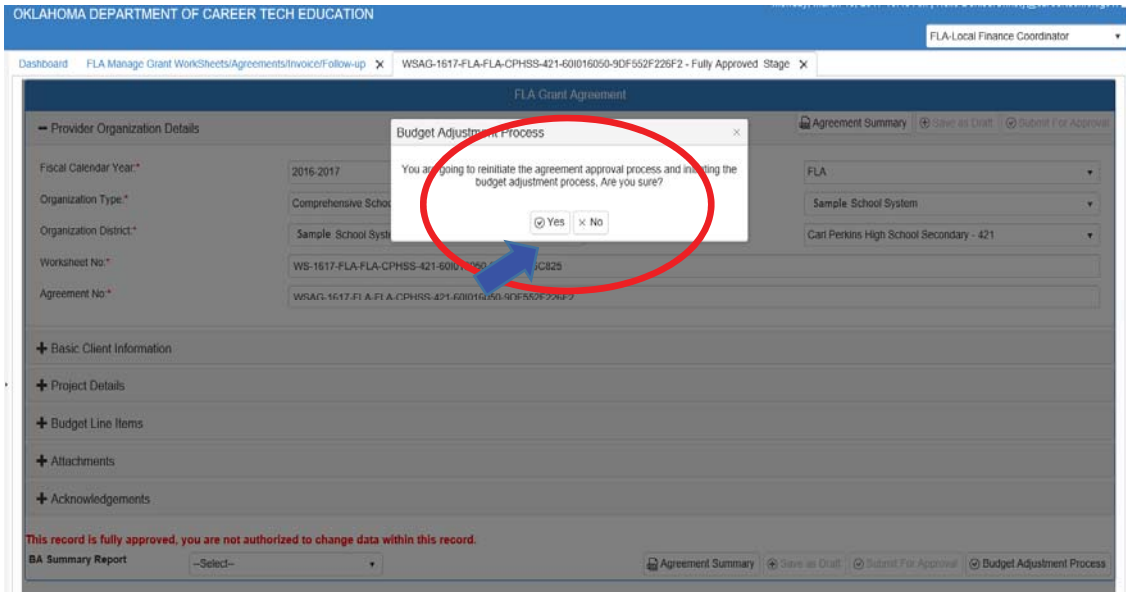
The screenshot shows the 'FLA Grant Agreement' form in the Oklahoma Department of Career Tech Education system. The form is titled 'FLA Grant Agreement' and is currently in the 'Fully Approved Stage'. The user is identified as 'FLA-Local Finance Coordinator'. The form contains the following fields:

Provider Organization Details			
Fiscal Calendar Year.*	2016-2017	Grant Fund Type.*	FLA
Organization Type.*	Comprehensive Schools Districts	Organization.*	School System
Organization District.*	School System	Program Initiative.*	Carl Perkins High School Secondary - 421
Worksheet No.*	WS-1617-FLA-FLA-CPHSS-421-601016050-493486540500		
Agreement No.*	WSAG-1617-FLA-FLA-CPHSS-421-601016050-128C1C6A94D7		

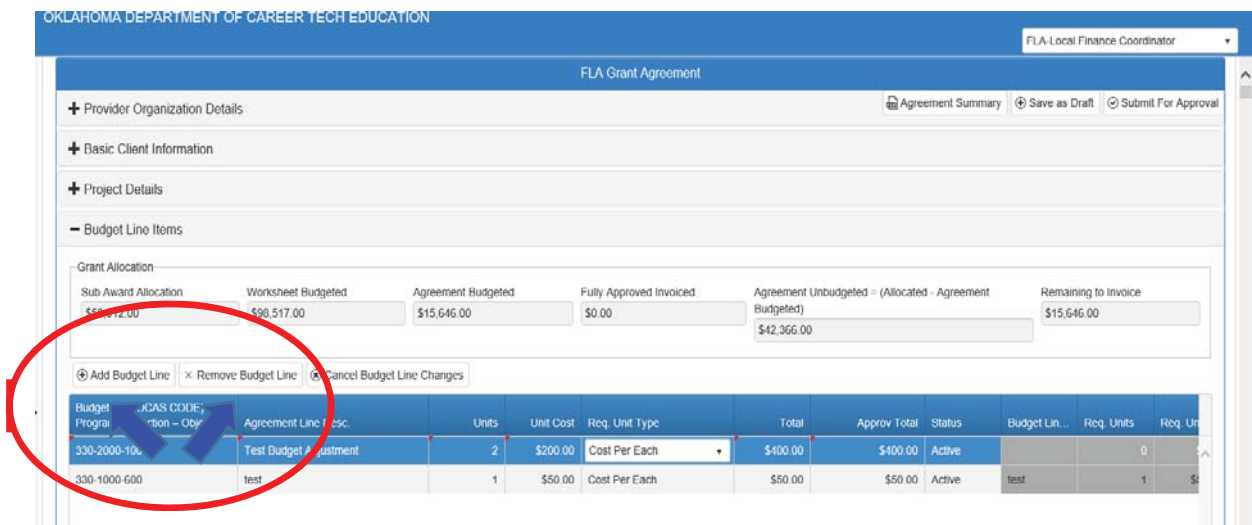
Below the form, there are several expandable sections: Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. At the bottom of the form, a red message states: "This record is fully approved, you are not authorized to change data within this record." Below this message, there is a 'BA Summary Report' dropdown menu and a row of buttons: 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'. The 'Budget Adjustment Process' button is circled in red, and a blue arrow points to it.

Requesting a Budget Adjustment

Step 6: If you want to make a **Budget Adjustment**, select **Yes**. This will pull the **Agreement** out of approved status and you can adjust the budget, then go through the **Agreement** approval process again.



Step 7: Click on the + (plus) sign next to **Budget Line Items**. Click on **Add Budget Line** or **Remove Budget Line** to adjust the budget.



Step 8: Before submitting your budget changes, you must go into the **Acknowledgements** tab and enter a **Budget Adjustment Justification Note** to describe the reason for the adjustment(s).

The screenshot displays the 'FLA Grant Agreement' interface within the Oklahoma Department of Career Tech Education system. The user is logged in as 'FLA-Local Finance Coordinator'. The interface includes a navigation bar with 'Dashboard', 'FLA Manage Grant Worksheets/Agreements/Invoices/Follow-up', and 'WSAG-1617-FLA-FLA-CPHSS-421-601016050-9DF552F226F2 - Fully Approved Stage'. The main content area is titled 'FLA Grant Agreement' and contains several expandable sections: 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. The 'Acknowledgements' section is expanded, revealing a 'Budget Adjustment Justification Note' text area with a rich text editor toolbar. A red circle highlights this text area, and a blue arrow points to it. Below the text area is a checkbox for a certification statement: 'I certify to the best of my knowledge that the submitted agreement budget is complete, and accurate, and that the expenditures fall within the intent of the Carl Perkins act of 2006.' Below this is another 'Acknowledgement Note' text area with a similar toolbar. A red circle highlights the 'Submit for Agreement' button at the bottom of the form, and a blue arrow points to it.

Requesting a Budget Adjustment

Step 9: Select **Submit for Approval** to send the **Budget Adjustment** through the approval process.

The screenshot shows the 'FLA Grant Agreement' form in the OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION system. The form includes sections for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. A 'Budget Adjustment Justification Note' field is at the bottom. In the top right corner, there are two buttons: 'Save as Draft' and 'Submit For Approval'. The 'Submit For Approval' button is circled in red, and a blue arrow points to it.

Step 10: You can check the status of the adjusted budget by going into the **FLA Manage Grant Worksheets / Agreements / Invoice**. Use the scroll button to move to the right, then look at the status under **Agreement Approval Status**.

The screenshot shows the 'FLA Grant Fund Worksheets List' table in the OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION system. The table has columns for Worksheet, Agreement, Agreement Approval Cur..., Worksheet Approved Status, Agreement..., Agreement Approved Status, and Client Name. A red circle highlights a note that says: 'Use Scroll bar to scroll over to Agreement Approved Status. Agreement is Pending again and must be reviewed and approved by State Coordinator.' An arrow points from this note to the 'Agreement Approved Status' column in the table. The table shows a row with the following data: 02/03/2017, WS-1617-FLA-FLA-CPHSS-421-6001605..., WSAG-1617..., FLA CPHSS-421-60016..., State Initiative Coordinator..., Fully Approved, 02/14/2017, Pending, Sample SC.

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