CareerTech Information Management System (CTIMS)

EDI Complete Process Guidebook

IMD

careertech

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NOTE: For questions about specific EDI requirements or what content you need to input or attach with your worksheet, contact your ODCTE Regional Coordinator.
If you have questions about submitting information in CTIMS, please contact CTIMS Support at CTIMSSupport@careertech.ok.gov.

Complete Approval Process

Worksheet Approval Stage (Stage 1)

EDI Role	Process
Local Coordinator	This starts the Worksheet Approval process. Budget is added here along with company info. and excel worksheet is uploaded.
State Regional Coordinator	Approves the budget and line items, confirms company information is entered completely.
State Initiative Supervisor	Approves budget and line items. This completes the Worksheet Approval.

Agreement Approval Stage (Stage 2)

EDI Role	Process
Local Coordinator	This starts the Agreement Approval process. (No changes should need to be made.)
Local BIS Director	
State Regional Coordinator	Electronic signature for updated SOU obtained here.
State Initiative Supervisor	Electronic signature for updated SOU obtained here.
Local Superintendent/CEO (or designee)	Electronic signature for updated SOU obtained here.
State Requisition Coordinator	Generate SOU, submit requisition to finance, enter PO number into the Agreement
Local Finance Coordinator	Enter OCAS codes and add new codes as needed. Agreement Approval becomes fully approved.

Budget Adjustment Approval Stage (if Agreement changes are necessary)

EDI Role	Process
Local Coordinator	This starts the Budget Adjustment process. Budget Adjusted and/or new line items added here.
Local BIS Director	
State Regional Coordinator	Electronic signature for updated SOU obtained here.
State Initiative Supervisor	Electronic signature for updated SOU obtained here.
Local Superintendent/CEO (or designee)	Electronic signature for updated SOU obtained here.
State Requisition Coordinator	Verify PO amount is still accurate. (if $ increased, then request that finance increase PO amount)
Local Finance Coordinator	Verify OCAS codes and add new codes as needed. Budget adjustment becomes fully approved.

Invoice Approval Stage (Stage 3)

EDI Role	Process
Local Coordinator	After the school is done with training, EDI Local Coordinator starts Invoice Process here.
Local BIS Director	
Local Finance Coordinator	
State Regional Coordinator	
State Requisition Coordinator	Will verify the invoices, print the documentation and deliver to the finance department.
ODCTE EDI Finance Reviewer	This is final approval to pay the claim.

Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact CTIMSSupport@careertech.ok.gov. 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.

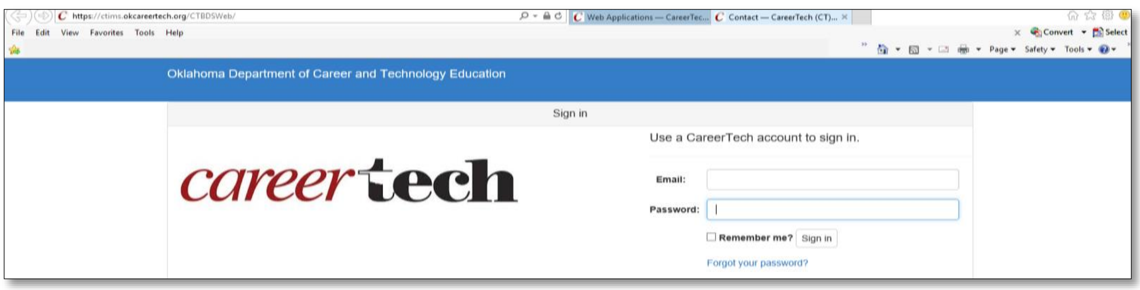
For helpful tips, see the Tips and Tricks section of this document.

IMPORTANT:

Please log into CTIMS using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

Logging into CTIMS

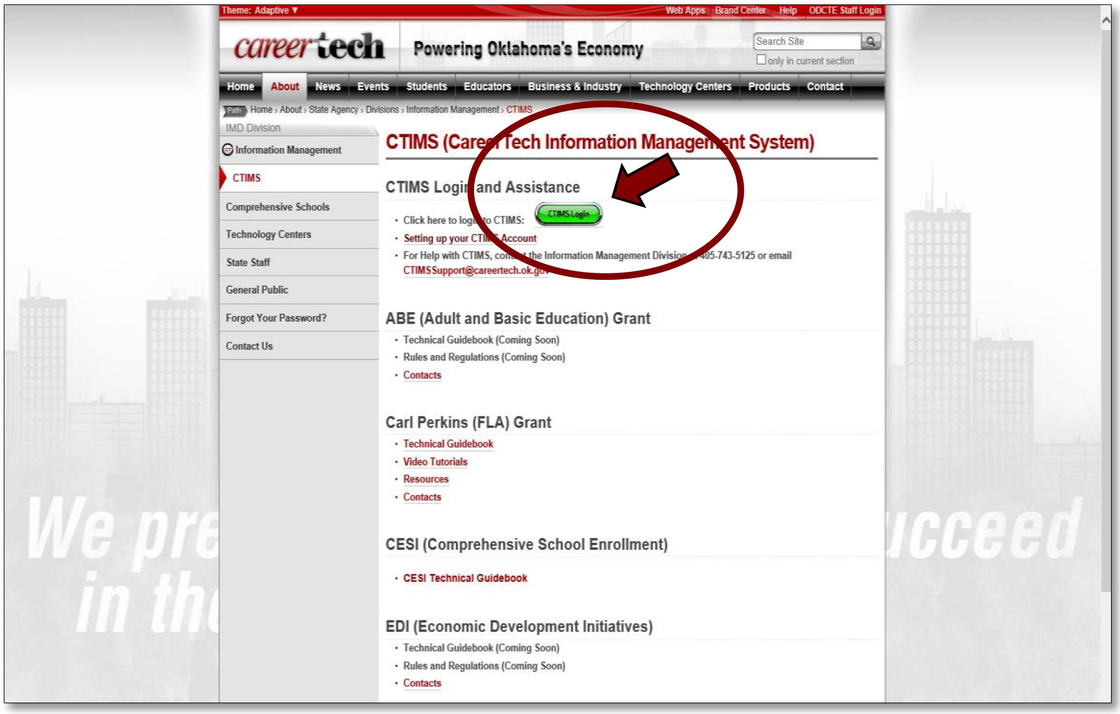
Sign in using your school email and CTIMS password at https://ctims.okcareertech.org/CTBDSWeb



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.

On the CTIMS website, select the green **CTIMS Login** button.



Worksheet

Worksheet Approval Process

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

Stage 1 - Local Coordinator – Creates, completes, saves and submits new worksheet. This starts the Worksheet Approval process. The budget is added here along with the company information. The mandatory excel worksheet is uploaded here.

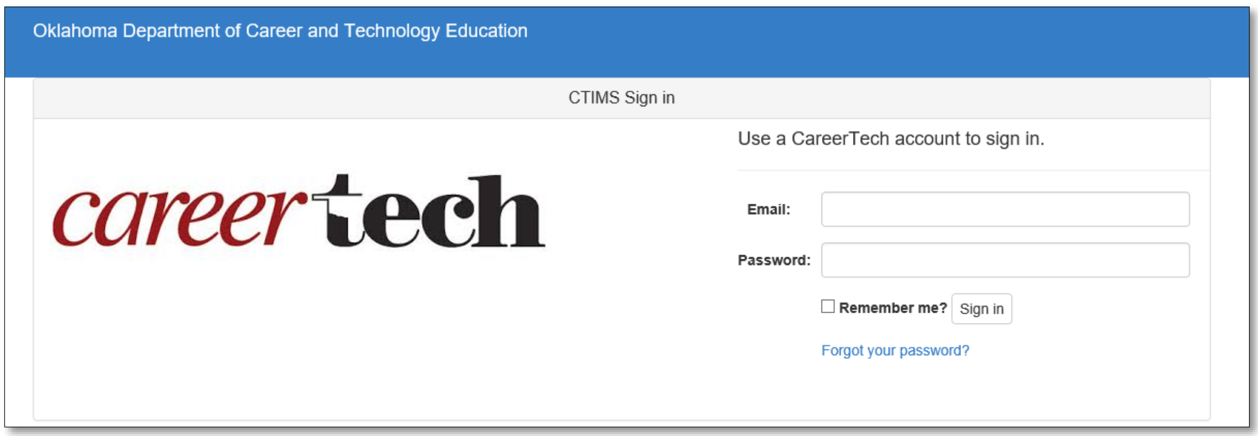
Stage 2 – State Regional Coordinator – 2nd Approval. Reviews and approves or rejects worksheet and line items and confirms company information is entered completely. If approved, goes to EDI State Supervisor stage. If rejected, goes back to stage 1.

Stage 3 – State Initiative Supervisor - 3rd Approval. ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If approved, this completes the Worksheet Approval. If rejected, goes back to stage 1.

Stage 1-Local Coordinator

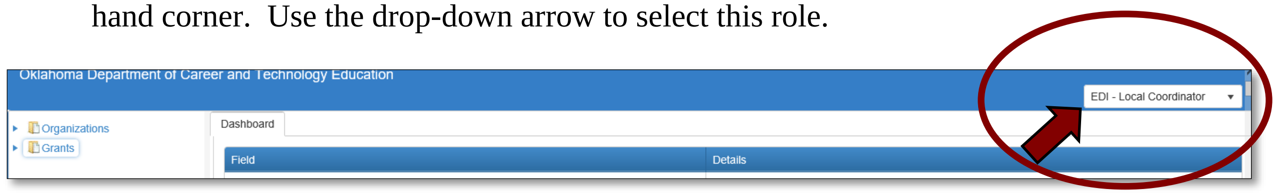
Starting a New Worksheet

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

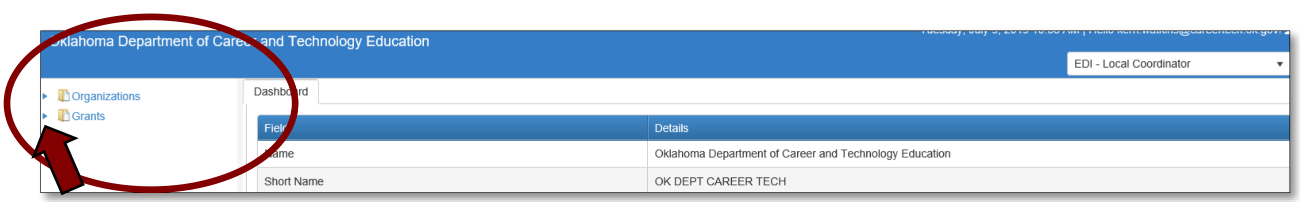


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

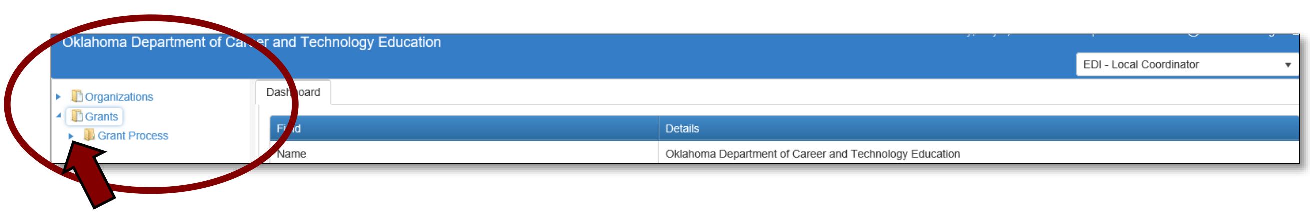
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



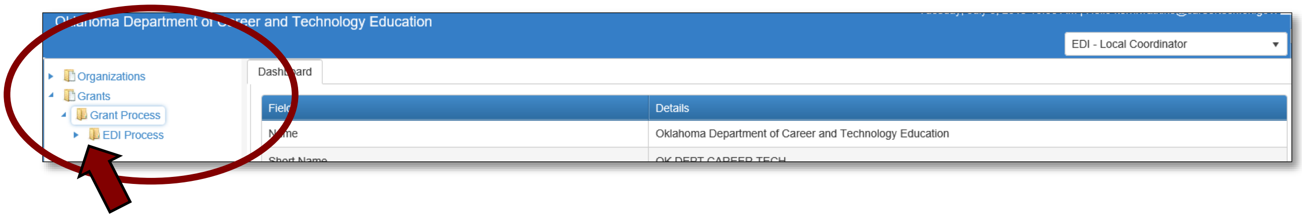
- Click the arrow next to **Grants** on left navigation.



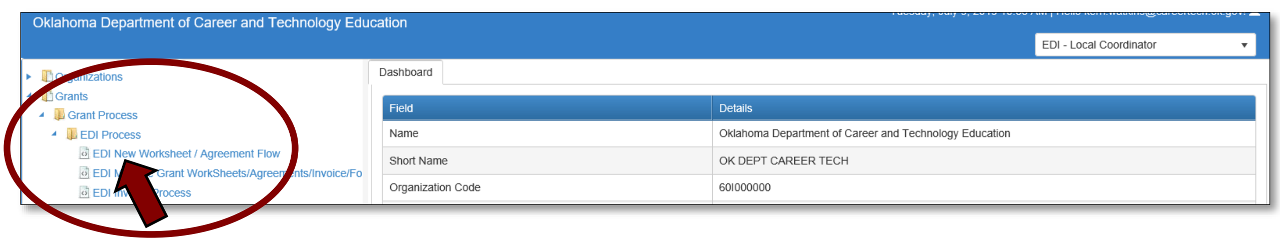
- Click the arrow next to **Grant Process** on left navigation.



- Click the arrow next to EDI Process on left navigation.



- Select **EDI New Worksheet/Agreement Flow.**

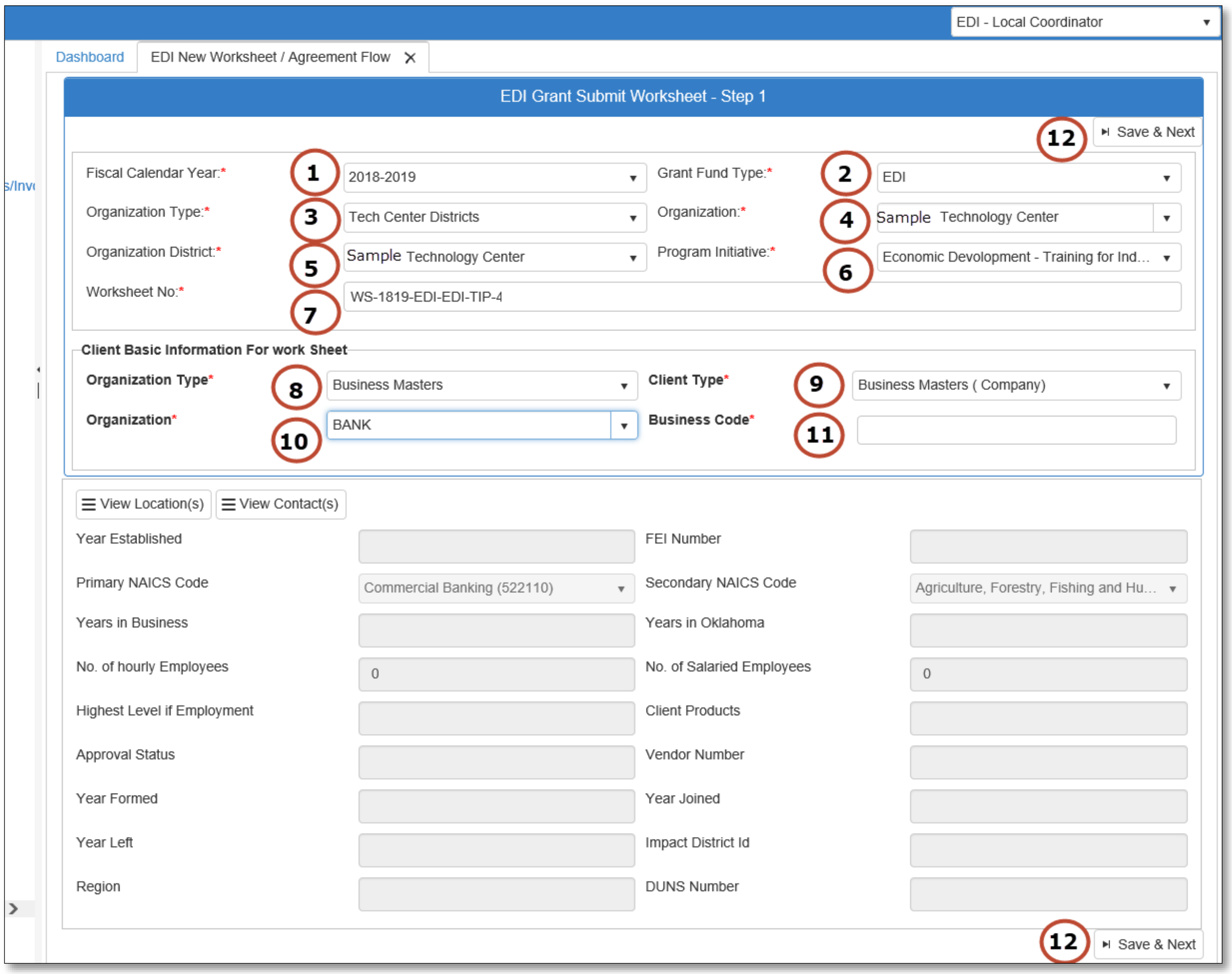


EDI Grant Submit Worksheet – Step 1

1.1 **-** Complete the **EDI Grant Submit Worksheet – Step 1** form**. The tagged numbers on the screenshot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization login credentials.

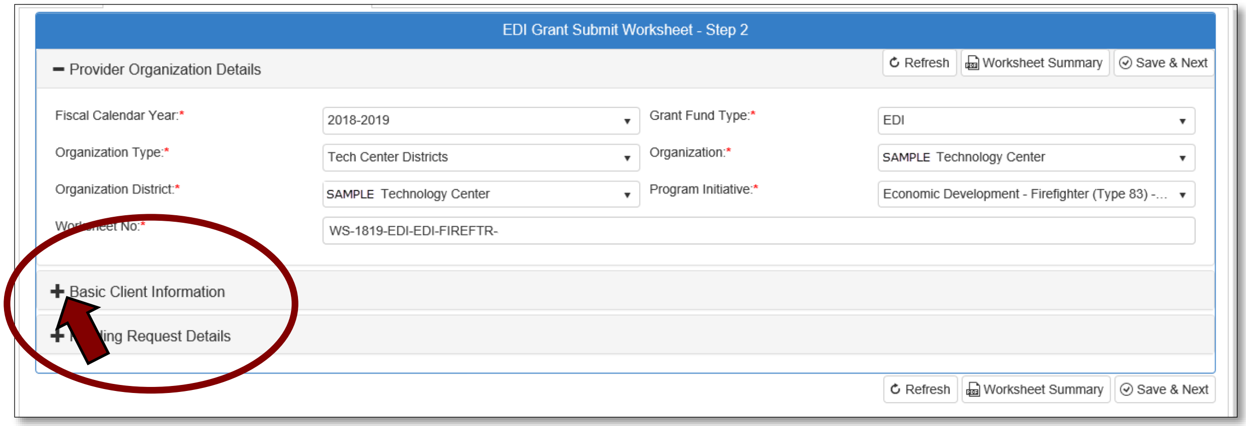
1. **Fiscal Calendar Year*.** This field automatically displays the current year. If you are applying for another year, change this field.
2. **Grant Fund Type*** automatically displays based on your organization login and role credentials. Should be EDI.
3. **Organization Type*** should be Tech Center Districts and will automatically display.
4. ***S*elect an Organization** * by typing in the first three letters of your school or organization name.
5. Select an **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*** from the dropdown menu.
7. The **Worksheet No**.* automatically displays after selecting the **Program Initiative.**
8. **Organization Type*** will automatically display as Business Masters.
9. Select the appropriate **Client Type*** from the drop-down menu.
10. Select an **Organization** you are requesting training by typing in the first three letters of the organization name.* If this is a new organization, not in the Business Master, you will need to request a new business code by going to **Organizations>Business Master>Request New Business Code** (See the Business Master guidebook on the CTIMS page for complete instructions: https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/BusinessMasterGuidebook.pdf).
11. The **Business Code*** is associated with the Organization and automatically displays after an **Organization** is selected.
12. After verifying that all information is correct, Click **Save & Next** button.

NOTE: A red asterisk (*) indicates a required field.



EDI Grant Submit Worksheet – Step 2

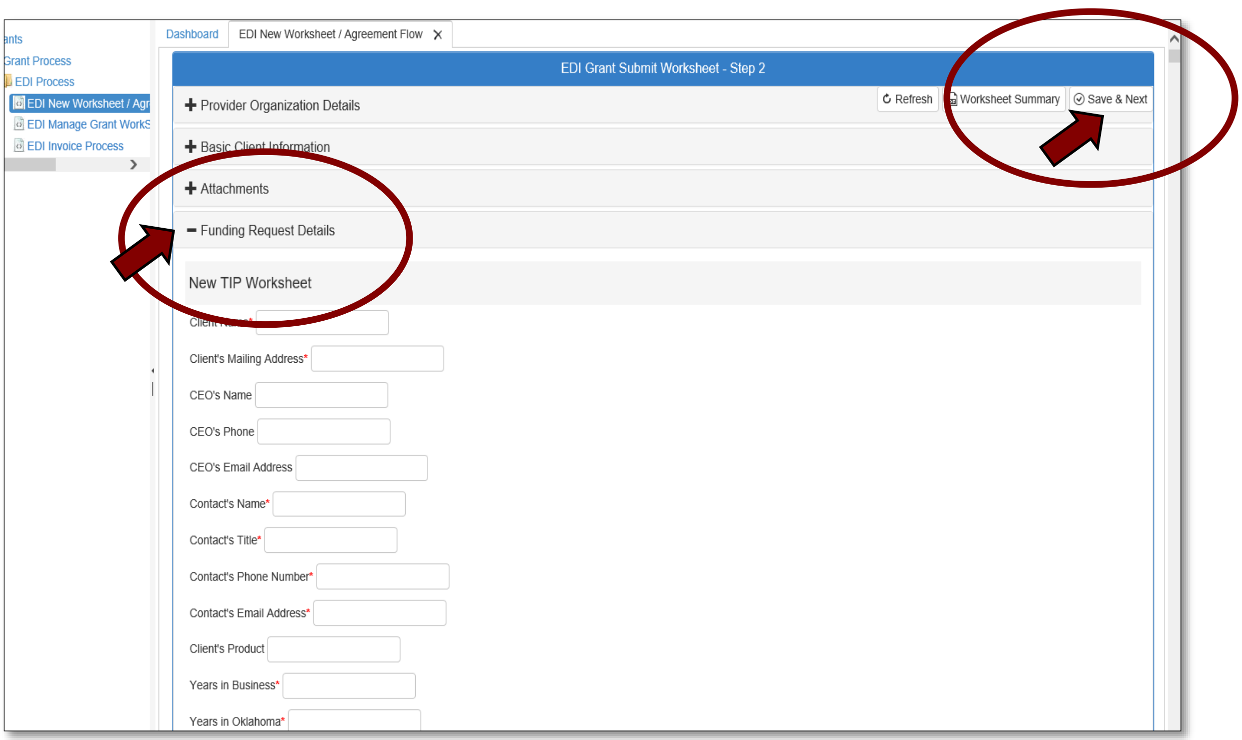
2.1 - Verify the client information on the **EDI Grant Submit Worksheet – Step 2 Page**. Click on the **+(plus)** sign to open this section of the page.



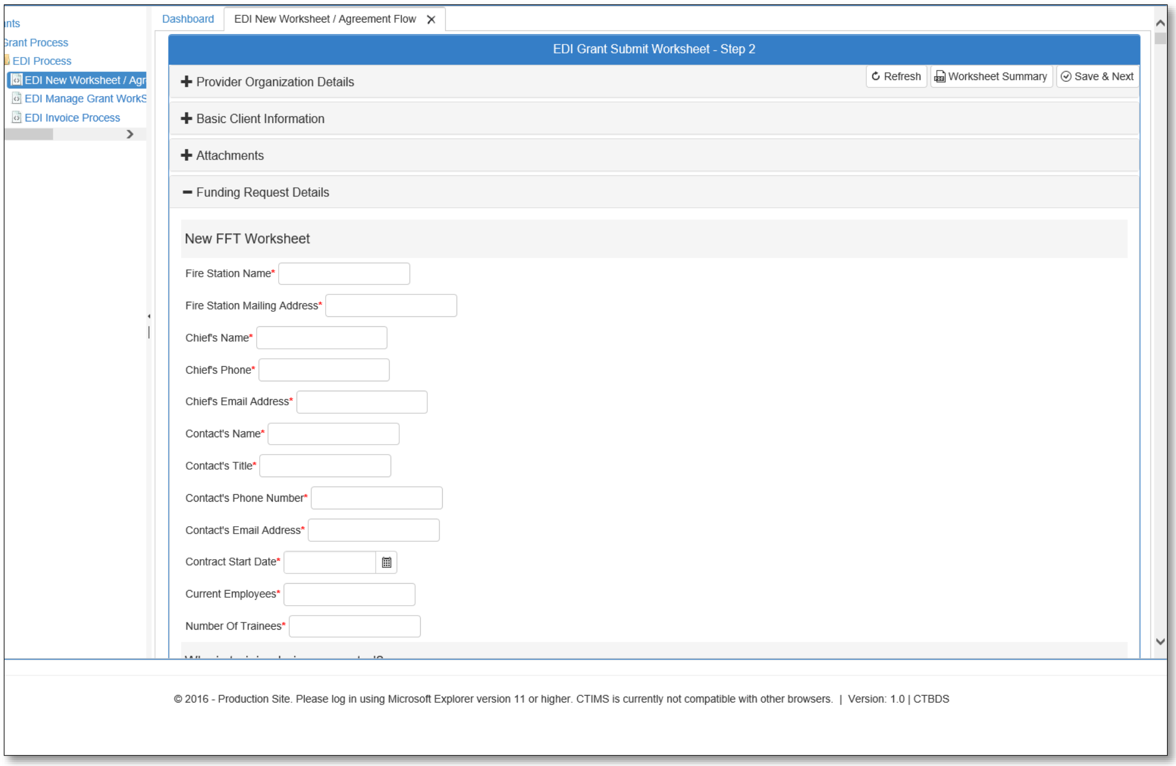
2.2 - Open the **Funding Request Details** form by clicking on the **+(plus)** sign. Scroll down to access and complete all the sections. You must put something in every box that has a red asterisk (*).This form is different for each initiative. After you complete the form, select the **Worksheet Summary** to print a pdf of your worksheet, then select the **Save & Next** button.

FORM EXAMPLES:

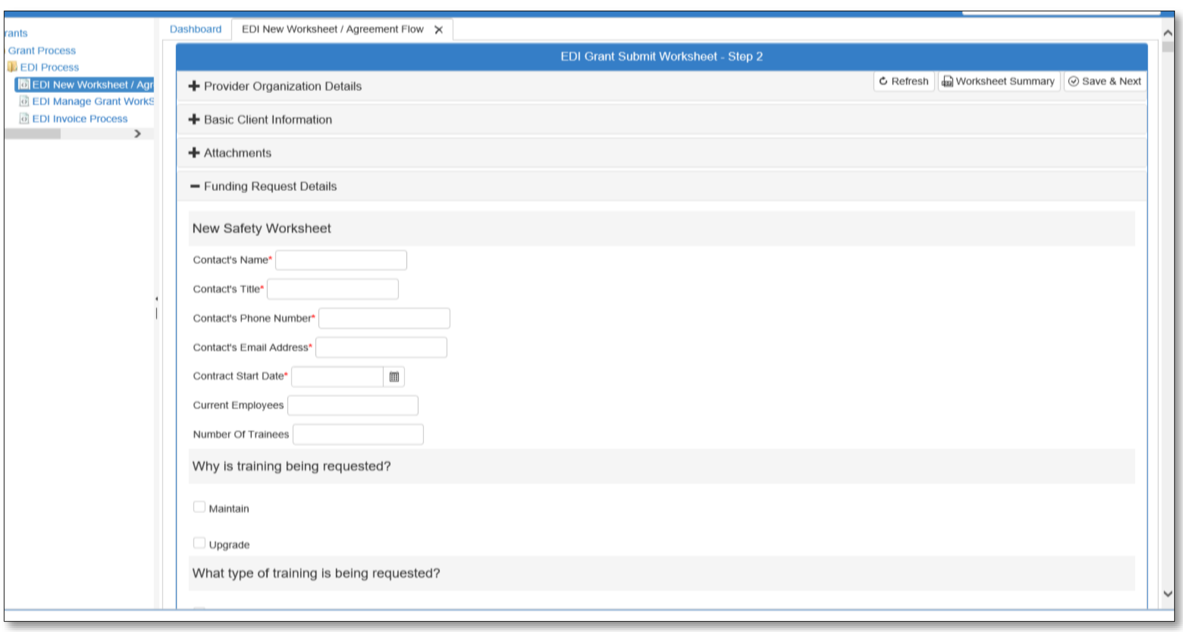
TIP Worksheet:



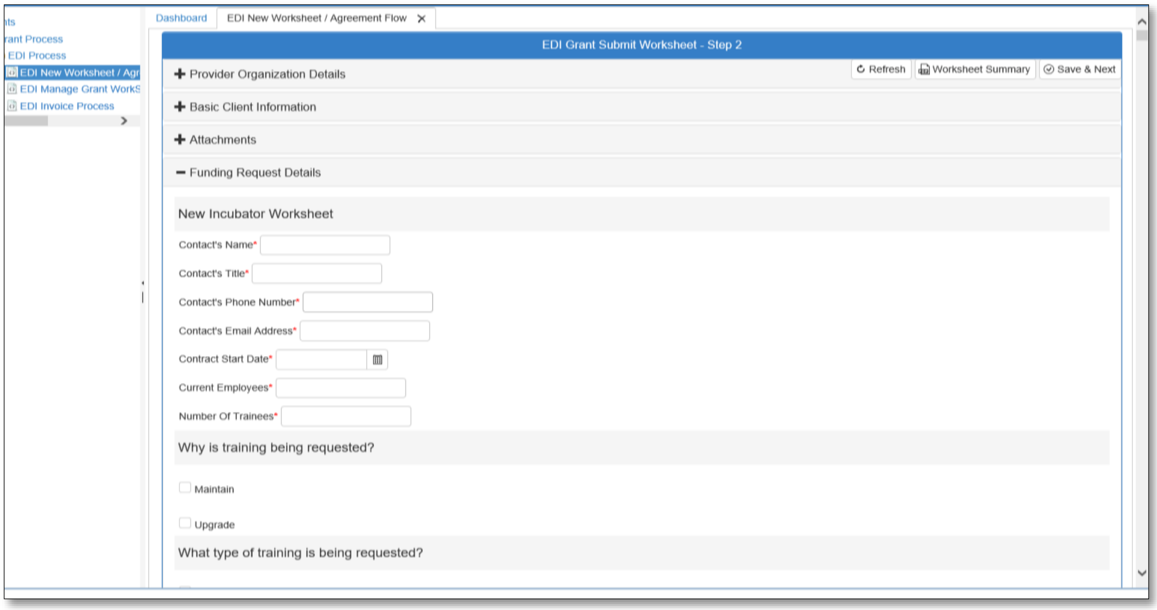
Firefighter Training Worksheet:



New Safety Worksheet:



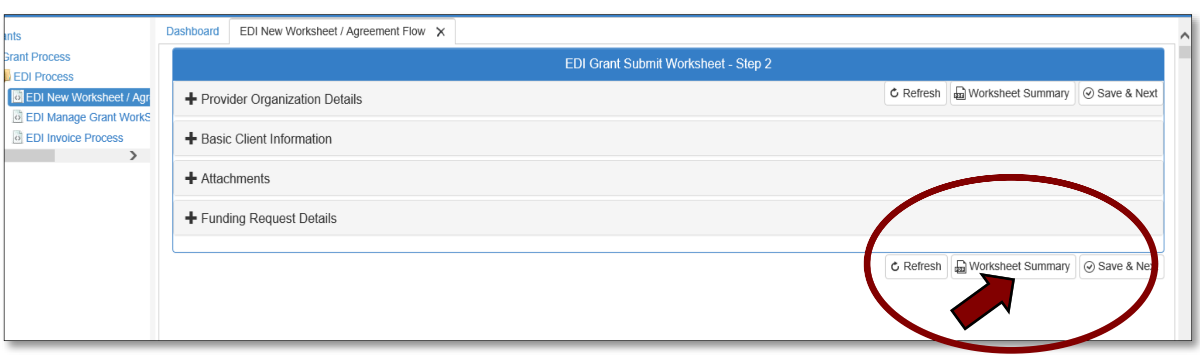
Economic Development – Incubator Worksheet:



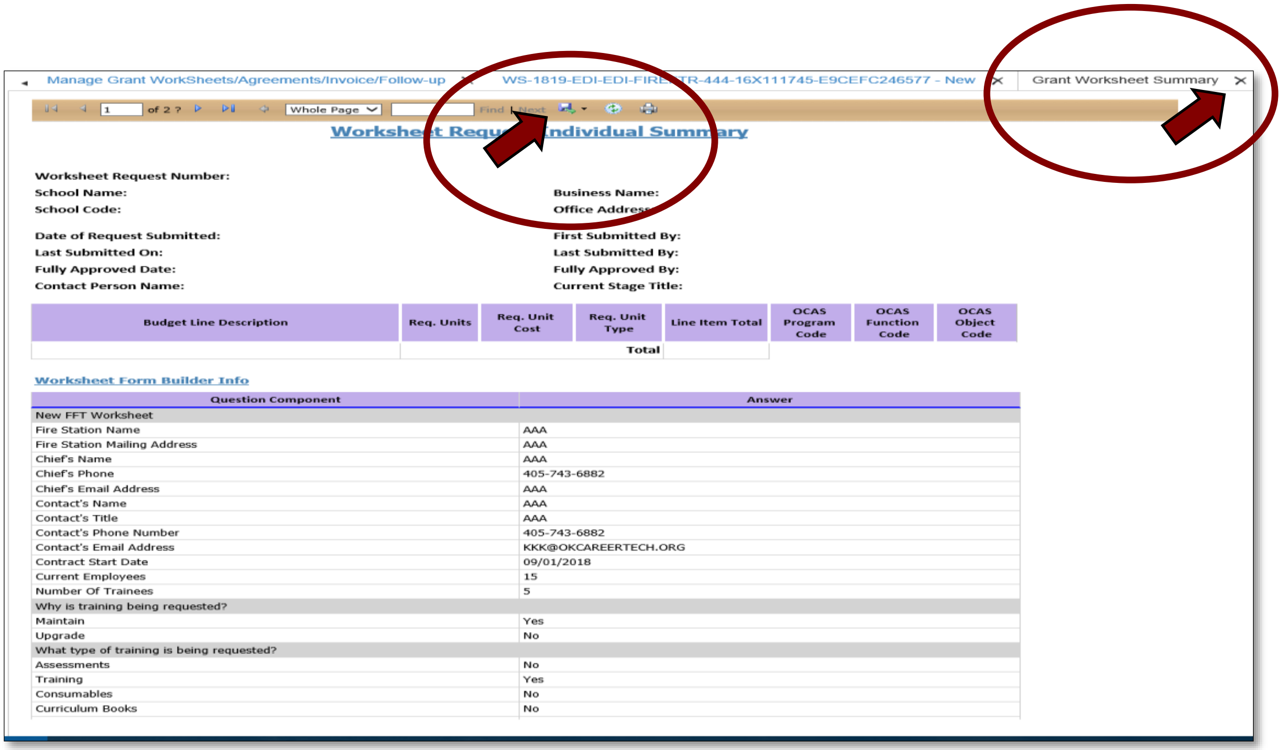
IMPORTANT: You must finish the **EDI Grant Submit Worksheet – Step 2 Page** and click **Save and Next** for any of the information to be saved.

NOTE: If the worksheet is sent back to you, or rejected for a change, please use the **Change Request** process. You can find complete instructions on page 24 of this document. **Do not** select the EDI New Worksheet/Agreement Flow option on the left navigation, as this will start a completely new worksheet.

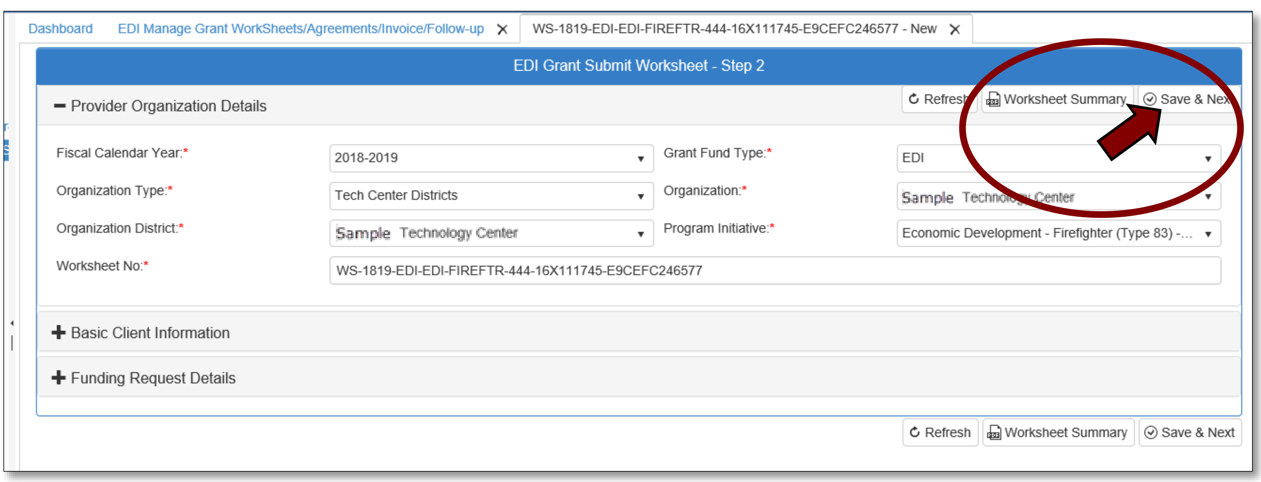
2.3 - TO REVIEW: After completing the **Funding Request Details** form, you can **Save as Draft** and view and download a **Worksheet Summary** pdf. Select the **Worksheet Summary** button at the bottom of the form.



2.4 - TO PRINT: Select the save/download button  to download a pdf that you can save and/or print. **Do not** use the printer button. Click on the ✕ on the **Grant Worksheet Summary** tab to close out the Worksheet page.



2.5 - Select Save and Next to continue.

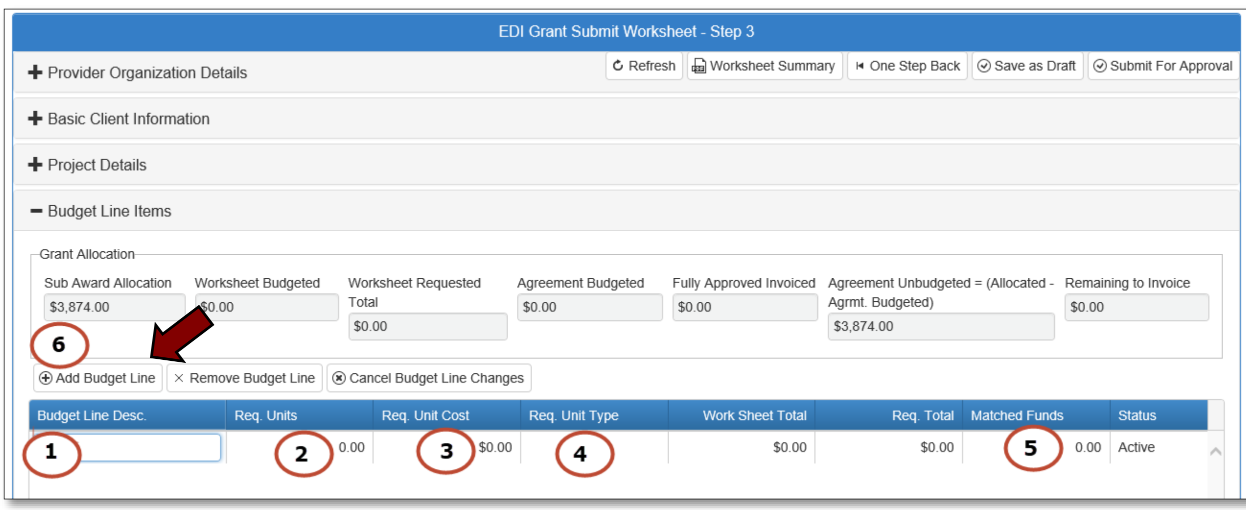


NOTE: You can click the **+(plus) sign** to expand the **Basic Client Information** and **Funding Request Details** sections to review information before saving.

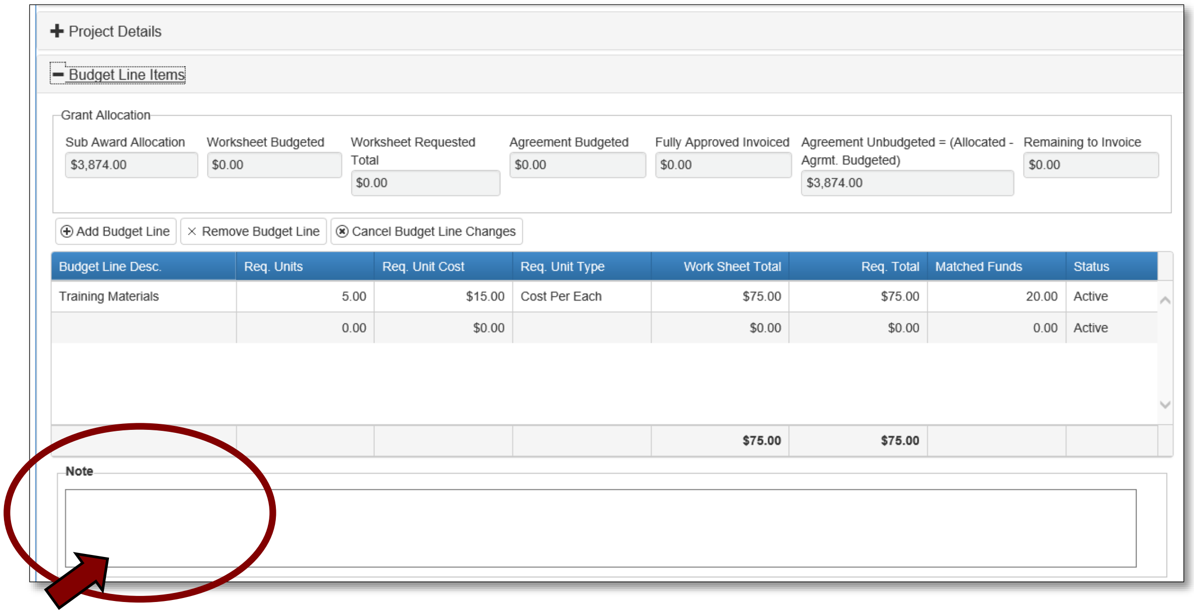
EDI Grant Submit Worksheet – Step 3

3.1 - On the **EDI Grant Submit Worksheet – Step 3 Page**, click on the **+(plus)** sign next to **Budget Line Items** to expand this section of the form. On the **Budget Line Items** screen, you can click the **Add Budget Line**, **Remove Budget Line**, or **Cancel Budget Line Changes**. The first line automatically comes up, so you can start typing in the budget items. Just click in the blank box under the titles to begin.

1. Complete **Budget Line Desc** with the description of the item.
2. Complete **Req. Units** (Required Units-Zero (0) is not acceptable in this field).
3. Complete **Req. Unit Cost** (Required Unit Cost-Zero (0) is not acceptable in this field).
4. Complete **Req Unit Type** (Required Unit Type)-Select **Req Unit Type** from drop-down.
5. If your school will match any of the funds, enter that amount under **Matched Funds.**
6. Click **Add Budget Line**, to add more budget lines and repeat steps 1-5. (You may need to scroll to the right to see).

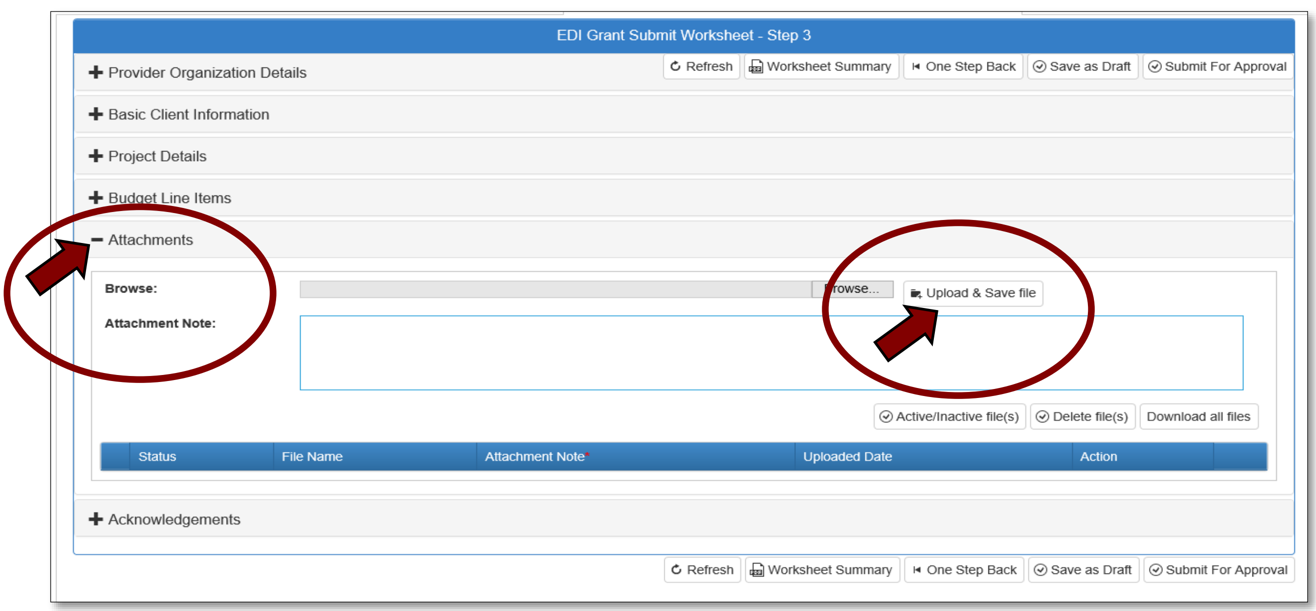


3.2 - Type a **Note** in the space below the line item budget area if desired.

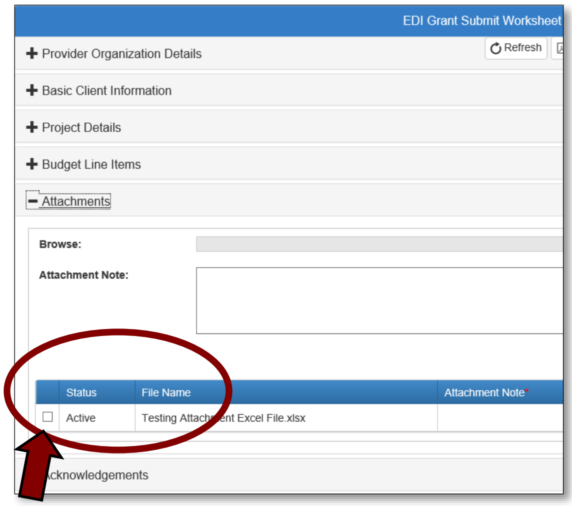


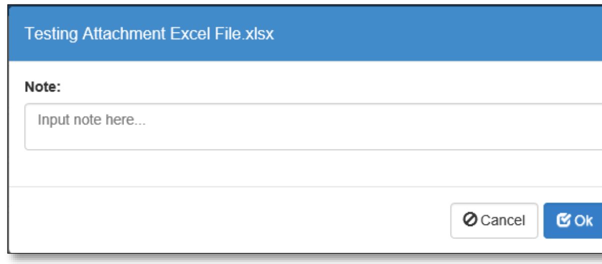
3.3 - Add supporting or required attachments by clicking on **+Attachments** tab. Then, click **Browse**, and find your document. Finally, select **Upload & Save file**.

NOTE: If you do not have your attachment file prepared at this time, you can click **Save as Draft** and return later to complete the Worksheet process.



NOTE: You can add a note for the attachment after it has been uploaded by clicking the **Active** box next to the file name. This will provide a **Note** window for you to add the note. Then click **OK.**



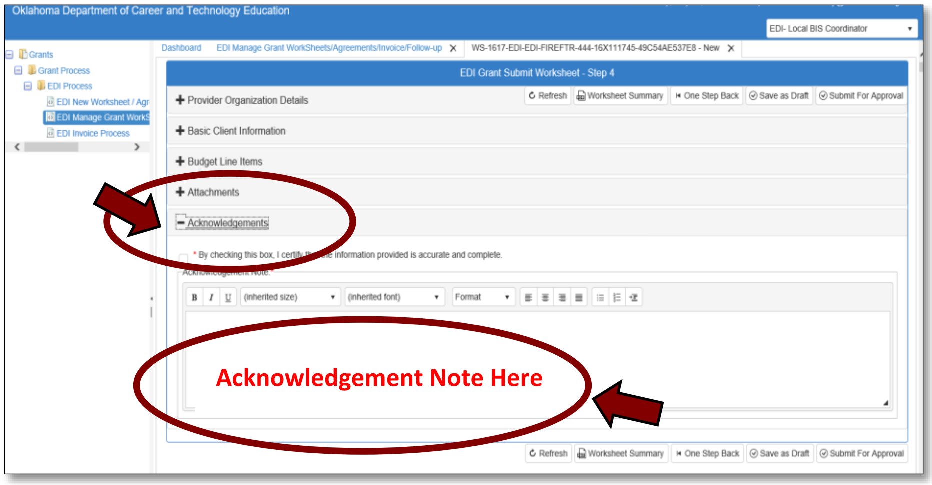


<u>To save as Draft</u>

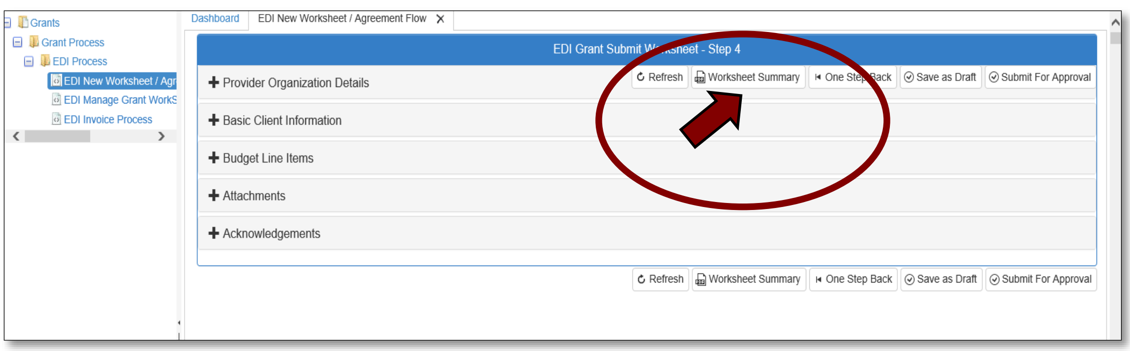
You can **Save as Draft** at this point and it will save all the information you have input on the **Funding Request Details** form and the **Budget Line Items** without submitting for approval. This will let you stop the process and resume at a later time. You can make any changes you need to the **Funding Request Details** or the **Budget Line Items** before you submit by selecting the line and making the changes.

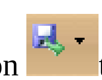
<u>EDI Grant Submit Worksheet – Step 4</u>

<u>4.1</u> - Click the **+(plus) sign** next to the **Acknowledgements** section and check the acknowledgement certification buttons, then add an **Acknowledgement Note.** This field is required, but you can add your initials if you do not have a note to add.

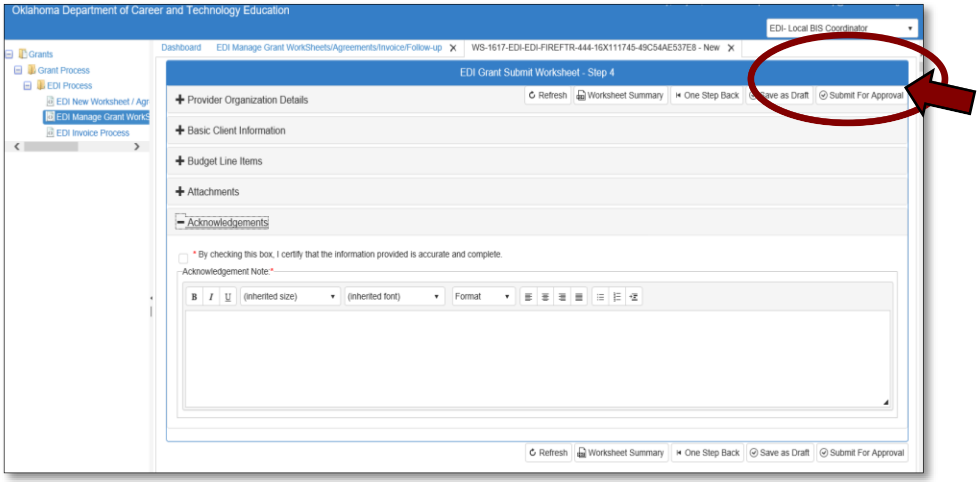


NOTE: To ensure your worksheet is complete and accurate, you can view or print your worksheet summary page before submitting for approval. Click on the **Worksheet Summary** button**.**



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.

4.3 - Click the **Submit for Approval.**



Your worksheet has been successfully submitted. You will receive an email from the CTIMS system stating your worksheet has been submitted successfully to the EDI State Regional Coordinator.

NOTE: After you submit the worksheet/application, if there are any changes, you will have to use the **Change Request** process. You can find complete instructions on page 24 of this document. **Do not** select the EDI New Worksheet/Agreement Flow option on the left navigation, as this will start a completely new worksheet.

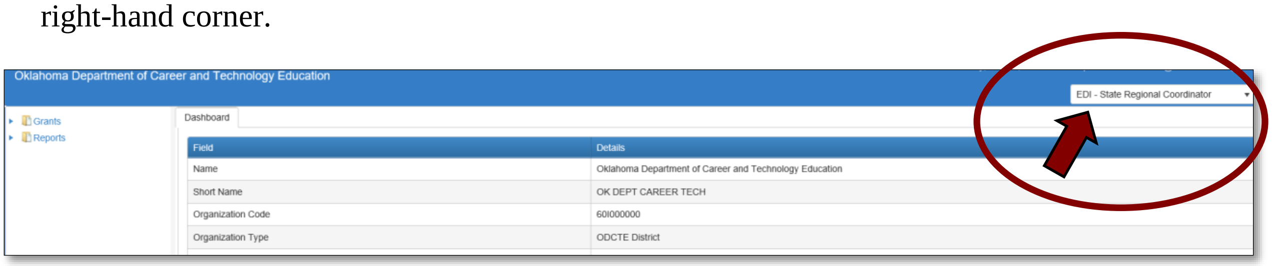
Stage 2 - EDI State Regional Coordinator

After the **EDI Local Coordinator** has created and submitted the worksheet, the **EDI State Regional Coordinator** will receive an email that they can sign in and review the worksheet and budget to approve or reject.

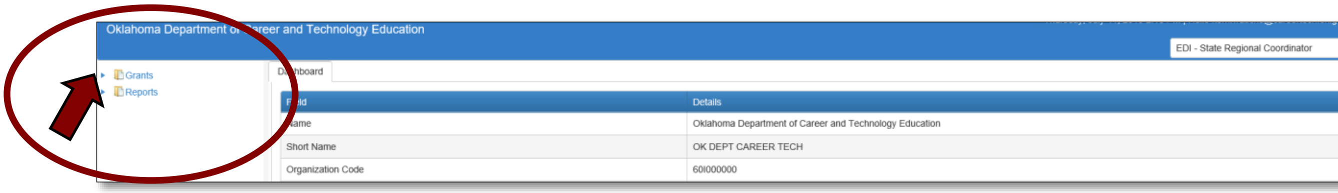
Signing in & Opening the Worksheet

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

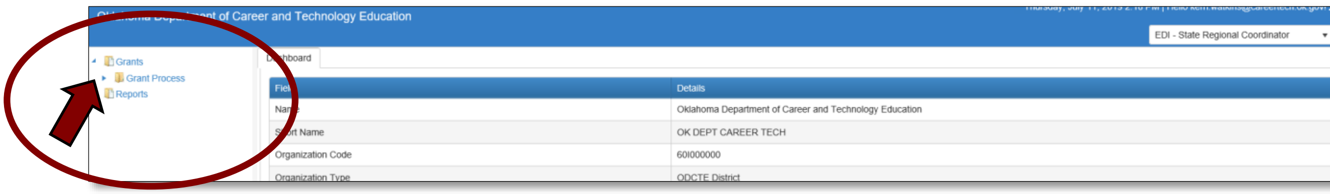
- Verify that you are signed in with the role of an **EDI State Regional Coordinator** in the top right-hand corner.



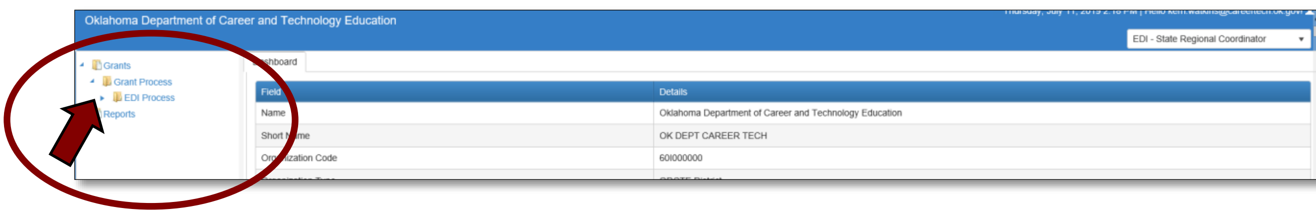
- Click the arrow next to **Grants** on left navigation.



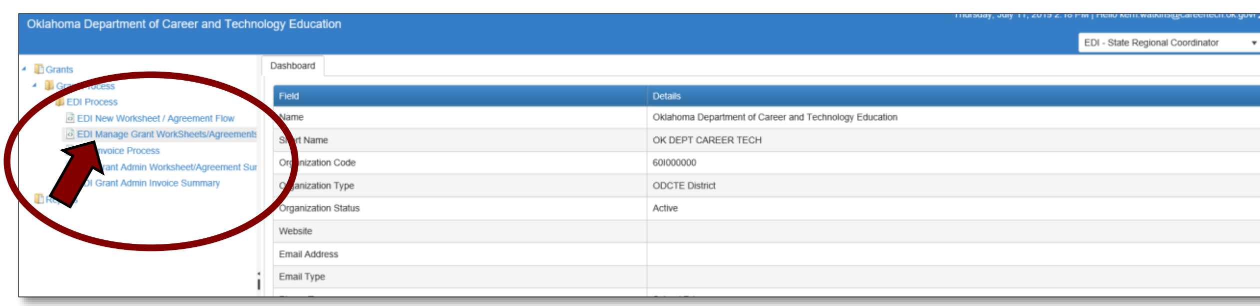
- Click the arrow next to **Grants Process**



- Click the arrow next to **EDI Process**

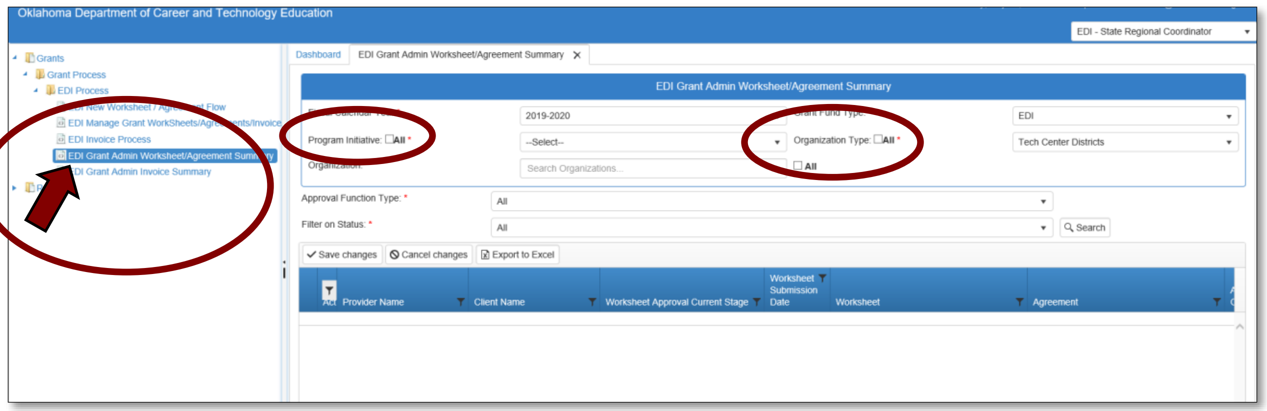


- Select **EDI Manage Grant Worksheet/Application/Invoice** to approve individual schools**.**



Or,

- select **EDI Grant Admin Worksheet/Agreement Summary** to list all pending requests. Check the **ALL** boxes on Program Initiative, Organization Type, and Organization to list all the requests.

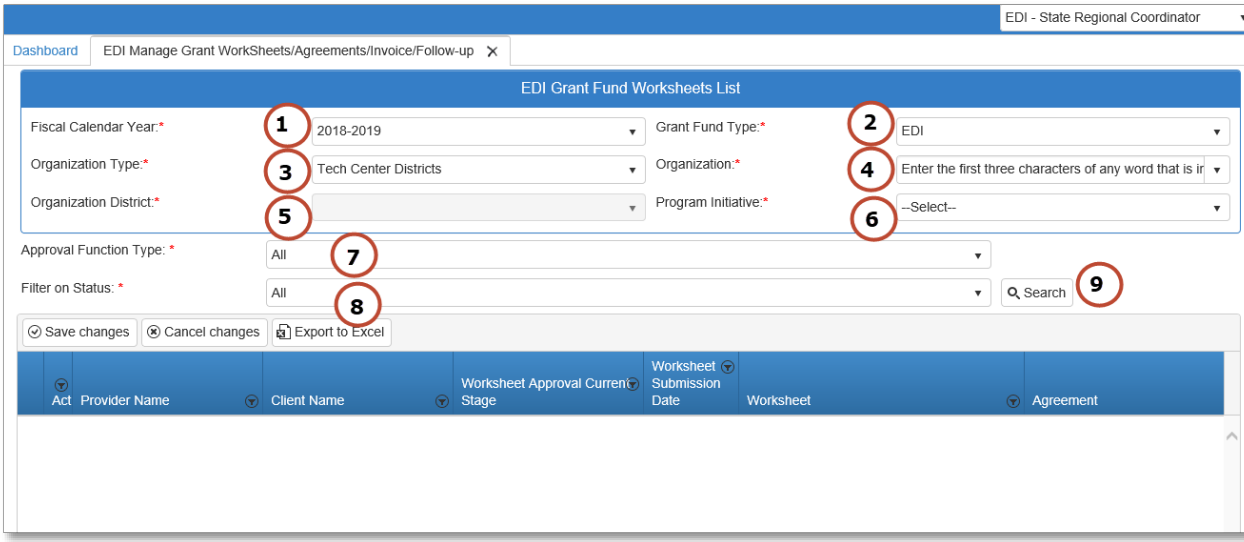


If you are selecting individual schools, complete the **EDI Grant Fund Worksheets List** form. **The tagged numbers on the screenshot correspond to the instruction steps below.**

NOTE: The red asterisks* represents a required field.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to **EDI***.
3. Select your correct **Organization Type** from the drop-down menu. Should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District***.
6. Select a **Program Initiative*** using the drop-down menu.
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.

NOTE: A red asterisk (*) indicates a required field. See next page for screen image.

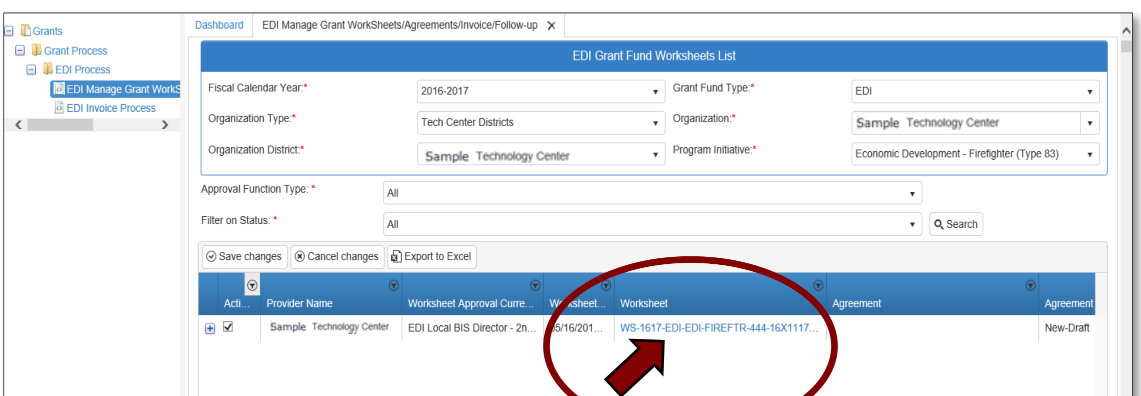


- The **EDI Grant Fund Worksheets List** will open and the worksheets/applications that needs to be approved will be listed.

NOTE: You can click the arrow ▶ in the first column to open the worksheet summary of the Approval Stages for each worksheet. The **Worksheet Approval Current Stage** column will show the current role that needs to take action on the worksheet.

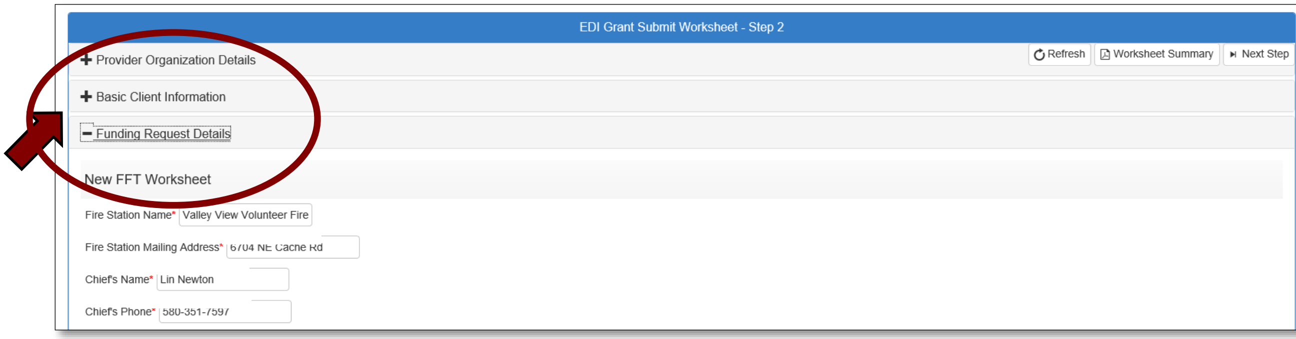
EDI Grant Fund Worksheet List – Step 1

1.1 - Select the blue worksheet number under the **Worksheet** column on the EDI Grant Fund Worksheet List screen to open the worksheet (or on the EDI Grant Admin Worksheet/Agreement Summary Screen if you are selecting from the list of all of your schools).

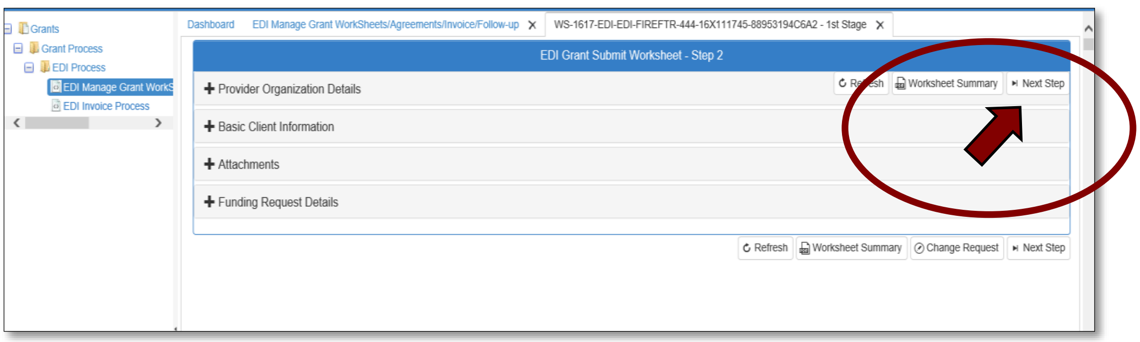


EDI Grant Submit Worksheet - Step 2

2.1 – Click the + (plus) signs next to **Basic Client Information** and **Funding Request Details** to expand these sections if you want to review the information.



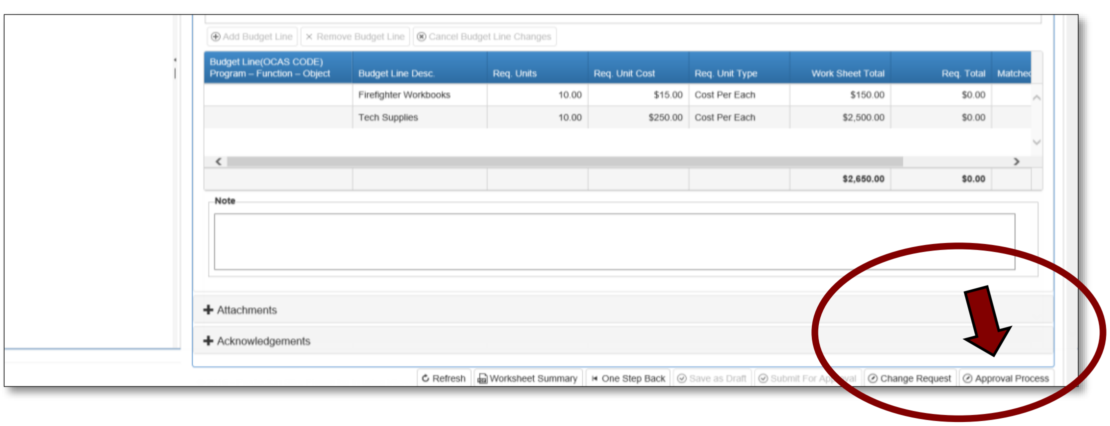
2.2 – Select **Next Step** to proceed.



NOTE: We recommend you print a pdf of the **Worksheet Summary** before going to the next step to help with project and budget verification. Click on the **Worksheet Summary** button on the top right of the screen. Then click the save icon  to export to a pdf.

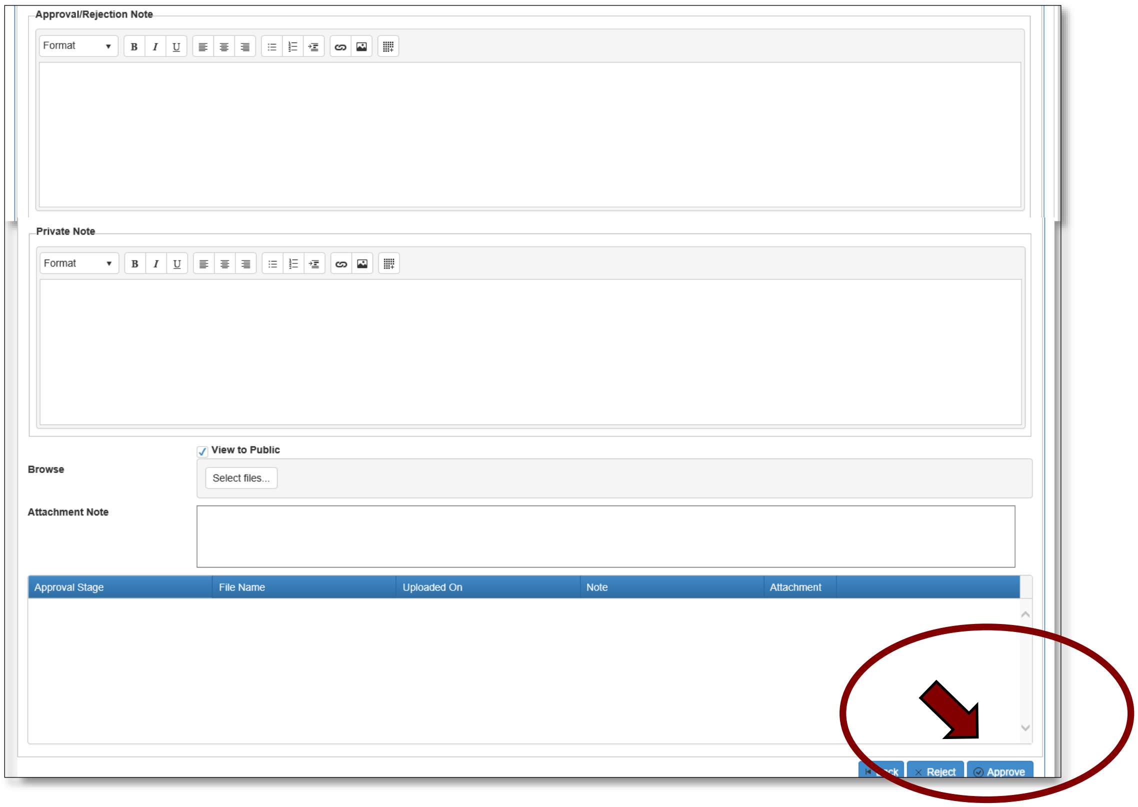
EDI Grant Submit Worksheet - Step 3

3.1 – Verify the **Budget Line Items**. If everything is correct, select **Approval Process** at bottom of page.



Approval Process - EDI Grant Worksheet Approval

- You are able to put an Approval or Rejection Note in at this step. The private note is for agency use only. When you have verified the worksheet and budget, hit the **Approve** button to send the worksheet to the next approval stage.



At this point, your worksheet/application is successfully submitted. You will receive an email from the CTIMS system stating your worksheet/application has been submitted successfully to the EDI State Supervisor.

Stage 3 - EDI State Supervisor

The review and approval or rejection process continues using the steps above for the **EDI State Supervisor.**

EDI Change Request Process

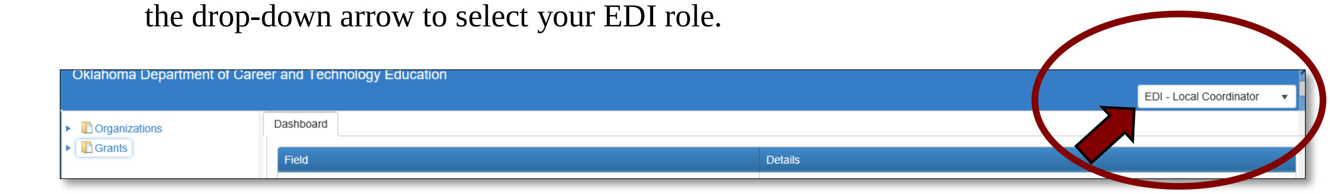
Logging in and Accessing the Worksheet

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

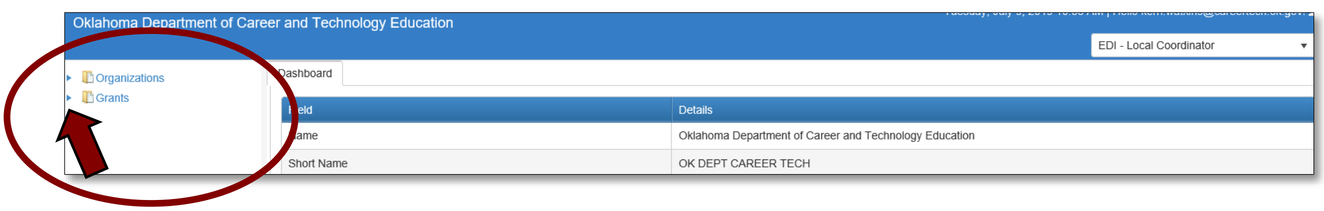
- Sign in at https://ctims.okcareertech.org/CTBDSWeb/ using your school email and CTIMS password.

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

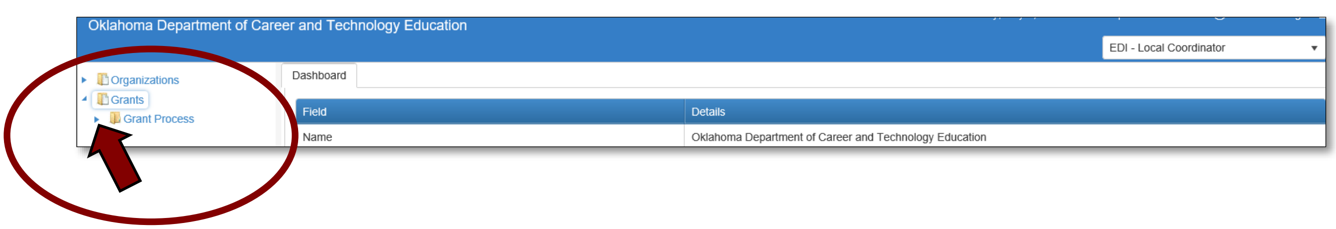
- Verify that you are signed in with the appropriate role in the top right-hand corner. Use the drop-down arrow to select your EDI role.



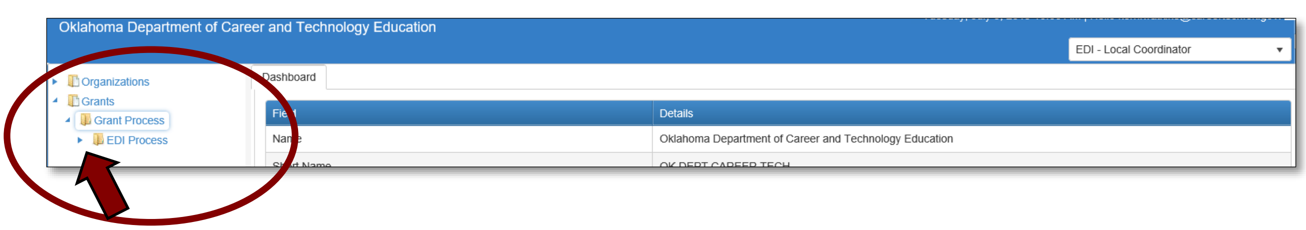
- Click the arrow next to **Grants** on left navigation.



- Click the arrow next to **Grant Process** on left navigation.



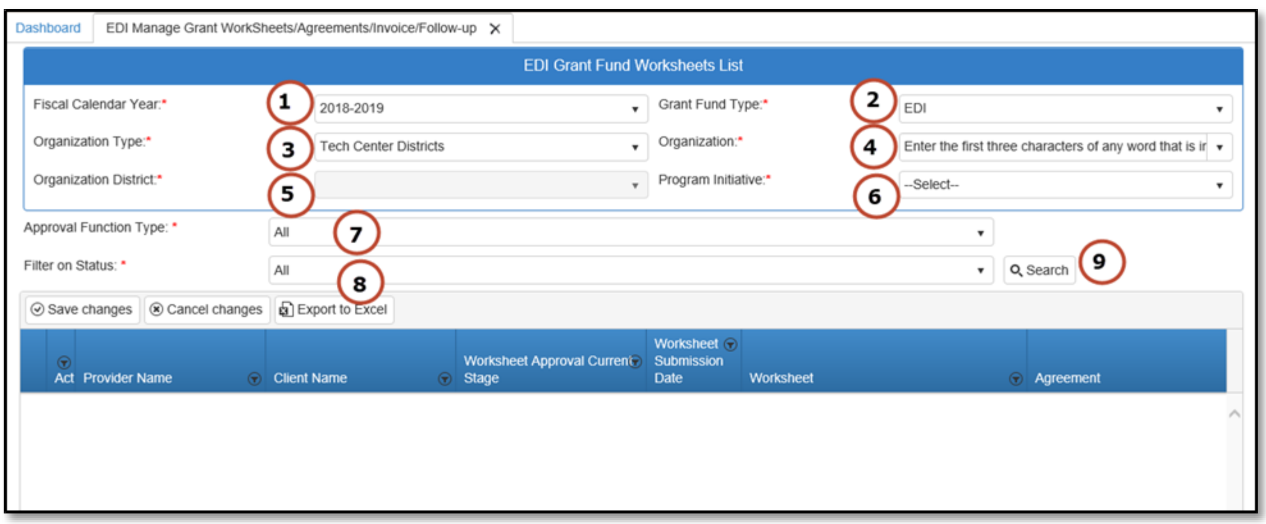
- Click the arrow next to **EDI Process** on left navigation.



- Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

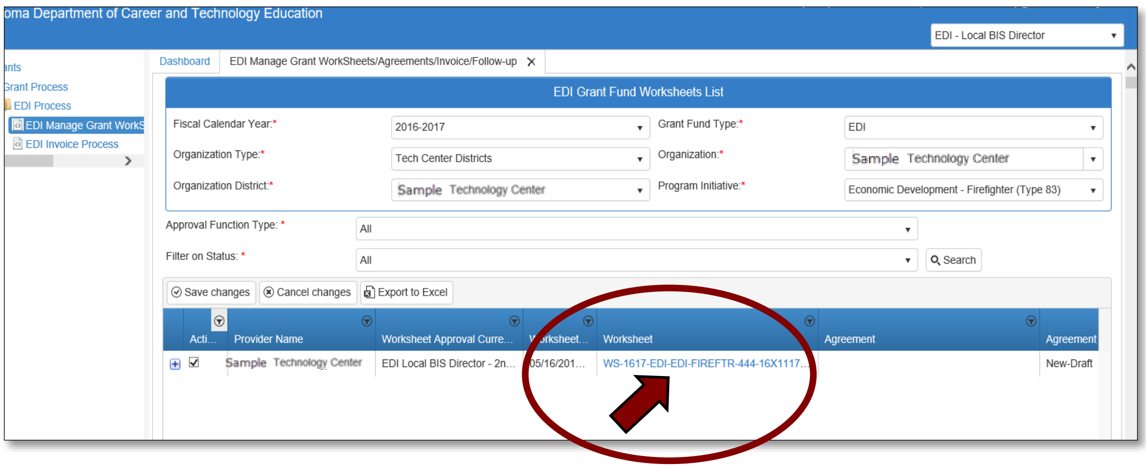
1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization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

NOTE: A red asterisk (*) indicates a required field.

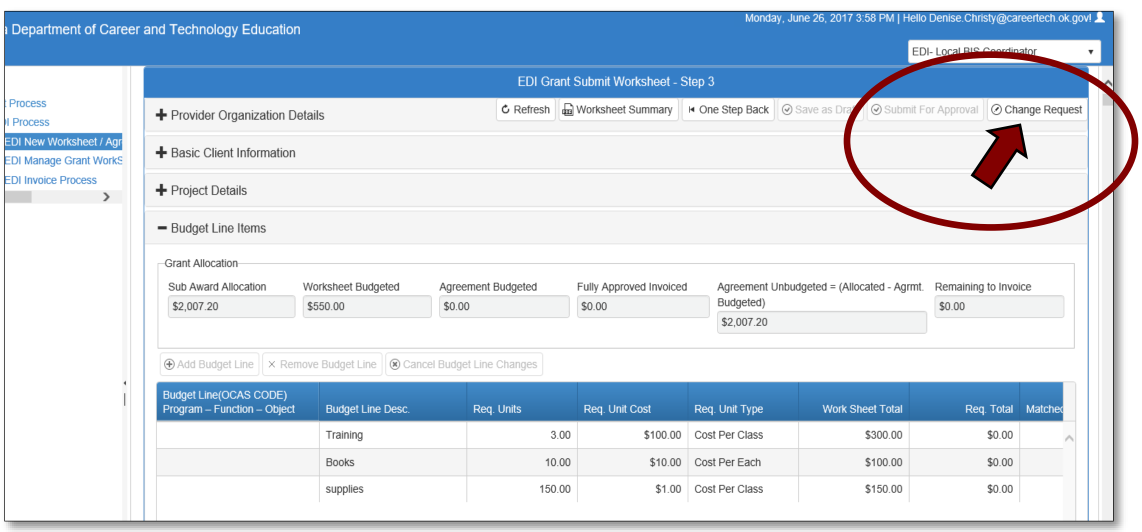


Initiating and Completing the Change Request

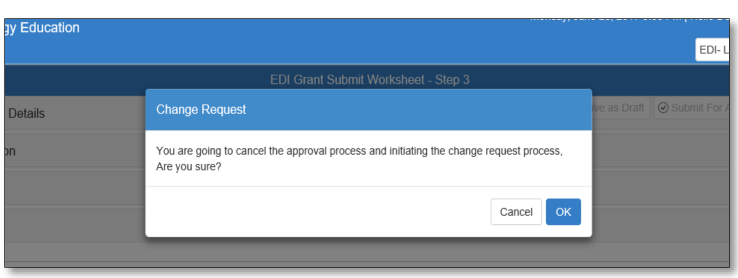
1.1 - After clicking the **Search** button, the worksheet/applications that are in the approval process will be listed. Select the worksheet number to open it.



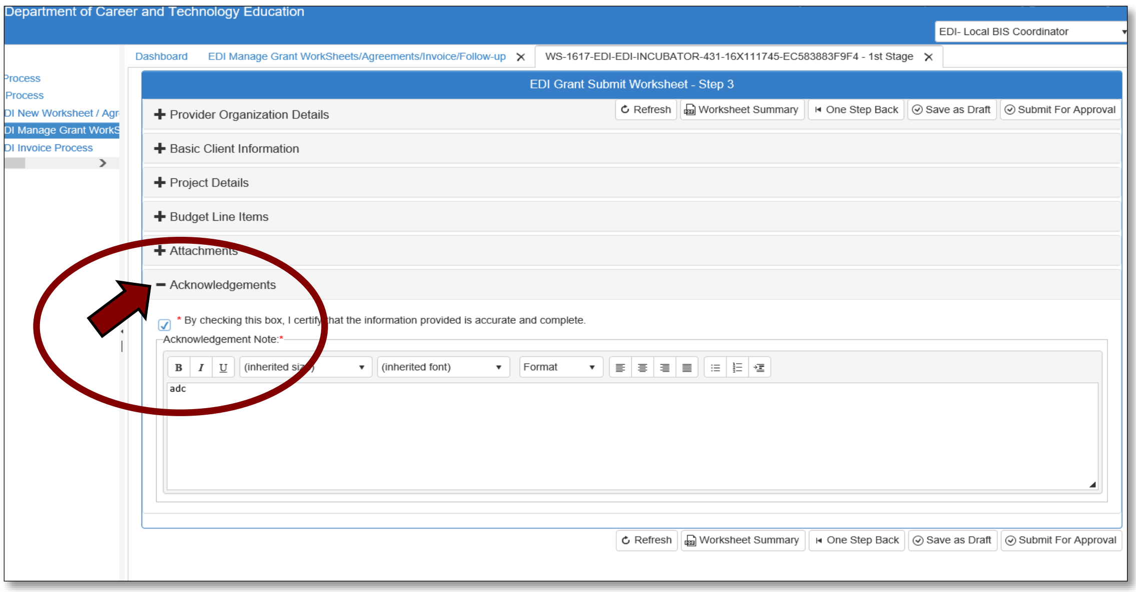
1.2 - To make changes to your Worksheet/Application or Budget, select **Change Request**.



1.3 - The Change Request process cancels the worksheet/application approval process. Click **OK** to continue.

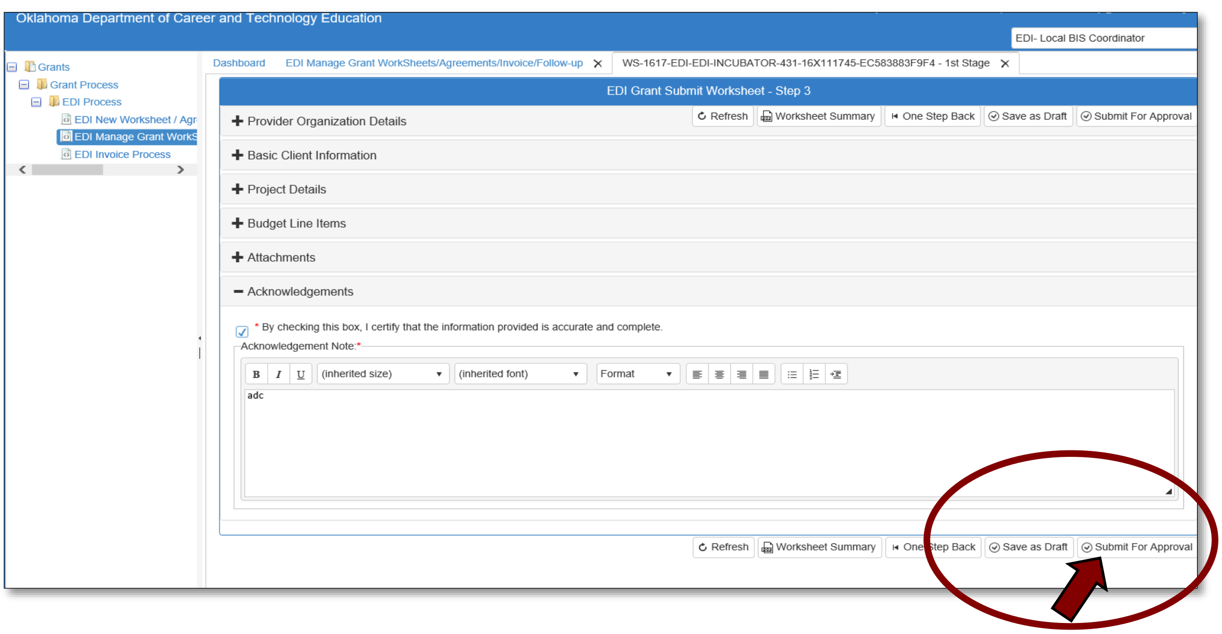


1.4 - You can now make changes to the **Project Details** section or **Budget Line Items** section. After making the changes, go to the **Acknowledgement** section and check the certification box and add an acknowledgment note.

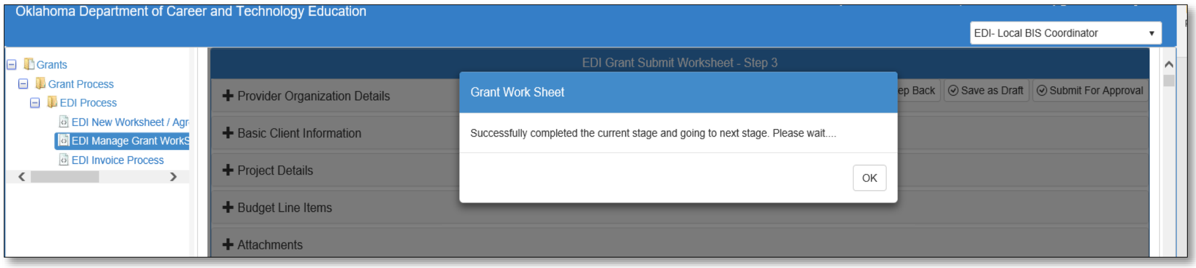


NOTE: Once the changes, or partial changes have been made, you can Save as Draft by clicking **Save as Draft**. This will save the changes to the worksheet without summiting to the next approval stage, so you can return and finish at a later time.

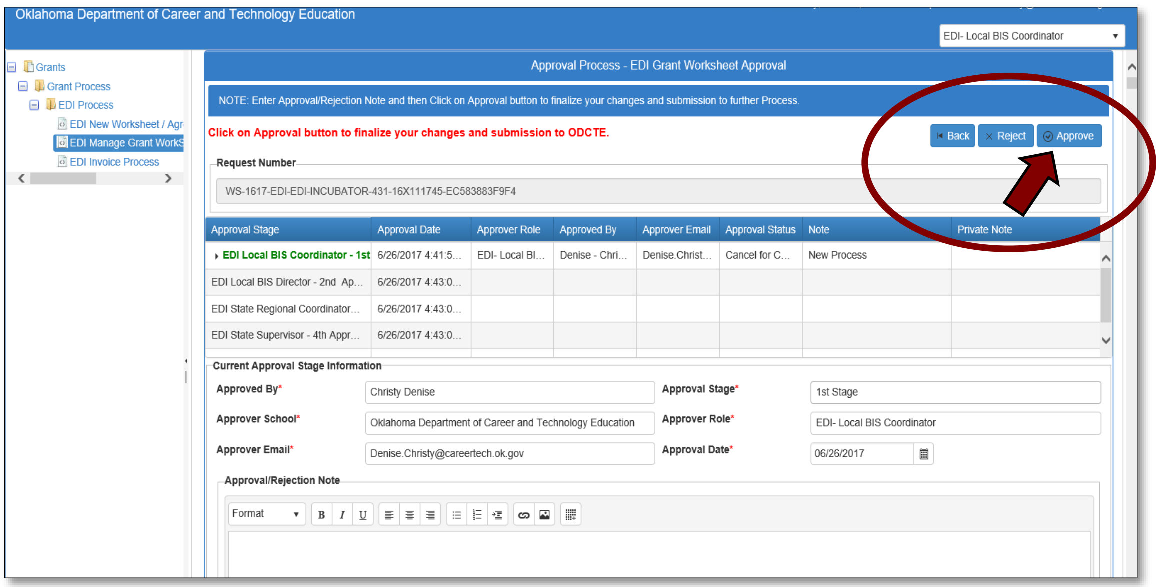
1.5 - Select **Submit for Approval.**



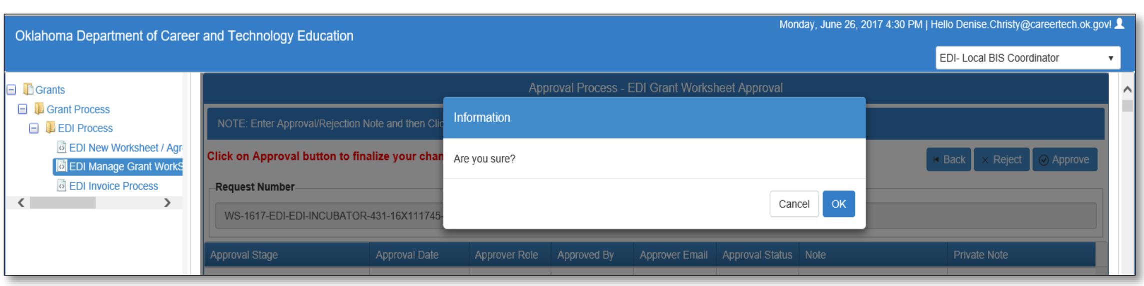
1.6 - Click **OK.**



1.7 - Select **Approve** to send changes to next approval stage.



1.8 - Click **OK** at the "Are you sure?" message.



The worksheet will go back through the regular approval process.

Agreement Process

Agreement Approval Process

The Agreement is the working copy of the Budget Line Items that contains the OCAS codes and details of planned expenditures. Only the agreement can be changed once the worksheet is fully approved by ODCTE staff and the agreement created (changes cannot be made to the worksheet after the agreement is created.)

Roles: Agreement Process

Stage 1 - Local Coordinator – Agreement process starts. (No changes should need to be made.)

Stage 2 – Local BIS Director

Stage 3 – State Regional Coordinator – Electronic signature for SOU obtained here.

Stage 4 – State Initiative Supervisor - Electronic signature for SOU obtained here.

Stage 5 – Local Superintendent/CEO (or designee) – Electronic signature for SOU obtained here.

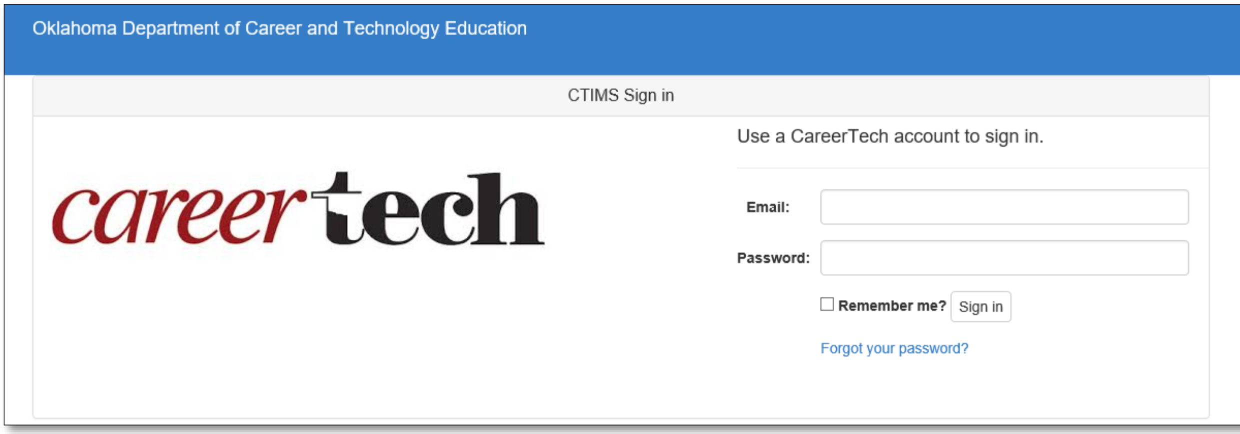
Stage 6 - State Requisition Coordinator – Generate SOU, submit requisition to finance, enter PO number into the agreement.

Stage 7 - Local Finance Coordinator – Enter OCAS codes for each line item. Agreement Approval becomes fully approved. (The tech center is responsible for selecting OCAS codes. See https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx for codes.)

Stage 1- Local Coordinator

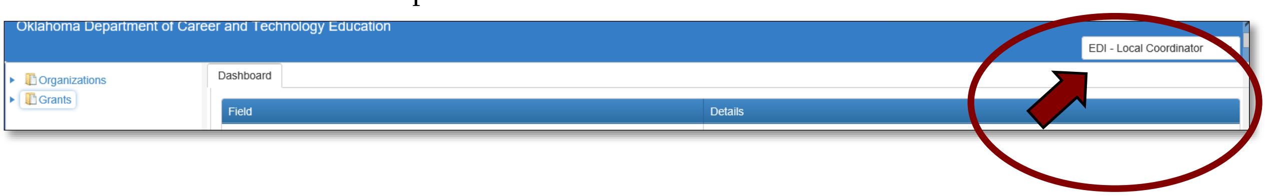
Accessing the Agreement List

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

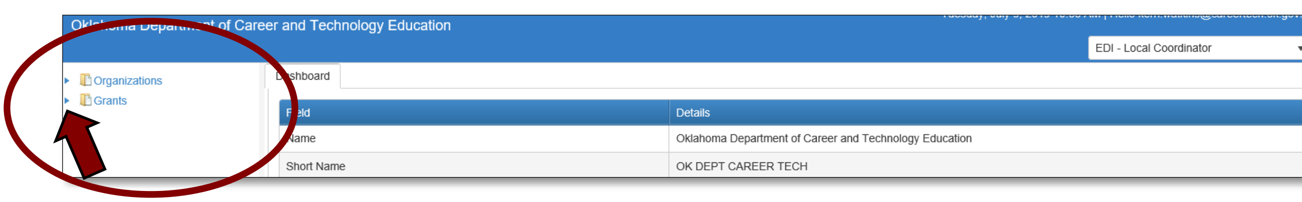


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

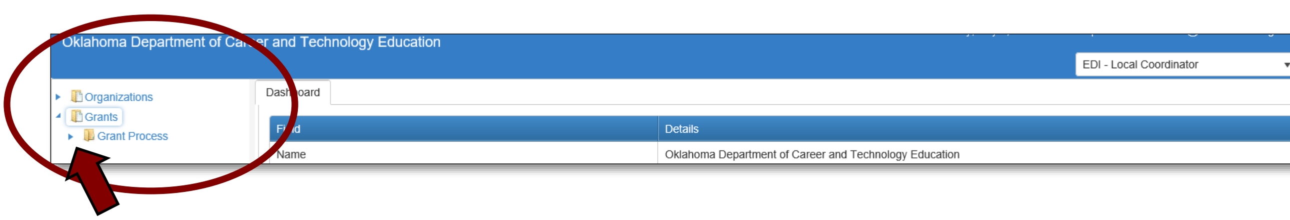
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



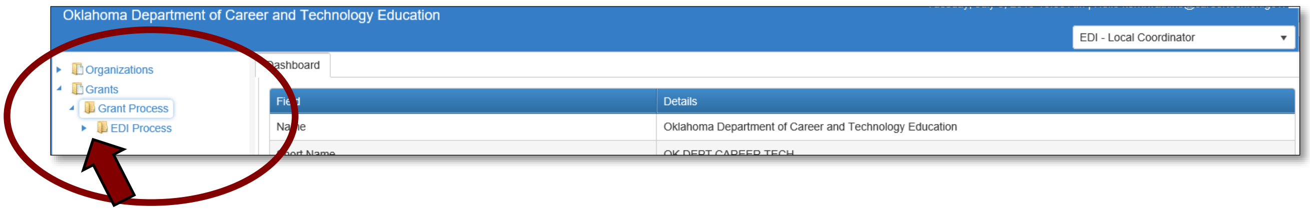
- Click the arrow next to **Grants** on left navigation.



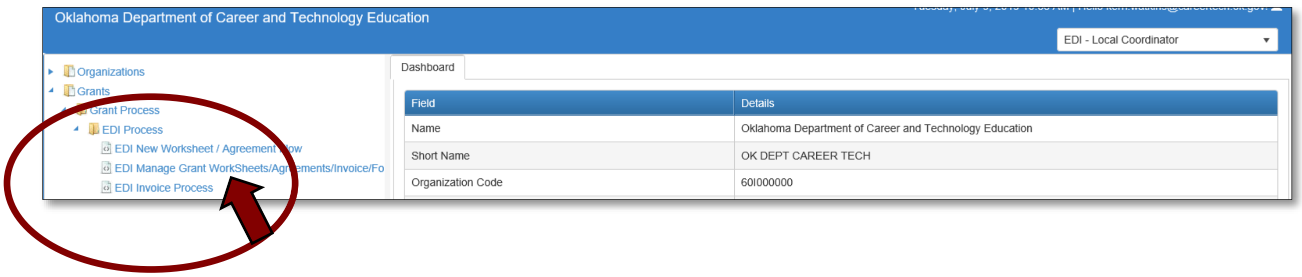
- Click the arrow next to **Grant Process** on left navigation.



- Click the arrow next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

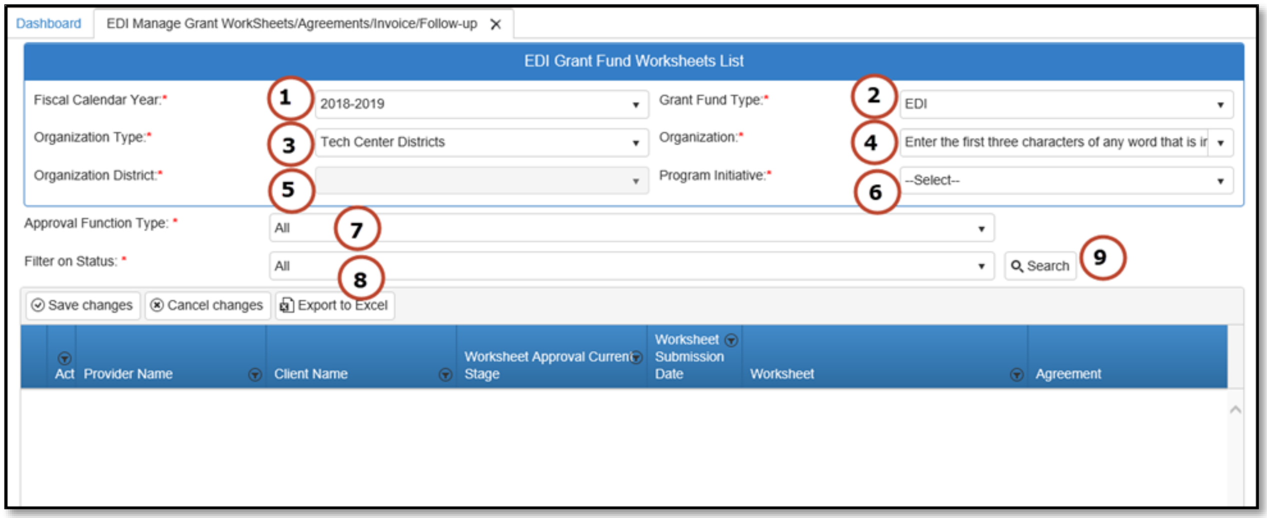


Opening the Agreement – Step 1

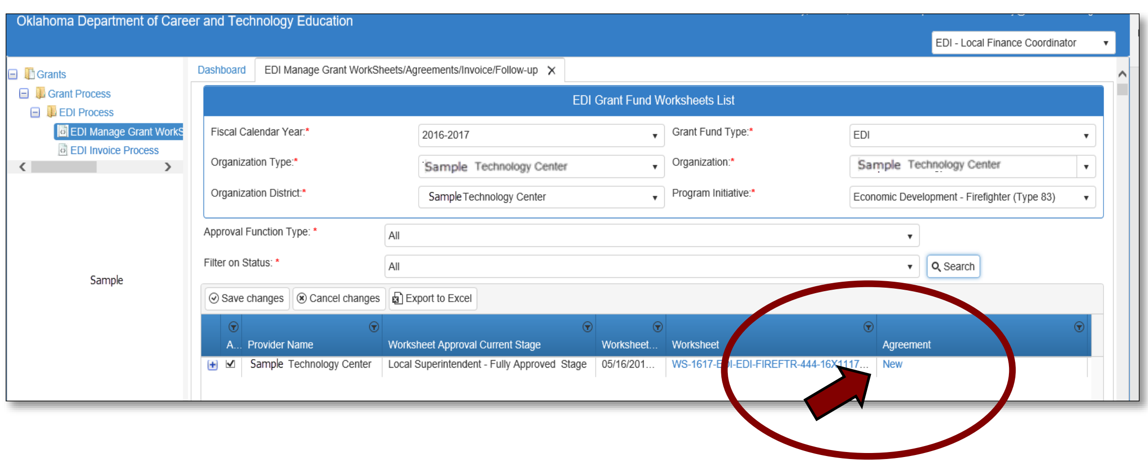
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
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*** 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.

NOTE: A red asterisk (*) indicates a required field. See next page for screen image.

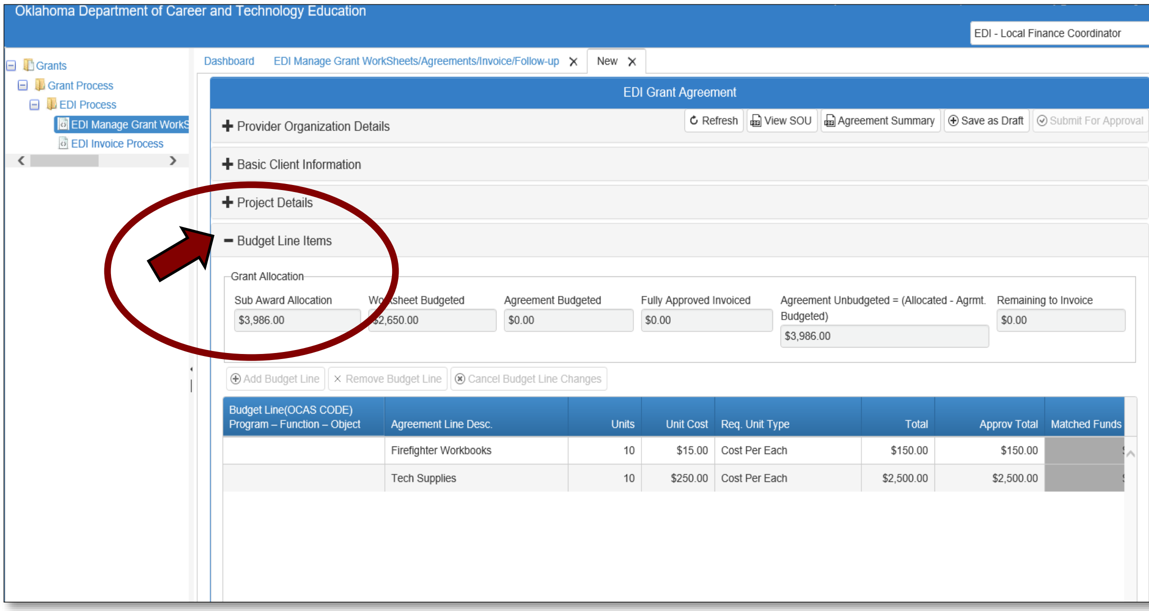


1.2 - After clicking the Search button, the agreement column will display **New**. Select the new agreement by clicking on the word **New**.

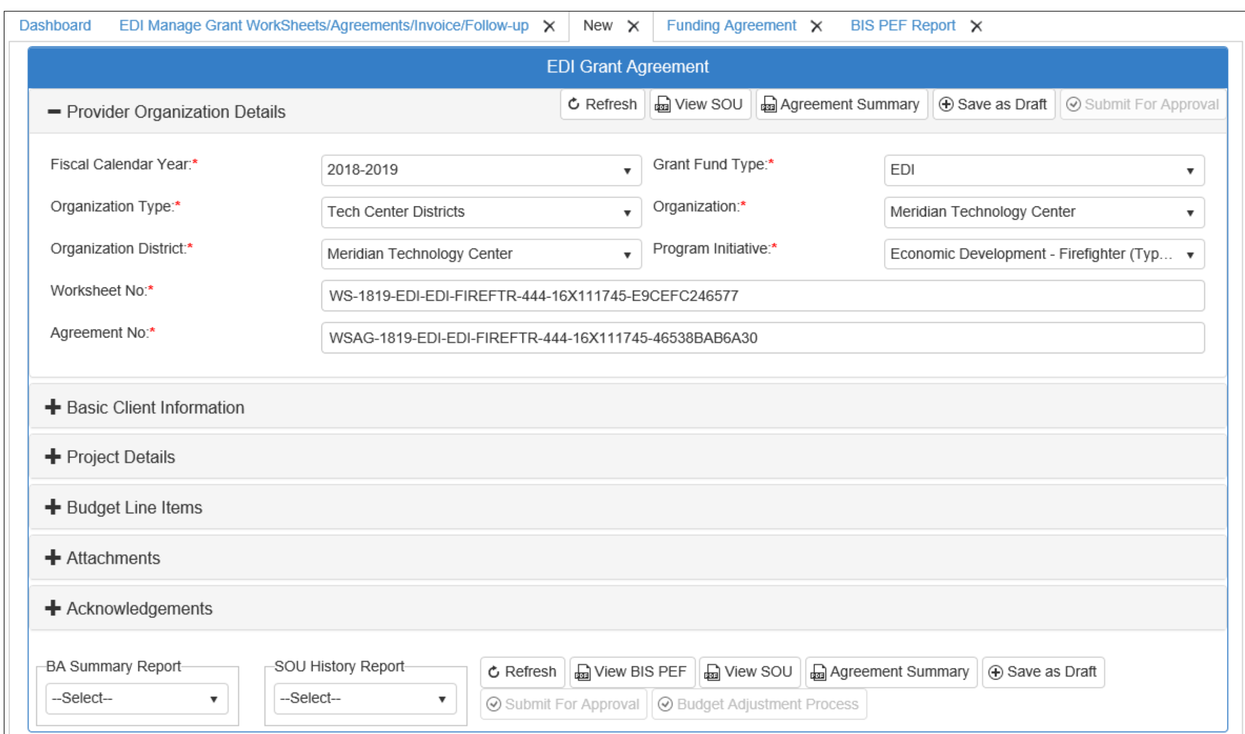


Reviewing the Agreement– Step 2

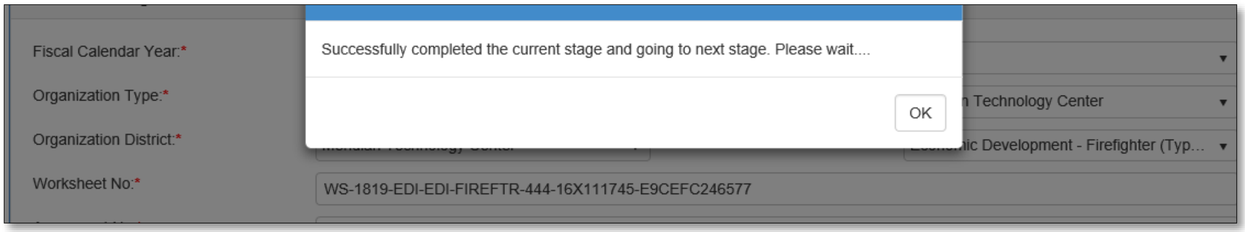
2.1 - Expand the **Budget Line Items** section by clicking on the + (plus) sign.



2.2 - Review the SOU and Agreement Summary by clicking on the appropriate buttons indicated below. To close out each tab after review, click the × on that tab. When back to the **EDI Grant Agreement** screen, click **Save as Draft** to go to the next stage.

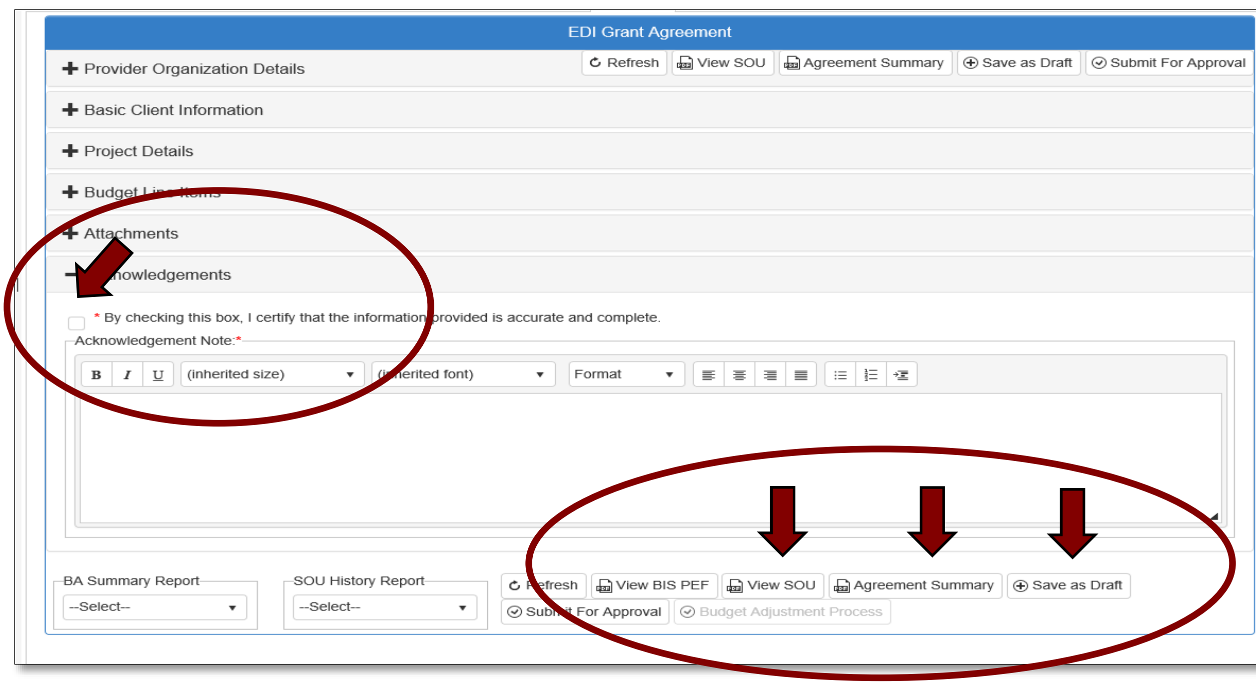


2.3 - Click **OK** to go to next step.

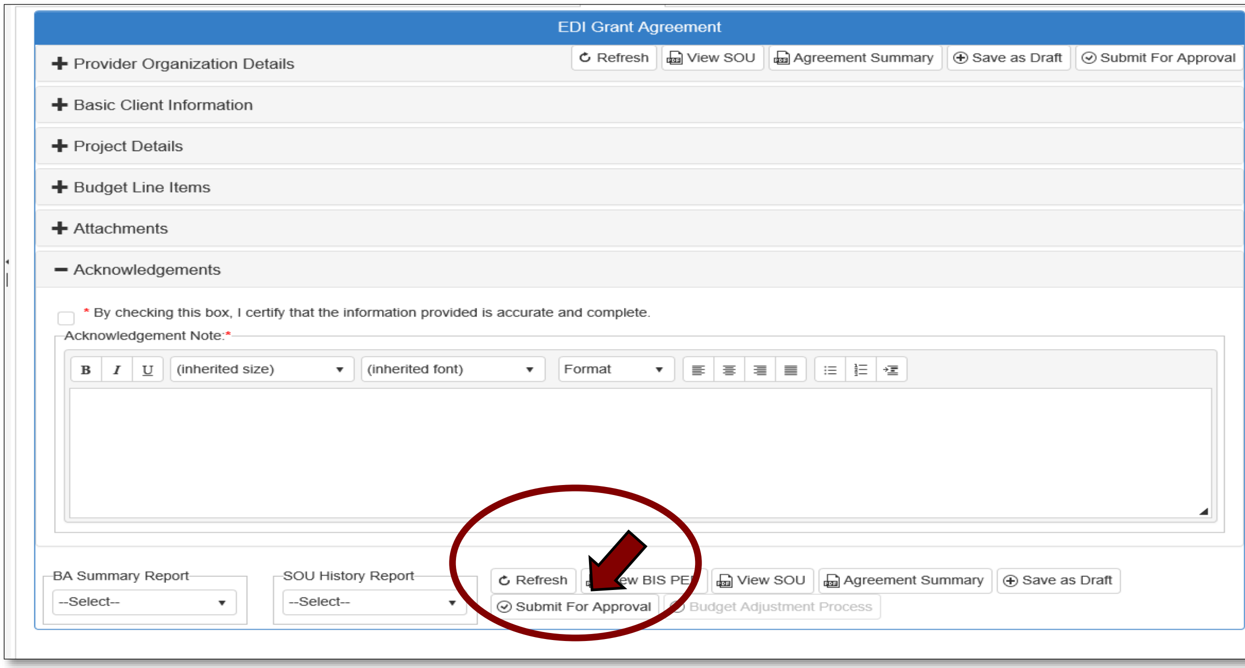


Agreement Acknowledgments and Approval– Step 3

3.1 - Click on the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



<u>3.2</u> - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.

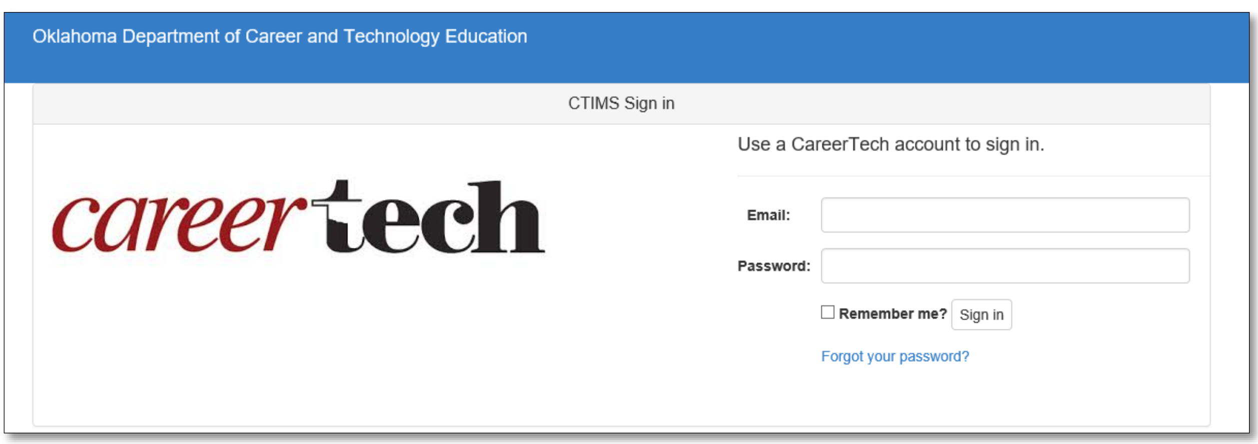


The agreement will now go to the **EDI Local BIS Director** for approval.

Stage 2-Local BIS Director

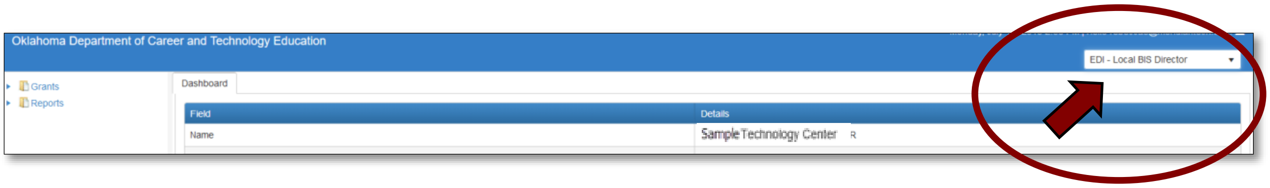
<u>Accessing the Agreement List</u>

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

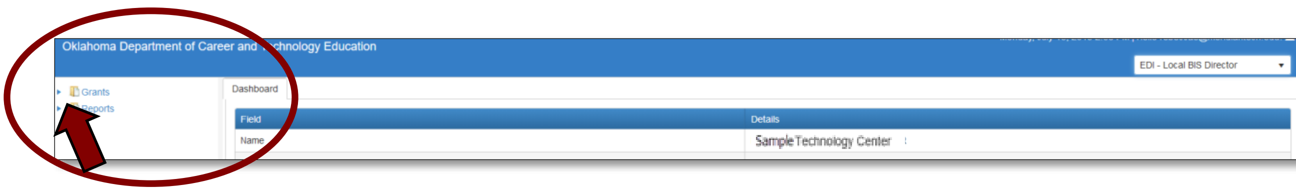


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

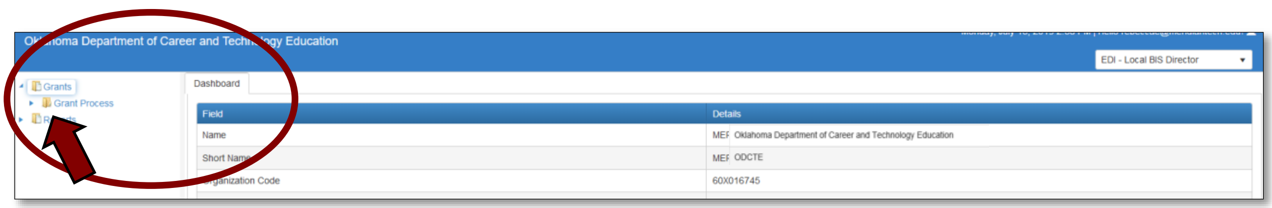
- Verify that you are signed in with the role of an **EDI Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select this role.



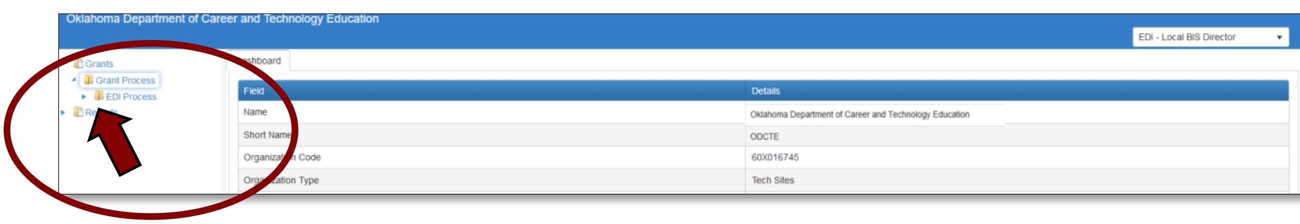
- Click the arrow ▸ next to **Grants** on left navigation.



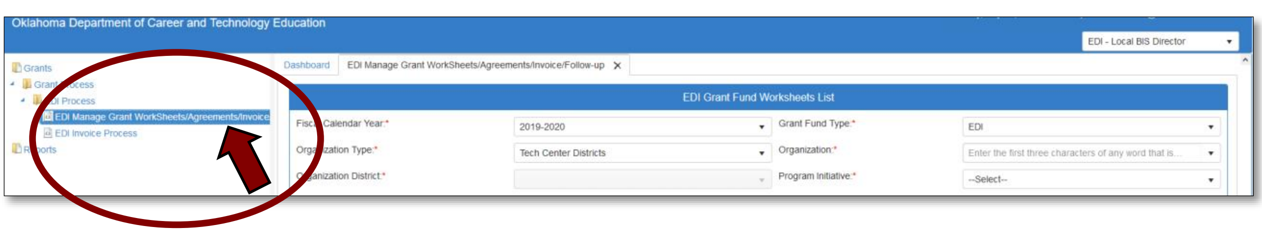
- Click the arrow ▸ next to **Grant Process** on left navigation.



- Click the arrow ▸ next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

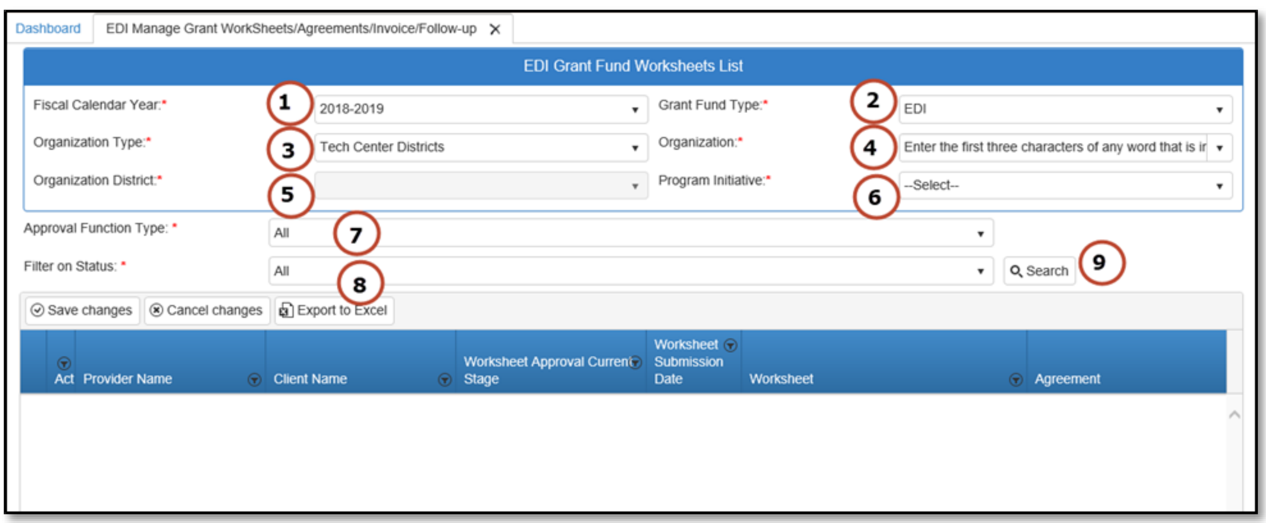


Opening the Agreement – Step 1

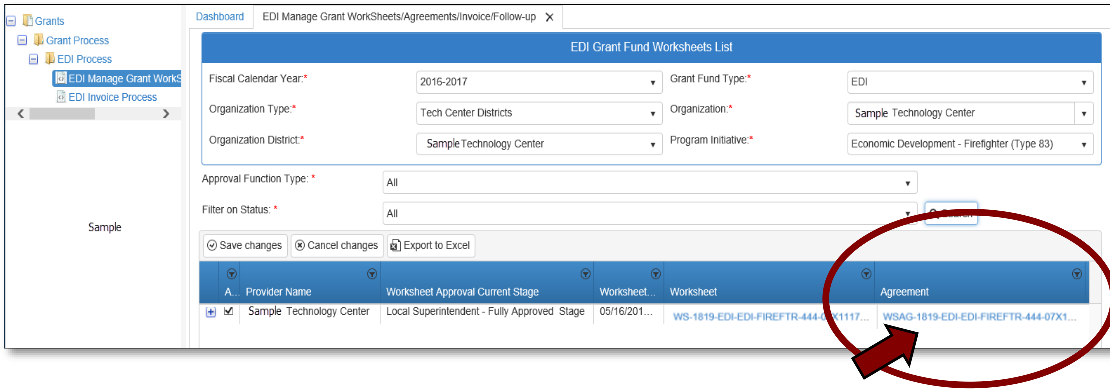
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
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*** 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.

NOTE: A red asterisk (*) indicates a required field.

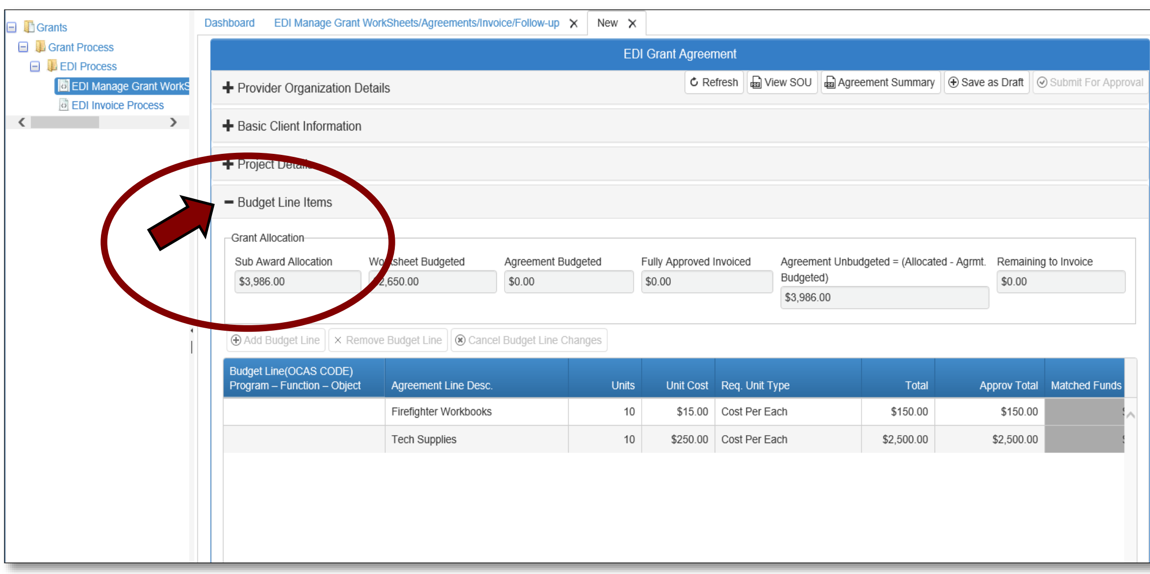


<u>1.2</u> - After clicking the Search button, the agreement column will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.

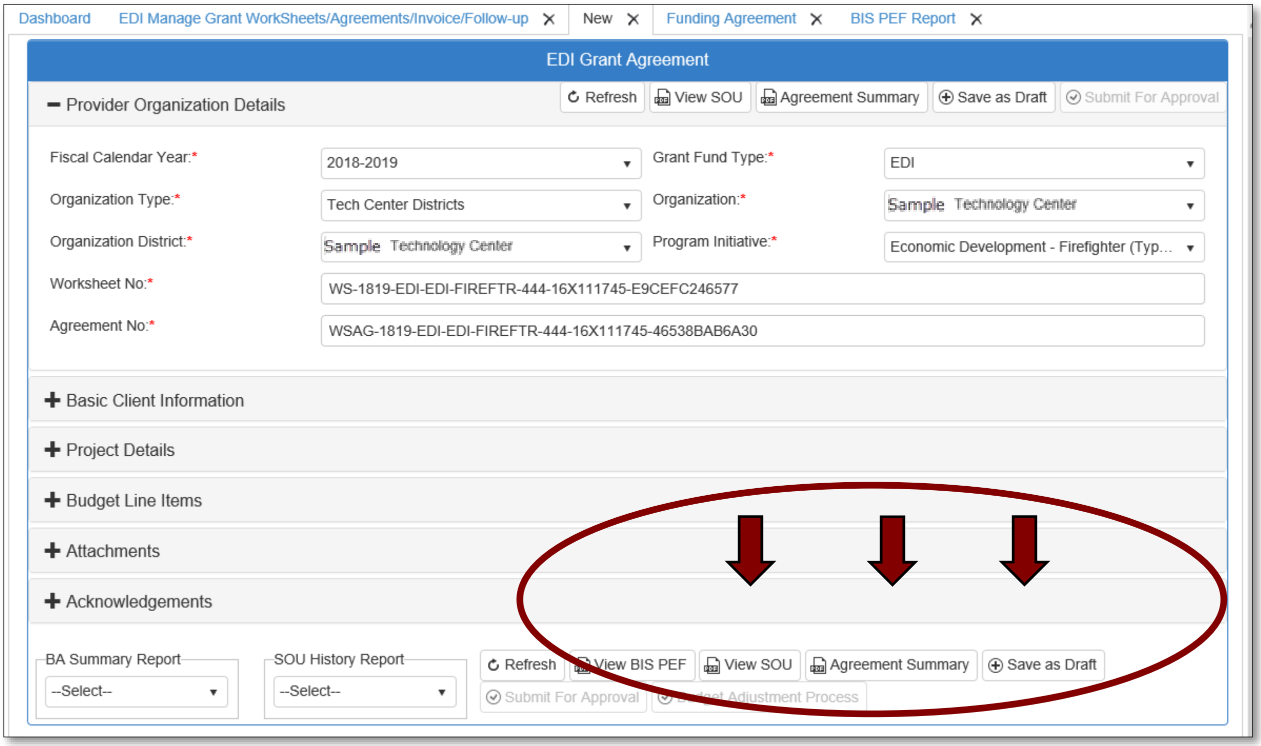


Reviewing the Agreement– Step 2

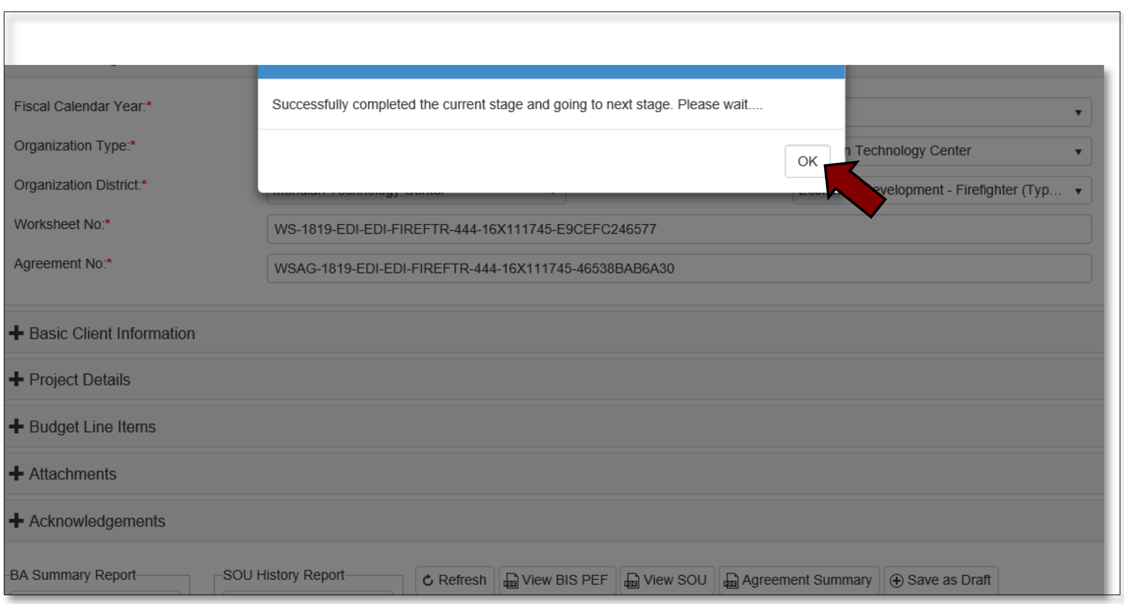
<u>2.1</u> - Expand the **Budget Line Items** section by clicking on the + (plus) sign. Review the budget.



2.2 - Review the SOU and Agreement Summary by clicking on the appropriate buttons indicated below. To close out each tab after review, click the ✕ on that tab. When back to the EDI Grant Agreement screen, click **Save as Draft** to go to the next step.

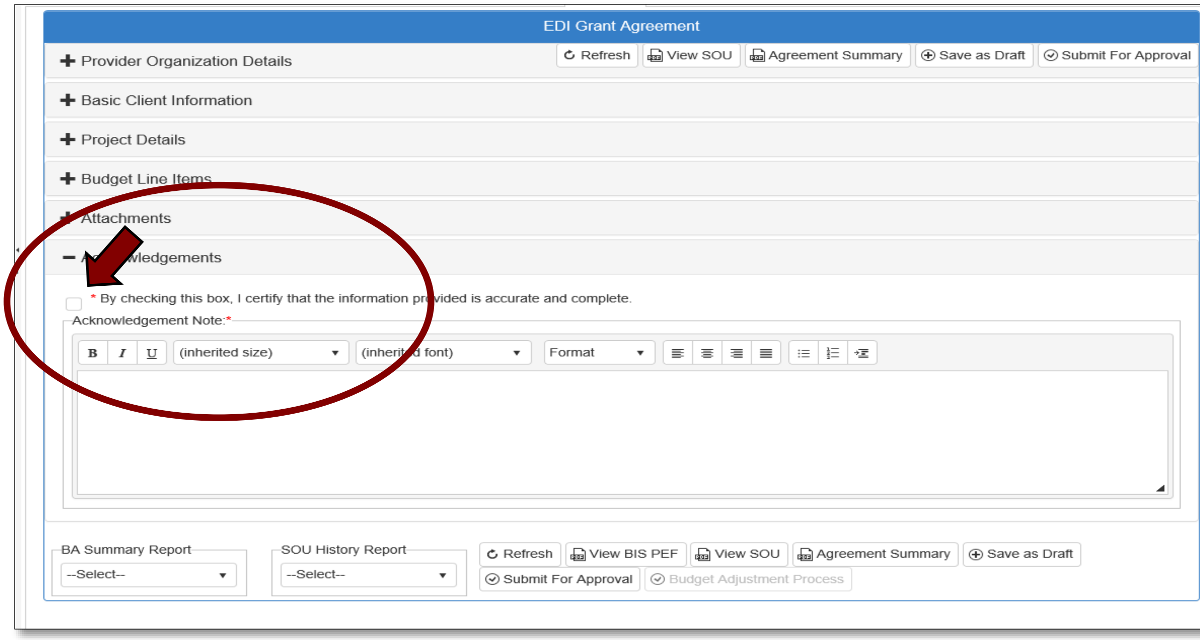


2.3 - Click **OK** to go to next step.

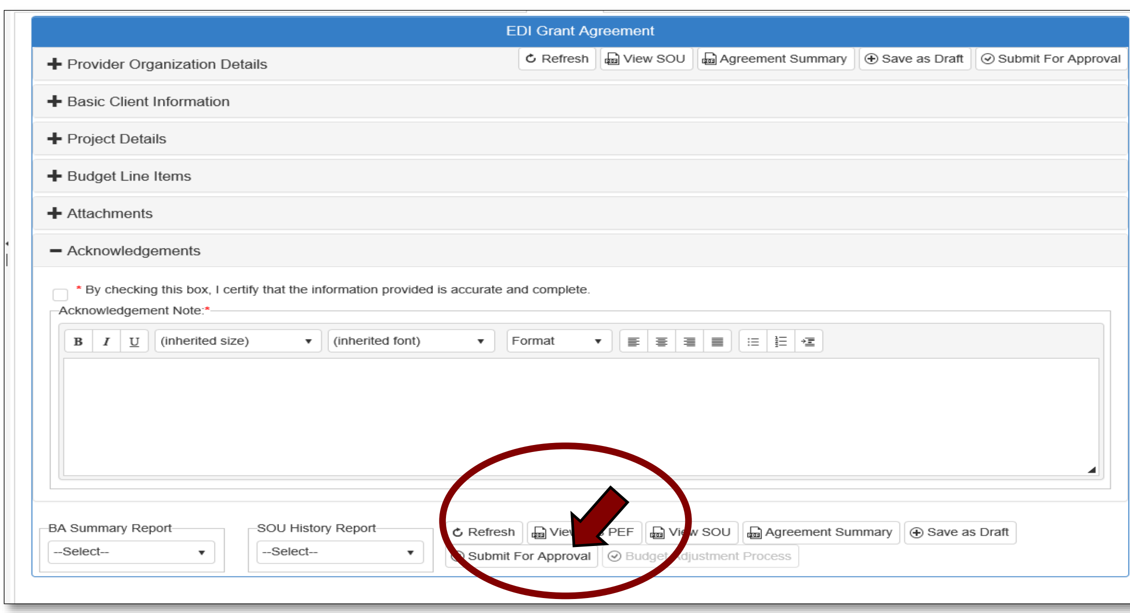


Agreement Acknowledgements and Approval– Step 3

3.1 - Click on the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



3.2 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.

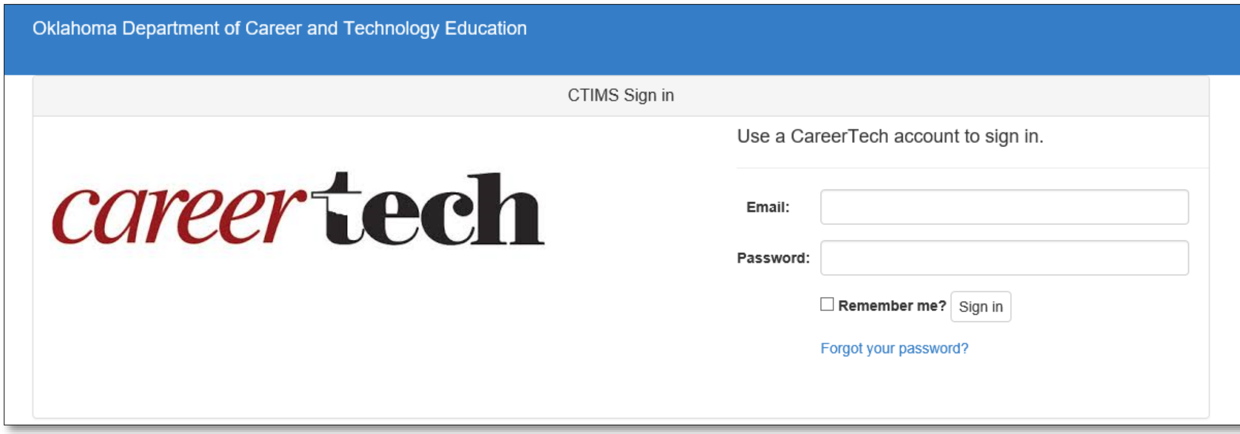


The agreement will now go to the **EDI State Regional Coordinator** for the SOU electronic signature.

Stage 3-State Regional Coordinator

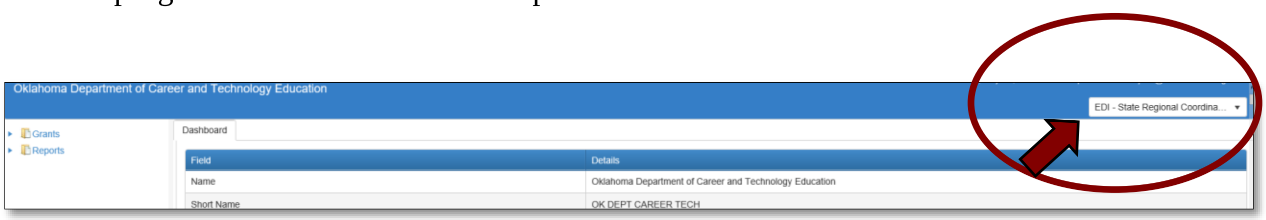
Accessing the Agreement

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

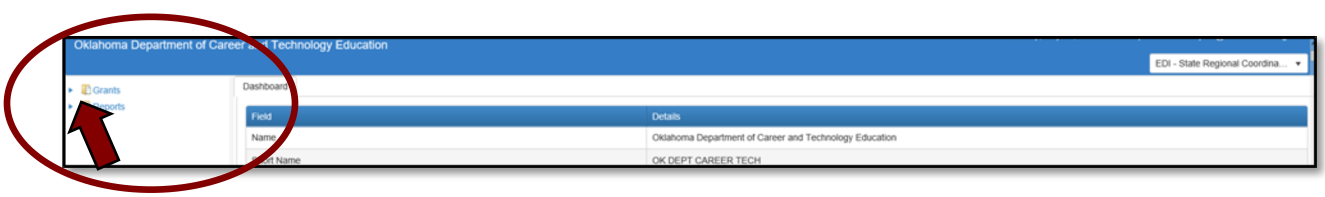


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

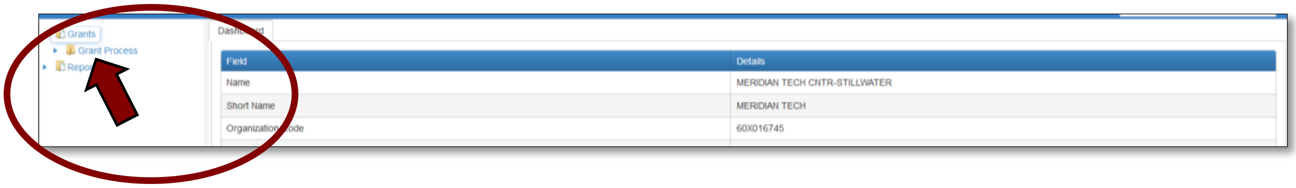
- Verify that you are signed in with the role of an **EDI State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



- Click the arrow ▸ next to **Grants** on left navigation.

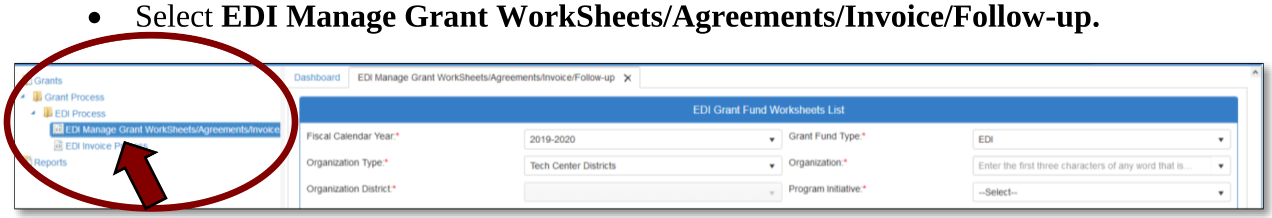


- Click the arrow next to **Grant Process** on left navigation.



- Click the arrow next to **EDI Process** on left navigation.

- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

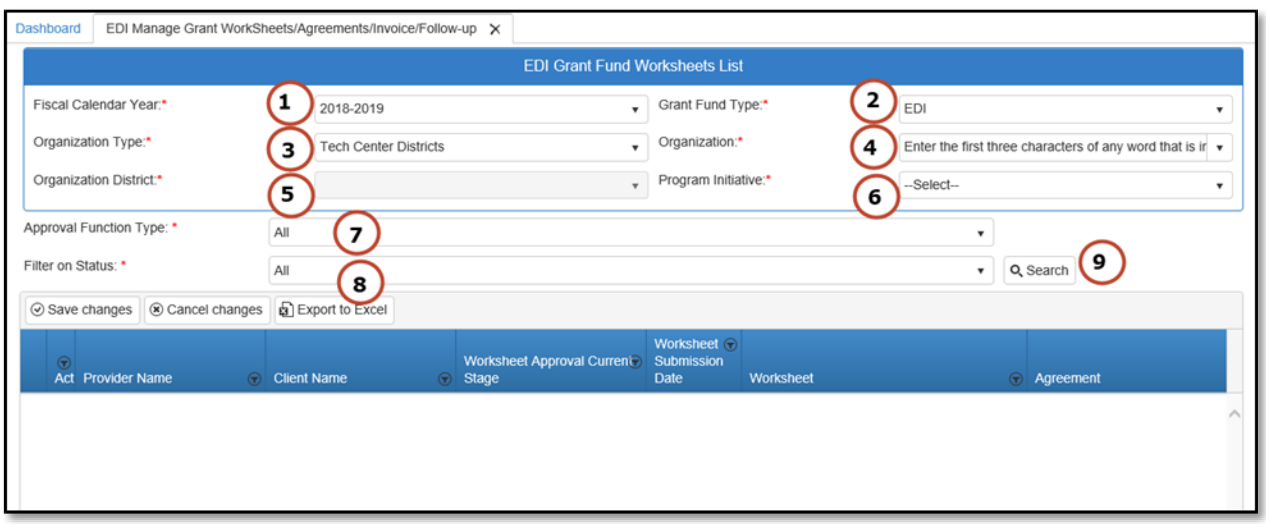


Opening the Agreement – Step 1

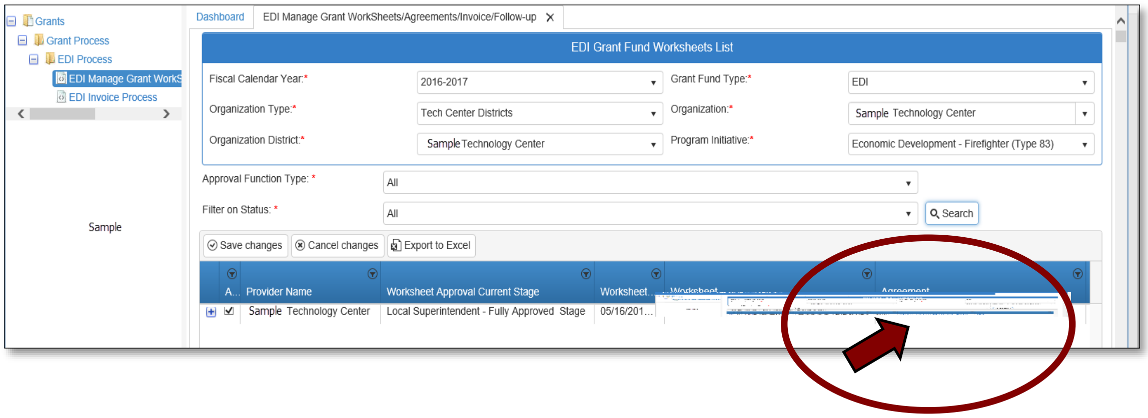
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **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 the 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.

NOTE: A red asterisk (*) indicates a required field.

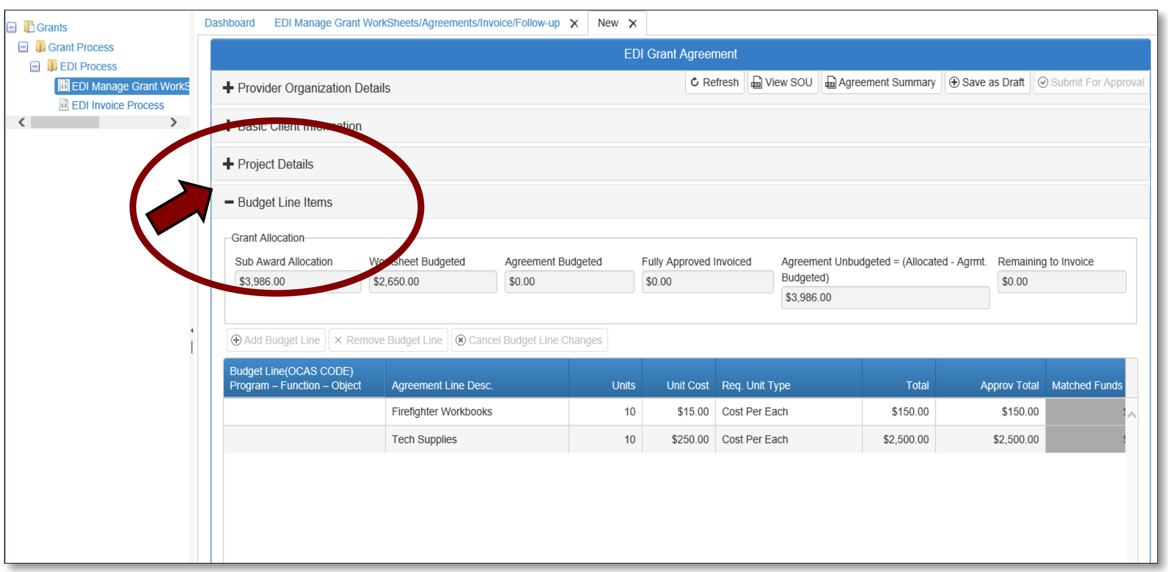


1.2 - After clicking the Search button, the agreement column will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.

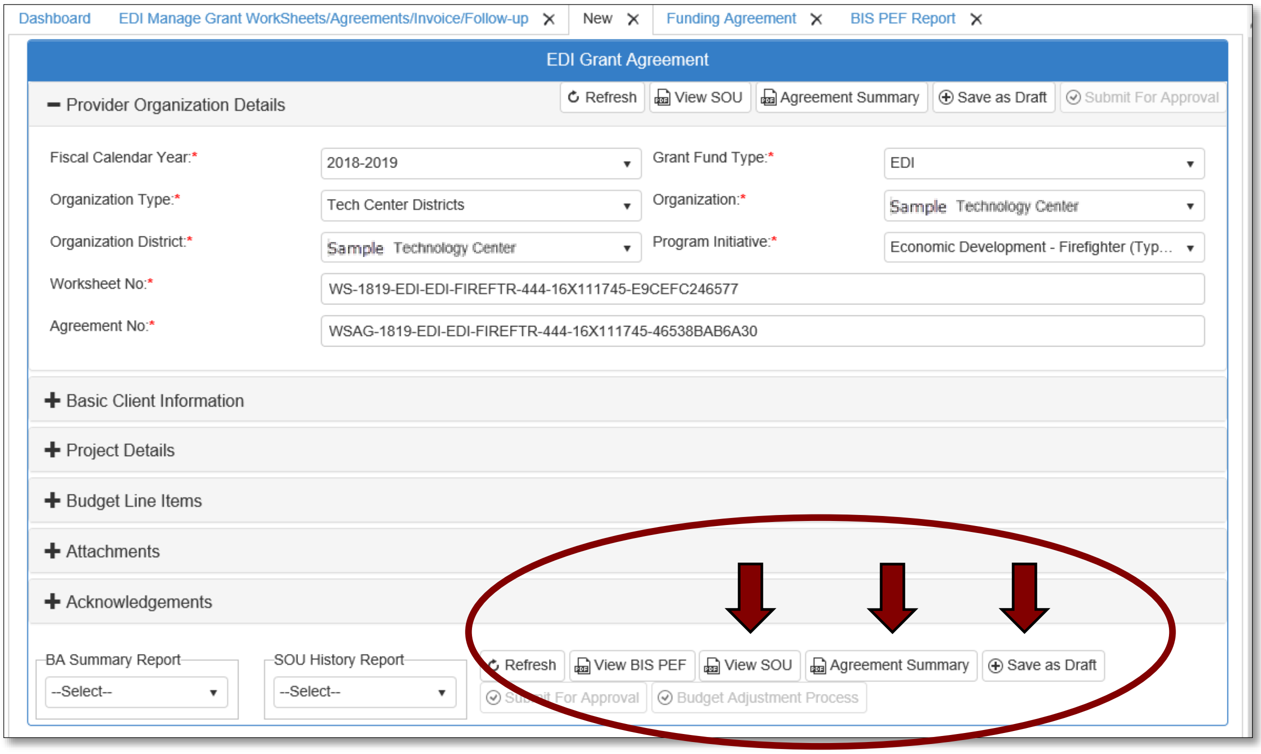


Reviewing the Agreement– Step 2

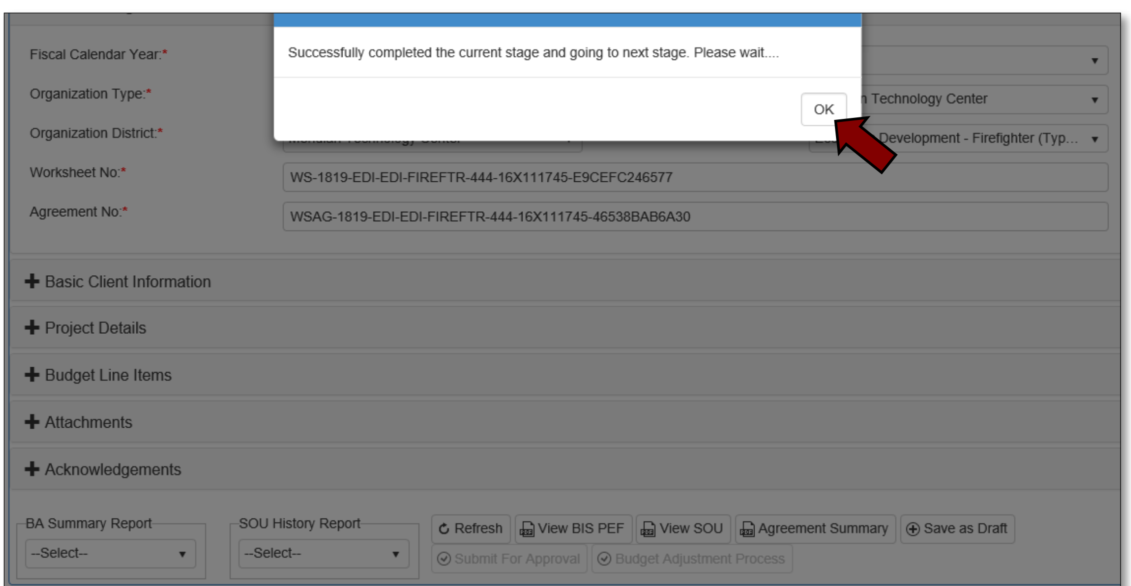
2.1 - Expand the **Budget Line Items** section by clicking on the + (plus) sign. Review the budget.



2.2 – Review the Agreement Summary, then review and sign the SOU by clicking on the appropriate buttons indicated below. To close out each tab after review, click the ✕ on that tab. When back to the EDI Grant Agreement screen, click **Save as Draft** to go to the next step.

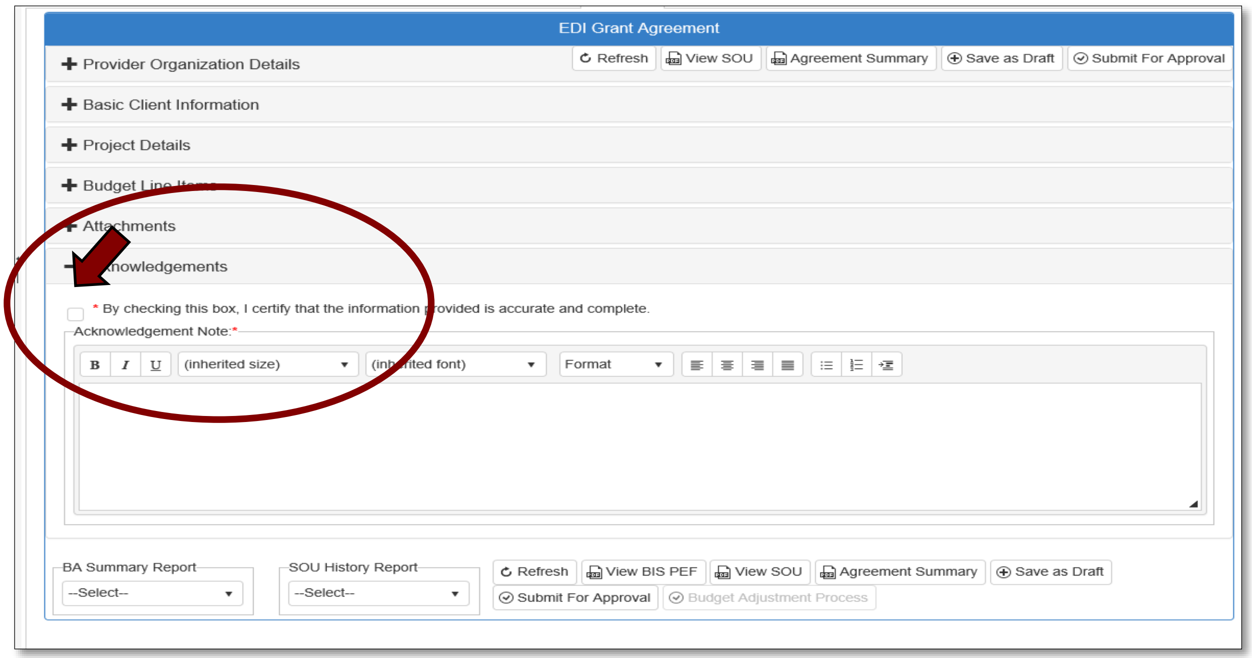


2.3 - Click **OK** to go to next step.

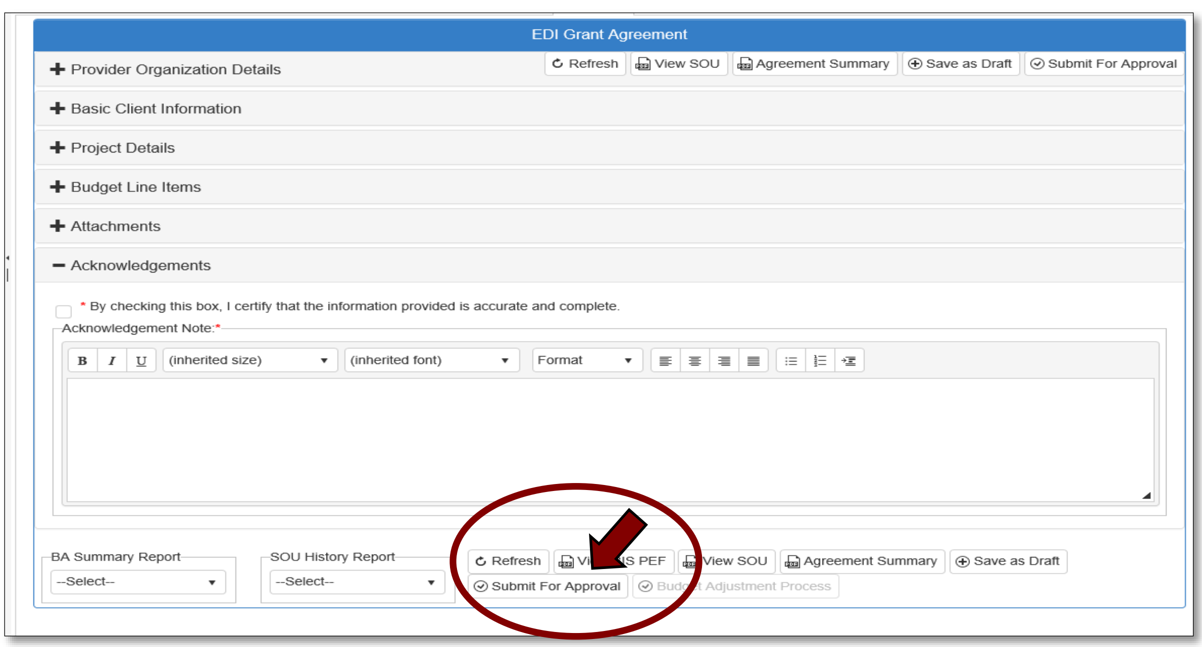


Agreement Acknowledgements and Approval– Step 3

3.1 - Click on the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



3.2 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.

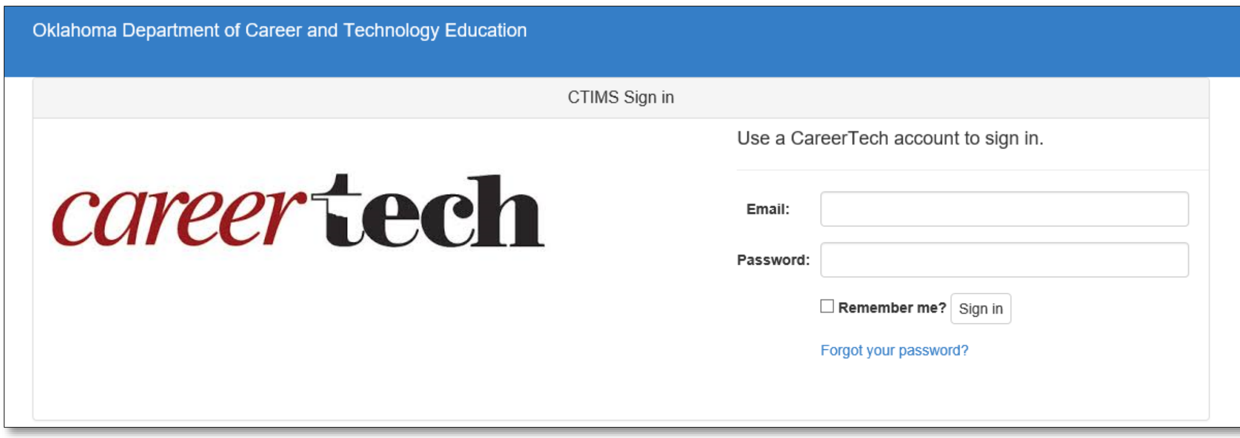


The agreement will now go to the **EDI State Initiative Supervisor** for the SOU electronic signature.

Stage 4-State Initiative Supervisor

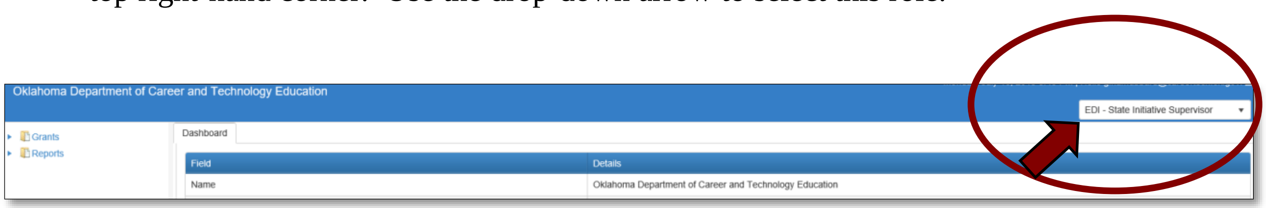
Accessing the Agreement

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

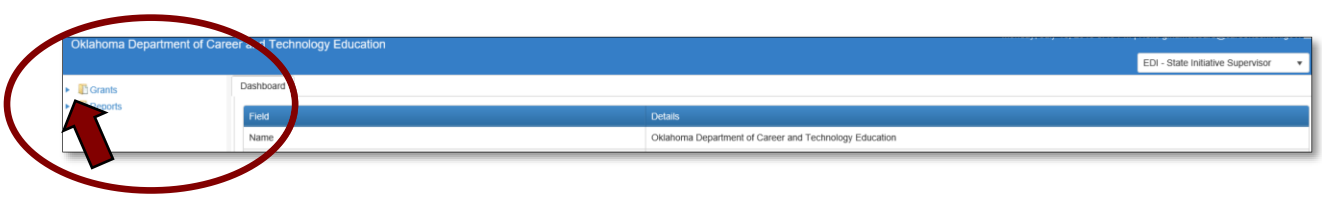


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

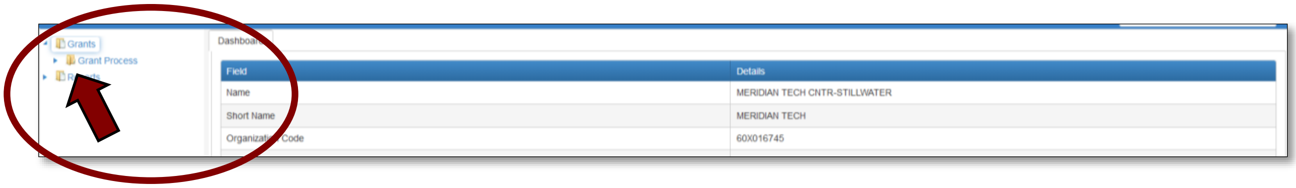
- Verify that you are signed in with the role of an **EDI State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



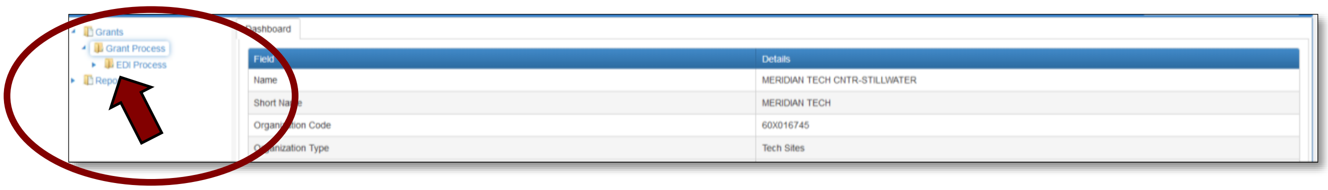
- Click the arrow ▸ next to **Grants** on left navigation.



- Click the arrow ▶ next to **Grant Process** on left navigation.



- Click the arrow ▶ next to **EDI Process** on left navigation.



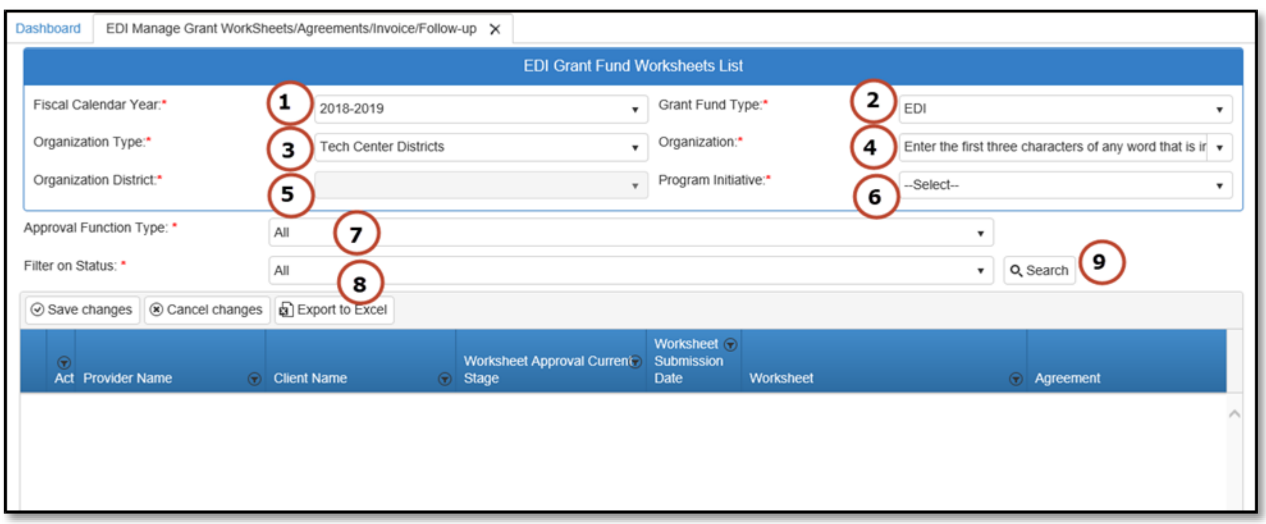
- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

Opening the Agreement – Step 1

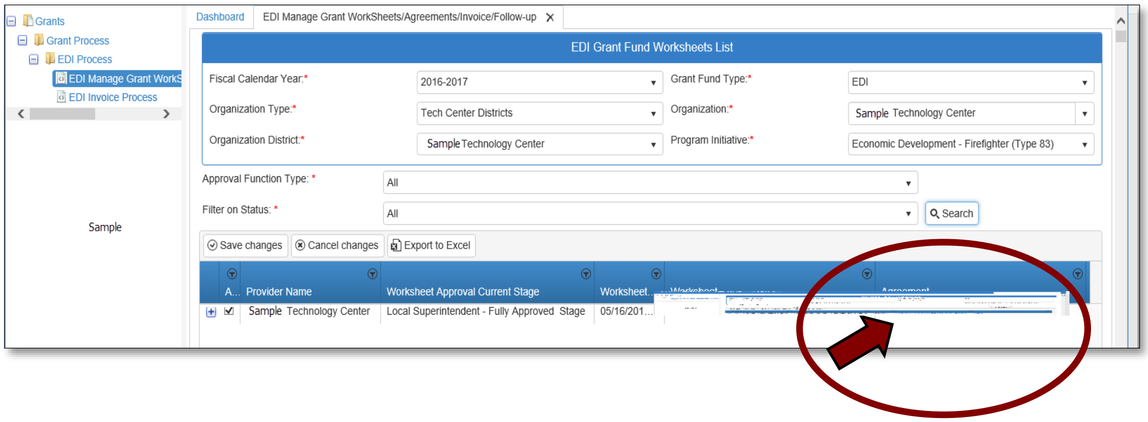
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **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 the 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.

NOTE: A red asterisk (*) indicates a required field.

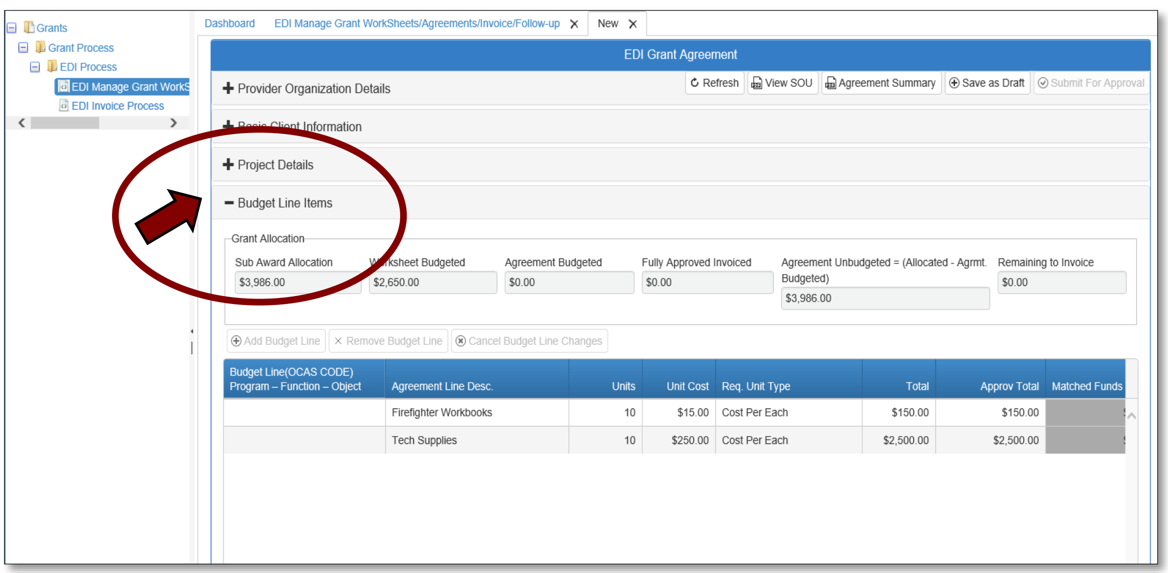


1.2 - After clicking the Search button, the agreement column will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.

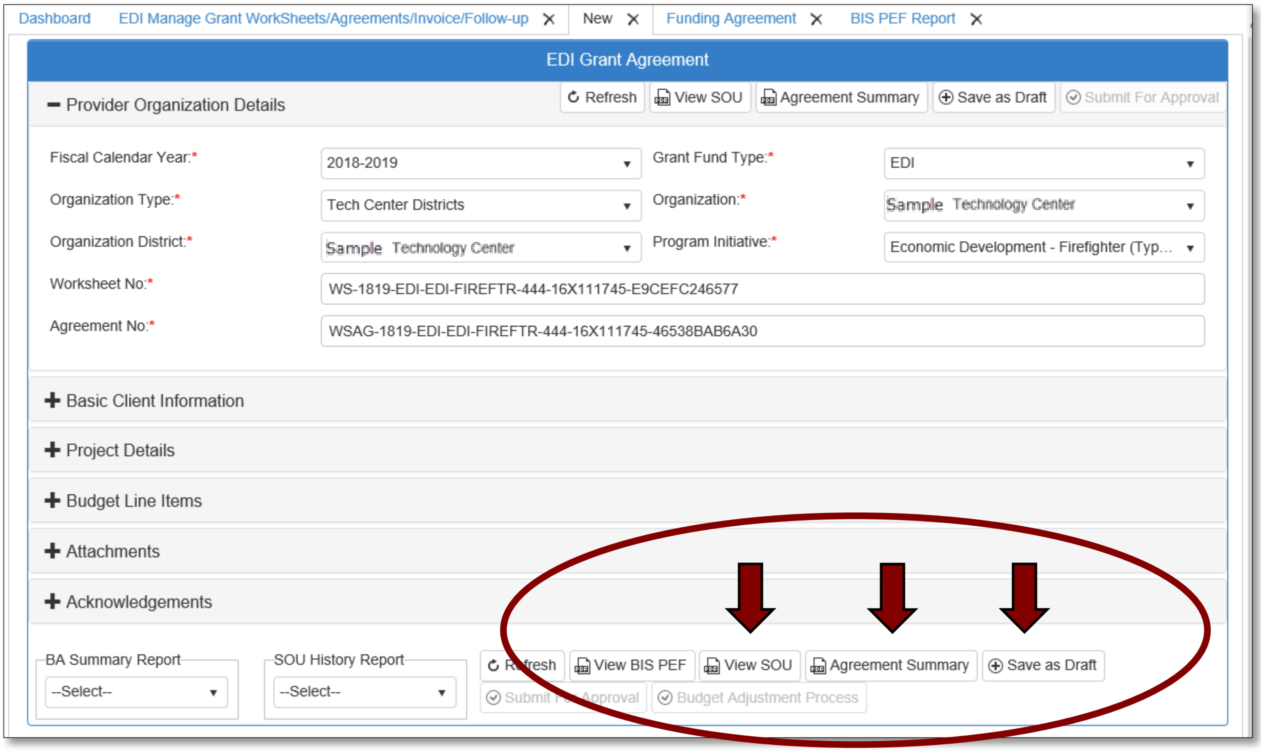


Reviewing the Agreement– Step 2

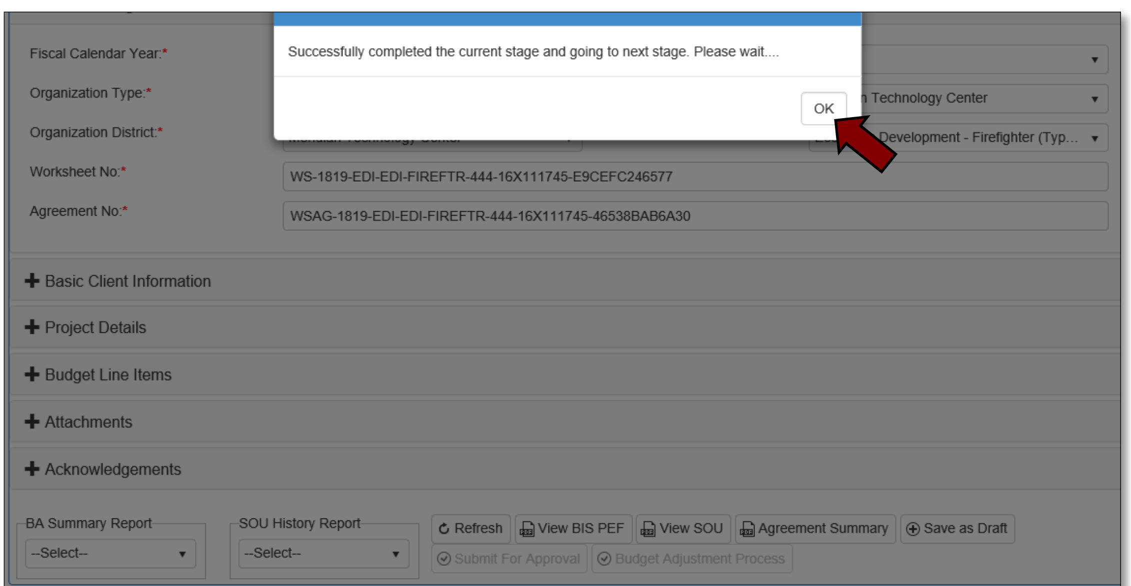
2.1 - Expand the **Budget Line Items** section by clicking on the + (plus). Review the budget.



2.2 - Review the Agreement Summary, then review and sign the SOU by clicking on the appropriate buttons indicated below. To close out each tab after review, click the ✕ on that tab. When back to the EDI Grant Agreement screen, click **Save as Draft** to go to the next step.

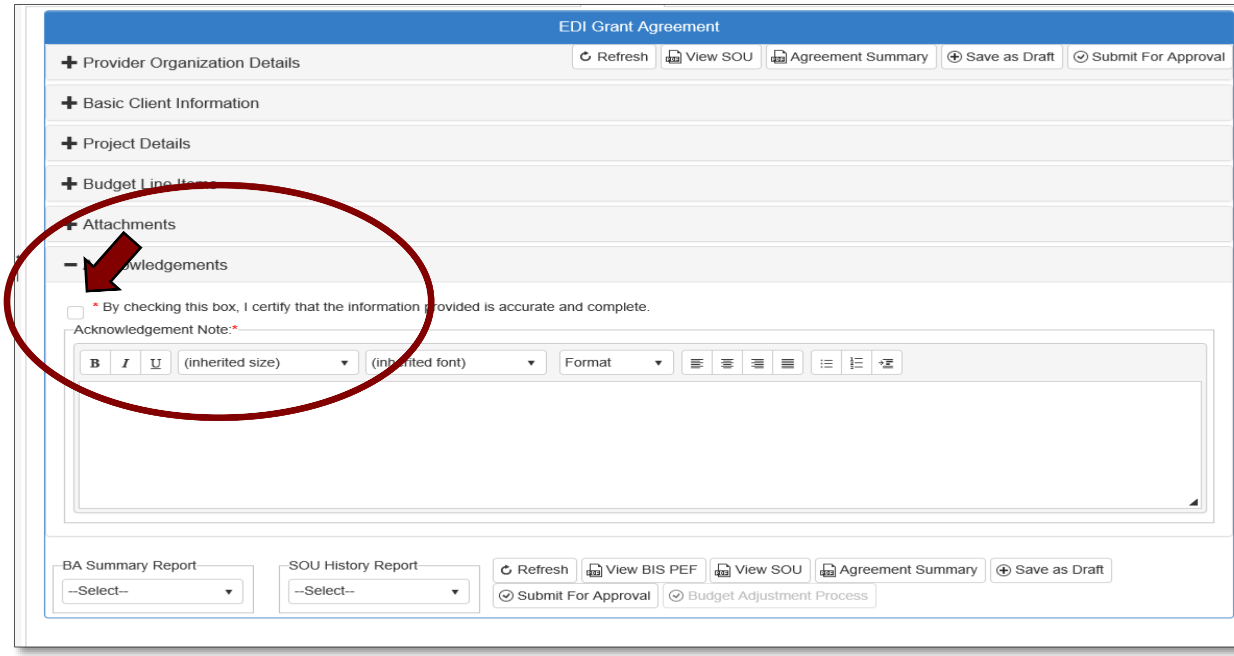


2.3 - Click **OK** to go to next step.

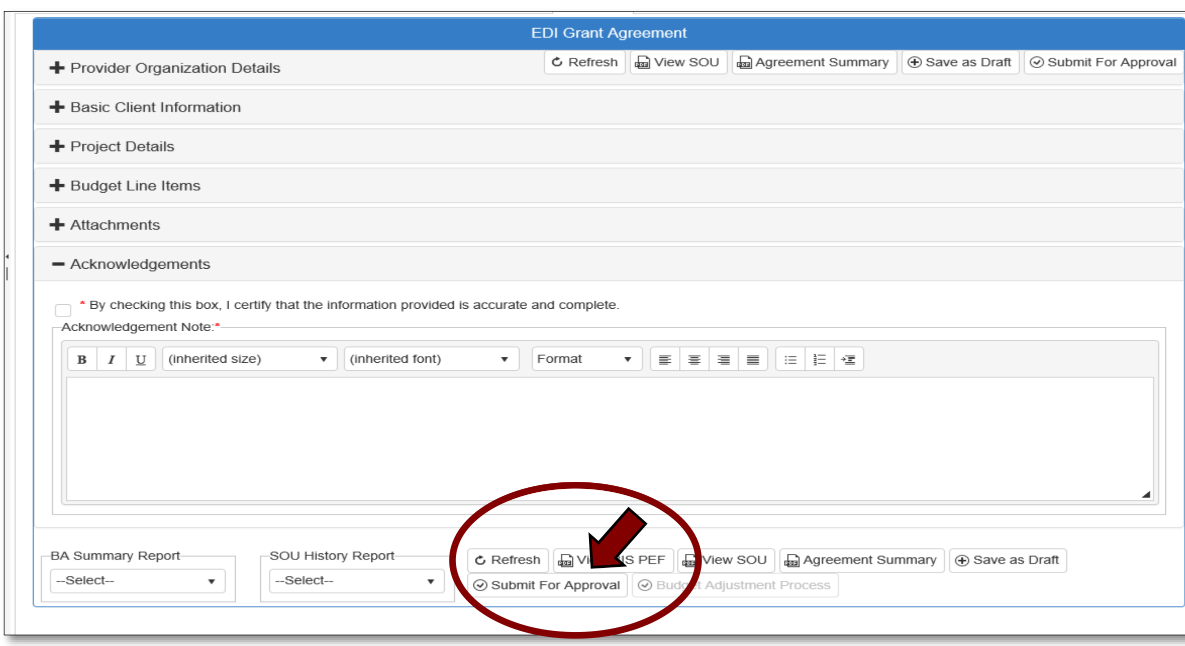


Agreement Acknowledgements and Approval– Step 3

3.1 - Click on the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



3.2 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.

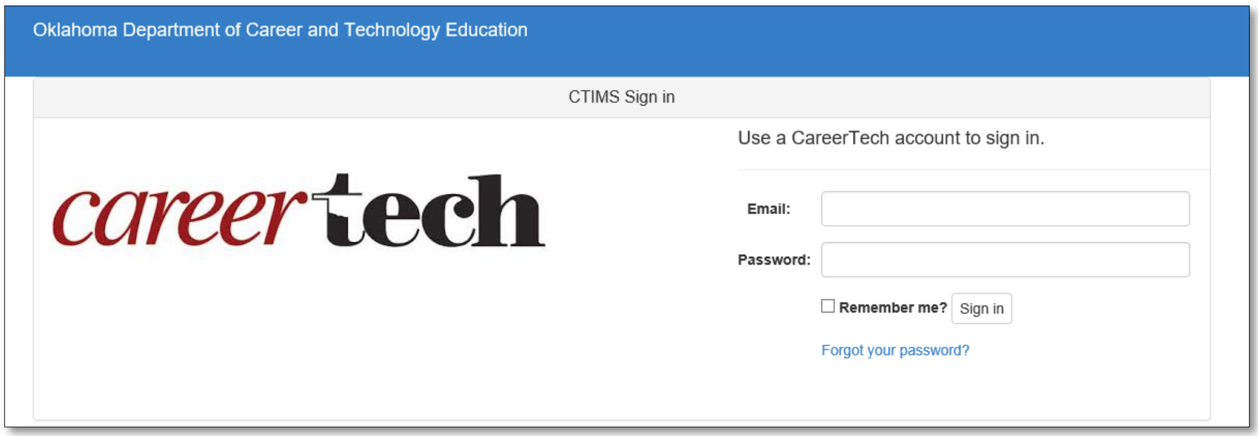


The agreement will now go to the **EDI Local Superintendent/CEO (or designee)** for the SOU electronic signature.

Stage 5-Local Superintendent/CEO (or Designee)

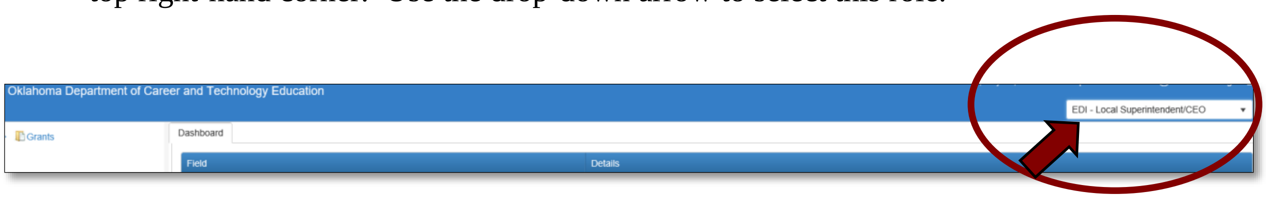
Accessing the Agreement

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

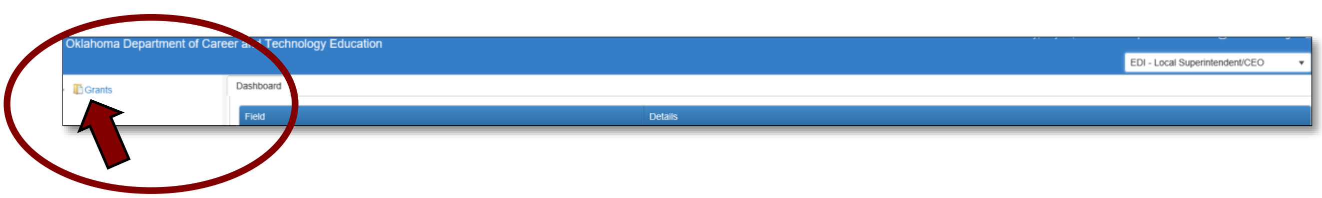


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

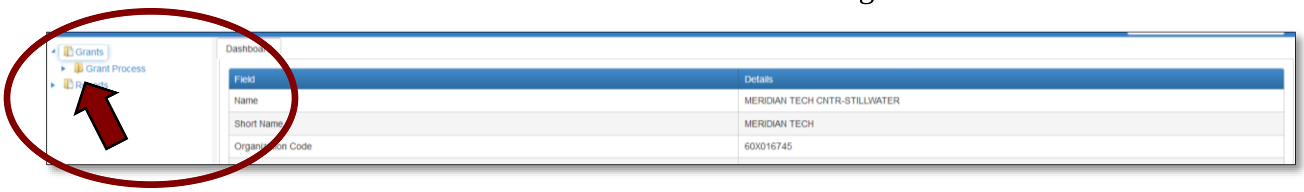
- Verify that you are signed in with the role of an **EDI Local Superintendent/CEO** in the top right-hand corner. Use the drop-down arrow to select this role.



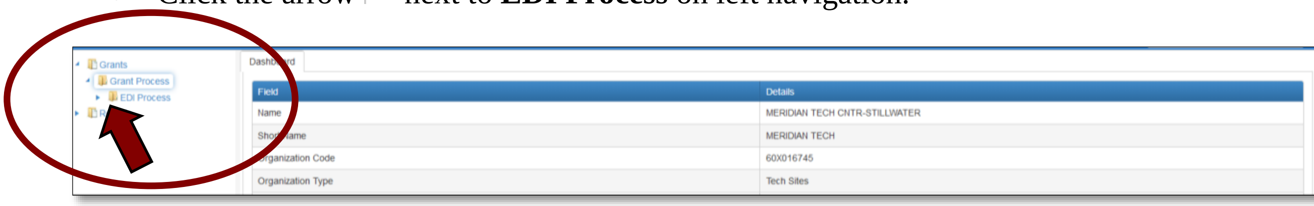
- Click the arrow ▶ next to **Grants** on left navigation.



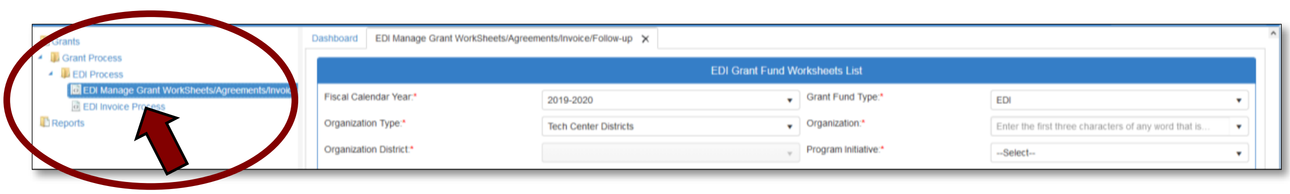
- Click the arrow next to **Grant Process** on left navigation.



- Click the arrow next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

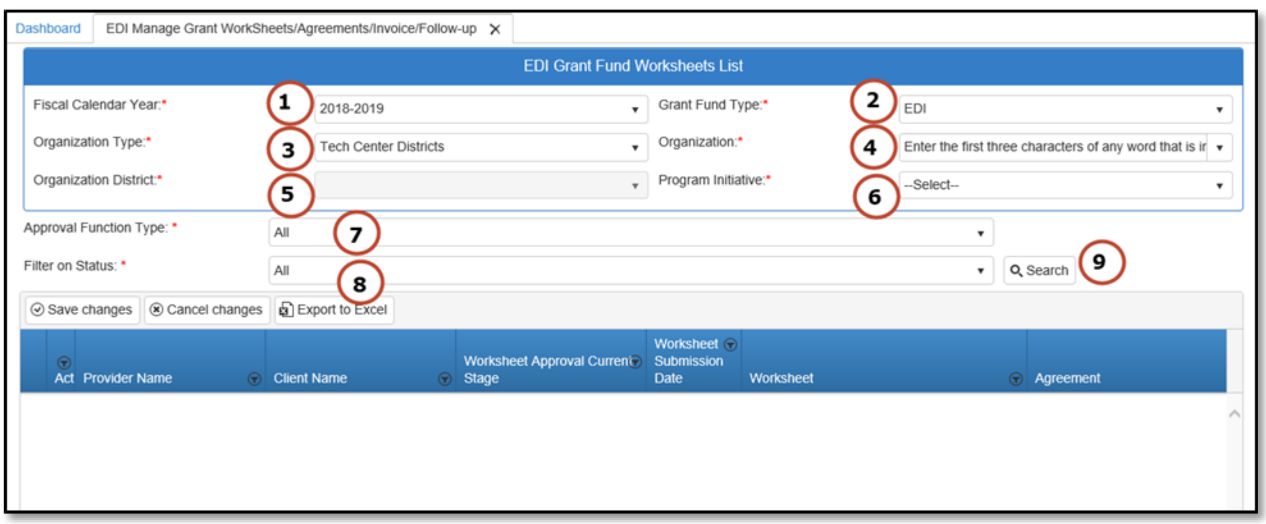


Opening the Agreement – Step 1

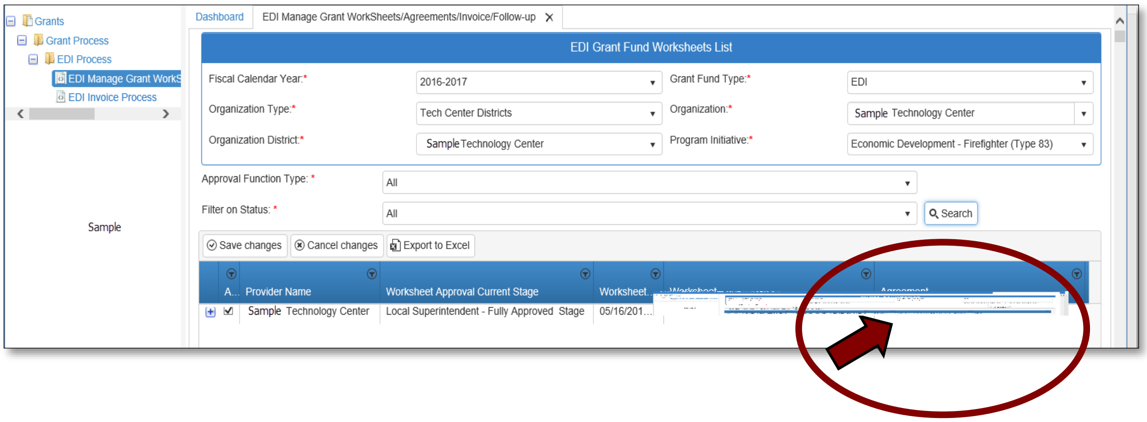
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **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 the 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.

NOTE: A red asterisk (*) indicates a required field.

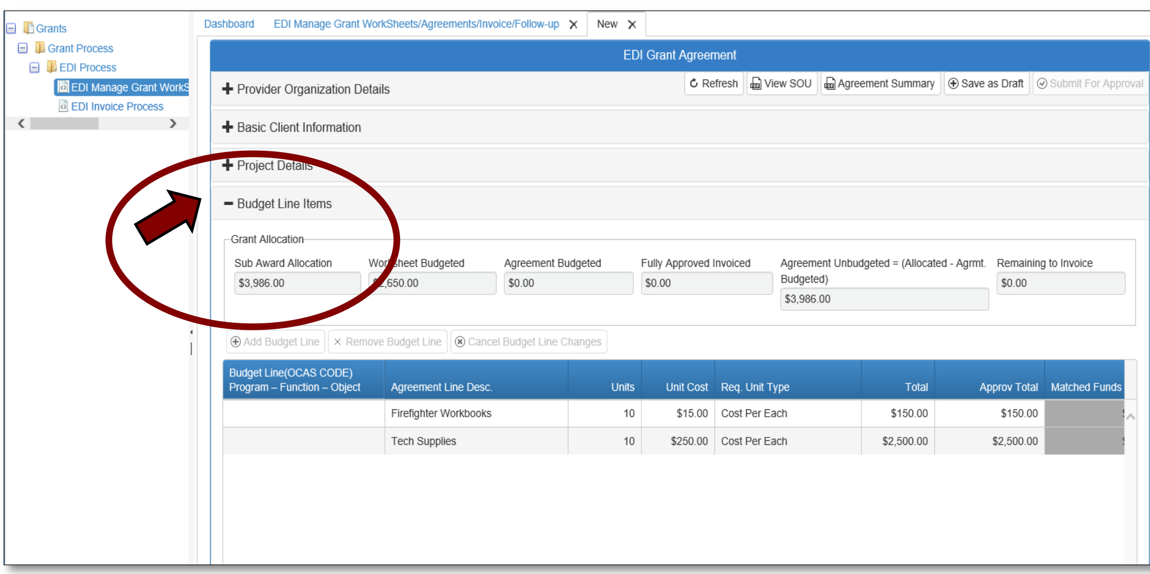


<u>1.2</u> **-** After clicking the Search button, the agreement column will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.

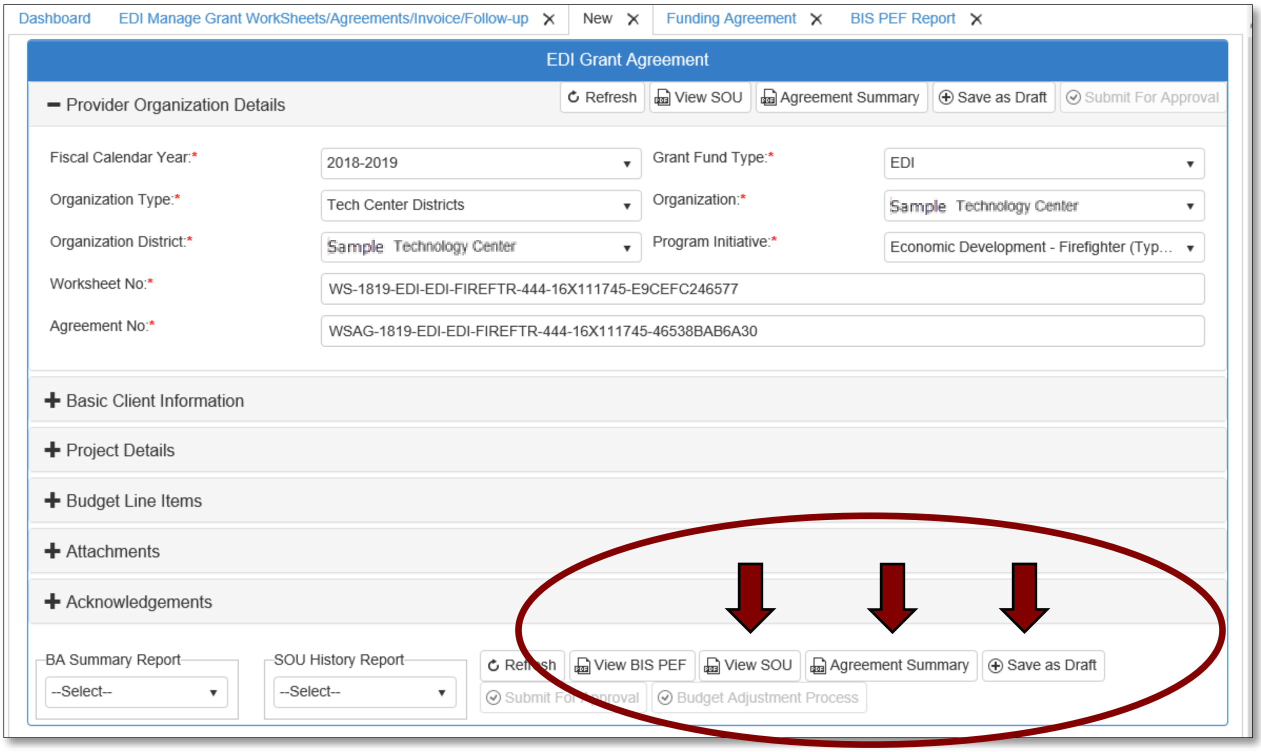


<u>Reviewing the Agreement– Step 2</u>

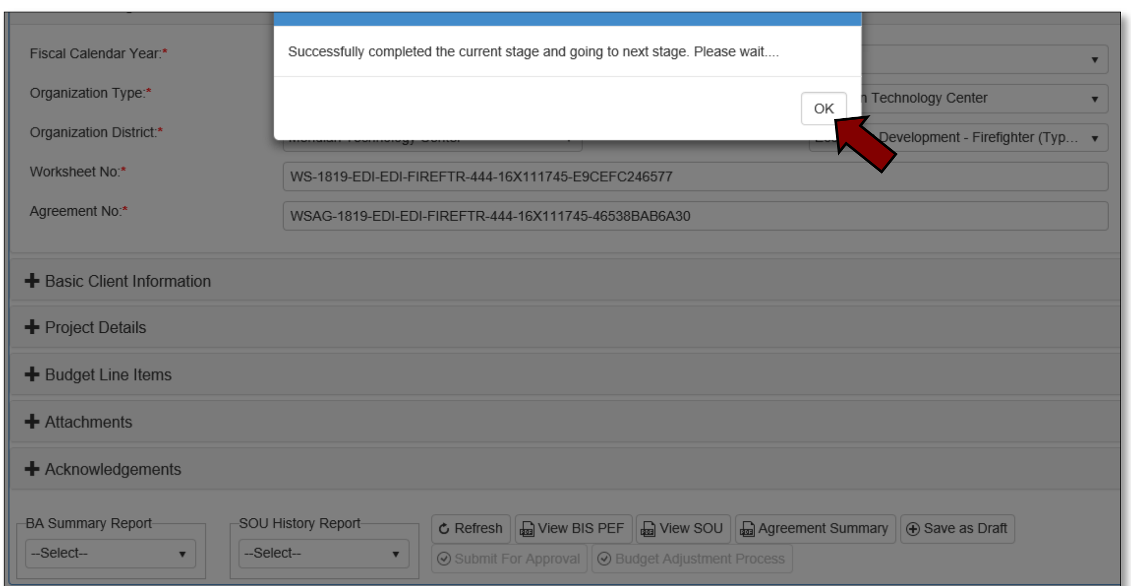
<u>2.1</u> – Expand the **Budget Line Items** section by clicking on the + (plus) sign. Review the budget.



2.2 – Review the Agreement Summary, then sign the SOU by clicking on the appropriate buttons indicated below. To close out each tab after review, click the ✕ on that tab. When back to the EDI Grant Agreement screen, click **Save as Draft** to go to the next step.

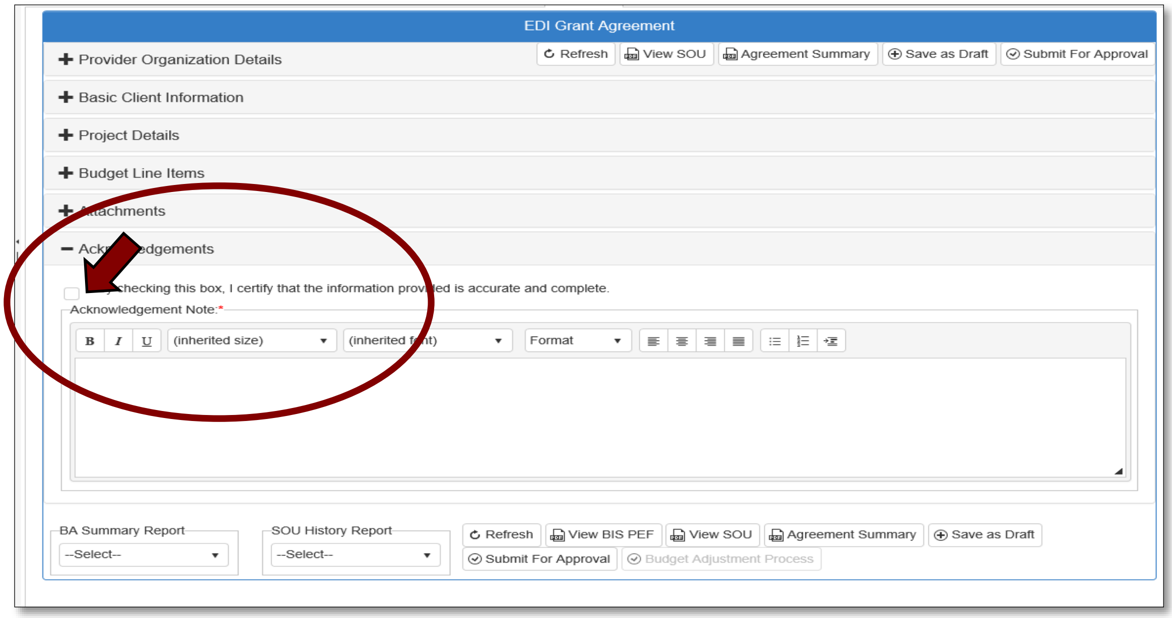


2.3 - Click **OK** to go to next step.

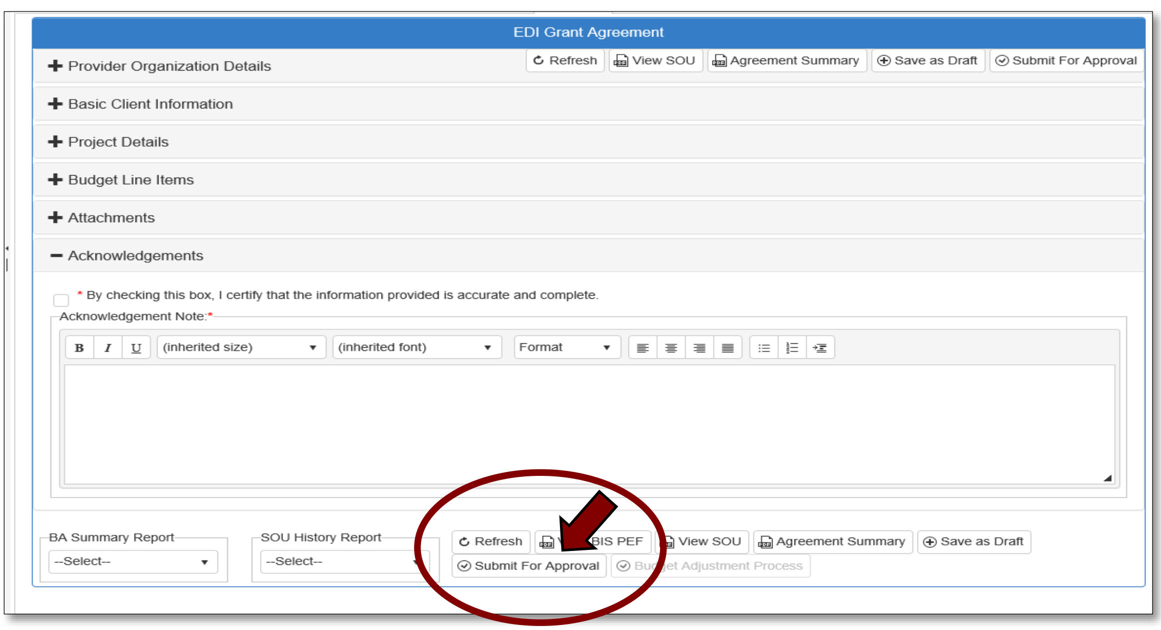


Agreement Acknowledgements and Approval– Step 3

3.1 - Click on the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



3.2 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.

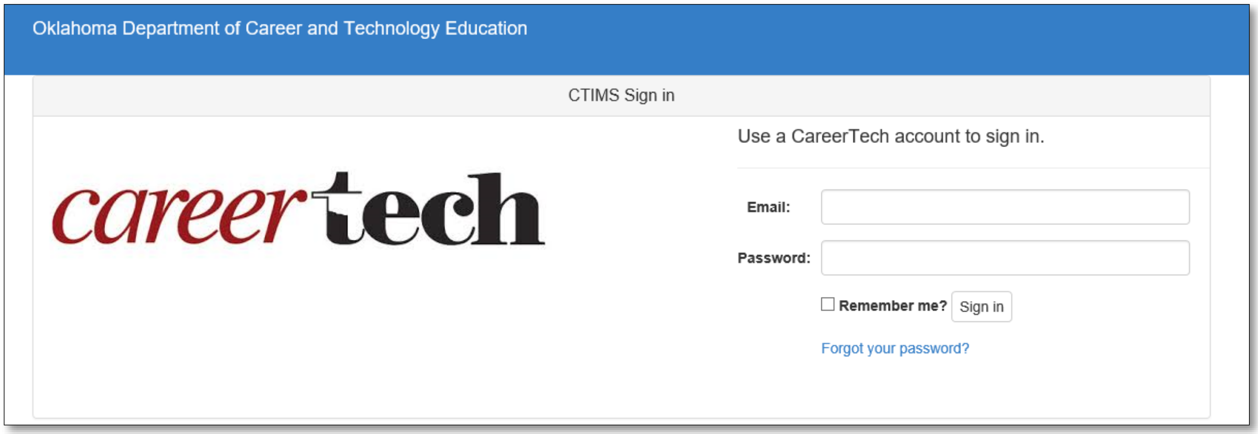


The agreement will now go to the **EDI State Requisition Coordinator** to generate the SOU, submit a requisition and enter the PO number into the agreement.

Stage 6-State Requisition Coordinator

Accessing the Agreement

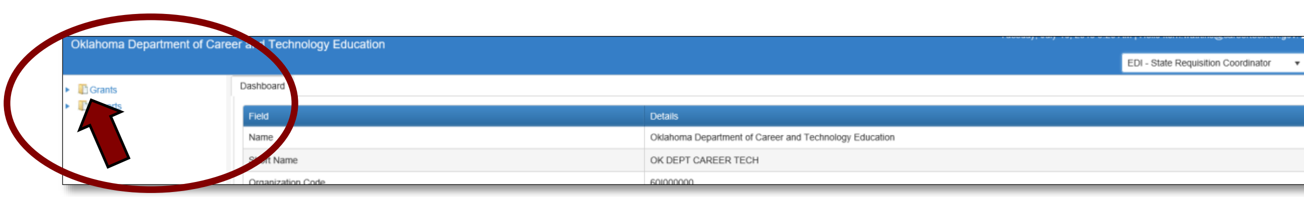
- Sign in at https://ctims.okcareertech.org/CTBDSWeb/ using your school email and CTIMS password.



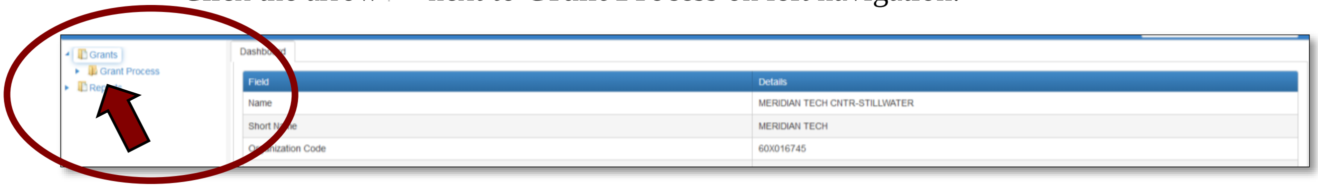
IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

- Verify that you are signed in with the role of an **EDI State Requisition Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.

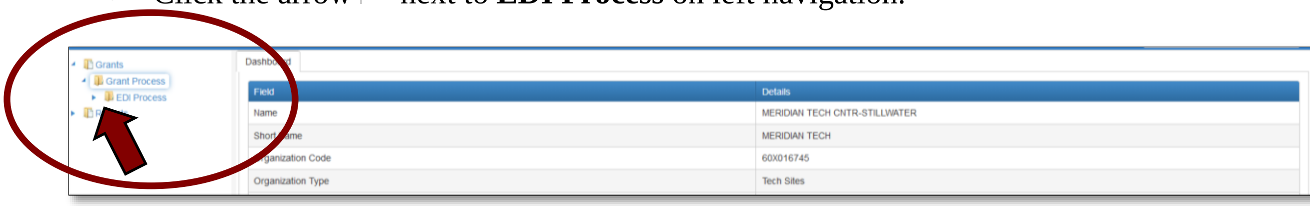
- Click the arrow next to **Grants** on left navigation.



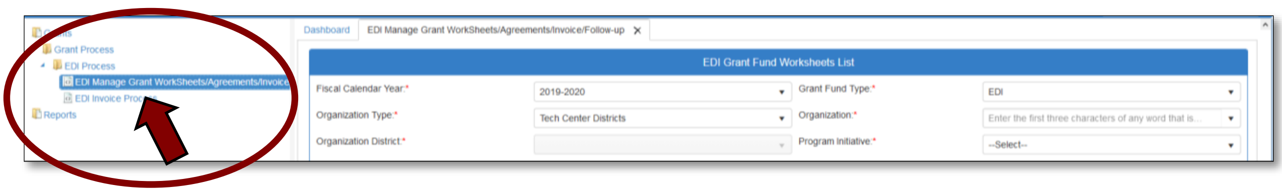
- Click the arrow next to **Grant Process** on left navigation.



- Click the arrow next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

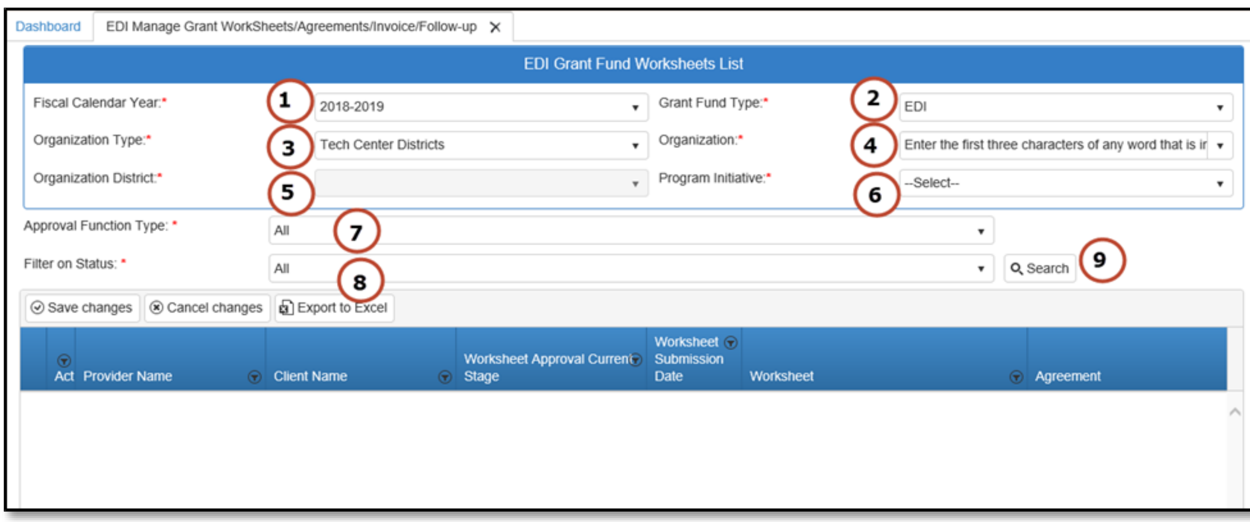


Opening the Agreement – Step 1

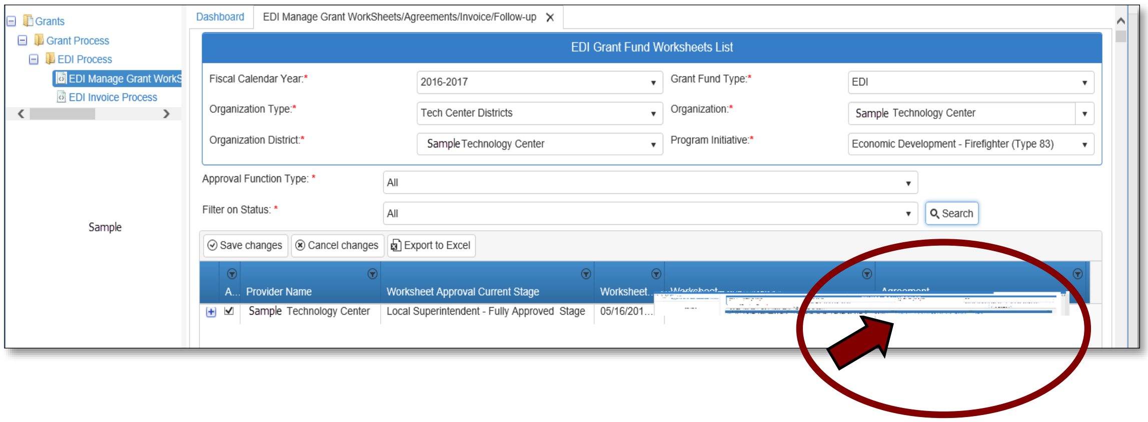
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **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 the 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.

NOTE: A red asterisk (*) indicates a required field.

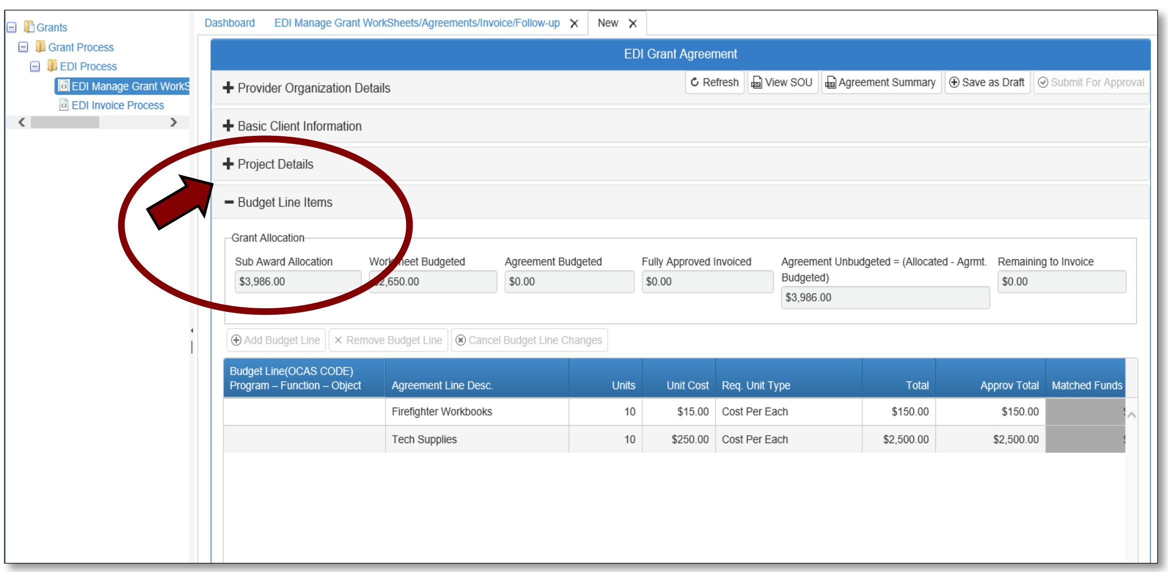


1.2 - After clicking the Search button, the agreement column will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.



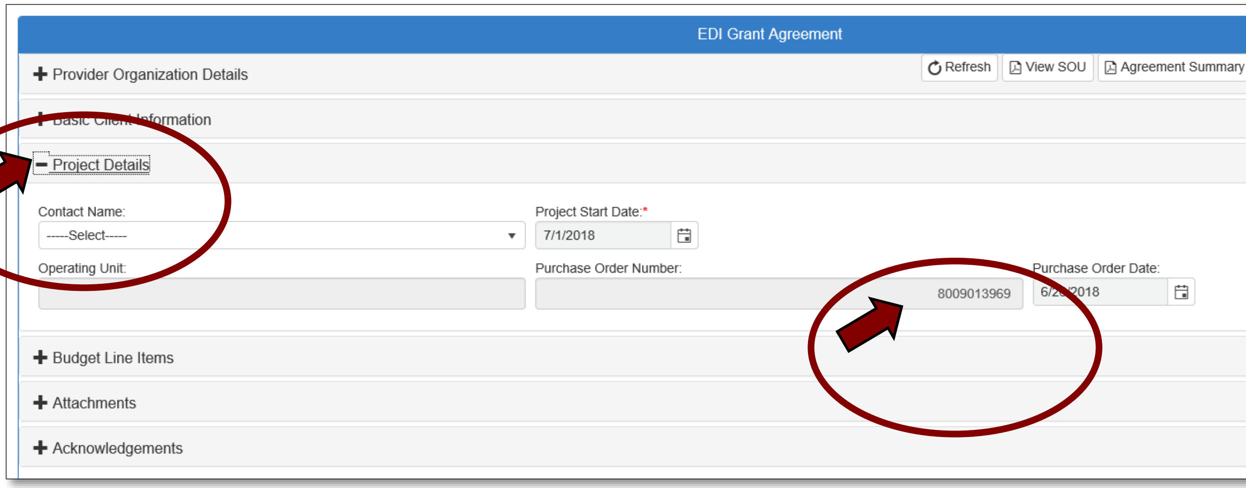
Reviewing the Agreement– Step 2

2.1 - Expand the **Budget Line Items** section by clicking on the + (plus) sign. Review the budget.

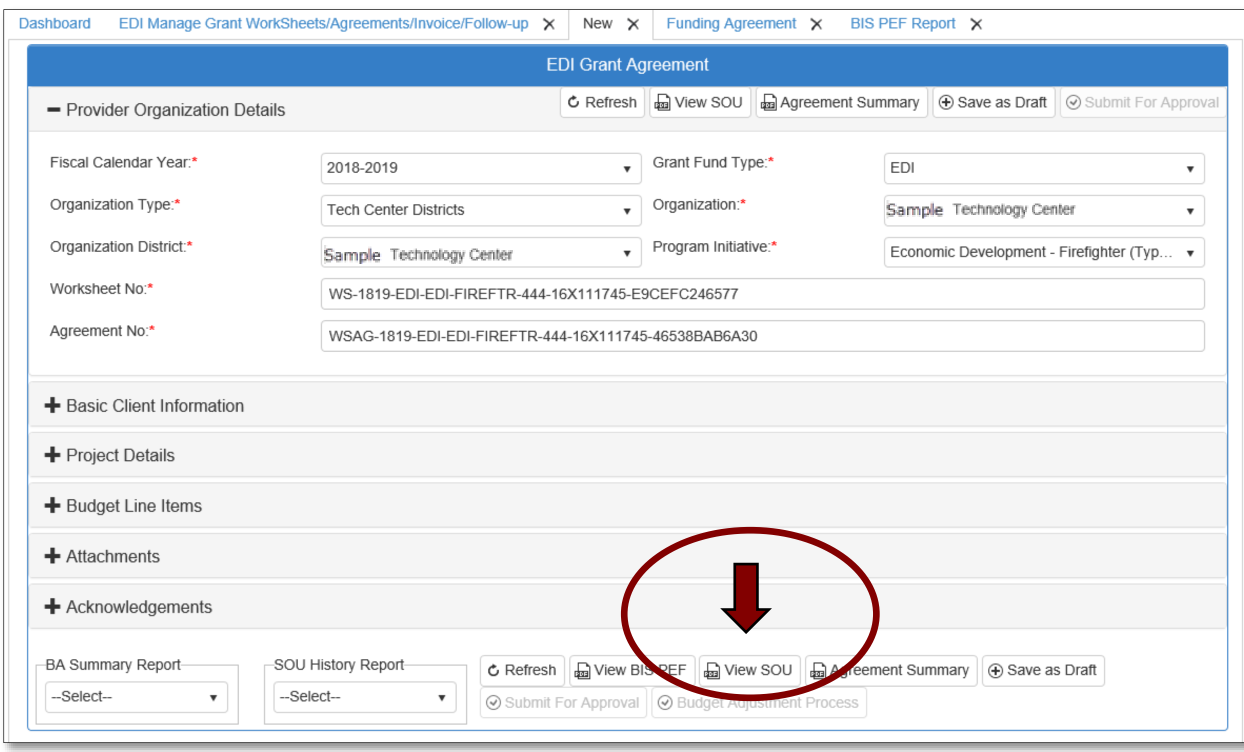


2.2 – Submit the requisition to finance.

2.3 – Expand the **Project Details** section by clicking on the + (plus) sign. Enter the purchase order number. Then, click **Save as Draft**.

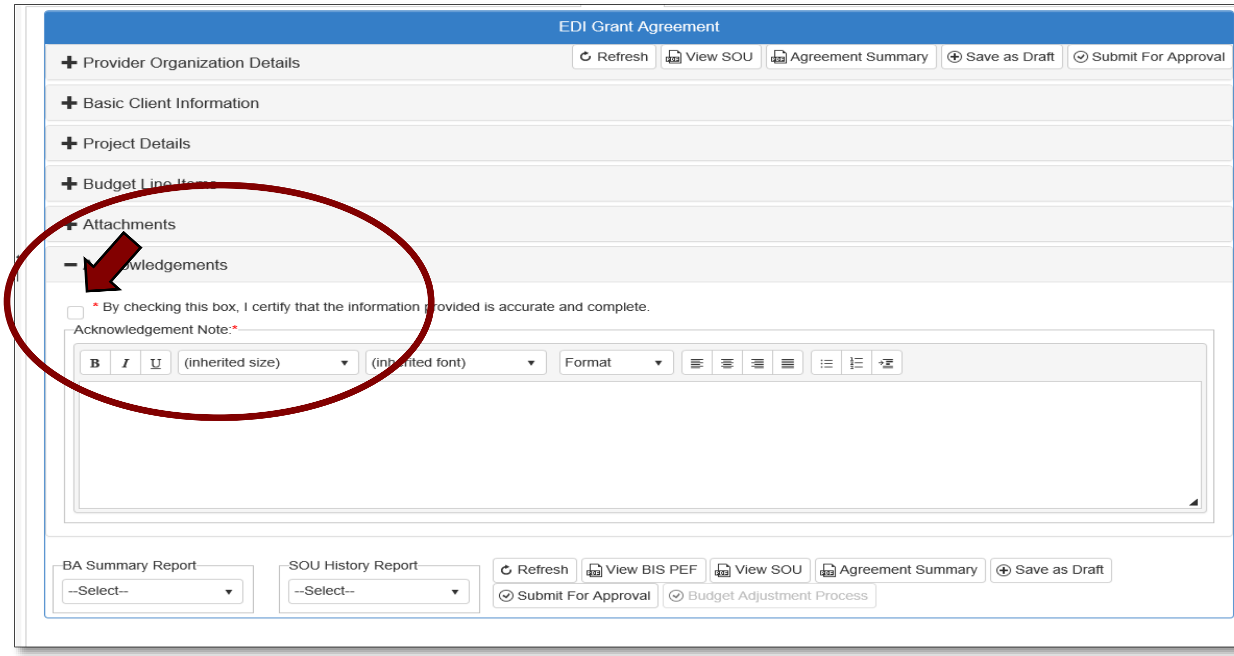


2.4 - Review and print the SOU by clicking on **View SOU** button. Click the save icon  to export and save a pdf and print the document. **Do not** use the print icon to print. To close out the tab, click the ✕ on the tab.



Agreement Acknowledgements and Approval– Step 3

3.1 - Click on the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



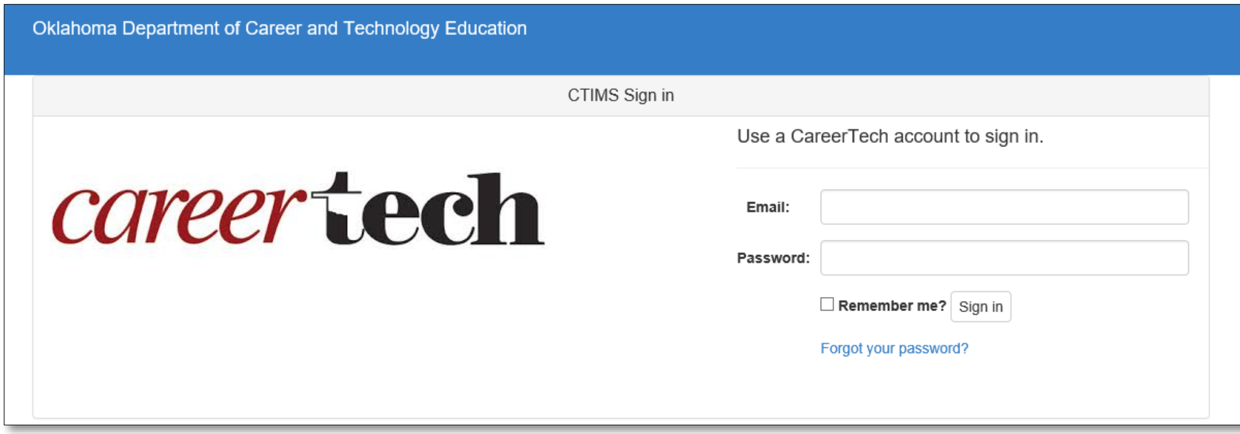
3.2 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.

The agreement will now go to the **EDI Local Finance Coordinator** to enter OCAS codes and submit for final approval.

Stage 7-Local Finance Coordinator

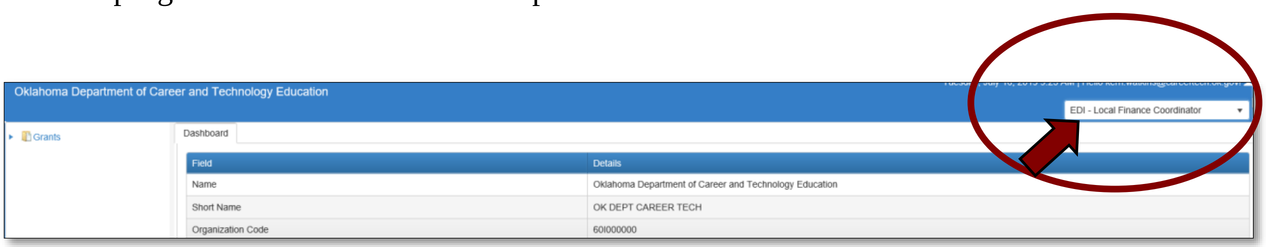
<u>Accessing Agreement List</u>

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

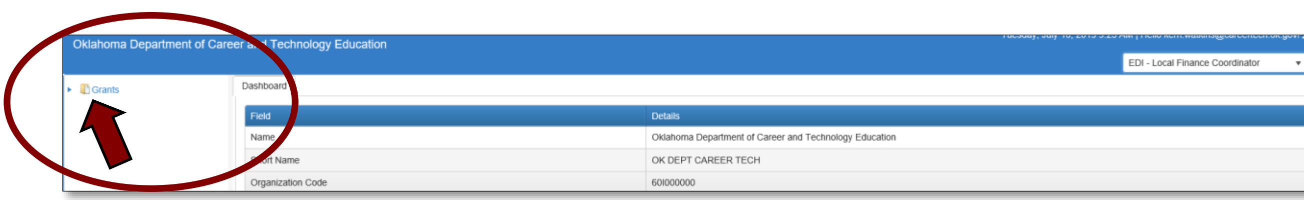


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

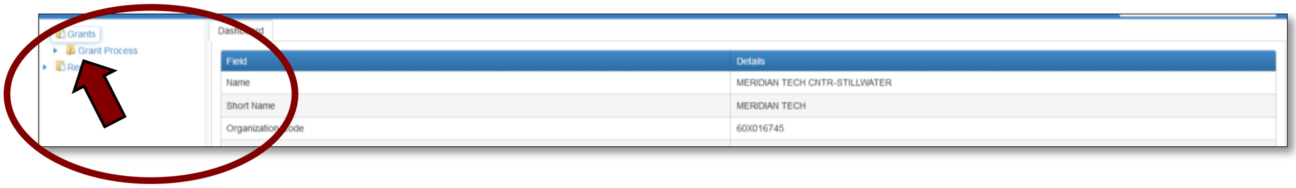
- Verify that you are signed in with the role of an **EDI Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



- Click the arrow next to **Grants** on left navigation.

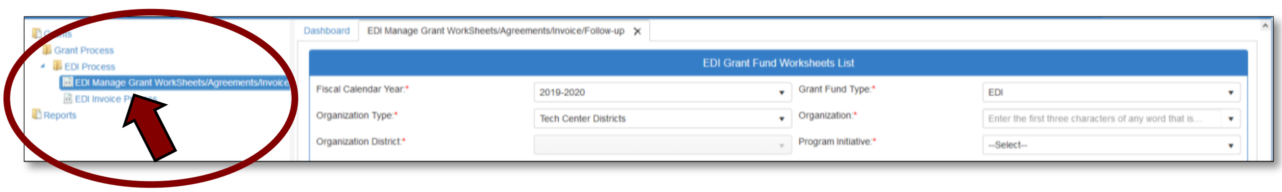


- Click the arrow ▸ next to **Grant Process** on left navigation.



- Click the arrow ▸ next to **EDI Process** on left navigation.

- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

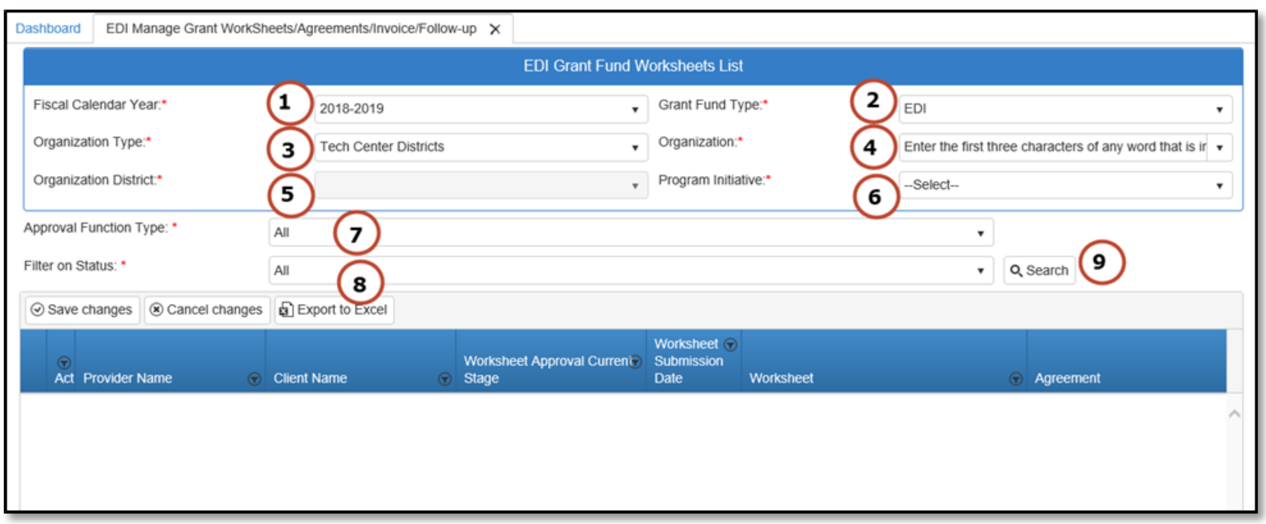


Opening Agreement – Step 1

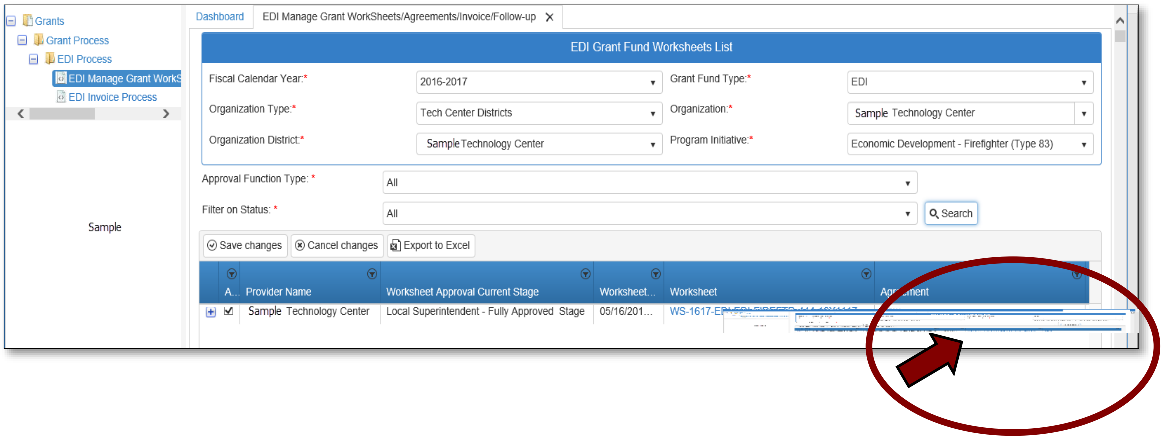
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **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 the 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.

NOTE: A red asterisk (*) indicates a required field.

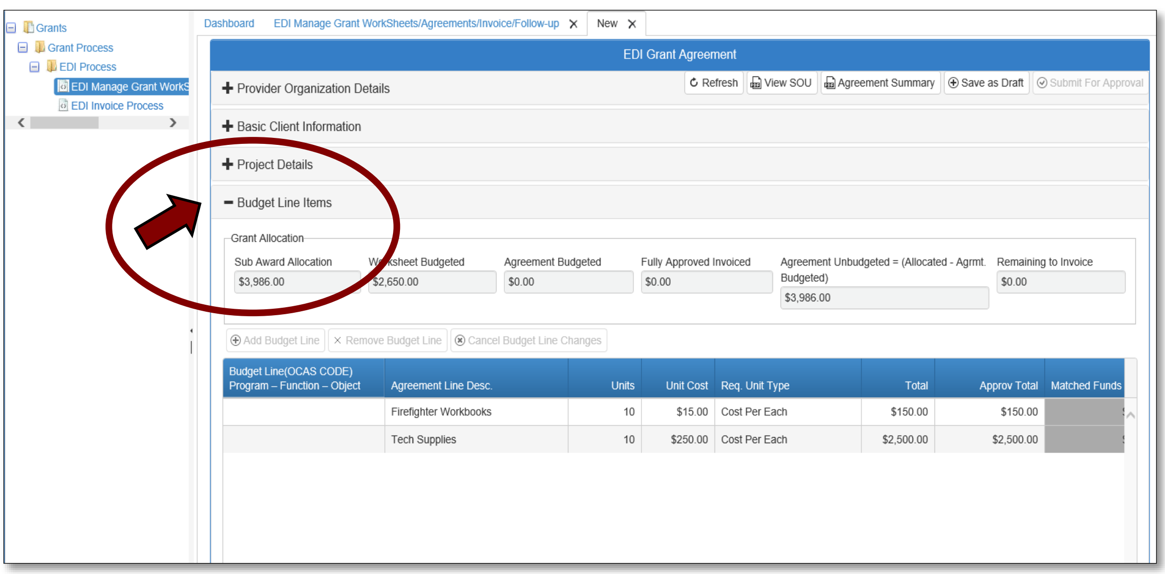


1.2 - After clicking the Search button, the agreement column will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.



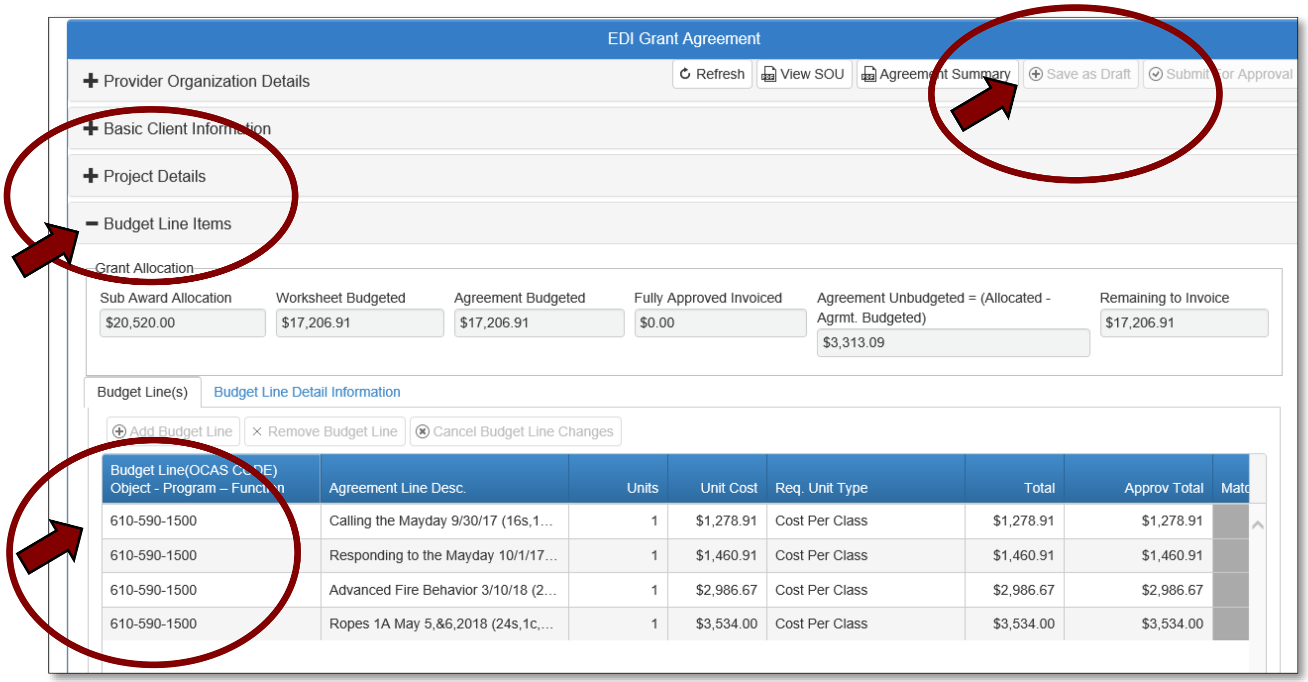
Reviewing the Agreement

<u>2.1</u> - Expand the **Budget Line Items** section by clicking on the + (plus) sign. Review the budget.



Entering OCAS Codes– Step 3

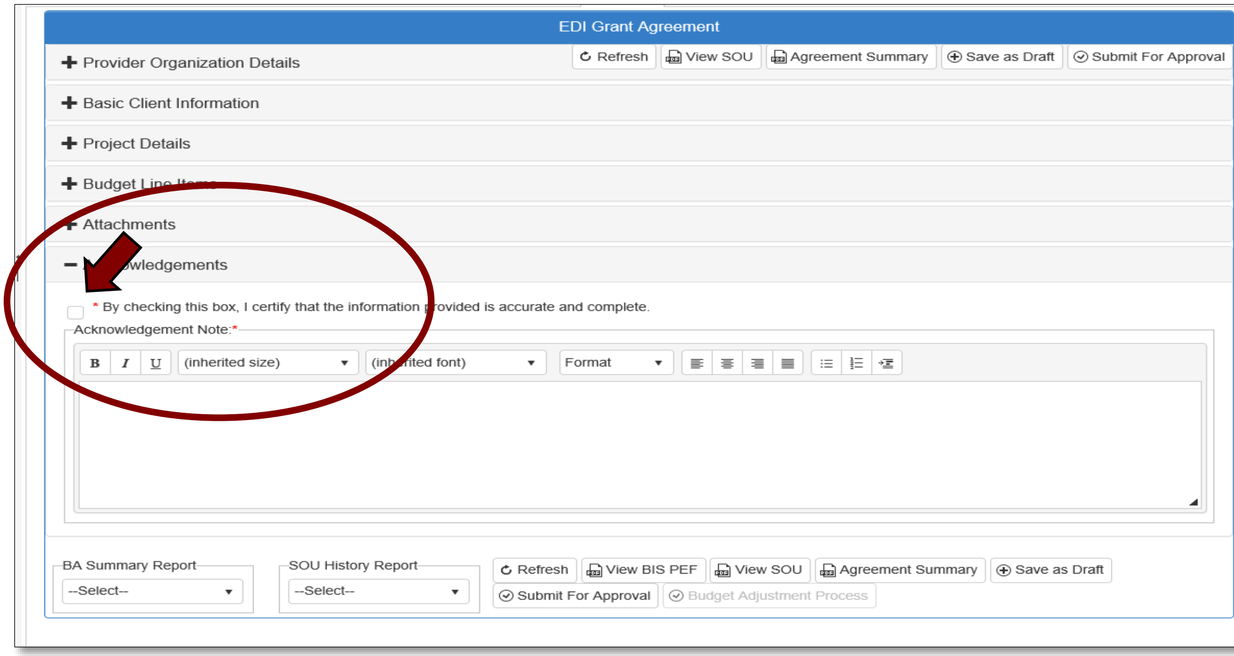
3.1 - Go to the **Budget Line Items**. Enter the OCAS coding for each of the line items in the following order: Object-Program-Function Code (e.g. 610-590-1500). Click in the blank box under the Budget Line (OCAS Code) Column heading. As you begin typing the OCAS code, a drop-down of OCAS codes will come up that you can select from. Select the valid OCAS code for each budget item. Use the scroll bar at the bottom of the page to scroll to the right and input any Matched Funds. After entering all budget information, click on the **Save as Draft** button.



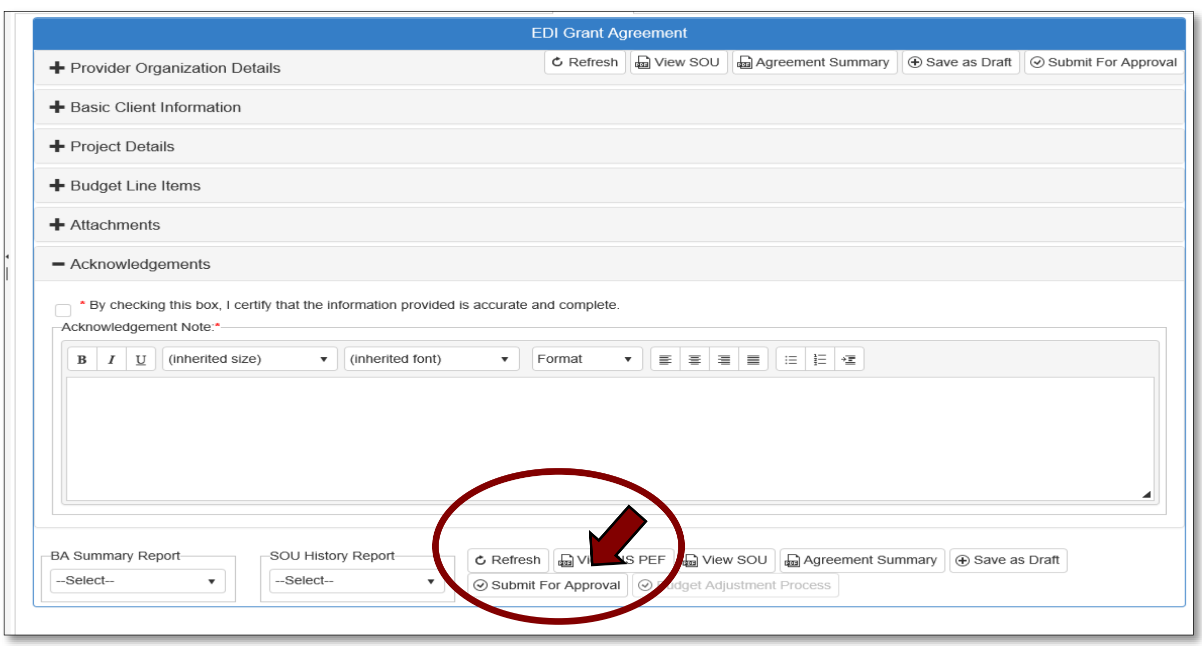
NOTE: The tech center is responsible for selecting OCAS codes. See https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx for codes.

Agreement Acknowledgements and Approval– Step 4

4.1 - Click on the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



4.2 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.



The agreement is now fully approved.

Budget Adjustment Process

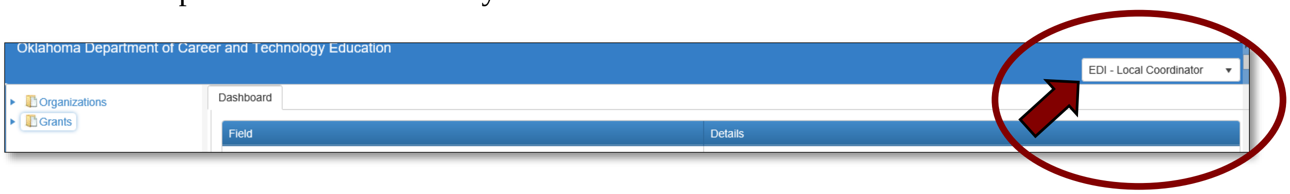
After an Agreement is submitted for approval, you must go through the **Budget Adjustment Process** to make any changes.

Accessing the Agreement List

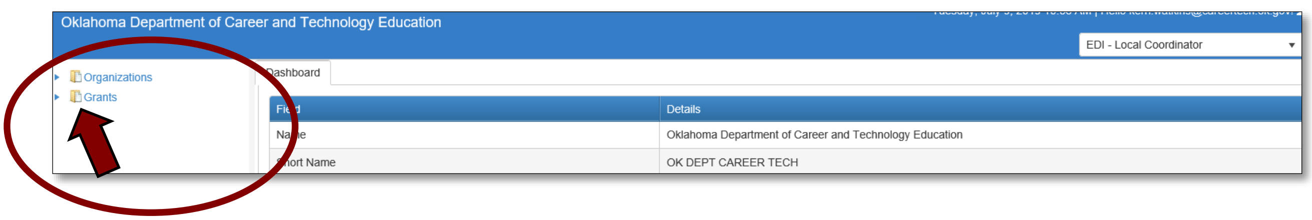
- Sign in at https://ctims.okcareertech.org/CTBDSWeb/ using your school email and CTIMS password.

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

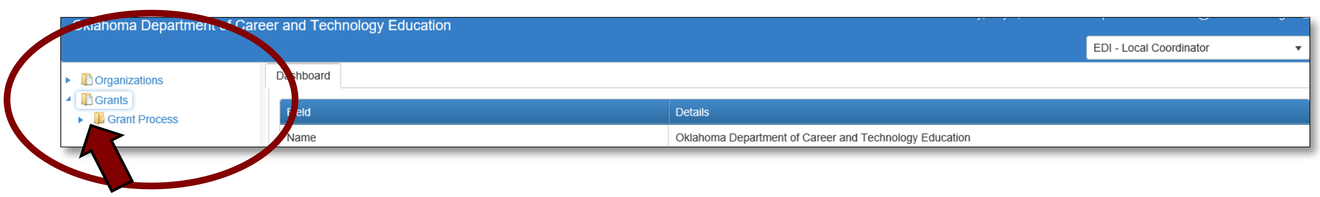
- Verify that you are signed in with the appropriate role in the top right-hand corner. Use the drop-down arrow to select your EDI role.



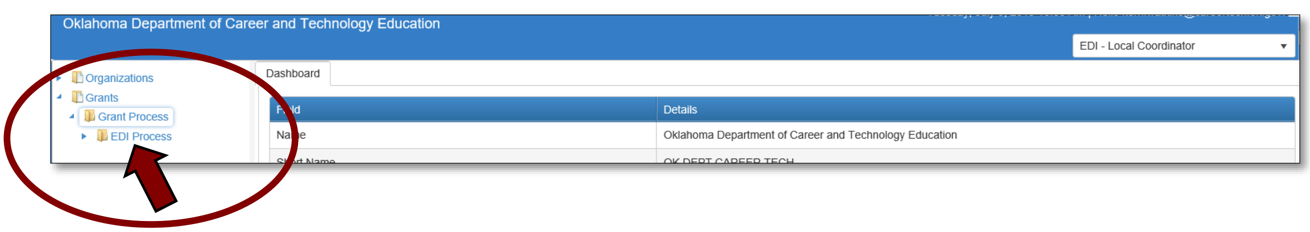
- Click the arrow next to **Grants** on left navigation.



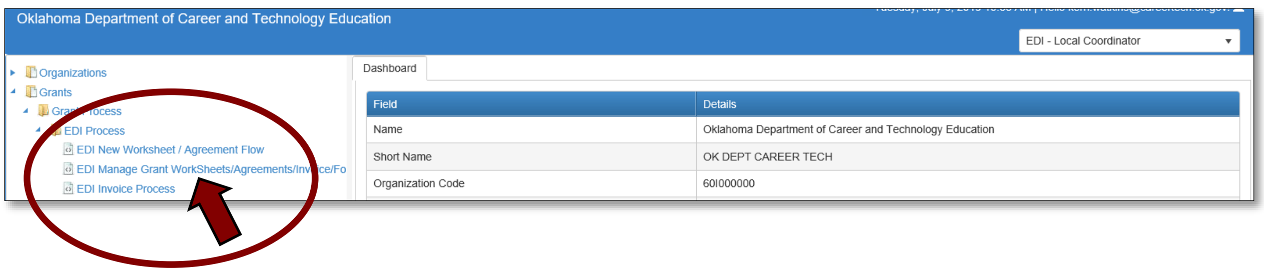
- Click the arrow next to **Grant Process** on left navigation.



- Click the arrow next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

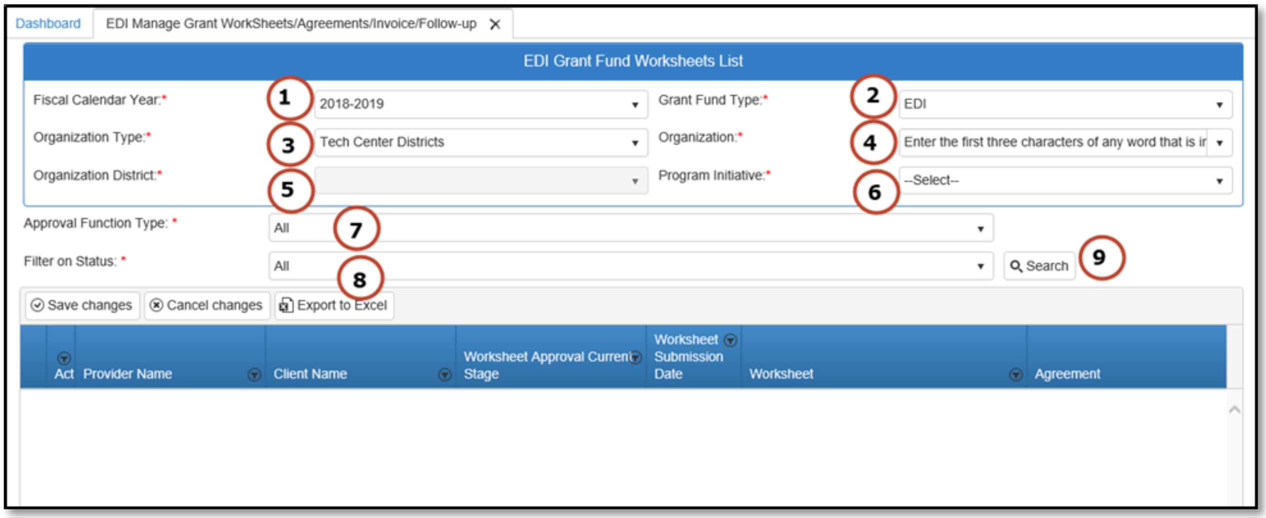


Opening Agreement – Step 1

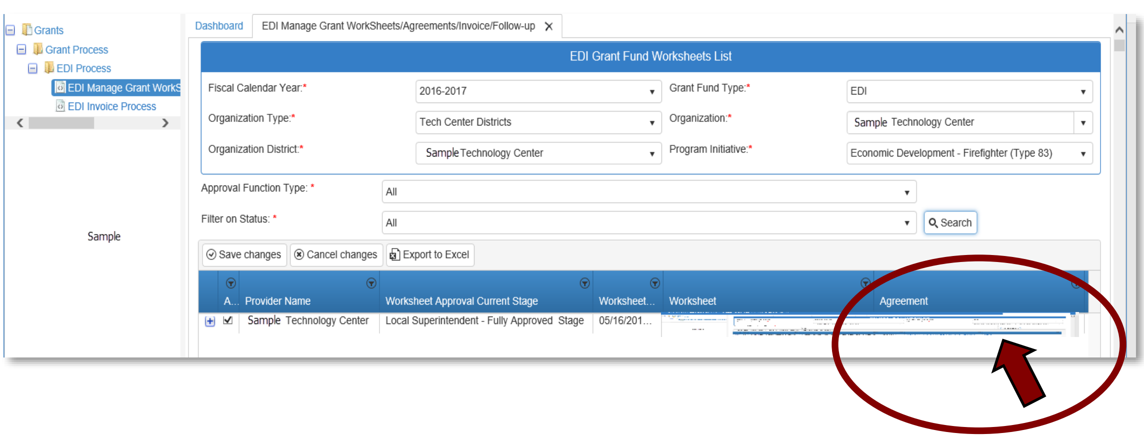
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing**.**
2. Verify **Grant Fund Type*** is set to EDI.
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*** 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.

NOTE: A red asterisk (*) indicates a required field. See next page for screen image.



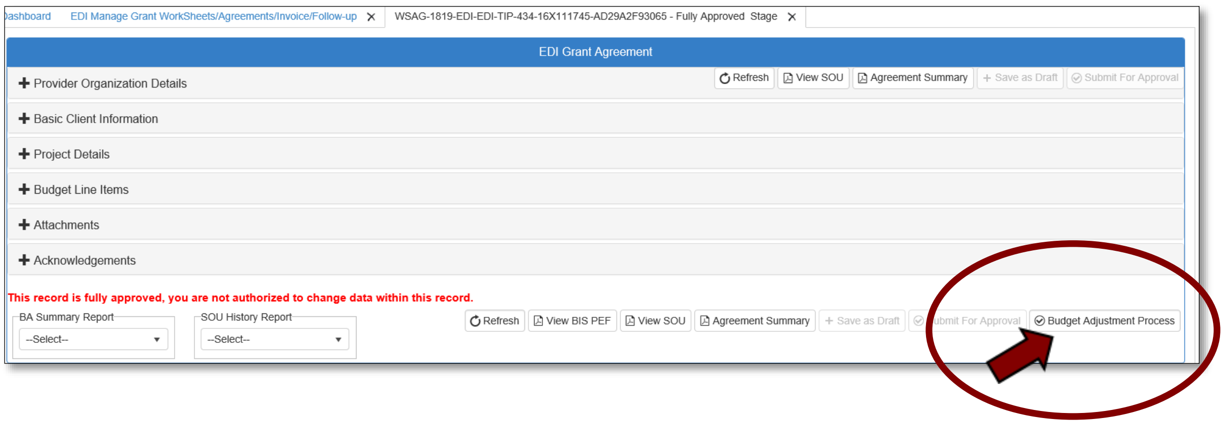
1.2 - After clicking the Search button, the agreement column will display an agreement number. Select the agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.



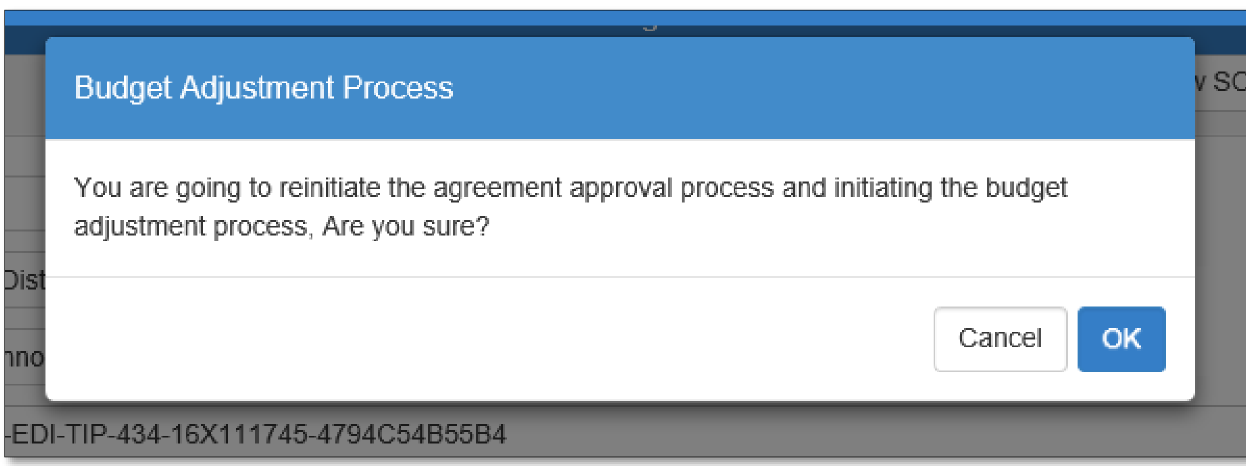
Initiating the Budget Adjustment – Step 2

2.1 - At the bottom right corner of the EDI Grant Agreement screen, click Budget Adjustment Process.

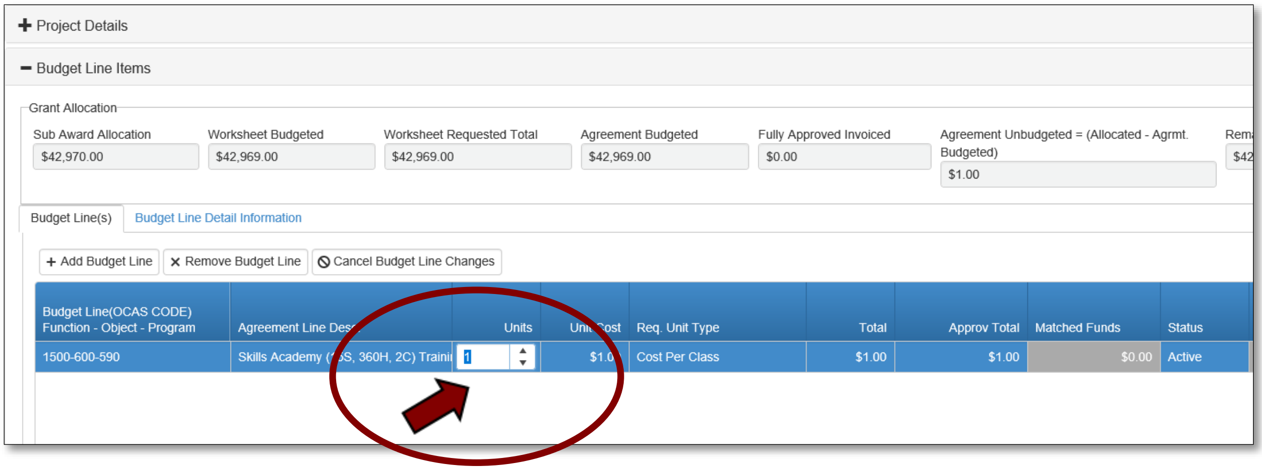
NOTE: This will freeze any invoice in process and the agreement process will be sent back to your approval stage.



2.2 - You will be asked to confirm that you are reinitiating the agreement approval process. Click **OK.**

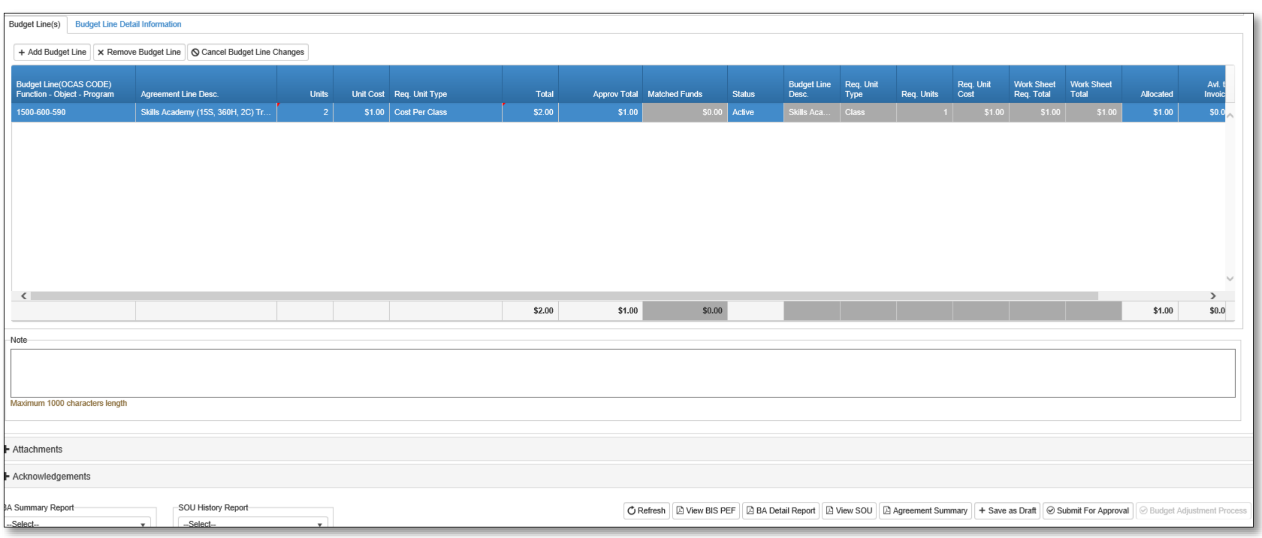


<u>2.3</u> - Expand the Budget Line Items section by clicking on the +(plus) sign, then in the budget line needing adjusted, make the necessary changes by clicking in the appropriate columns. For example, click in the Units column to change the number of units.



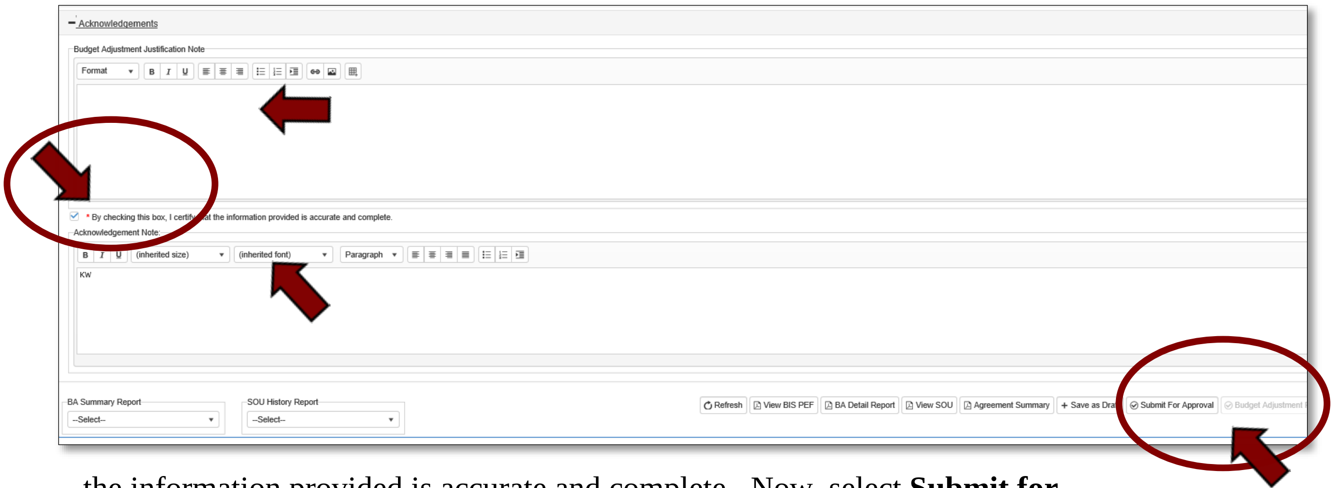
NOTE: Once the changes, or partial changes have been made, you can Save as Draft by clicking **Save as Draft** at the bottom of the **EDI Grant Agreement** screen. This will save the changes to the agreement without summiting to the next approval stage, so you can return and finish at a later time.

<u>2.4</u> - When all adjustments have been made and you are ready to send to the next approval stage, add the approval note in the Note field below the budget line items.



Acknowledgements and Approval– Step 3

3.1 - Next, expand the Acknowledgments section by clicking on the +(plus) sign. Add your **Budget Adjustment Justification Note** (this field is required), then click the box to verify that



the information provided is accurate and complete. Now, select **Submit for Approval**.

The agreement will go back through the regular approval process.

Invoice Process

Invoice Submission & Approval Process

NOTE: For more information on funding and reimbursement, please refer to the Reimbursement Checklist on page 19 of the BIS Guidelines FY20.
https://www.okcareertech.org/about/state-agency/divisions/imd/ctims

Roles: Invoice Process

The roles represent the stages required in CTIMS for the submission of an invoice.

Stage 1 - Local Coordinator – Initiates the invoice process

Stage 2 - Local BIS Director

Stage 3 - Local Finance Coordinator

Stage 4 - State Regional Coordinator

Stage 5 - State Requisition Coordinator - Will verify the invoices, print the documentation and deliver to The finance department.

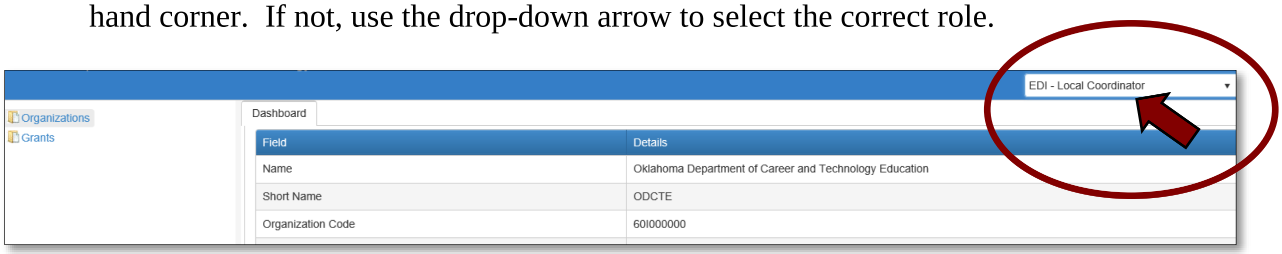
Stage 6 -ODCTE EDI Finance Reviewer - This is final approval to pay the claim.

Stage 1- Local Coordinator

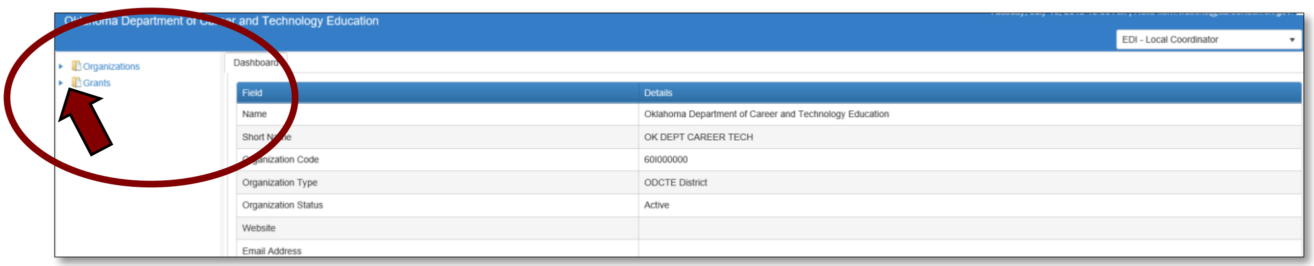
Accessing the Invoice

After the school is done with training, the **EDI Local Coordinator** starts the **EDI Invoice Process.**

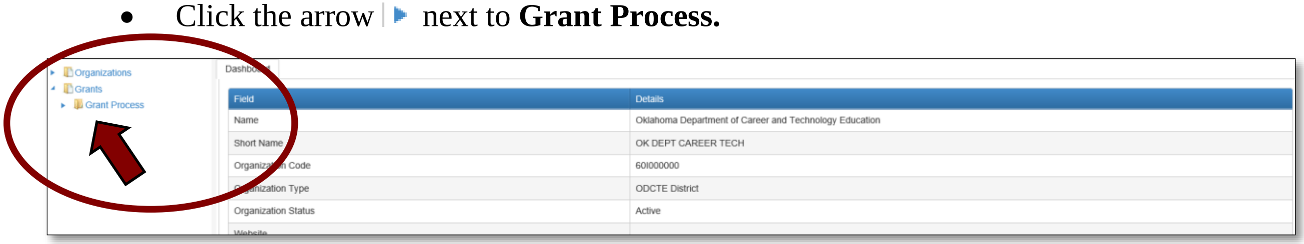
- Sign in at https://ctims.okcareertech.org/CTBDSWeb/ using your school email and CTIMS password.
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. If not, use the drop-down arrow to select the correct role.



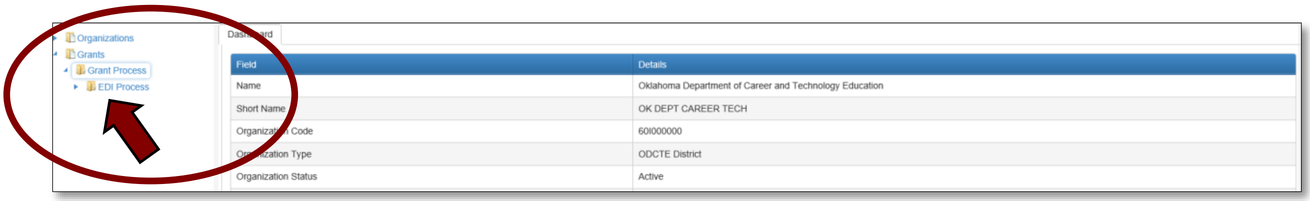
- Click the arrow ▸ next to **Grants** on left navigation.



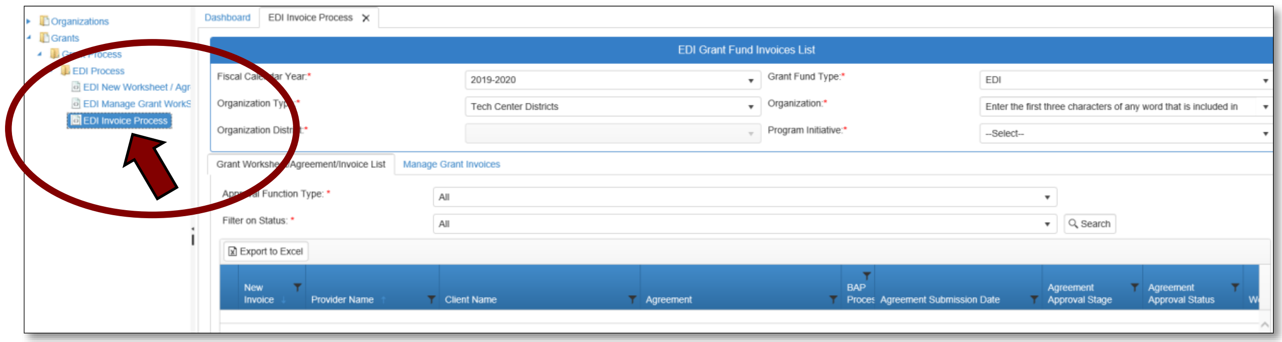
- Click the arrow ▸ next to **Grant Process.**



- Click the arrow ▸ next to **EDI Process.**



- Select the **EDI Invoice Process.**

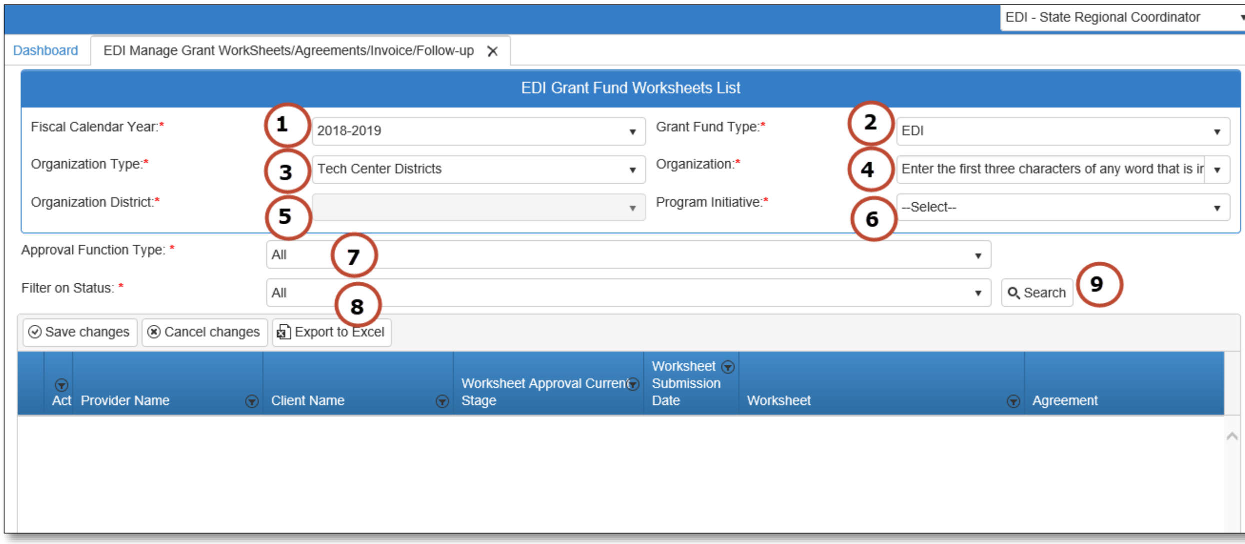


Opening/Creating the Invoice

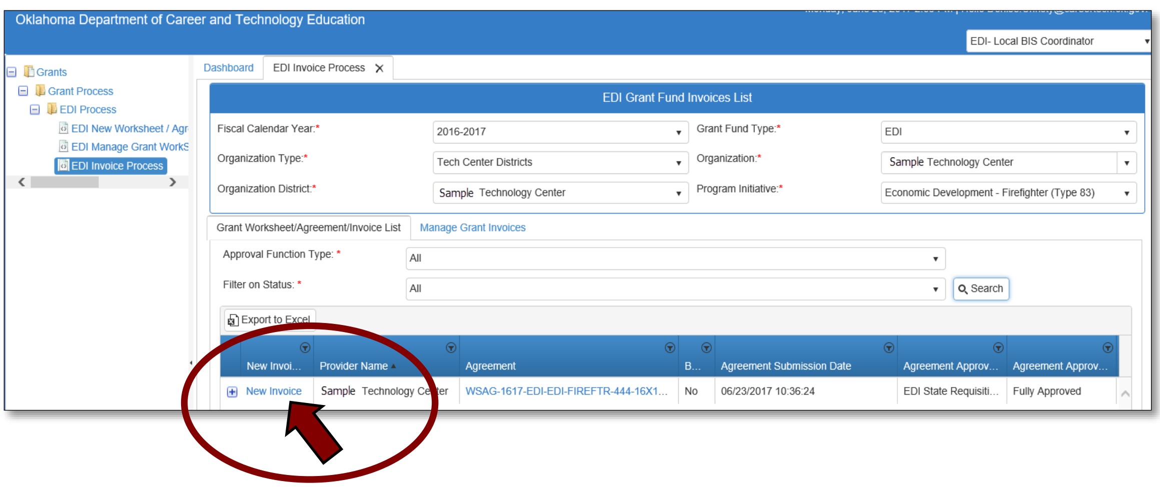
Complete the **EDI Grant Fund Invoices List** form**. The tagged numbers on the screenshot correspond to the instruction steps below.**

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to **EDI***.
3. Select your correct **Organization Type** from the drop-down menu. Should default to Tech Center Districts.
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.

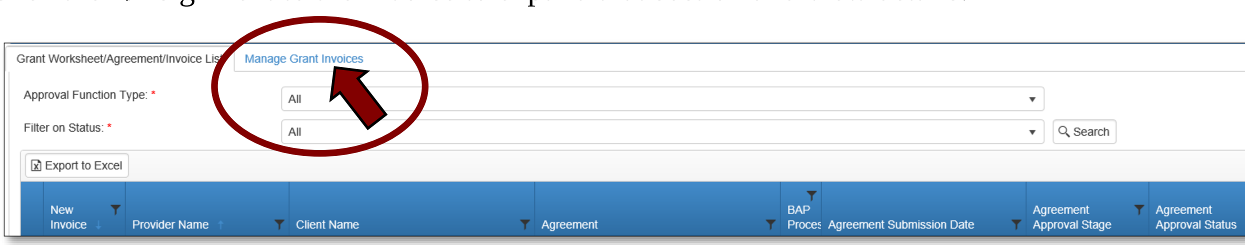
NOTE: A red asterisk (*) indicates a required field. See next page for screen image.



After clicking the **Search** button, select **New Invoice** to start the invoice process, **<u>not the + (plus) sign</u>**.

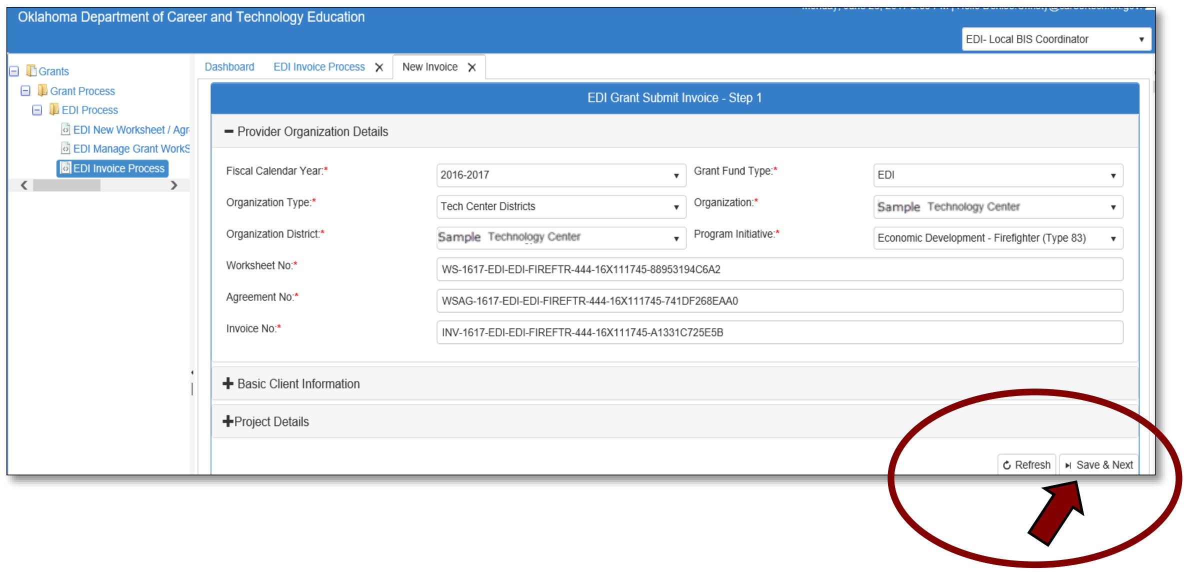


NOTE: To open an invoice that has been started, but not submitted for approval, click on the Manage Grant Invoices tab. Or, to view the approval status of an invoice already submitted, click the ▸ sign next to the invoice to expand that section and view details.



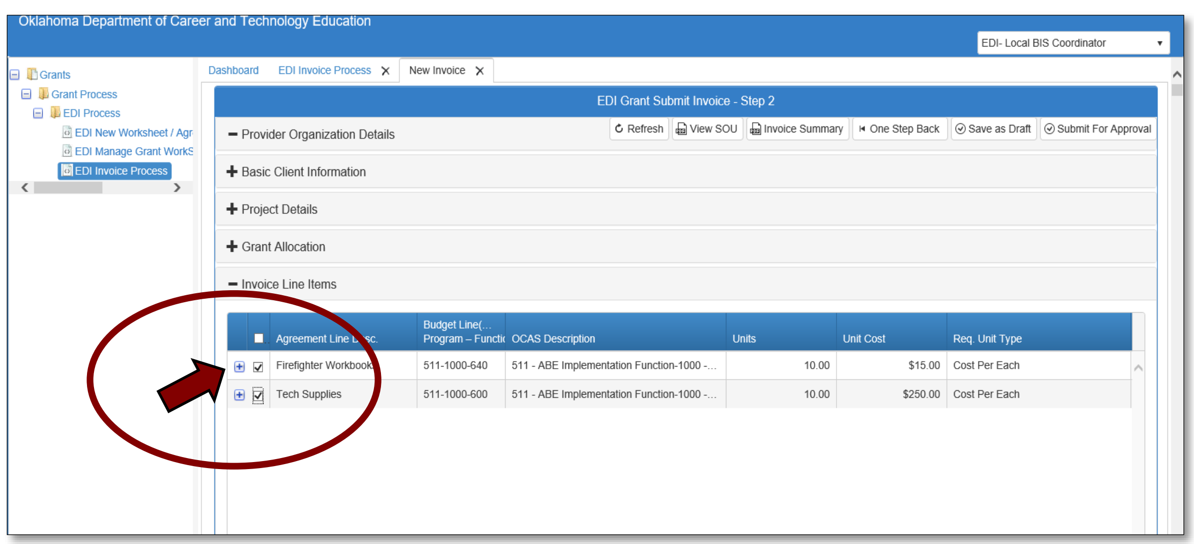
EDI Grant Submit Invoice - Step 1

1.1 - Verify that the information is correct, then select **Save & Next** to continue to the next screen.

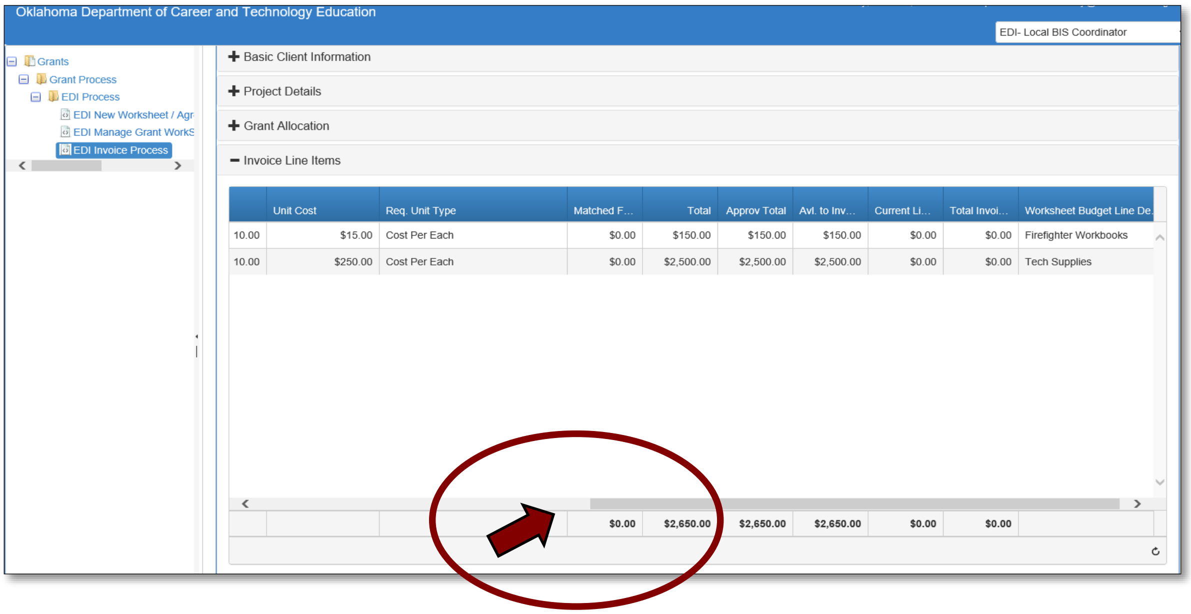


EDI Grant Submit Invoice - Step 2

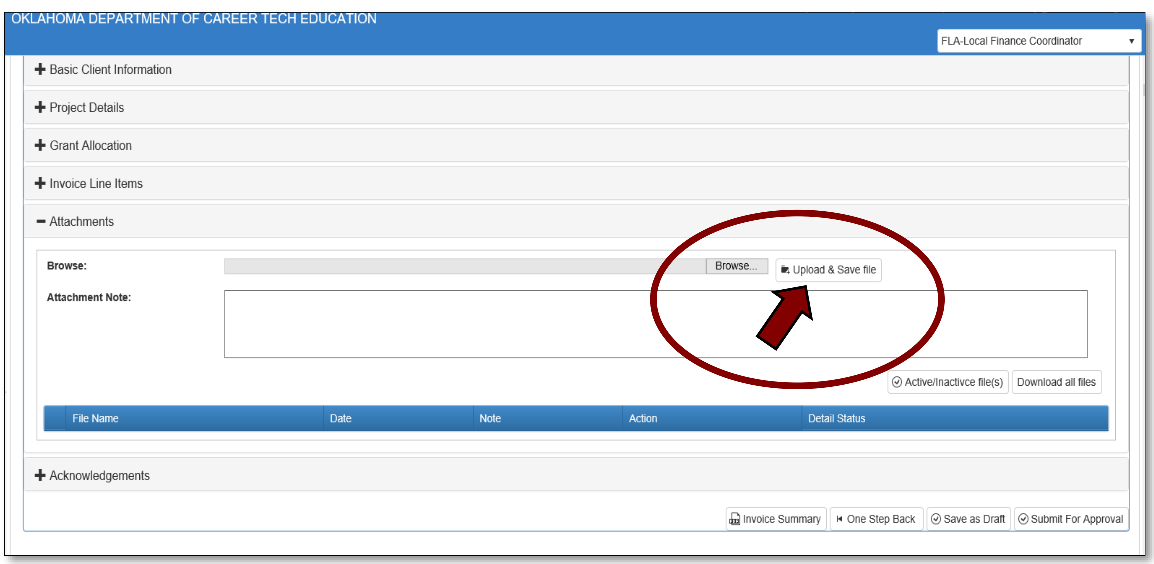
2.1 - Under the **Invoice Line Items** tab, select the budget line item you want to invoice by clicking on the checkbox next to the line item. This will add a check mark in the box next to that line item.



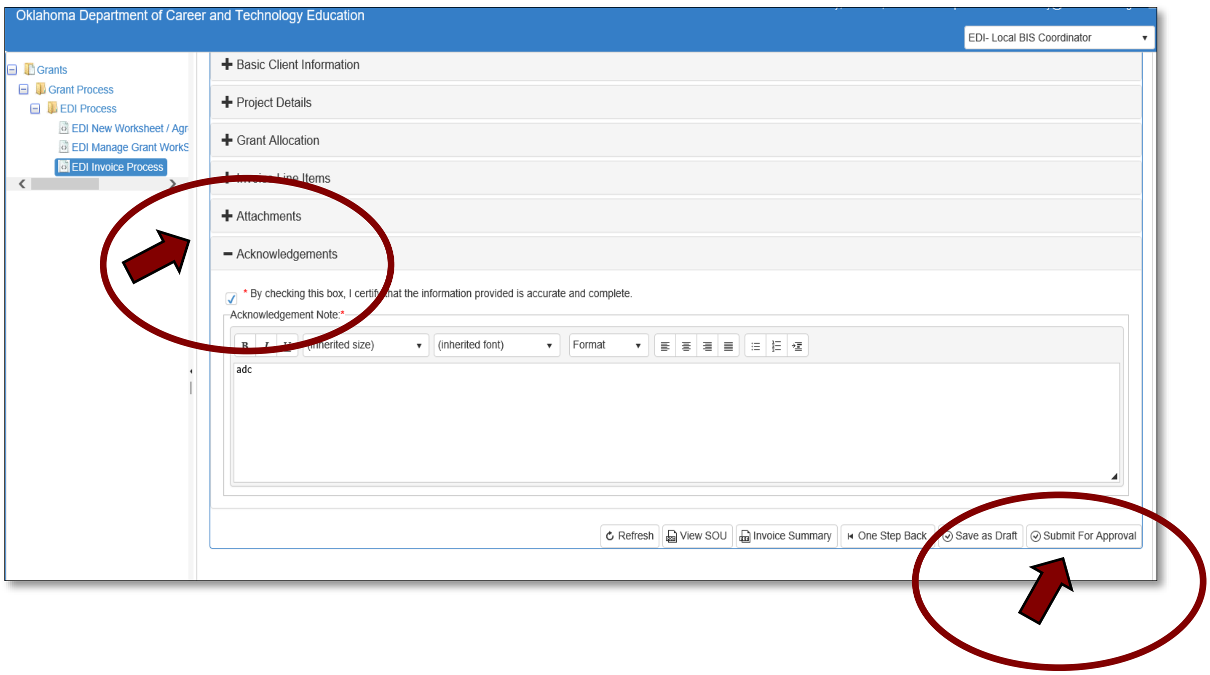
2.2 - Use the scroll bar below the invoice items to scroll to the right to see total invoiced. Verify that the Invoice OCAS codes and the line item amounts match the OCAS report you will attach.



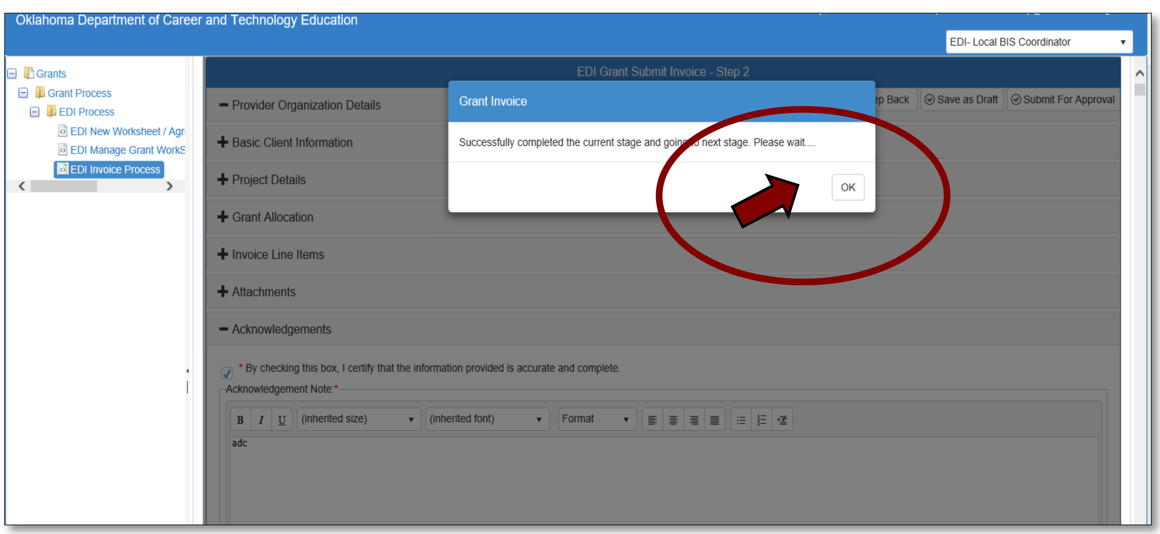
2.3 - Attach the OCAS Expenditure Summary and Detailed Reports that match the amount of reimbursement you are requesting. Attach required receipts, vendor invoices, PEF's and contracts. To attach a document, use your mouse scroll button to go down to the **Attachments** section. Click the **+(plus)** sign, then click **Browse** to locate the files on your computer. Select **Upload and Save File** to attach the file. A message box will say you have successfully uploaded the file. Close this box.



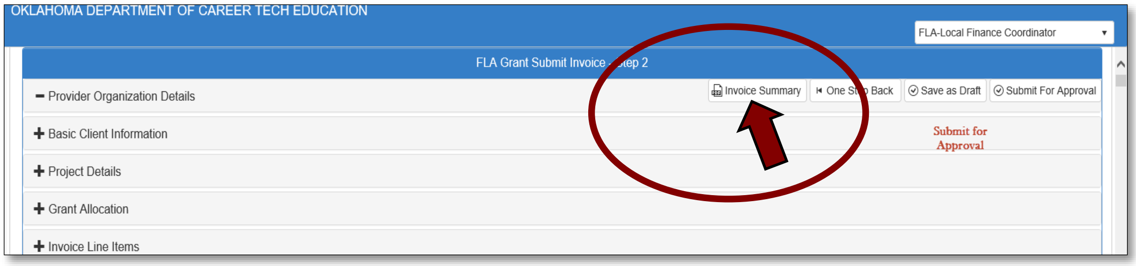
2.4 - Go to the **Acknowledgements** tab by clicking on the **+(plus)** sign to expand this section. Check the required acknowledgment boxes. Type an acknowledgment note in the box. If you don't have a note to add, type your initials, as this field is required. Then, click the **Submit for Approval** button.

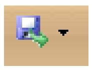


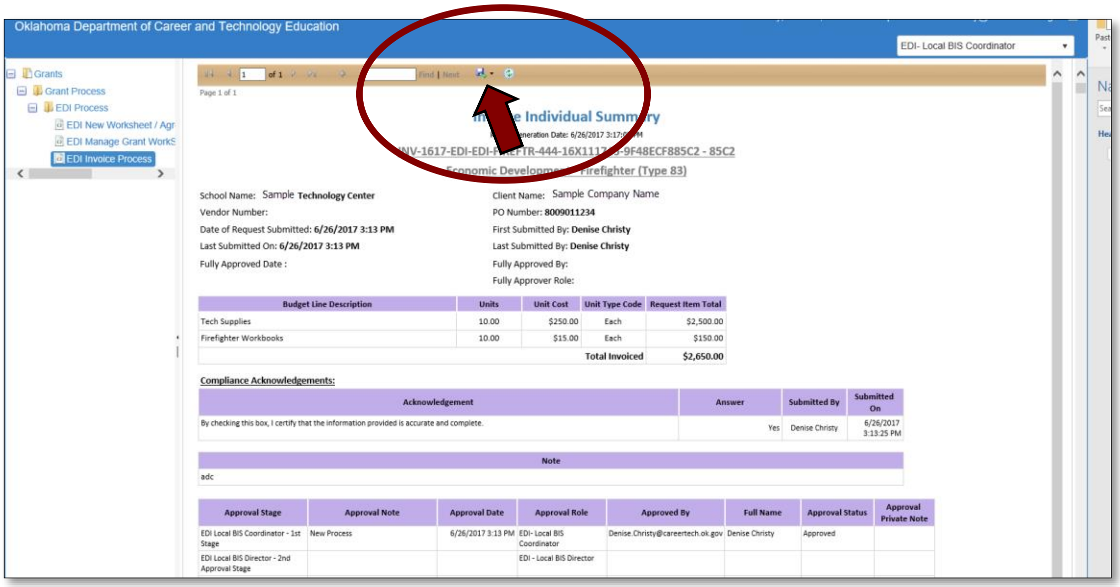
2.5 – A message will pop up to let you know that you have successfully submitted the invoice to the next approval stage. Click **OK**.



2.6 - Go to the **Invoice Summary** tab to print a pdf report of the claim you have submitted.



2.7 - Click on the  symbol to download a pdf of your invoice.



The Invoice has been successfully submitted and will go to the **EDI Local BIS Director**.

Making Changes to an Invoice

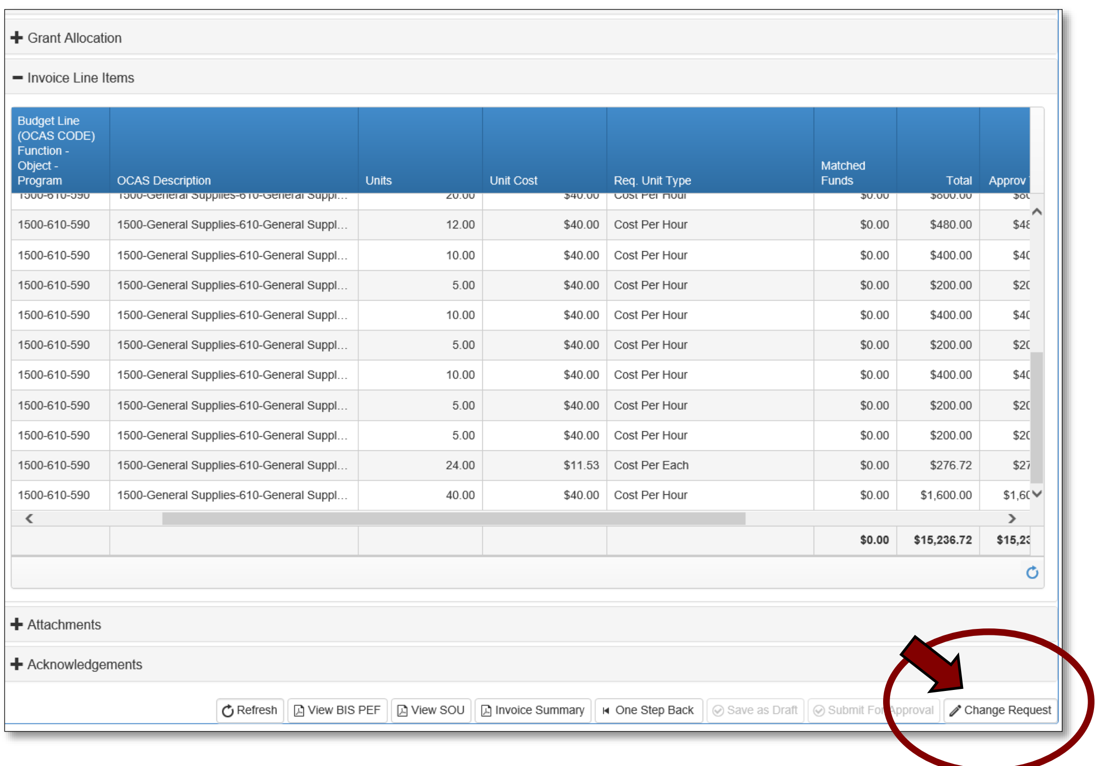
Changes to Invoices before Submitting for Approval

- If you need to make changes to an amount on an invoice that has already been created, but not submitted for approval, go to the invoice by clicking on the **Manage Invoices** tab on the **EDI Grant Fund Invoices List** screen and click on the Invoice Number in the Invoice column.

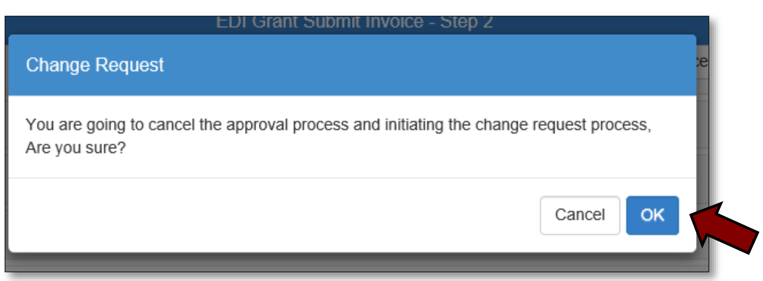
- Click Next Step to get to the EDI Grant Submit Invoice- Step 2 screen, then expand the **Budget Line** section, and click on the **Edit** button. Change the dollar amount in the **Unit Cost** column to change the **Total to be Invoiced** column amount. Click **Update** to complete the edit.
- When you've made all the necessary changes, you can click **Save as Draft**, then **Submit for Approval**.

Changes to Invoices after Submitting for Approval

- To make changes to an invoice after it has been submitted for approval, you will need to do a change request in the invoice. Open the invoice to be changed using the steps mentioned above in the **Accessing the Invoice** section. At the bottom right of the screen (you may need to use the scroll bar at the bottom) click **Change Request**.

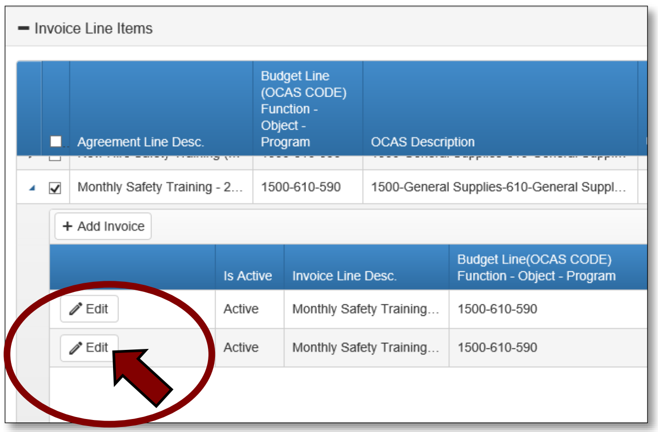


- Initiating the change request will cancel the approval process. If you are sure you would like to begin the change request click **OK** to confirm.



- Click the next to the invoice line item you need to change to expand it. Then, click the **Edit** button to make the changes.

NOTE: You can change the **Units, Unit Cost, Req. Unit Type**, and **Matched Funds** to change the Total and Total to be Invoiced columns.



- At this point, you can **Save as Draft** and come back to it later if necessary, or **Submit for Approval** to send it to the next approval stage.

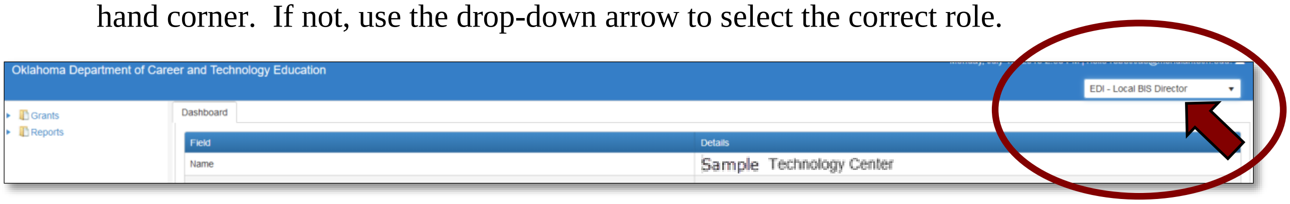
IMPORTANT: Changes to an Invoice can only be made by the EDI Local Coordinator. If an invoice is at the final approval stage - ODCTE Finance Reviewer, a change request is no longer an option. If you need to make a change at this stage, you will need to contact the ODCTE Finance Reviewer to request they reject the invoice. Then, you can initiate the change request.

NOTE: If $0.00 are available in a line item to invoice, the line item will no longer appear on a new invoice.

Stage 2- Local BIS Director

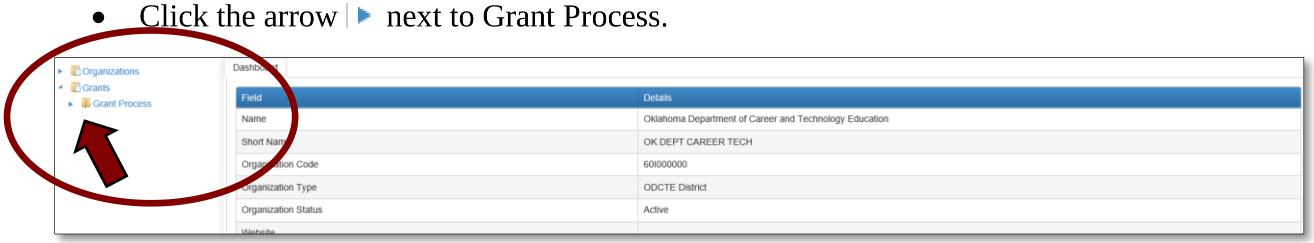
Accessing the Invoice

- Sign in at https://ctims.okcareertech.org/CTBDSWeb/ using your school email and CTIMS password.
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. If not, use the drop-down arrow to select the correct role.

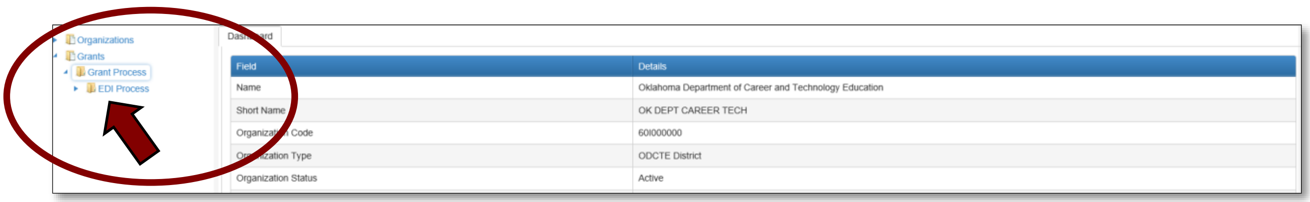


- Click the arrow ▸ next to **Grants** on left navigation.

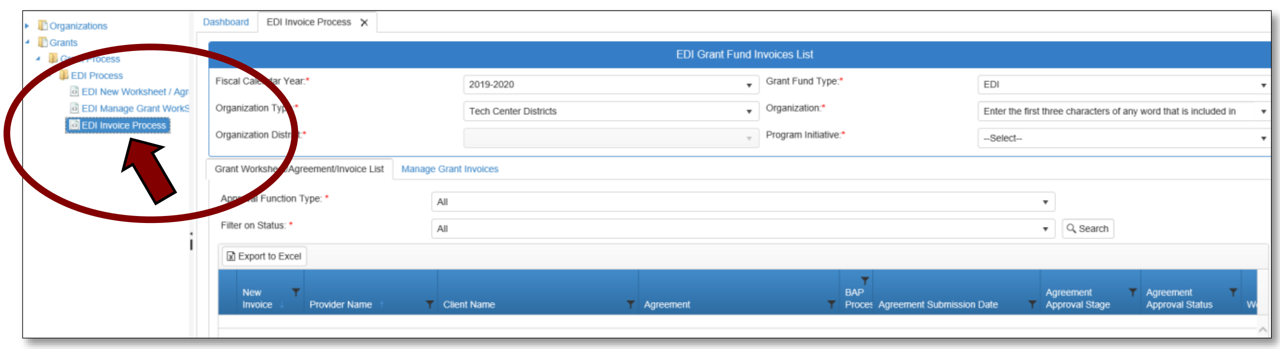
- Click the arrow ▸ next to Grant Process.



- Click the arrow ▸ next to **EDI Process.**



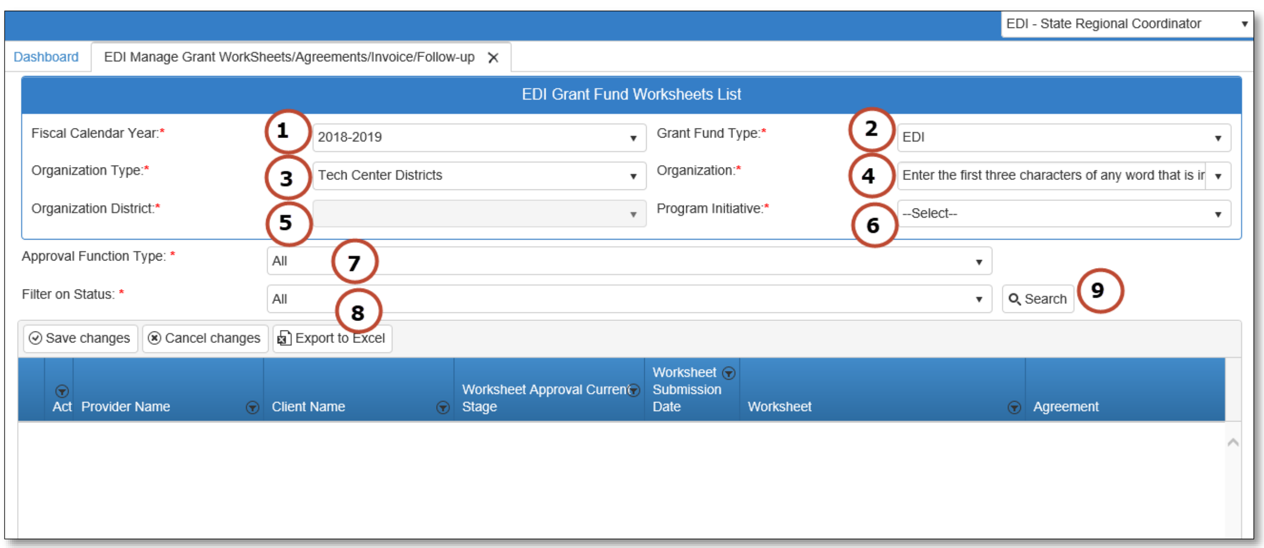
- Select the **EDI Invoice Process.**



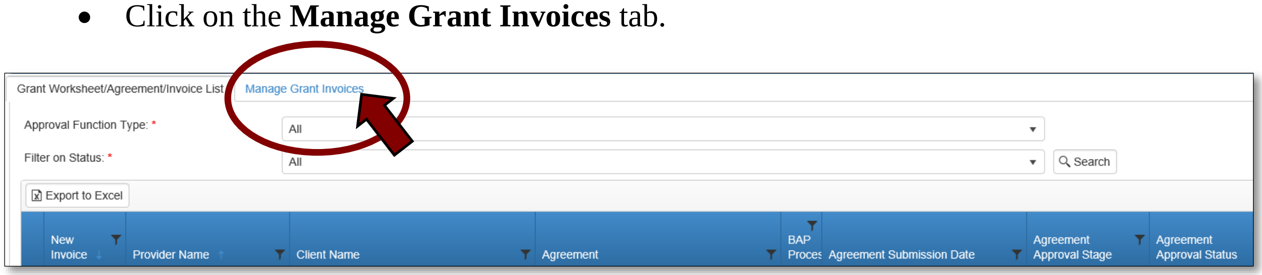
Opening the Invoice

- Complete the **EDI Grant Fund Invoices List** form**. The tagged numbers on the screenshot correspond to the instruction steps below.**
  1. Verify **Fiscal Calendar Year***.
  2. Verify **Grant Fund Type** is set to **EDI***.
  3. Select your correct **Organization Type** from the drop-down menu. Should default to Tech Center Districts.
  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.

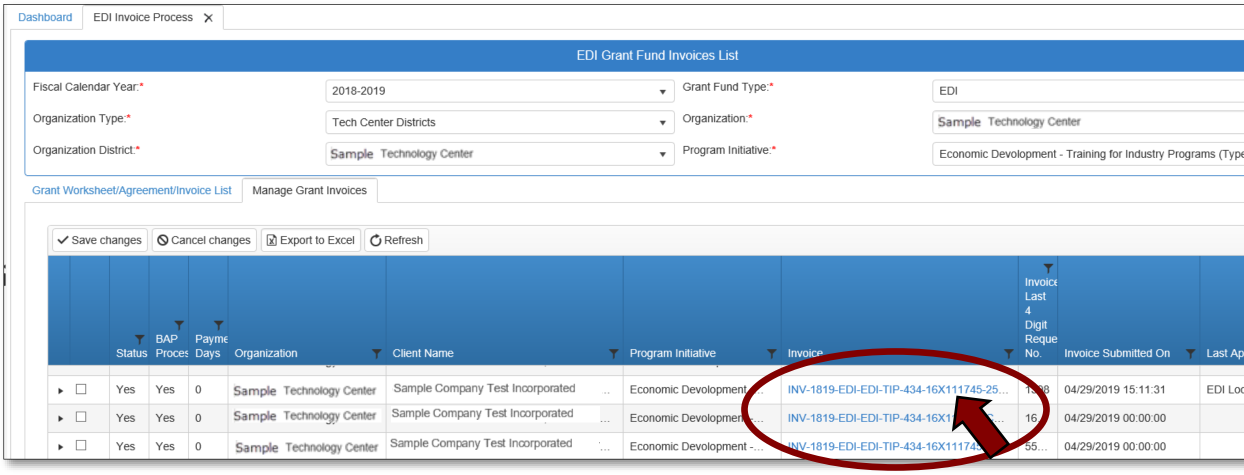
NOTE: A red asterisk (*) indicates a required field. See next page for screen image.



- Click on the **Manage Grant Invoices** tab.



- Click on the invoice number in the Invoice column to choose the invoice to review and approve.



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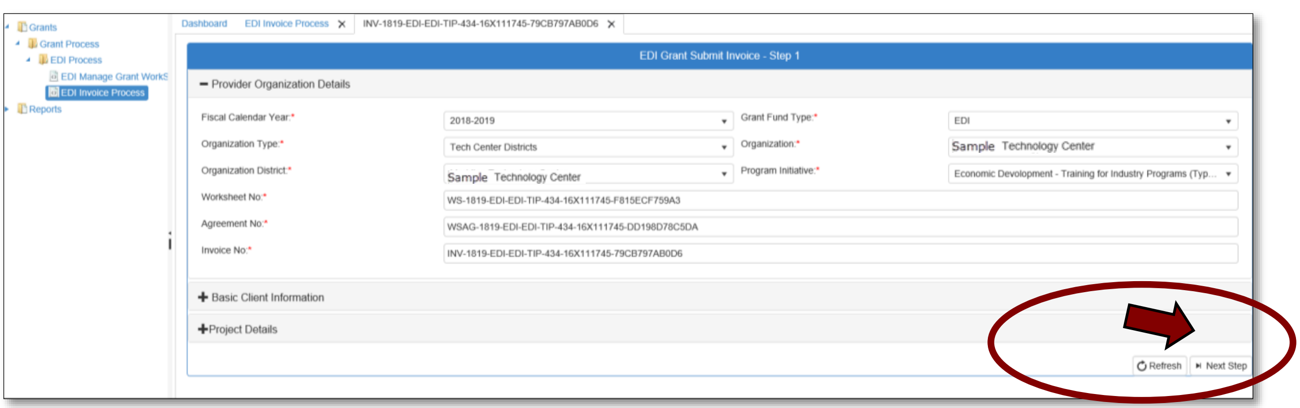
NOTE: To view and invoice approval summary, click on the ▸ next to the invoice line you want to view. This summary will allow you to see the approval status and approval notes. You can also filter by the Current Approval Stage column (use the scroll bar to scroll to the right). Click on the filter icon and type in your role. This will allow you to see only the invoices you have at your approval stage.

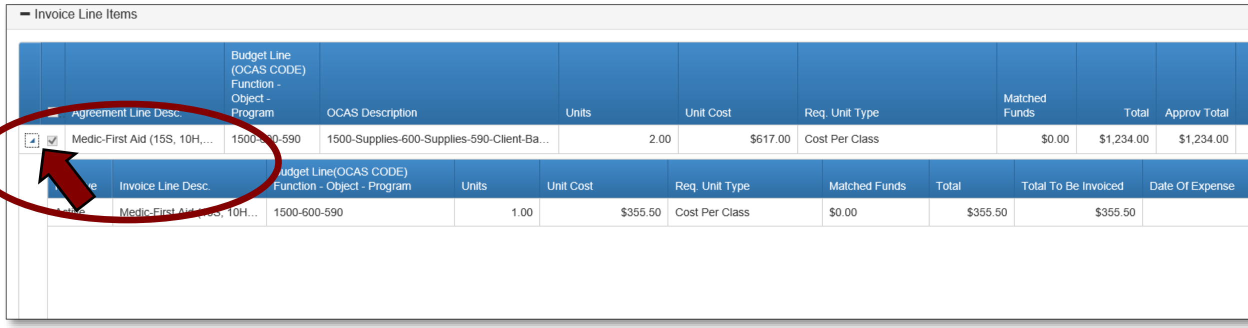
EDI Grant Submit Invoice Step-1

1.1 - Review the information on the **EDI Grant Submit Invoice Step-1** screen and click **Next Step.**



EDI Grant Submit Invoice Step-2

2.1 - Review the information on the **EDI Grant Submit Invoice Step-2** screen. You can expand the sections by clicking ont the +(plus) sign. Then view the invoice details by clicking on the ▶ next to the agreement line.



2.2 – Click **Submit for Approval**. The invoice will now go to the next approval stage.

Stage 3-Local Finance Coordinator

Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the EDI Local Finance Coordinator Role.

Stage 4-State Regional Coordinator

Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the EDI State Regional Coordinator Role.

Stage 5-State Requisition Coordinator

Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the EDI State Requisition Coordinator Role.

At this approval stage, you will also need to print the required documentation and deliver to the finance department.

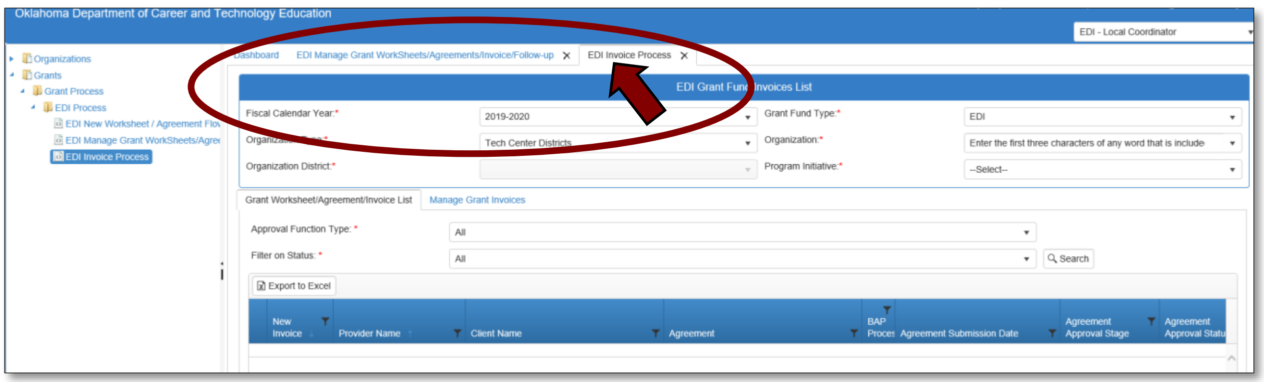
Stage 6-ODCTE EDI Finance Reviewer

Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the ODCTE EDI Finance Reviewer Role. This is the final approval to pay the claim.

TIPS and Tricks

CTIMS Helpful Hints

- There are scroll bars located at the bottom and right of some of the screens in CTIMS. If you cannot see all of the information on a screen, go to the right or bottom of the screen and use the scroll bar to see navigate over to view additional columns and rows.
- You can flip between screens or tabs in CTIMS. Click on any open tab at the top of your screen to toggle between them.



- There are tabs within screens in CTIMS. Look for these tabs to view a different screen or more information. For example, within the Invoice Process, on the EDI Grand Fund Invoices List screen, there are two tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. You can flip between the two tabs within this screen.
- Many sections in CTIMS can be expanded in order to view more detailed information by clicking on the +(plus) sign or an arrow next to the section header or line (row).
- Hold down the Ctrl key and click on the + or – keys to zoom in or out.
- Do not use the Print icon to print documentation. Use the save icon to download a pdf, then you can save it to your computer or print the pdf.
- You can only have 10 tabs open at one time. To close tabs, click on the on the right side of the tab you wish to close, then confirm that you would like to close by clicking OK on the confirmation screen.

Where's my Worksheet, Agreement or Invoice?

To find out what approval stage your worksheet, agreement or invoice is in, you can take the following steps:

Worksheets/Agreements

- On the navigation on the left, go to Grants>Grant Process>EDI Process>then click on EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.
- Complete the EDI Grant Fund Worksheets List form and click Search.
- The list of worksheets/agreements will populate. In the Agreement Approval Current State column you can see at which stage the worksheet/agreement is currently in.
- You can also click on the ▶ on the left, on the worksheet row to view the worksheet and agreement summaries. This includes approval/rejection notes for each approval stage.

NOTE: If the worksheet is still in the New Draft stage, the approval summary will be blank.

Invoices

- On the navigation on the left, go to Grants>Grant Process>EDI Process>then click on EDI Invoice Process.
- Complete the EDI Grant Fund Invoices List form and click Search.
- There are 2 tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. Click on the Manage Grant Invoices tab.
- You can use the scroll bar at the bottom to scroll to the right to see the Current Approval Stage column.
- Or you can click on the ▶ on the left, on the invoice row to view the Invoice Approval Summary. This includes approval/rejection notes.

Where are the Funds?

- If you have created a new invoice and added a dollar amount to a line item, that amount will be subtracted from your balance on the dashboard. This includes a draft of an invoice that has not been submitted for approval.
- If $0.00 are available in a line item to invoice, the line item will not appear on a new invoice.