

# CAREERTECH INFORMATION MANAGEMENT SYSTEM (CTIMS)

## ABE WORKSHEET GUIDEBOOK

IMD

*career*tech

August 2, 2017

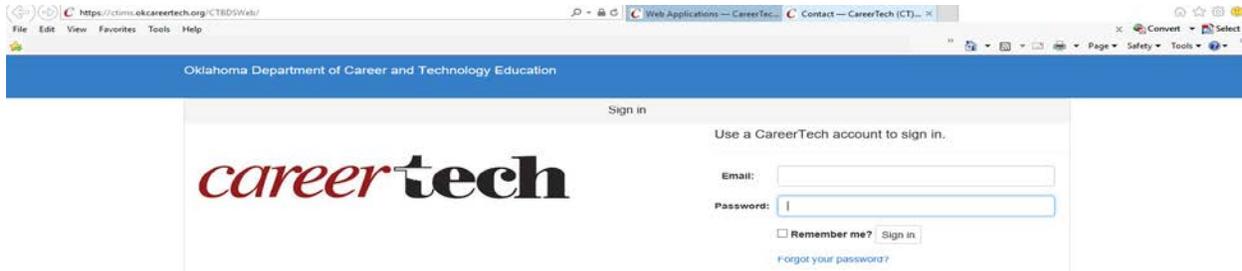
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**Objective:** This section will take you through the submission and approval stages for starting a new ABE Worksheet in CTIMS,

### Signing in to CTIMS

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



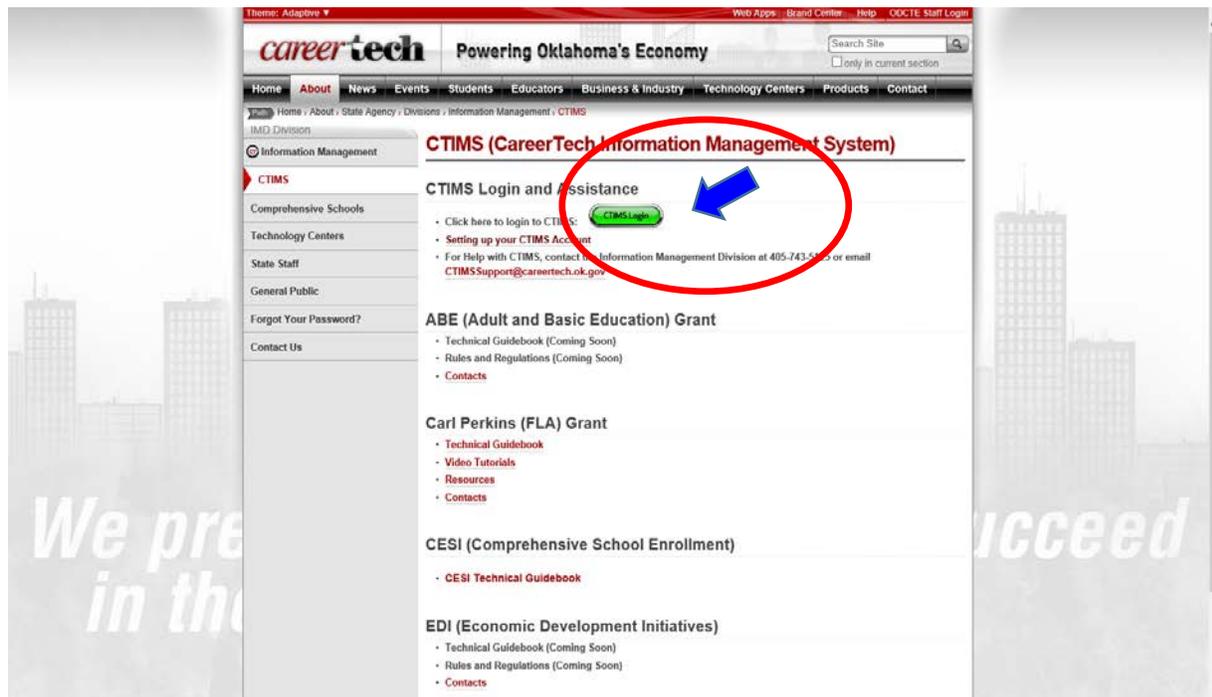
**Or,**

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.



## 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.

Joanne Dewald  
Phone: 405.743.5570

Email: [joanne.dewald@careertech.ok.gov](mailto:joanne.dewald@careertech.ok.gov)

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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** – 1<sup>st</sup> 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** – 2<sup>nd</sup> Approval. Reviews and approves or rejects worksheet. If approved, goes to State approval stage. If rejected, goes back to stage 1.



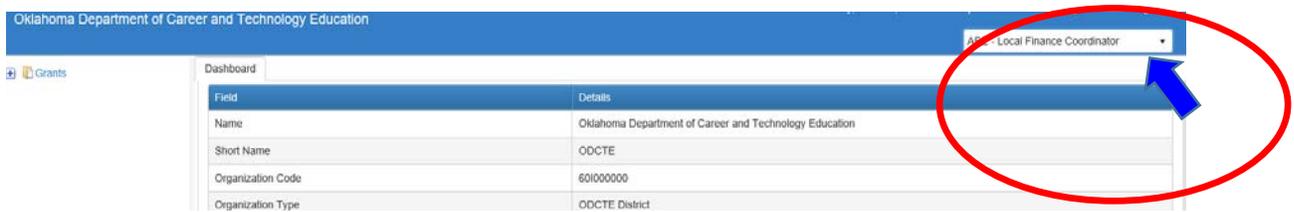
**Stage 4 – ABE State Initiative Supervisor** – Final Approval. After the worksheet is approved through Stage 4, the Agreement Process begins with the ABE Local Finance Coordinator.

## 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.



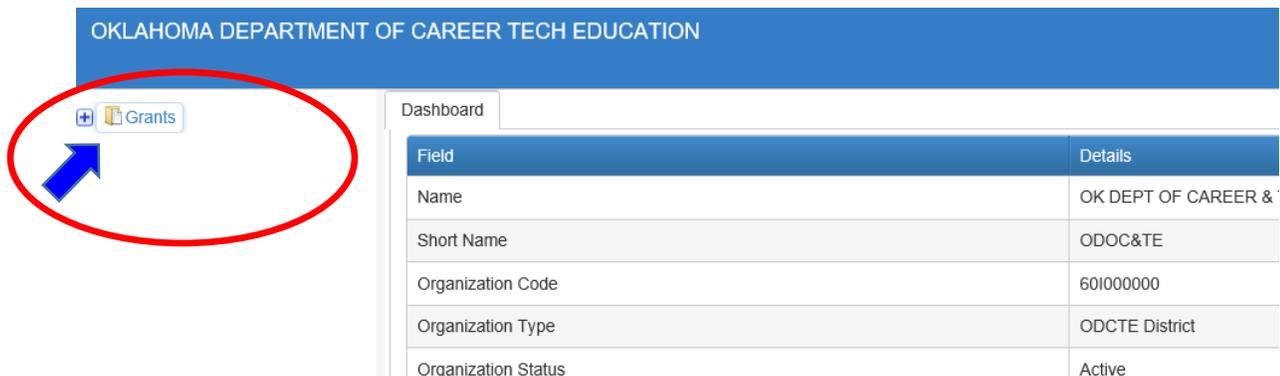
Oklahoma Department of Career and Technology Education

ABE-Local Initiative Coordinator

Grants

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODOCTE
Organization Code	60I000000
Organization Type	ODOCTE District

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



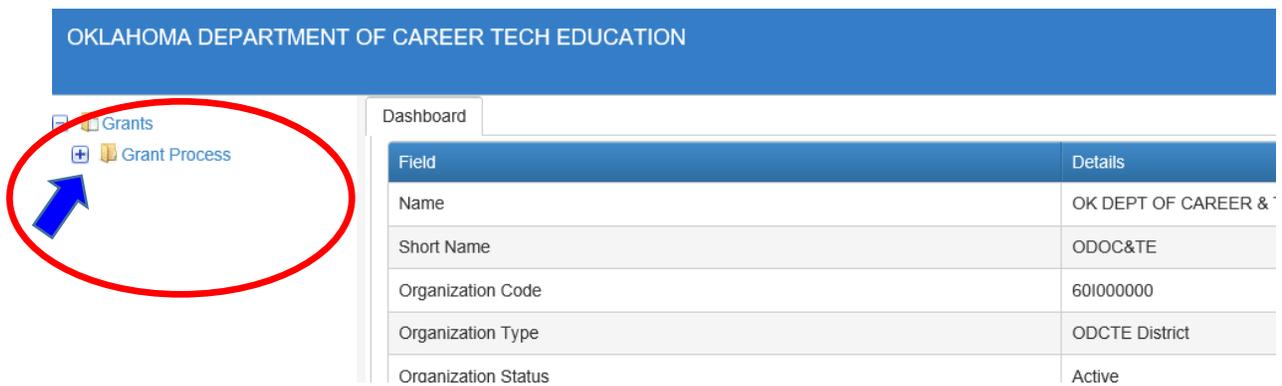
OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Grants

Dashboard

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

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



OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

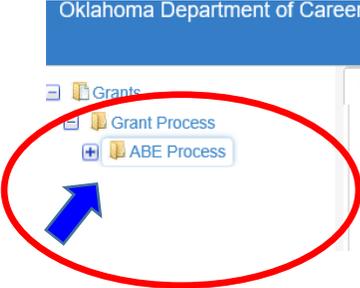
Grants

Grant Process

Dashboard

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

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



Oklahoma Department of Career and Technology Education

Grants

- Grant Process
- ABE Process**

Dashboard

Field	Details
Name	Oklahoma Department of Career and Tech
Short Name	ODCTE
Organization Code	601000000

**Step 6. Select New Worksheet / Agreement Flow**



Oklahoma Department of Career and Technology Education

Grants

- Grant Process
- ABE Process
- New Worksheet / Agreement Flow**
- Manage Grant Worksheets/Agreements/Invoice/Follow-up

Dashboard

Field	Details
Name	Oklahoma Department of Career and Technolo
Short Name	ODCTE
Organization Code	601000000
Organization Type	ODCTE District
Organization Status	Active

**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.

Dashboard | New Worksheet / Agreement Flow x

ABE Grant Submit Worksheet - Step 1

Save & Next

Fiscal Calendar Year\* 2016-2017 Grant Fund Type\* Adult Basic Education

Organization Type\* 1 Comprehensive Schools Districts Organization\* 2 Bartlesville School System

Organization District\* Bartlesville School System Program Initiative\* 3 Adult Education and Literacy-731

Worksheet No.\* WS-1617-ABE-ABE-AEL-731-74030050-369BFB456FA1

Client Basic Information For work Sheet

Organization Type\* Business Masters Client Type\* 4 Business Masters ( Company)

Organization\* 5 BARTLESVILLE SCHOOL SYSTEM Business Code\* 6 9798

View Location(s) View Contact(s) 7

Year Established FEI Number

Primary NAICS Code Elementary and Secondary Schools (6111) Secondary NAICS Code Agriculture, Forestry, Fishing and Hunting...

Years in Business Years in Oklahoma

No. of hourly Employees 0 No. of Salaried Employees 0

Highest Level if Employment Client Products

Approval Status Vendor Number

Year Formed Year Joined

Year Left Impact District Id

**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.

The screenshot shows the 'ABE Grant Submit Worksheet - Step 2' interface. The left sidebar contains a navigation menu with the following items: 'Provider Organization Details', 'Basic Client Information', and 'Funding Request Details'. The 'Funding Request Details' item is circled in red, and a blue arrow points to the plus sign next to it. The main content area displays the 'Welcome to the FY17 ABE-Adult Education and Literacy Worksheet' and the 'FFATA Information Collection Requirements' section. This section includes several certification checkboxes and input fields, such as 'I certify that the DUNS number listed above in the Client Information section is correct.', 'If the DUNS number listed in the Client Information section is not correct, please enter the correct DUNS number here.', 'Please provide your Zip+4 for the physical street address of your primary place of business.', 'I certify that the Zip+4 listed above is correct and active for my school or organization.', '[1.4] - Please provide your organization's two-digit Congressional District:', and '[1.2] - For the DUNS number above, verify your organization's registration in the federal System for Award Management (SAM) has been updated for this year'. Below this is the 'Budget Narrative' section, which includes instructions to 'Complete a narrative clearly identifying planned expenditures for each OCAS coding structure you wish to utilize. Each category specific. Identify the expenditures as instructional (511) and/or administrative (519)'. It provides examples for 'Supplies' and 'Other Purchased Services' and lists various categories for budgeting: Salaries, Benefits, Contracted Services, Purchased Property Services, Other Purchased Services, Supplies, Property, Dues and Fees, and Staff Registration and Tuition.

**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.

Oklahoma Department of Career and Technology Education

ABE - Local Initiative Coordinator

5 + Add Budget Line × Remove Budget Line ⊖ Cancel Budget Line Changes

Budget Line Desc	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Status
Salaries 1	1.00 2	\$1,500.00 3	Cost Per Class 4	\$1,500.00	\$0.00	Active
Books	15.00	\$25.00	Cost Per Each	\$375.00	\$0.00	Active
				\$1,875.00	\$0.00	

Note

6 + Attachments

+ Acknowledgements

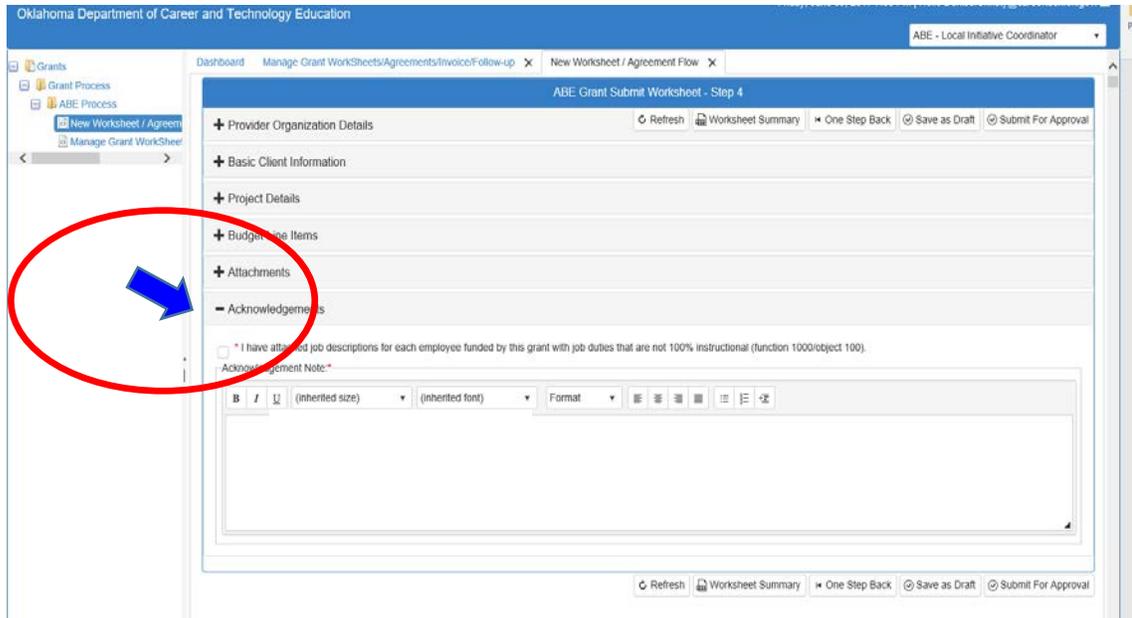
7

Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval

**Step 10: Do Not click Save & Continue yet because you are required to complete the Acknowledgements section.**

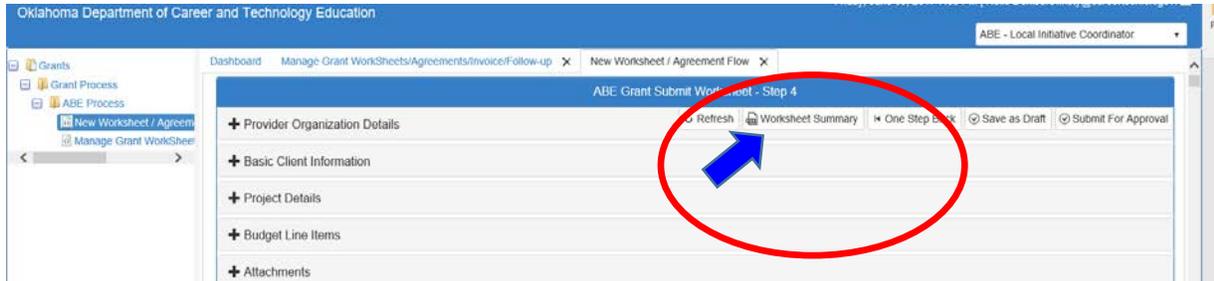
Go to the **Acknowledgements** by clicking the **+(plus)** sign.

Check the acknowledgement button, then add an **Acknowledgement Note**.

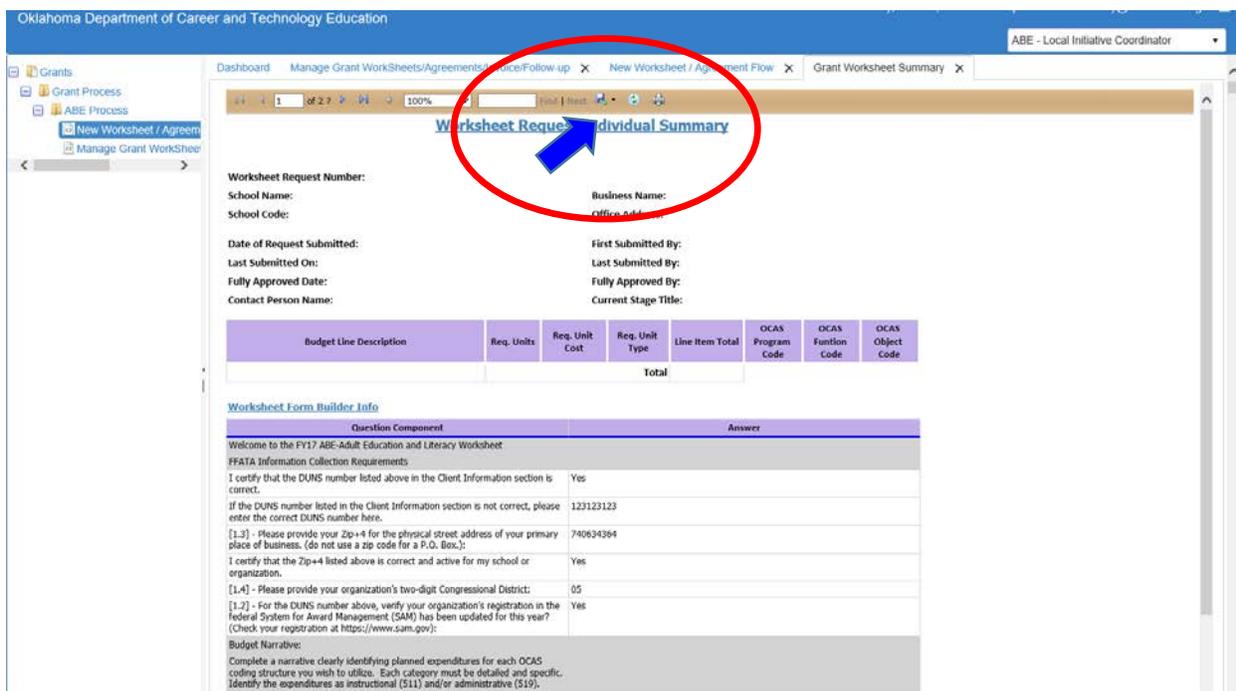


## Step 11: Worksheet. Summary

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

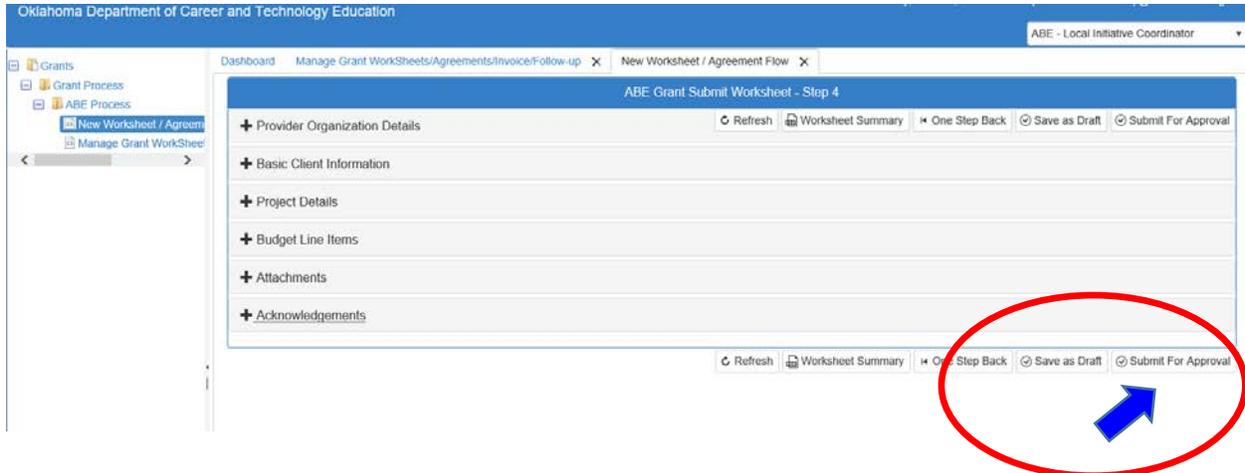


To print the Worksheet Summary, select the save/download button  to download a pdf that you can save or print. Do not use the printer button.



## 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.



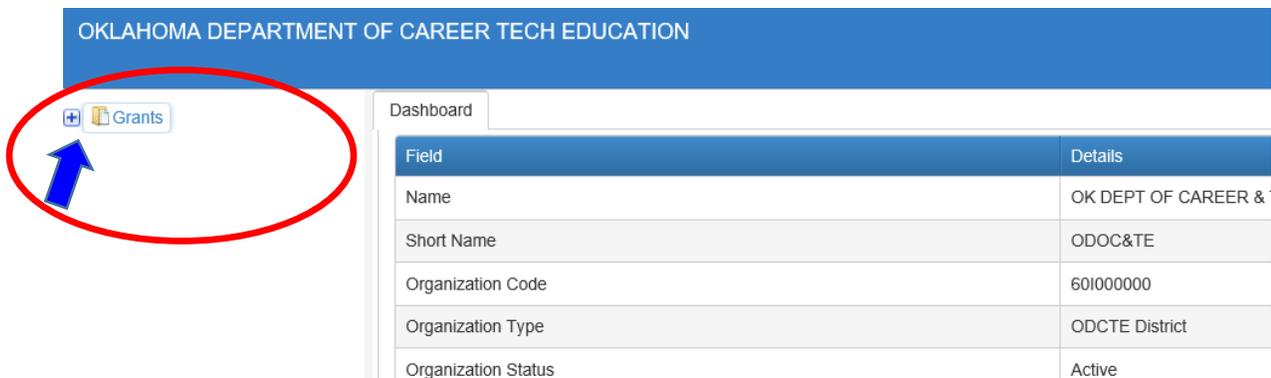
Oklahoma Department of Career and Technology Education

Grants

Dashboard

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	601000000

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



OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Grants

Dashboard

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

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

Oklahoma Department of Career and Technology Education



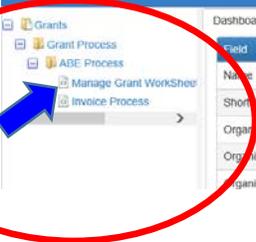
Dashboard

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active
Website	

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

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator



Dashboard

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active

**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.

Oklahoma Department of Career and Technology Education

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

ABE - Local Finance Coordinator

ABE Grant Fund Worksheets List

Fiscal Calendar Year\* 1 2016-2017 Grant Fund Type\* 2 Adult Basic Education

Organization Type\* 3 Colleges Organization\* 4 Enter the first three characters of any word that is incl

Organization District\* 5 Program Initiative\* 6 --Select--

Approval Function Type\* 7 All

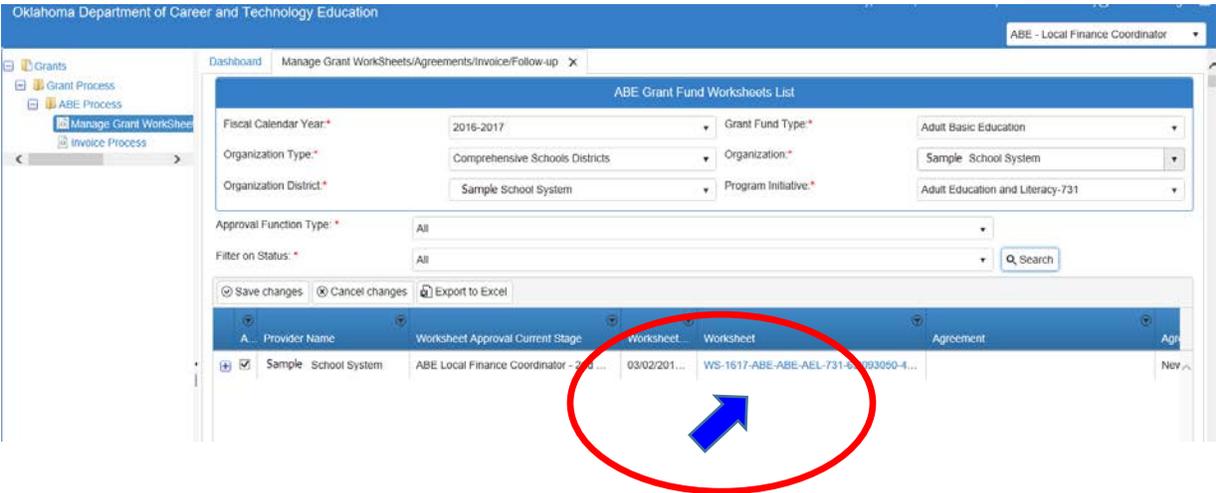
Filter on Status\* 8 All

Save changes Cancel changes Export to Excel

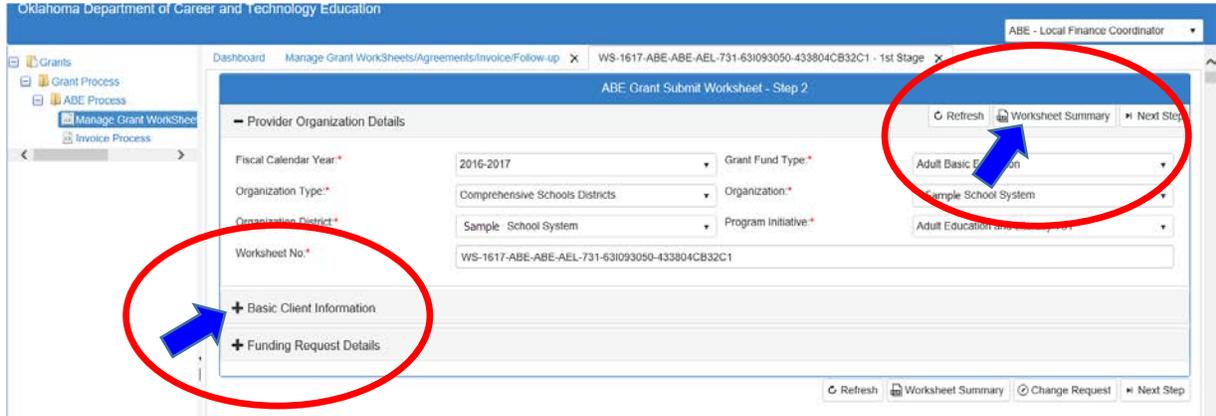
Search 9

Provider Name Worksheet Approval Curre Worksheet Worksheet Agreement Agreement Approval Cu

**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.

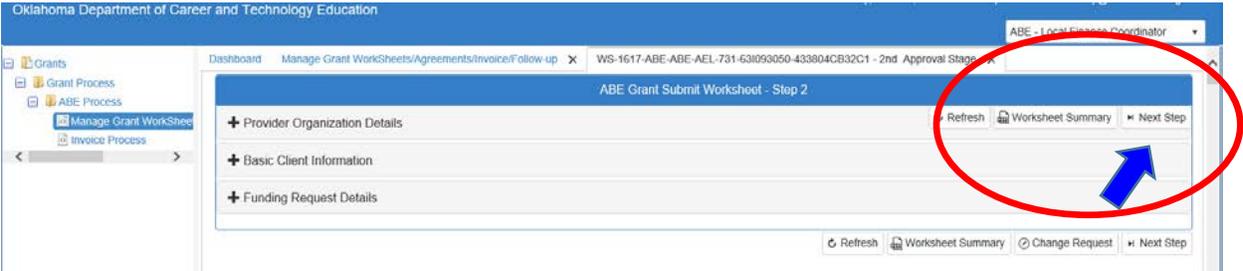


**Step 9: ABE Grant Submit Worksheet - Step 2.** Open each section of the worksheet by hitting the + (plus) sign beside the title. Verify the contents of each section of the worksheet. We recommend you print a pdf of the worksheet summary to help with project and budget verification.

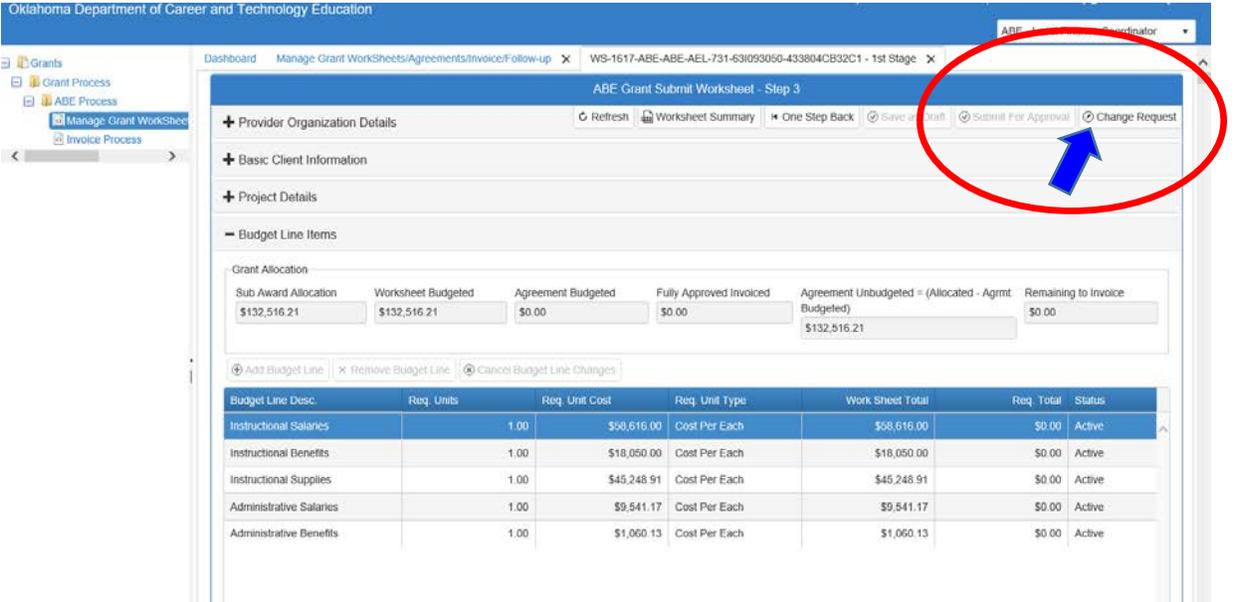


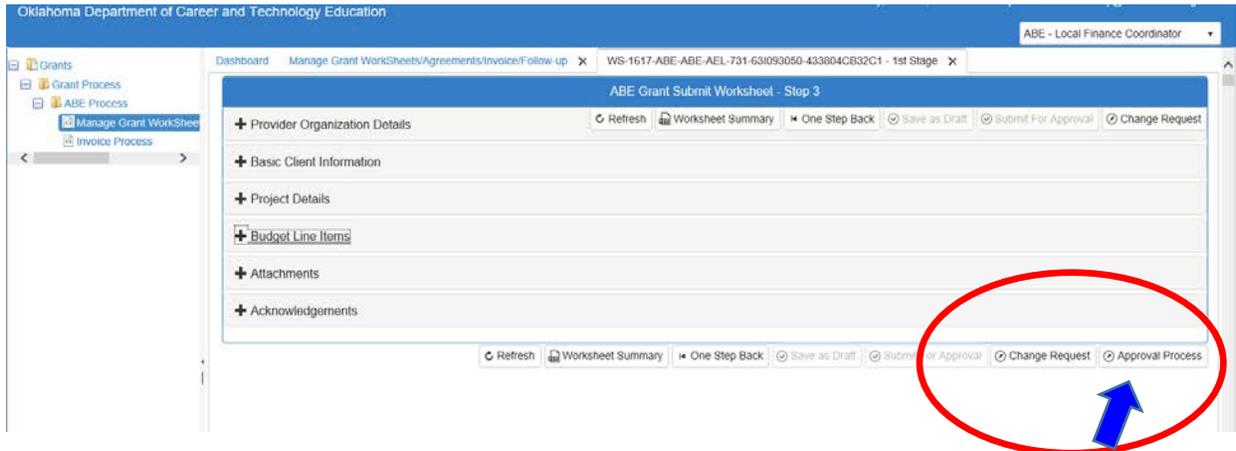
**Step 10: ABE Grant Submit Worksheet – Step 2**

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



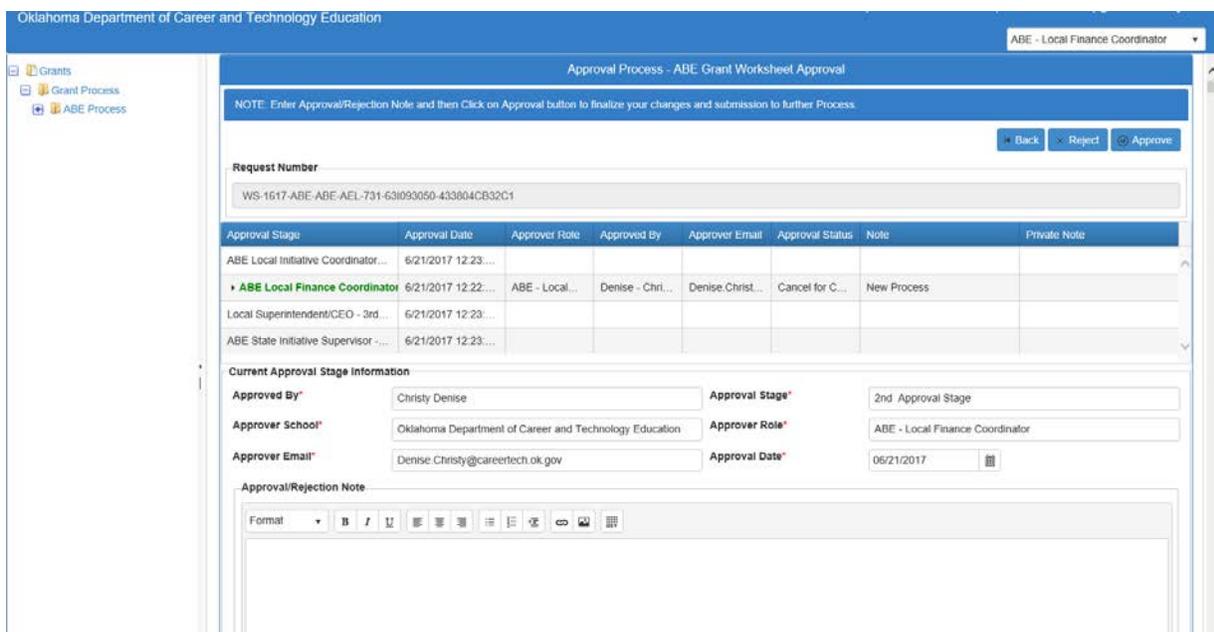
**Step 11: ABE Grant Submit Worksheet.** Verify the information in the budget is correct. If you need to make a change, select **Change Request** and follow the instructions to make the changes.



**Step 12: If the budget is correct, select Approval Process.****Step 13: Approval Process - ABE Grant Worksheet Approval.**

1. At this point, you can see that the worksheet/application is at the Local Finance Coordinator Stage (2<sup>nd</sup> 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.

## **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.

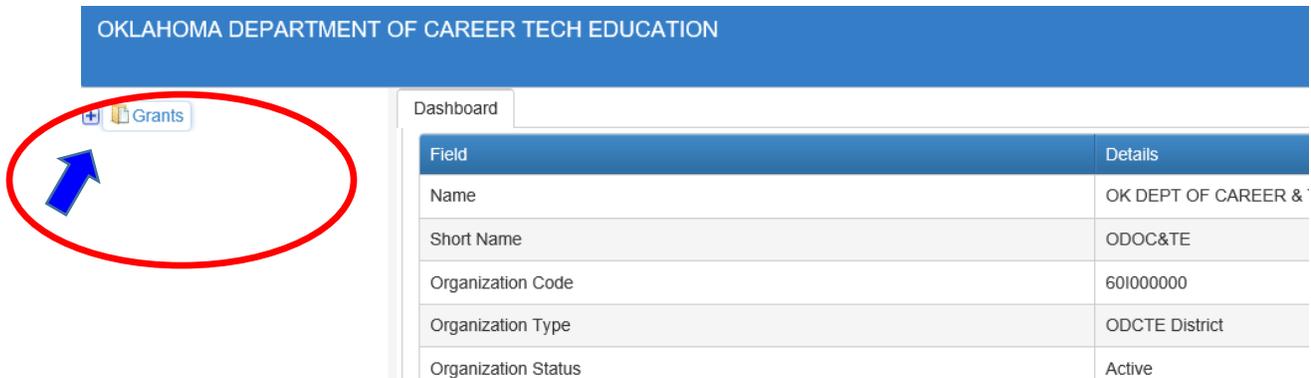
**Role: Local Finance Coordinator**

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

**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.**

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

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

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

Oklahoma Department of Career and Technology Education

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active
Website	

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

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active

**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.

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

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

ABE Grant Fund Worksheets List

Fiscal Calendar Year\* 1 2016-2017 Grant Fund Type\* 2 Adult Basic Education

Organization Type\* 3 Colleges Organization\* 4 Enter the first three characters of any word that is incl

Organization District\* 5 Program Initiative\* 6 --Select--

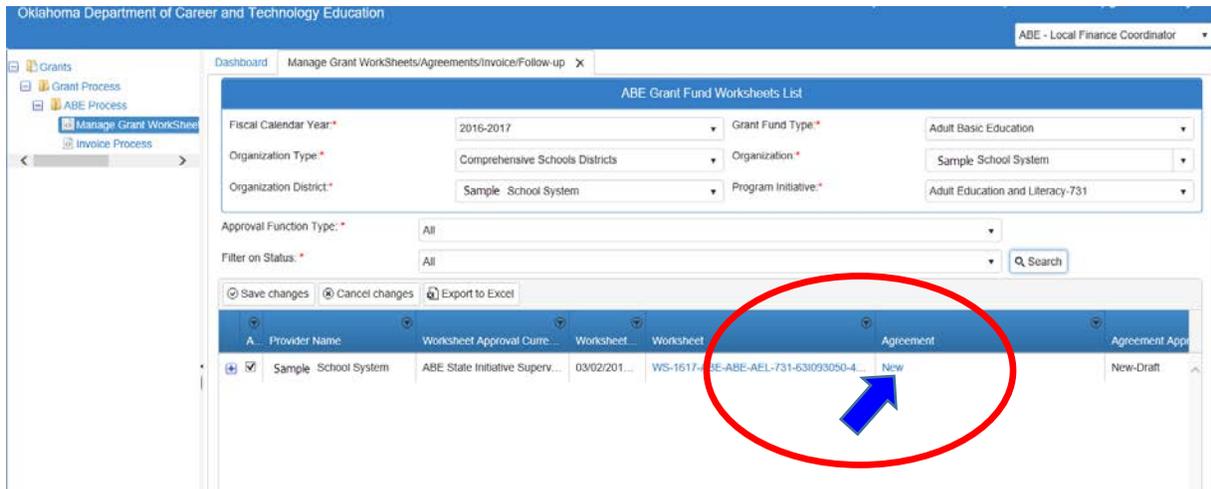
Approval Function Type\* 7 All

Filter on Status\* 8 All Q Search 9

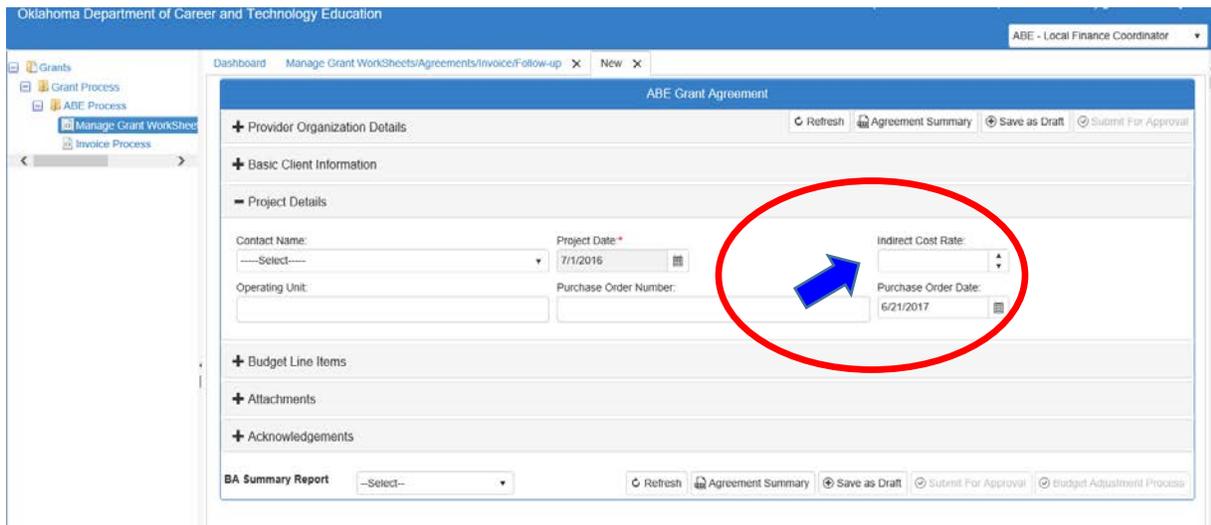
Save changes Cancel changes Export to Excel

Provider Name	Worksheet Approval Curre...	Worksheet	Worksheet	Agreement	Agreement Approval Cu
A...					

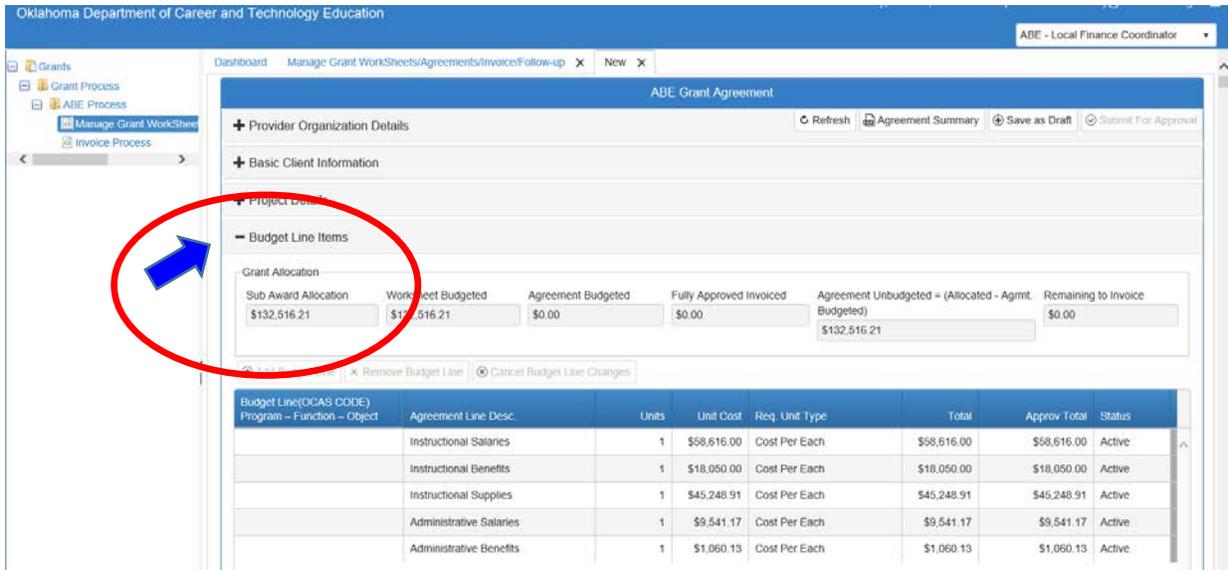
**Step 8:** After hitting the **Search** button, select the new agreement by clicking on the word **New** in the agreement column.



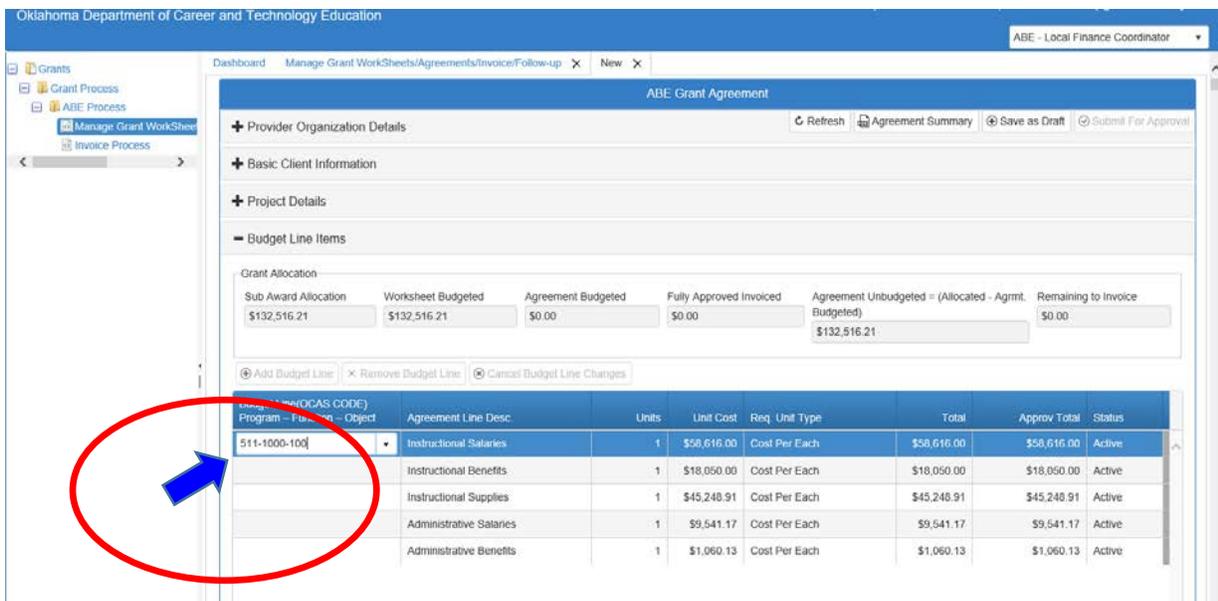
**Step 9: Project Details:** Expand the **Project Details** section by hitting the **+(plus)** sign and enter your negotiated Indirect Cost Rate (or F&A) from your cognizant agency.



**Step 10: ABE Grant Agreement:** Open the **Budget Line Items** section by clicking on the + (plus) sign.

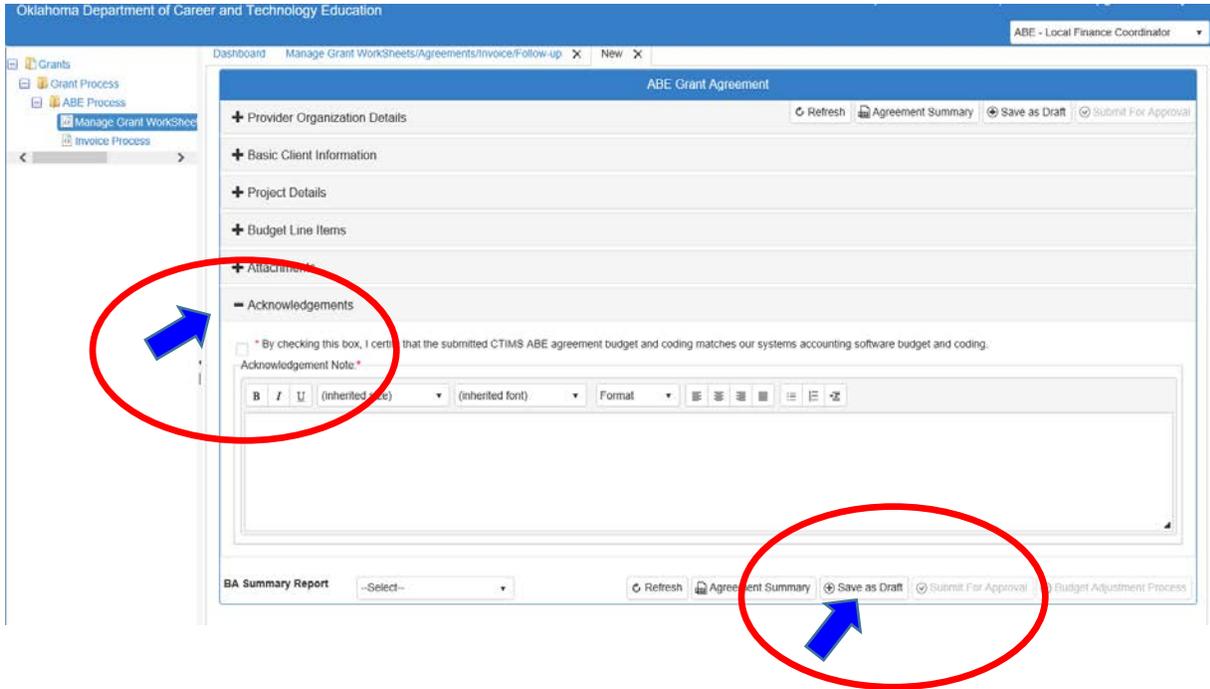


**Step 11: ABE Grant Agreement – OCAS Codes.** Go to the Budget Line Items. Click inside the blank box under the Budget Line (OCAS CODE) column. Enter the OCAS coding for each of the line items in the following order: Object-Program-Function Code (e.g. 100-511-1000). As you begin typing the OCAS code, 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”.

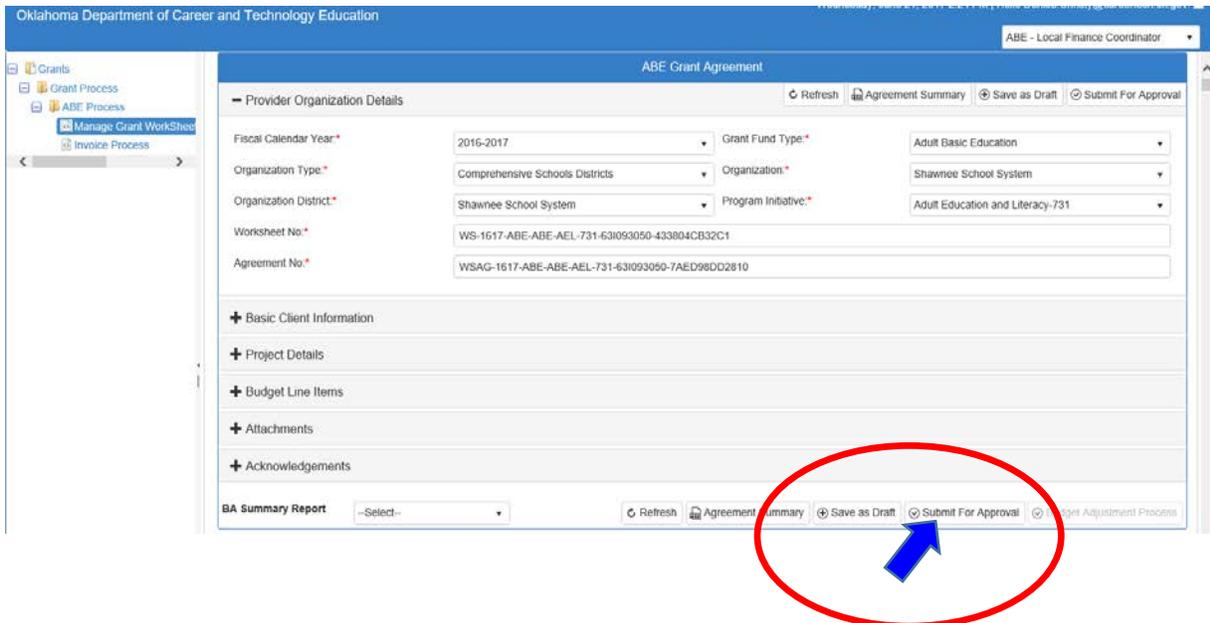


Save as Draft *before* checking acknowledgements.

**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.**

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

Grants

- Grant Process

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

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

Oklahoma Department of Career and Technology Education

Dashboard

Grants

- Grant Process
- ABE Process

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active
Website	

**Step 6. Select Invoice Process.**

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

Dashboard

Grants

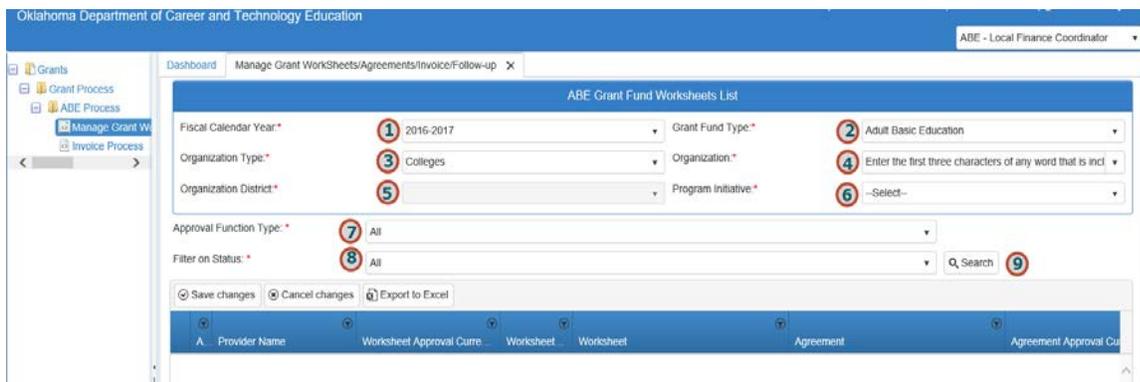
- Grant Process
- ABE Process
- Manage Grant WorkSheet
- Invoice Process

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	60I000000
Organization Type	ODCTE District
Organization Status	Active

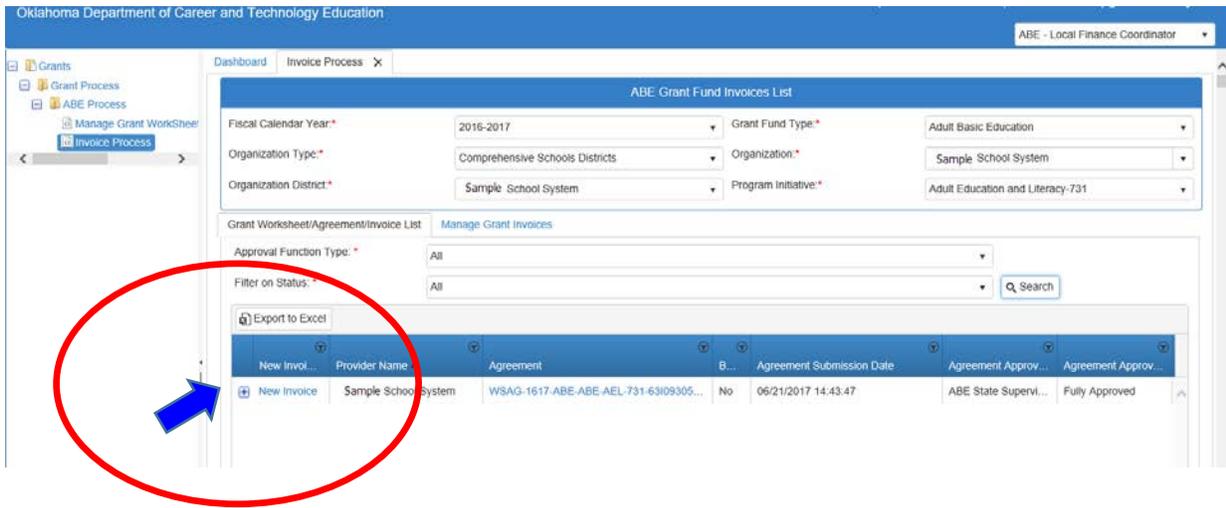
**Step 7.** Complete the requested information on this screen. **The tagged numbers on the screen shot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization login credentials.

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

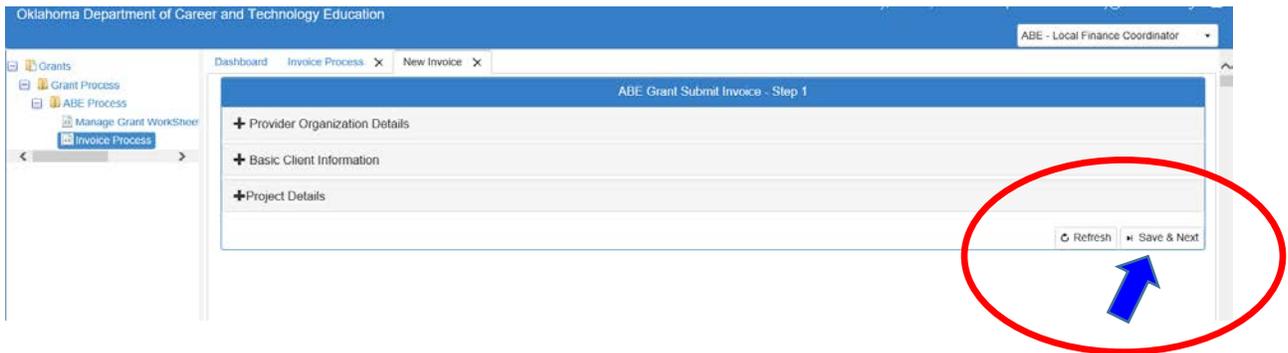
1. Verify **Fiscal Calendar Year** to make sure correct year is showing\*.
2. Verify **Grant Fund Type** is set to Adult Basic Education\*.
3. Select your correct **Organization Type** from the drop down menu.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify 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.



**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**.



### Step 10: ABE Grant Submit Invoice – Step 2.

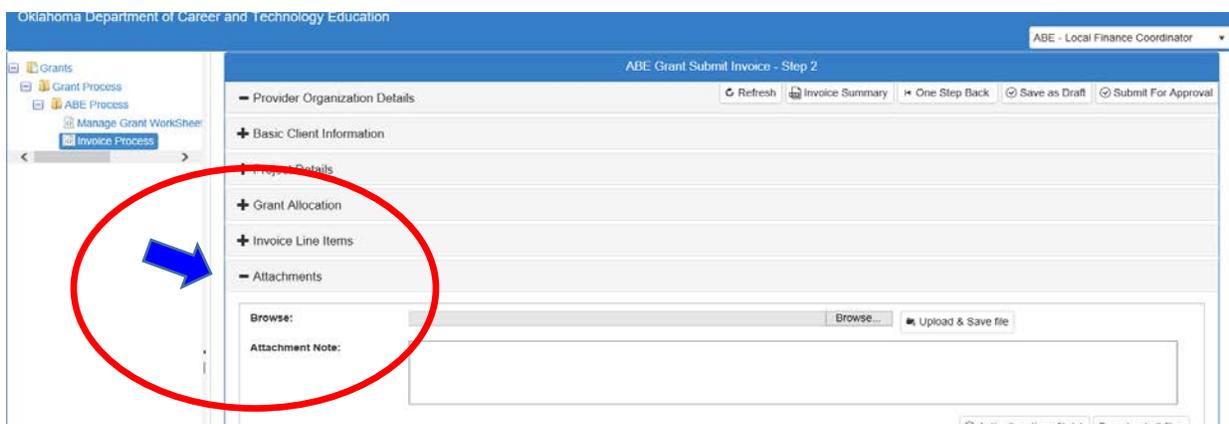
Under the **Invoice Line Items** tab, select the budget line item you want to invoice by clicking on the + **(plus)** sign. You can invoice all or part of the budget line.

The screenshot shows the 'ABE Grant Submit Invoice - Step 2' interface. The 'Invoice Line Items' section contains a table with the following data:

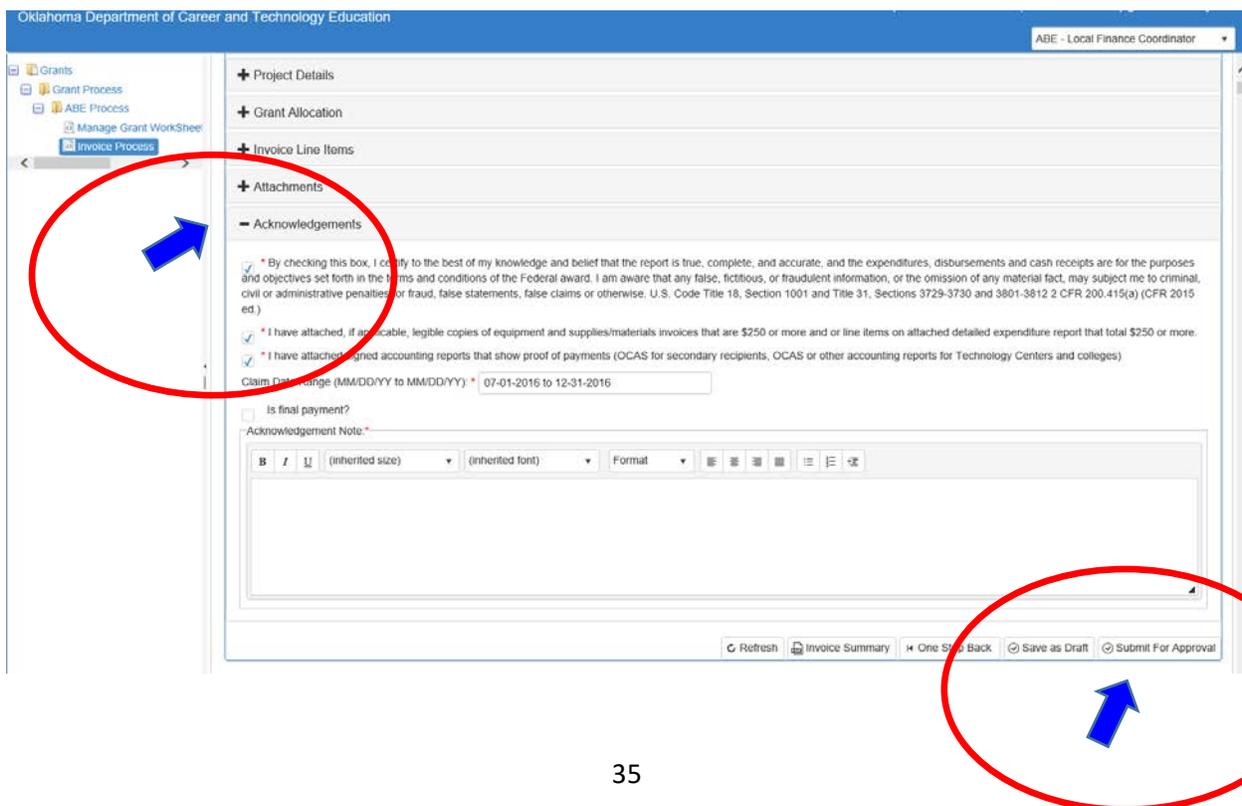
Agreement Line Item	Budget Line/Program - Functn	OCCAS Description	Total	Approv Total	Avf. to Inv...	Current LI...	Total Invol...	Work...
<input checked="" type="checkbox"/>	511-1000-100	511 - ABE Implementation Function-1000 ...	\$58,616.00	\$58,616.00	\$58,616.00	\$0.00	\$0.00	Instruc...
<input checked="" type="checkbox"/>	511-1000-200	511 - ABE Implementation Function-1000 ...	\$18,050.00	\$18,050.00	\$18,050.00	\$0.00	\$0.00	Instruc...
<input checked="" type="checkbox"/>	511-1000-600	511 - ABE Implementation Function-1000 ...	\$45,248.91	\$45,248.91	\$45,248.91	\$0.00	\$0.00	Instruc...
<input type="checkbox"/>	511-1000-100	511 - ABE Implementation Function-1000 ...	\$9,541.17	\$9,541.17	\$9,541.17	\$0.00	\$0.00	Admini...
<input type="checkbox"/>	511-1000-200	511 - ABE Implementation Function-1000 ...	\$1,060.13	\$1,060.13	\$1,060.13	\$0.00	\$0.00	Admini...
			\$132,516.21	\$132,516.21	\$132,516.21	\$0.00	\$0.00	

**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

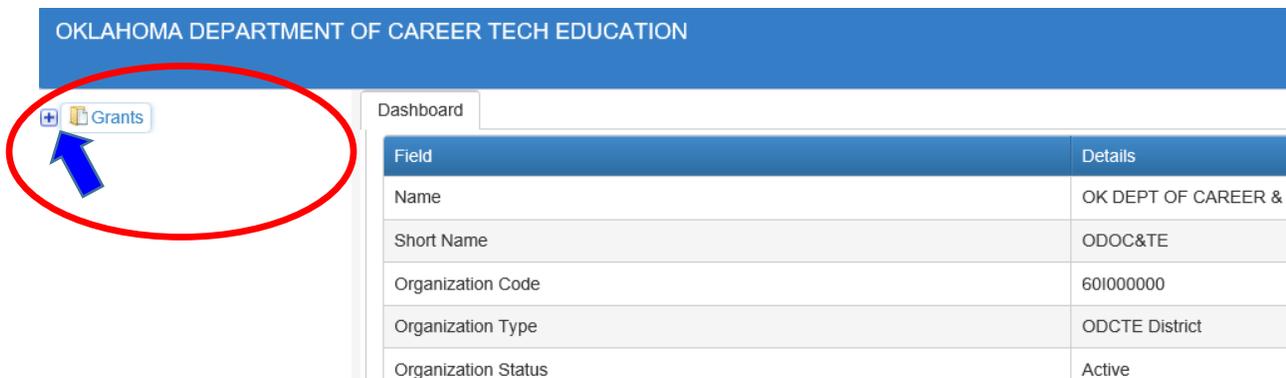
After a worksheet/application is submitted for approval, you must go through the **Change Request Process** to make any changes.

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

**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.**

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

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

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

Oklahoma Department of Career and Technology Education

Dashboard

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	601000000
Organization Type	ODCTE District
Organization Status	Active
Website	

**Step 6. Select ABE Manage Grant Worksheets/Agreements/Invoice/Follow-up.**

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

Dashboard

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	601000000
Organization Type	ODCTE District
Organization Status	Active

**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.

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

Dashboard Manage Grant Worksheets/Agreements/Invoice/Follow-up X

ABE Grant Fund Worksheets List

Fiscal Calendar Year:\* 1 2016-2017 Grant Fund Type:\* 2 Adult Basic Education

Organization Type:\* 3 Colleges Organization:\* 4 Enter the first three characters of any word that is incl

Organization District:\* 5 Program Initiative:\* 6 -Select-

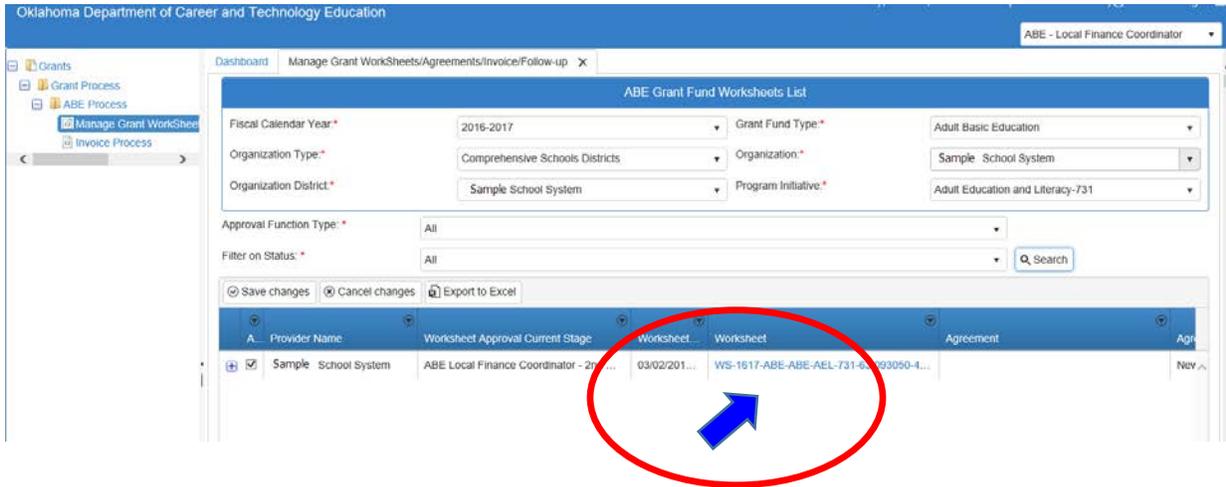
Approval Function Type:\* 7 All

Filter on Status:\* 8 All Q Search 9

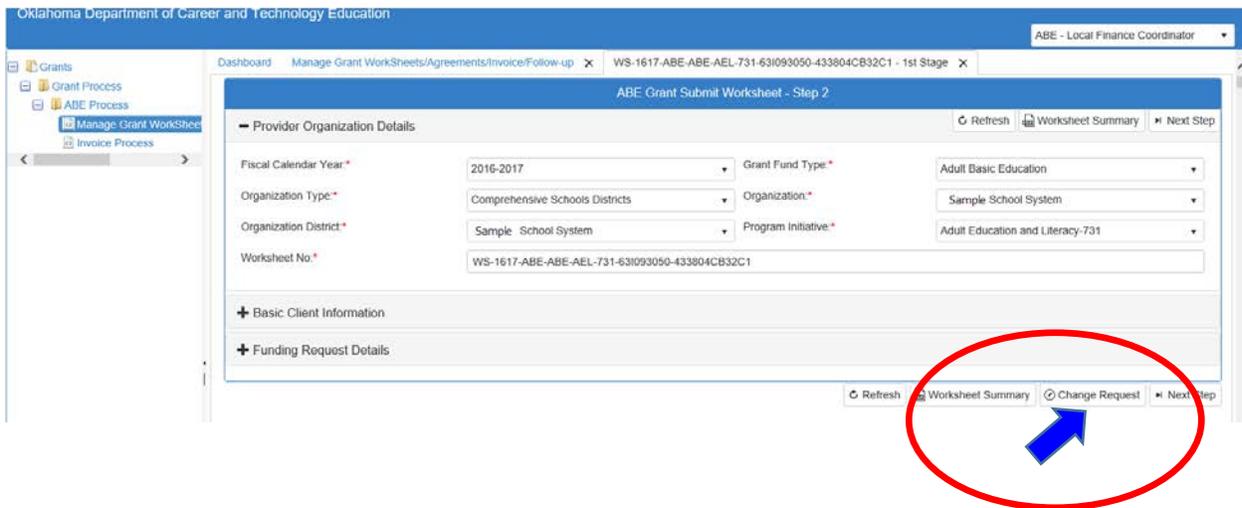
Save changes Cancel changes Export to Excel

Provider Name	Worksheet Approval Curre	Worksheet	Worksheet	Agreement	Agreement Approval Cu
A					

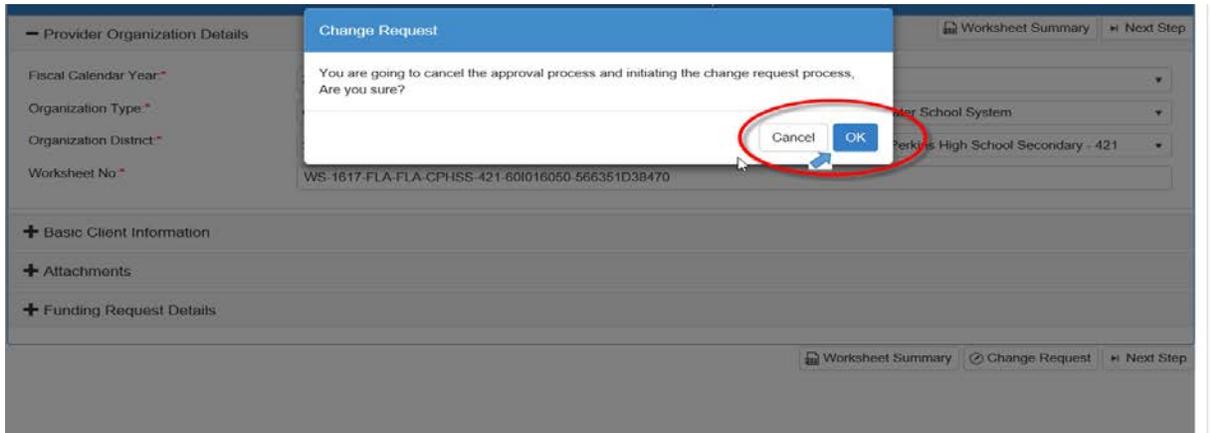
**Step 8:** After hitting the **Search** button, the worksheet/applications that are in the approval process will be listed. Select the worksheet number to open it.



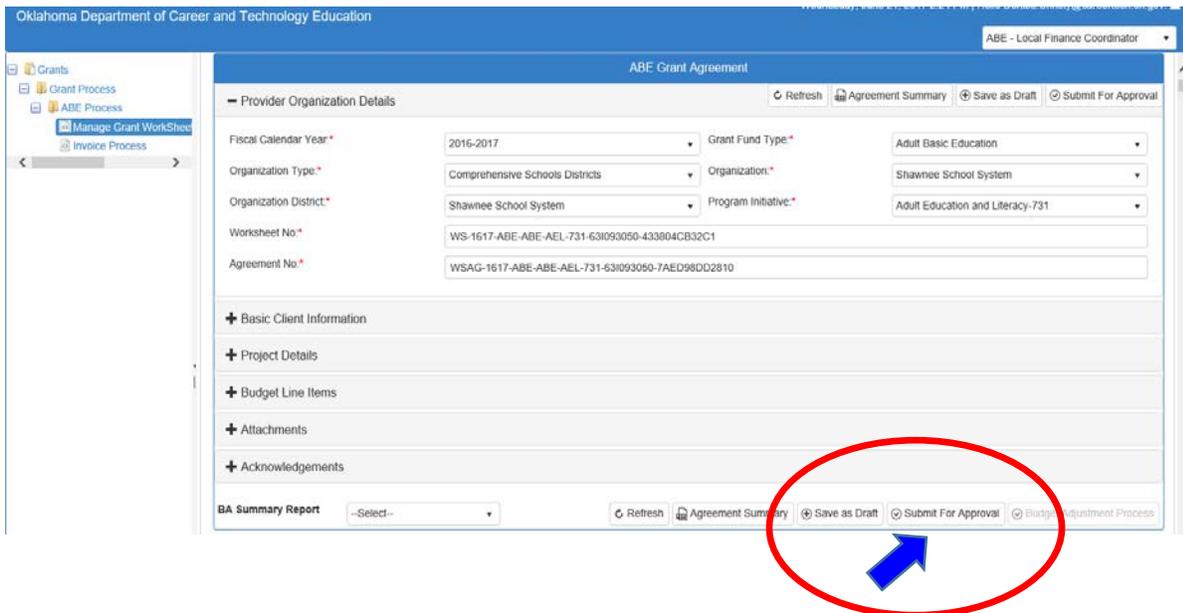
**Step 9:** To make changes to your Worksheet/Application or Budget, select **Change Request**.



**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**.



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

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

Approval Process - ABE Grant Worksheet Approval

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number  
WS-1617-ABE-ABE-AEL-731-631093050-433804CB32C1

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
ABE Local Initiative Coordinator...	6/21/2017 12:23:...						
ABE Local Finance Coordinator	6/21/2017 12:22:...	ABE - Local...	Denise - Chri...	Denise.Christ...	Cancel for C...	New Process	
Local Superintendent/CEO - 3rd ...	6/21/2017 12:23:...						
ABE State Initiative Supervisor ...	6/21/2017 12:23:...						

Current Approval Stage Information

Approved By\* Christy Denise Approval Stage\* 2nd Approval Stage

Approver School\* Oklahoma Department of Career and Technology Education Approver Role\* ABE - Local Finance Coordinator

Approver Email\* Denise.Christy@careertech.ok.gov Approval Date\* 06/21/2017

Approval/Rejection Note

**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

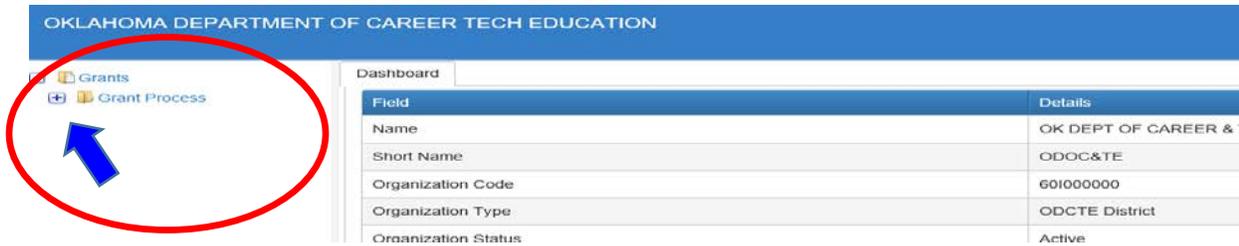
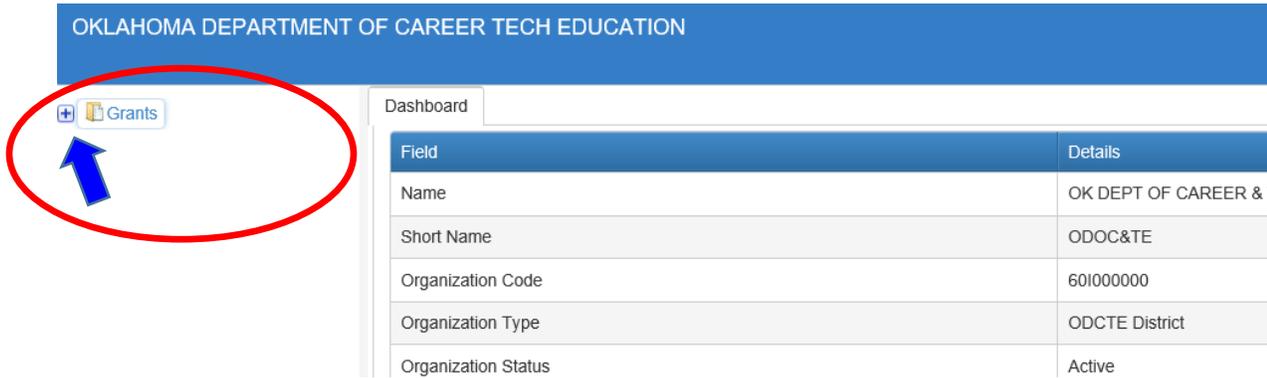


ABE State Initiative Supervisor

**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**.



Oklahoma Department of Career and Technology Education

Grants

- Grant Process
- ABE Process

Dashboard

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	601000000
Organization Type	ODCTE District
Organization Status	Active
Website	
Email Address	

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

Dashboard

- Grant Process
- ABE Process
- Manage Grant Worksheet
- Invoice Process

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	ODCTE
Organization Code	601000000
Organization Type	ODCTE District
Organization Status	Active

**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.

Oklahoma Department of Career and Technology Education

ABE - Local Finance Coordinator

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

ABE Grant Fund Worksheets List

Fiscal Calendar Year\* 1 2016-2017 Grant Fund Type\* 2 Adult Basic Education

Organization Type\* 3 Colleges Organization\* 4 Enter the first three characters of any word that is inci

Organization District\* 5 Program Initiative\* 6 --Select--

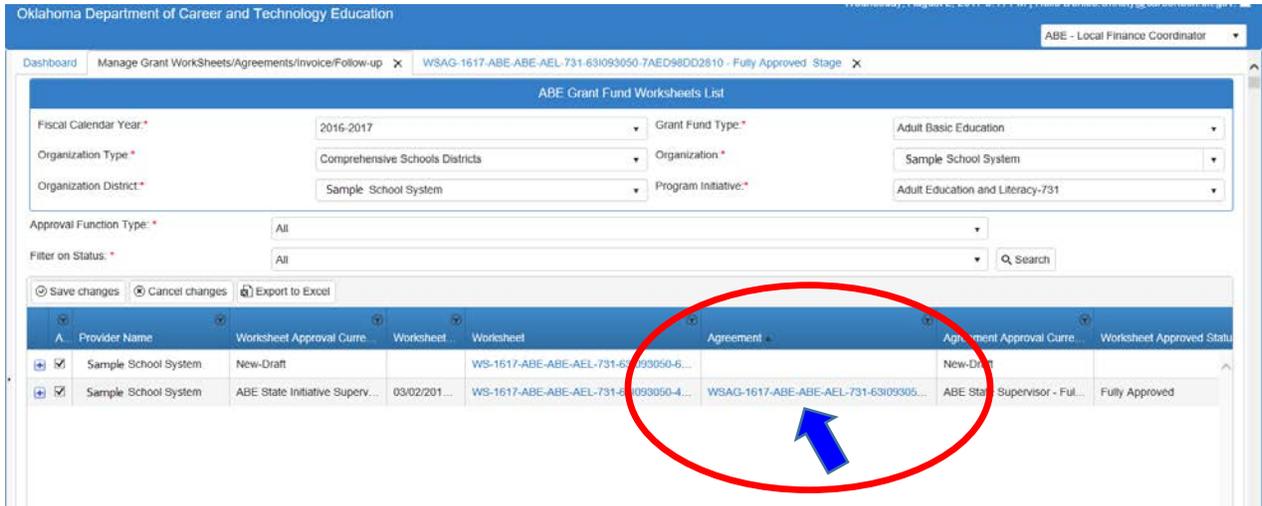
Approval Function Type\* 7 All

Filter on Status\* 8 All Search 9

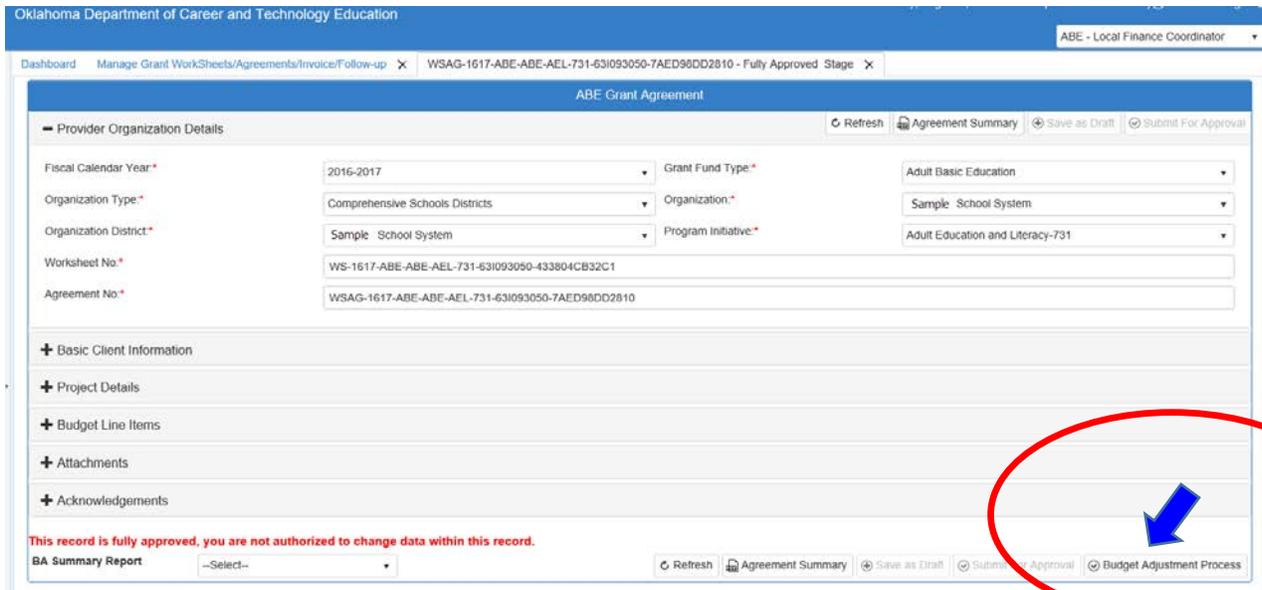
Save changes Cancel changes Export to Excel

Provider Name	Worksheet Approval Curre...	Worksheet	Worksheet	Agreement	Agreement Approval Cu
A.					

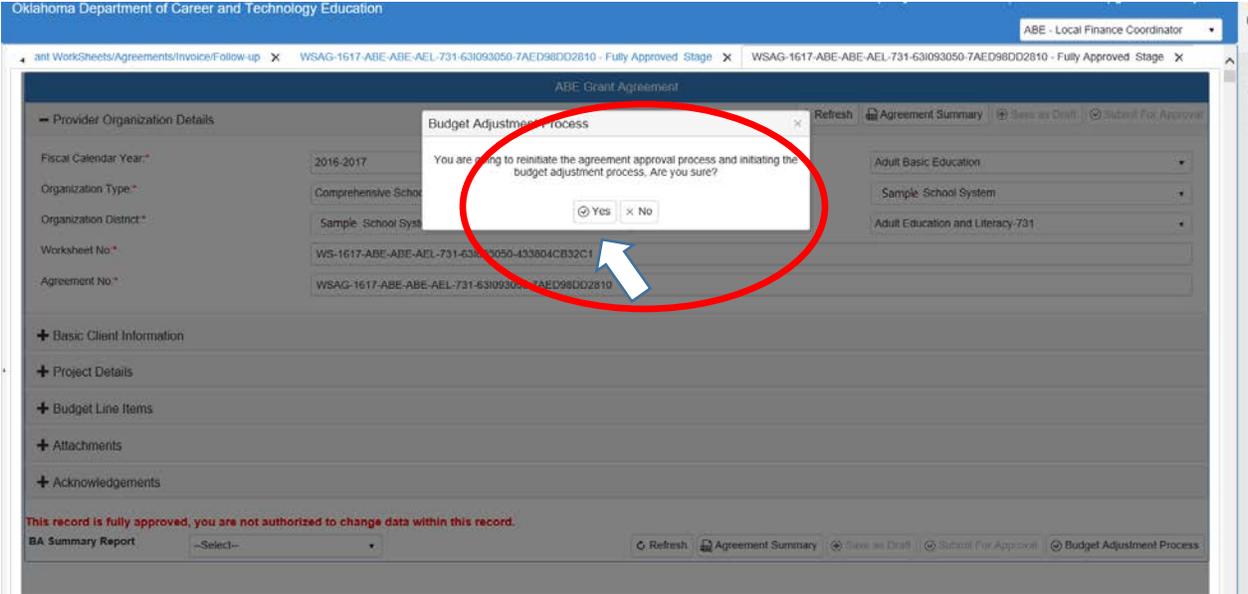
**Step 3:** In the **Budget Adjustment Process**, you will change the agreement, not the worksheet. Select the link under the **Agreement** column.



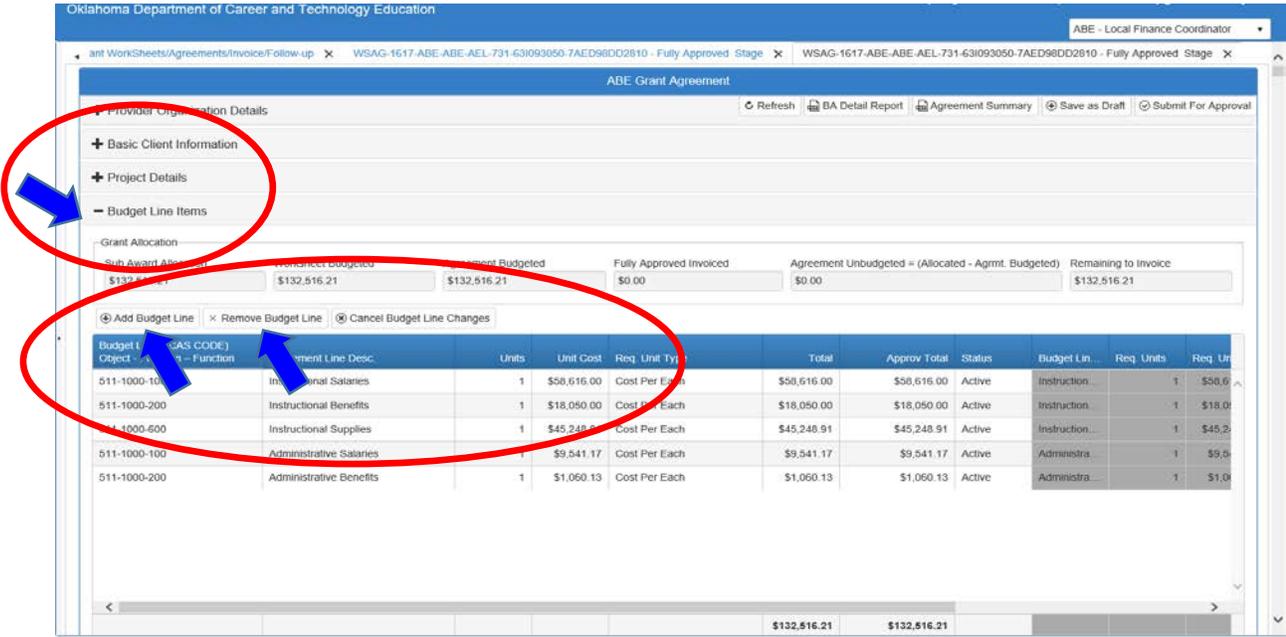
**Step 4:** Select **Budget Adjustment Process**. There is an image saying “This record is fully approved. You are not authorized to change data within this record.” You cannot change the agreement without going through the **Budget Adjustment Process**. Select **Budget Adjustment Process**.



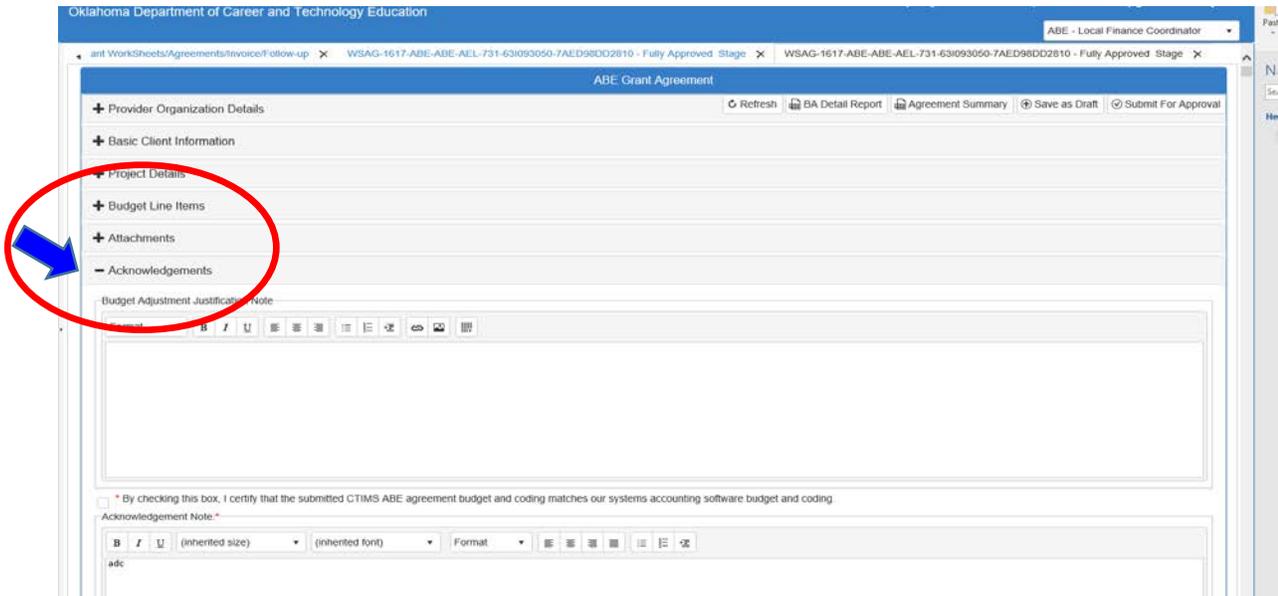
**Step 5:** If you want to make a budget adjustment, select **Yes**. This will pull the agreement out of approved status and you can adjust the budget, then go through the agreement approval process again.



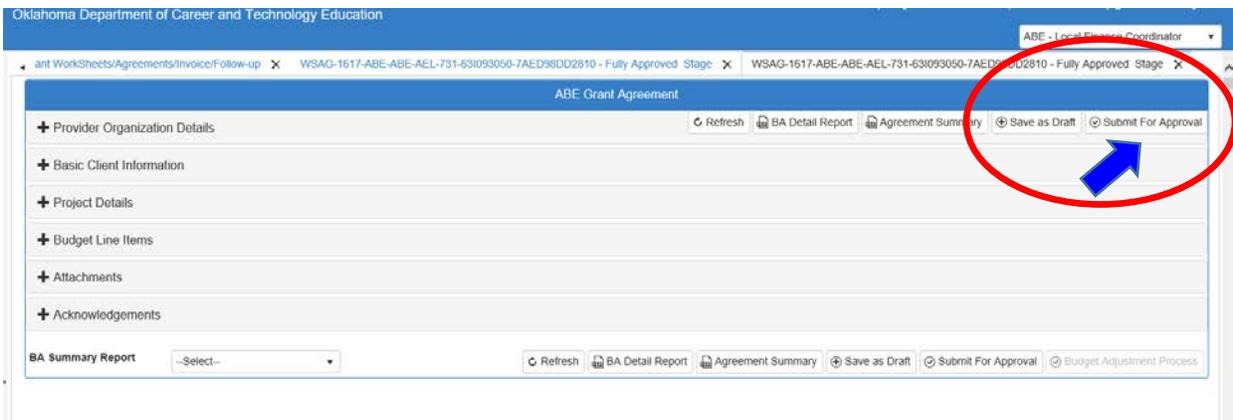
**Step 6:** Click on the **+(plus)** sign next to **Budget Line Items**. Click on **Add Budget Line** or **Remove Budget Line** to adjust the budget.



**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**.