Table of Contents

Signing in to CTIMS .......................................................................................................................... 1
Help and Troubleshooting .................................................................................................................. 2
Roles................................................................................................................................................ 3
Starting a New Worksheet.................................................................................................................. 4

  Role: Local Initiative Coordinator ................................................................. 4

  Role: Local Finance Coordinator ................................................................. 12

  Role: ABE Superintendent/President .......................................................... 19

  Role: ABE State Initiative Supervisor ......................................................... 20

Submitting the Agreement ......................................................................................... 21
Invoicing...................................................................................................................... 29
Initiating an ABE Change Request ................................................................. 37
Requesting a Budget Adjustment ......................................................................... 43
Objective: This section will take you through the submission and approval stages for starting a new ABE Worksheet in CTIMS,

Signing in to CTIMS

Sign in using your school email and CTIMS password at https://ctims.okcareertech.org/CTBDSWeb

Or,

Go to http://www.okcareertech.org/ and select CTIMS in the red bar at the top of the page. Do not select the ODCTE Staff Login selection in the red bar. This is not the CTIMS login.

Note: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.
On the CTIMS website, select the green **CTIMS Login** button.

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**Help and Troubleshooting**

If you don’t have an account set up or are having trouble with the navigation or software, contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov) and send a message describing your problem. Include your school name and your telephone number and we will contact you.

If you have forgotten your password, click the **Forgot your password?** link to reset your password.

If you have questions on specific ABE requirements or what content you need to input or attach, contact the ODCTE ABE office.

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Roles: Worksheet Approval Process
The following are the roles representing the stages required in CTIMS for the submission of a New Worksheet (Application).

**Stage 1 - ABE Local Initiative Coordinator** – Creates, completes, saves and submits new worksheet.

**Stage 2 - ABE Local Finance Coordinator** – 1st Approval. Reviews and approves or rejects worksheet. If approved, goes to next stage. If rejected, goes back to stage 1.

**Stage 3 - ABE Superintendent/President** – 2nd Approval. Reviews and approves or rejects worksheet. If approved, goes to State approval stage. If rejected, goes back to stage 1.

**Stage 4 – ABE State Initiative Supervisor** – Final Approval. After the worksheet is approved through Stage 4, the Agreement Process begins with the ABE Local Finance Coordinator.
Starting a new worksheet

Role: Local Initiative Coordinator

Step 1: Sign in using your school email and CTIMS password at https://ctims.okcareertech.org/CTBDSWeb/.

Step 2: Verify that you are signed on with the role of an ABE-Local Initiative Coordinator in the top right hand corner. Use the drop down arrow to select this role.

Step 3. Hit + (plus) sign next to Grants on left navigation.

Step 4. Hit + (plus) sign next to Grant Process.
**Step 5.** Hit + (plus) sign next to ABE Process.

**Step 6.** Select New Worksheet / Agreement Flow
Step 7. Complete the ABE Grant Submit Worksheet – Step 1 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.

The Fiscal Calendar Year* and Grant Fund Type* automatically display based on your organization login credentials. Some of the other fields may also automatically fill, so verify that all the information is correct for your school.

1. Select an Organization Type, such as Colleges, Comprehensive Schools Districts, Other Organization, Tech Center Districts or Tech Sites*.
2. Select an Organization by typing in the first three letters of your organization name*.
3. Select a Program Initiative* from the dropdown menu. The Worksheet No.* automatically displays after selecting the Program Initiative.
4. Verify that Client Type* is Business Masters.
5. Select an Organization by typing in the first three letters of your organization name*. This name should be the same as #2.
6. The Business Code* is associated with the Organization and automatically displays after an Organization is selected.
7. After selecting the Organization, the bottom of the screen displays fields that are grayed out and cannot be changed. You can view the selected Organization’s Business Master information that was previously entered in this area.
8. After verifying that all information is correct, Click Save & Next button.
Step 8: Open the Funding Request Details form by clicking on the +(plus) sign. Complete the form by clicking in the certifications boxes or entering the requested information. You must put something in every box that has a red asterisk (*). Verify your DUNS number and Zip+4 for your physical address. If your DUNS number or Zip Code is not listed, you will need to provide that information under FFATA Information Collection Requirements. There are some small required check boxes you must check to certify the information. You will also need to provide your two digit Congressional District code. Under the Budget Narrative, complete all sections identifying planned expenditures for each OCAS coding structure identifying instructional and administrative costs. All job descriptions must be attached that are not coded 1000/100 (see Step 9). You can cut and paste from another document to fill in the boxes. You must finish this form and hit Save and Next for any of the information to be saved.

Step 9: On the Budget Line Items screen, you can click the Add Budget Line, Remove Budget Line, or Cancel Budget Line Changes.
To add a Budget Line Item:

1. Type a **Budget Line Desc** (Budget Line Description)
2. Type **Req. Units** (Required Units)
3. Type **Req. Unit Cost** (Required Unit Cost)
4. Type **Req Unit Type** (Required Unit Type-Always select *Cost Per Each*)
5. Select **Add Budget Line** to add more budget lines and repeat steps 1-4.
6. Add supporting or required attachments by clicking on the +**Attachments** tab.
7. You can **Save as Draft** at this point and it will save all the information you have input on the **Funding Request Details** form and the **Budget Line Items** without submitting for approval. This will let you stop the process and resume at a later time. You can make any changes you need to the **Funding Request Details** or the **Budget Line Items** before you submit selecting the line and making the changes.
Step 10: Do Not click Save & Continue yet because you are required to complete the Acknowledgements section.

Go to the Acknowledgements by clicking the +(plus) sign.

Check the acknowledgement button, then add an Acknowledgement Note.
Step 11: Worksheet. Summary

You can view or print your worksheet summary page to review before submitting to ensure your worksheet/application is complete and accurate. If you need to make any changes, open

To print the Worksheet Summary, select the save/download button to download a pdf that you can save or print. Do not use the printer button.
Step 12: Submitting the Worksheet

Click on the Submit for Approval button.

At this point, your worksheet/application has been successfully submitted. You will receive an email stating your worksheet/application has been submitted successfully to the ABE Local Finance Coordinator.

After you submit the worksheet/application, if there are any changes, you will have to go through the Change Request process.
Role: Local Finance Coordinator

After the Local Initiative Coordinator has created and submitted the worksheet/application, the Local Finance Coordinator will receive an email that they can sign in and review the worksheet/application to approve or reject. If the Local Finance Coordinator approves the worksheet/application, it will go to the ABE Local Superintendent/CEO to approve or reject using the same process.

Step 1: Sign in using your school email and CTIMS password at https://ctims.okcareertech.org/CTBDSWeb/.

Step 2: Verify that you are signed on with the role of an ABE-Local Finance Coordinator in the top right hand corner.

Step 3. Hit + (plus) sign next to Grants on left navigation.
Starting a New Worksheet

Step 4. Hit + (plus) sign next to **Grant Process**.

Step 5. Hit + (plus) sign next to **ABE Process**.

Step 6. Select **Manage Grant Worksheets/Agreements/Invoice/Follow-up**.
Step 7. Complete the Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screen shot correspond to the instruction steps below.

**Note:** The red asterisks* represents a required field.

1. Verify **Fiscal Calendar Year**.*
2. Verify **Grant Fund Type** is set to Adult Basic Education*.
3. Select your correct **Organization Type** from the drop down menu.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **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.
Step 8: After hitting the **Search** button, the worksheet/application that needs to be approved will be listed. Select the worksheet number to open the worksheet.

Step 9: **ABE Grant Submit Worksheet - Step 2.** Open each section of the worksheet by hitting the **+ (plus)** sign beside the title. Verify the contents of each section of the worksheet. We recommend you print a pdf of the worksheet summary to help with project and budget verification.
Step 10: ABE Grant Submit Worksheet – Step 2

After verifying the information by opening each screen by hitting the + (plus) sign, select **Next Step**.

Step 11: ABE Grant Submit Worksheet. Verify the information in the budget is correct. If you need to make a change, select **Change Request** and follow the instructions to make the changes.
Step 12: If the budget is correct, select Approval Process.


1. At this point, you can see that the worksheet/application is at the Local Finance Coordinator Stage (2nd Stage).
2. Select the Reject button to reject the worksheet/application, (A rejection note is required, or
3. Select the Approve button to approve the worksheet/application.

After hitting the Reject or Approve button, the system will ask, “Are you sure?” Hit cancel or ok. If ok, the application has been successfully approved or rejected. If approved, an email will be sent to you and the next approver (ABE Superintendent/President).
At this point your worksheet/application is successfully submitted. You will receive an email stating your worksheet/application has been submitted successfully to the ABE Superintendent/President for review.
Role: ABE Local Superintendent/President

Steps 1-13 are the same as the ABE Local Finance Coordinator above: After the ABE Local Finance Coordinator approves the worksheet/application, the ABE Superintendent/President will receive an email that a worksheet/application is ready for review. They will use the same steps outlined above, using the role of ABE Local Superintendent/President in Step 2 and following each step.

At this point your worksheet/application is submitted. You will receive an email stating your worksheet/application has been submitted successfully to the ABE State Staff for review.
Role: ABE State Initiative Supervisor

Steps 1-13 are the same as the ABE Local Finance Coordinator above: The review and approval or rejection process continues using the steps above for the ABE State Initiative Supervisor. After the worksheet/application is approved by the ABE State Initiative Supervisor, the Agreement Approval Process begins.
Submit the Agreement

ABE Agreement Process

Objective: This section will take you through the Agreement Process for an ABE worksheet/grant in CTIMS.

Roles: Worksheet/Application Agreement Process

ABE Local Finance Coordinator

ABE State Initiative Supervisor

After the Worksheet/Application has been approved through the ABE State Initiative Supervisor level, the school will receive an email from the ODCTE ABE office with the official approval notification.

Note: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.
The following steps should be followed to finish the approval and agreement process in CTIMS.

**Role: Local Finance Coordinator**

**Step 1:** Sign in using your email and password at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/).

**Step 2:** Verify that you are signed on with the role of an **ABE Local Finance Coordinator** in the top right hand corner. Your account will probably automatically come up as ABE-Local Finance Coordinator, but if not, use the drop down arrow to select the correct role.

**Step 3.** Hit + (plus) sign next to **Grants** on left navigation.
Step 4. Hit + (plus) sign next to Grant Process.

Step 5. Hit + (plus) sign next to ABE Process.

Step 6. Select Manage Grant Worksheets/Agreements/Invoice/Follow-up.
Submitting the Agreement

Step 7. Complete the Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screen shot correspond to the instruction steps below.

Note: The red asterisks* represents a required field.

1. Verify Fiscal Calendar Year*.
2. Verify Grant Fund Type is set to Adult Basic Education*.
3. Select your correct Organization Type from the drop down menu.
4. Select your Organization by typing in the first three characters of the name.
5. Verify the 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.
**Step 8:** After hitting the **Search** button, select the new agreement by clicking on the word **New** in the agreement column.

**Step 9:** **Project Details:** Expand the **Project Details** section by hitting the **+(plus)** sign and enter your negotiated Indirect Cost Rate (or F&A) from your cognizant agency.
Step 10: ABE Grant Agreement: Open the Budget Line Items section by clicking on the + (plus) sign.

Step 11: ABE Grant Agreement – OCAS Codes. Go to the Budget Line Items. Click inside the blank box under the Budget Line (OCAS CODE) column. Enter the OCAS coding for each of the line items in the following order: Object-Program-Function Code (e.g. 100-511-1000). As you begin typing the OCAS code, a drop down of OCAS codes will come up that you can select from. Select the valid OCAS code for each budget item. After entering all OCAS codes, “Save as Draft”.
Save as Draft *before* checking acknowledgements.

**Step 12: ABE Grant Agreement -Acknowledgements.** Scroll down the page to the Acknowledgement tab. Click the certify box and put in an acknowledgment note.

**Step 13: ABE Agreement Submit for Approval.** Select Submit for Approval. The agreement will now go back to the ABE State Initiative Supervisor for approval.
Role: ABE State Initiative Supervisor

Steps 1-13: The review and approval or rejection process continues using the steps above for the ABE State Initiative Supervisor. The ABE State Supervisor will select the agreement number to review and approve. After the Agreement is approved by the ABE State Initiative Supervisor, the Local Finance Coordinator can begin submitting invoices.
ABE Invoice Process

Objective: This section will take you through the steps to submit an invoice for payment.

Roles: Invoice Process

ABE Local Finance Coordinator

ABE State Initiative Supervisor

ODCTE Finance Reviewer

Note: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.
Role: Local Finance Coordinator

Step 1: Sign in using your email and password at https://ctims.okcareertech.org/CTBDSWeb/.

Step 2: Verify that you are signed on with the role of an **ABE-Local Finance Coordinator** in the top right hand corner. Your account will probably automatically come up as ABE-Local Finance Coordinator, but if not, use the drop down arrow to select the correct role.

Step 3. Hit + (plus) sign next to **Grants** on left navigation.
Step 4. Hit + (plus) sign next to **Grant Process**.

Step 5. Hit + (plus) sign next to **ABE Process**.

Step 6. Select **Invoice Process**.
Step 7. Complete the requested information on this screen. 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 Adult Basic Education*.
3. Select your correct Organization Type from the drop down menu.
4. Select your Organization by typing in the first three characters of the name.
5. Verify the 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.
**Step 8: ABE Grant Fund Invoices List -** After hitting the **Search** button, select **New Invoice** to start the invoice process, **not** the + (plus) sign.

![Image of ABE Grant Fund Invoices List]

**Step 9: ABE Grant Submit Invoice - Step 1** - Verify that the information is correct by expanding each section by hitting the + (plus) sign. Select **Save & Next**.

![Image of ABE Grant Submit Invoice - Step 1]
Step 10: ABE Grant Submit Invoice – Step 2.

Under the **Invoice Line Items** tab, select the budget line item you want to invoice by clicking on the **+ (plus)** sign. You can invoice all or part of the budget line.
Step 11: Attach the OCAS Expenditure Summary and Detailed Reports that match the amount of reimbursement you are requesting. Attach receipts and invoices. Expenditure Summaries, Budget Analysis and Expenditure Analysis will no longer be accepted. Detailed and Summary Expenditure Quarterly Reports are required.

To attach a document, go to the Attachments tab, Browse your computer for the file, select Upload and Save File.

Step 12: Scroll down and expand the Acknowledgement tab. Check in the boxes to certify that the information is correct. If this is the final payment, check the Is final payment? box. Put in an acknowledgement note. Select the Submit for Approval button.
**Step 13:** The invoice request will go to the State Initiative Supervisor and the Finance Reviewer to be approved or rejected.

**Note:** Recipients are held to the 5% administrative cost rate or the negotiated rate of actual expenditures, not budgeted. Each invoice/claim must be submitted at the site’s negotiated administrative cost rate. The site may elect to apply indirect costs/administrative costs to their grant until the final claims. If sites elect to invoice above their approved administrative rate, they must complete an estimated year-end projection. The projection must be approved **before** invoices are approved. A projection template is available on the ABE Forms website.
Process: ABE Change Request

After a worksheet/application is submitted for approval, you must go through the Change Request Process to make any changes.

**Step 1:** Sign in using your school email and CTIMS password at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/).

**Step 2:** Verify that you are signed on with the role of an ABE-Local Initiative Coordinator in the top right hand corner. Your account will probably automatically come up as ABE-Local Initiative Coordinator, but if not, use the drop down arrow to select the correct role.

**Step 3.** Hit **+(plus)** sign next to Grants on left navigation.
Step 4. Hit + (plus) sign next to Grant Process.

Step 5. Hit + (plus) sign next to ABE Process.

Step 6. Select ABE Manage Grant Worksheets/Agreements/Invoice/Follow-up.
Step 7. Complete the ABE 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 Adult Basic Education*.
3. Select your correct Organization Type from the drop down menu.
4. Select your Organization by typing in the first three characters of the name.
5. Verify the 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.
**Step 8:** After hitting the **Search** button, the worksheet/applications that are in the approval process will be listed. Select the worksheet number to open it.

**Step 9:** To make changes to your Worksheet/Application or Budget, select **Change Request**.
**Step 10:** The Change Request process cancels the worksheet/application approval process. Click **OK** to continue.

**Step 11:** You can now make any changes to the worksheets or budget items. After making the changes, select **Submit for Approval.**
Initiating an ABE Change Request

**Step 12:** Select **Approve** to send changes to next approval level.

**Step 13:** After the worksheet is approved and an agreement is made, you cannot make changes to the worksheet, only the agreement.

**NOTE:** Once a change request is initiated by a user, it must be completed by the same user. Change Requests are author based, not role based.

**ABE Budget Adjustment Process**

**Change Request or Budget Adjustment?**

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

**Budget Adjustment** – To make budget changes on an agreement after it has been approved by ABE staff, use the Budget Adjustment Process. This can only be performed by the ABE Local Finance Coordinator.
Requesting a Budget Adjustment

Logging in to CTIMS

Sign in at https://ctims.okcareertech.org/CTBDSWeb/ using your school email and CTIMS password.

Or,

Go to http://www.okcareertech.org/ and select Web Apps in the red bar at the top of the page. **Do not select the Login selection in the red bar. This is not the CTIMS login.** Select CTIMS (Career Information Management System) from the menu. CTIMS will be all the way at the top of the page. Make sure you are logging in to CTIMS and not another application.

Note: Please log in using Microsoft Explorer 11 or higher. CTIMS is currently not compatible with other browsers.

Roles: Budget Adjustment Process

ABE Local Finance Coordinator

ABE State Initiative Supervisor
Process: Budget Adjustment

After the worksheet/application and the agreement are approved, you must go through the Budget Adjustment Process to make any changes.

Step 1: After logging in to your CTIMS account, verify that you are logged in with the role of an ABE-Local Finance Coordinator in the top right hand corner. Select the + (plus) sign next to Grants, Grants Process, ABE Process, then Manage Grant Worksheets/Agreements/Invoice/Follow-Up.
Step 2: Complete the 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 Adult Basic Education*.
3. Select your correct Organization Type from the drop down menu.
4. Select your Organization by typing in the first three characters of the name.
5. Verify the 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.
Step 3: In the **Budget Adjustment Process**, you will change the agreement, not the worksheet. Select the link under the **Agreement** column.

Step 4: Select **Budget Adjustment Process**. There is an image saying “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**.
**Step 5:** 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 6:** Click on the **+(plus)** sign next to **Budget Line Items**. Click on **Add Budget Line** or **Remove Budget Line** to adjust the budget.
Step 7: Before submitting your budget changes, you must go into the **Acknowledgements** tab and put in a **Budget Adjustment Justification Note**.

Step 8: Select **Submit for Approval** to send the Budget Adjustment through the approval process.

Step 9: You can check the status of the adjusted budget by going into the **Manage Grant Worksheets/Agreements/Invoice/Follow-Up**. Use the scroll button to scroll to the right, then look at the status under **Agreement Approval Status**.