

**CAREERTECH
INFORMATION
MANAGEMENT SYSTEM
(CTIMS)**

**CARL PERKINS (FLA)
WORKSHEET/APPLICATION
GUIDEBOOK**

IMD

*career***tech**

April 17, 2017

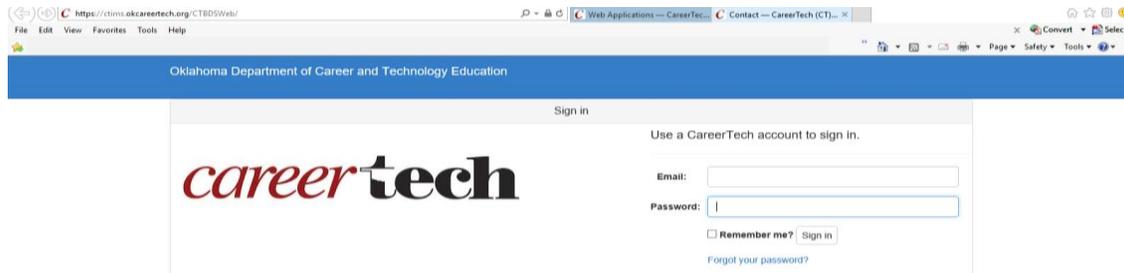
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Objective: This section will take you through the submission and approval stages for starting a new FLA Worksheet/Application in CTIMS.

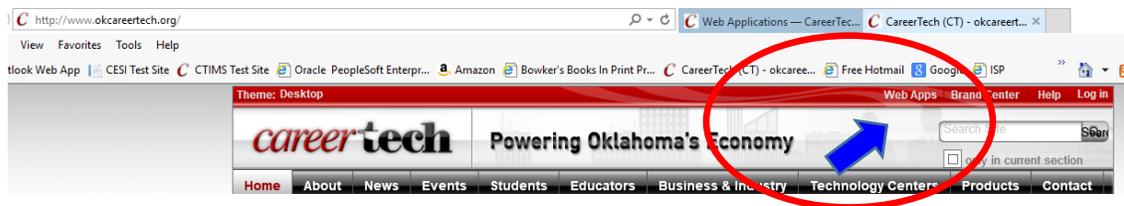
Logging in to CTIMS

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

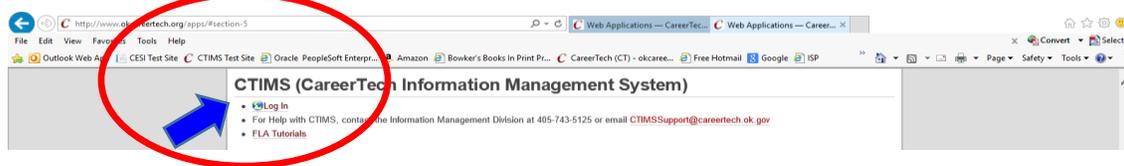


Or,

Go to <http://www.okcareertech.org/> and select **Web Apps** in the red bar at the top of the page. **Do not select the Login selection in the red bar. This is not the CTIMS login.**



Select CTIMS (Career Information Management System) from the menu. CTIMS will be all the way at the top of the page. Make sure you are logging in to CTIMS and not another application.



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

Help and Troubleshooting

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

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

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

Janet Cooper
Phone: 405.743.5130
Email: janet.cooper@careertech.ok.gov

Josh Miller
Phone: 405.743.5401
Email: josh.miller@careertech.ok.gov

Jared Bates
Phone: 405.743.5569
Email: jared.bates@careertech.ok.gov

Roles: Worksheet Approval Process

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

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



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



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



Stage 4 - State Initiative Coordinator - 3rd Approval. ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If rejected, goes back to stage 1.



Stage 5 - State Initiative Supervisor – Final Approval. After the worksheet is approved through Stage 5, the Agreement Process begins with the FLA Local Finance Coordinator.

Starting a new worksheet

Role: Local Initiative Coordinator

Step 1: 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.

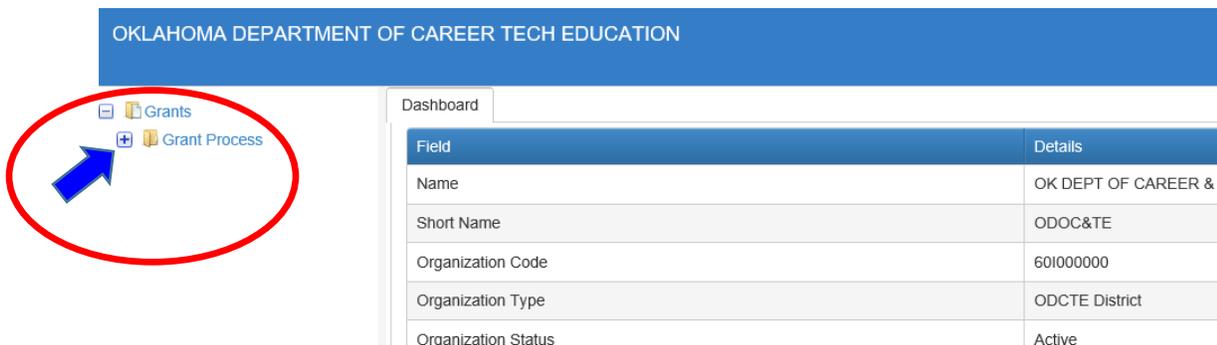
Step 2: Verify that you are signed on with the role of a **FLA-Local Initiative Coordinator** in the top right hand corner. Use the drop down arrow to select this role.



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



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



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

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

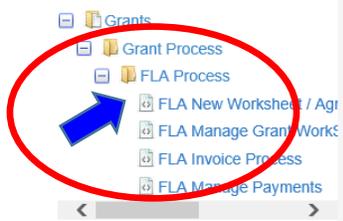


Dashboard

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

Step 6. Select FLA New Worksheet/Agreement Flow

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION



Dashboard

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

Step 7. Complete the **FLA Grant Submit Worksheet – Step 1** form. **The tagged numbers on the screen shot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization login credentials.

Note: The red asterisks* represents a required field.

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

1. Select an **Organization Type**, such as Comprehensive School District, Technology Center District, College District or College name*.
2. **Select an Organization** by typing in the first three letters of your school or organization name*.
3. 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*.
4. Select a **Program Initiative*** from the dropdown menu. The *Worksheet No.** automatically displays after selecting the *Program Initiative*.
5. Verify that **Client Type*** is Business Masters.
6. Select an **Organization** by typing in the first three letters of your organization name*. This name should be the same as #2. The **Business Code*** is associated with the Organization and automatically displays after an **Organization** is selected.
7. After verifying that all information is correct, Click **Save & Next** button.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA- Local Initiative Coordinator

Grants Dashboard FLA New Worksheet / Agreement Flow x

FLA Grant Submit Worksheet - Step 1

7 Save & Next

Fiscal Calendar Year* 2016-2017 Grant Fund Type* FLA

Organization Type* 1 Colleges Organization* 2 Enter the first three characters of any word that is includ

Organization District* 3 Program Initiative* 4 -Select-

Worksheet No.*

Client Basic Information For work Sheet

Organization Type* Business Masters Client Type* 5 Business Masters (Company)

Organization* 6 Enter the first three characters of any word that is includ Business Code* 5

7 Save & Next

Step 8: Open the **Funding Request Details** form by clicking on the **+(plus)** sign. This is **Step 2** in the process. This form has several sections. You must scroll down to access and complete all the sections. You must put something in every box that has a red asterisk (*). There are some small required check boxes you must check to certify the information.

In the form, there are links to other resources that will help you complete the form. There are also links to required templates and forms for you to download, complete and attach (see Step 9). You can cut and paste from another document to fill in the boxes.

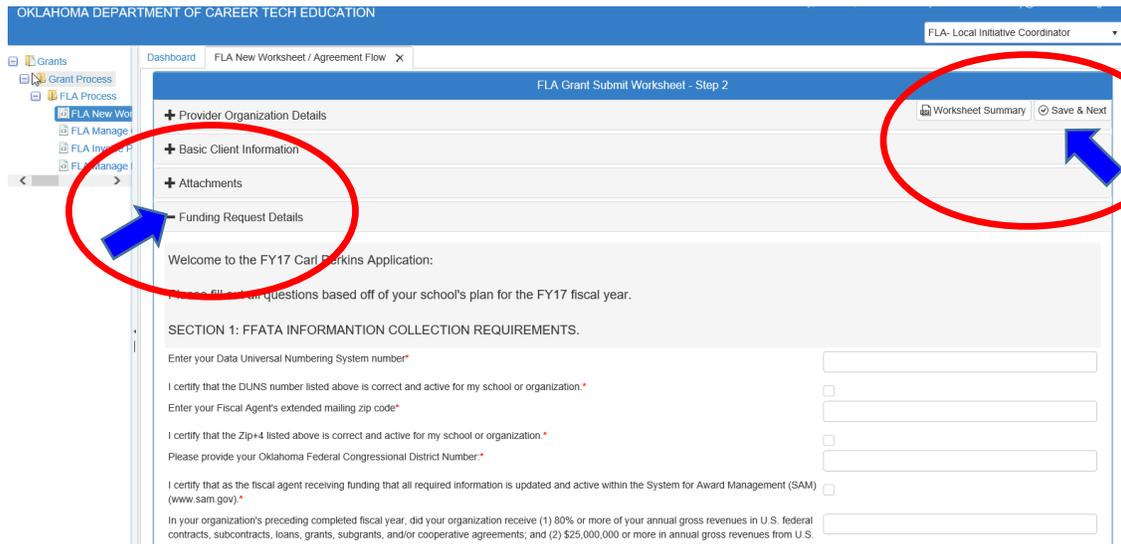
You must finish **Step 2** and hit **Save and Next** for any of the information to be saved.

If you cannot finish all the fields, you can put a placeholder character in all the fields (all required fields must have something in them) and hit **Save and Next**.

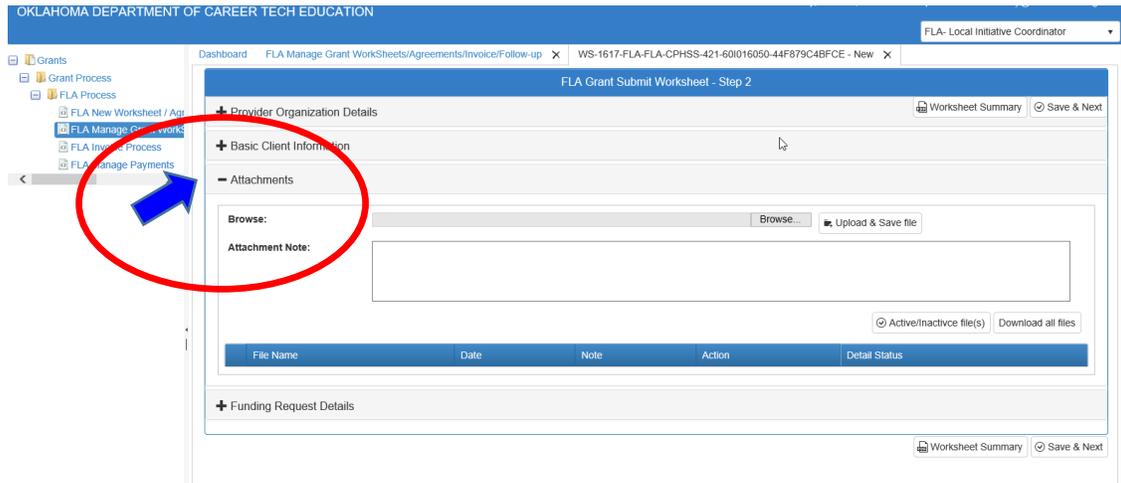
Returning to an existing Worksheet

When you come back to edit the fields after using **Save and Next**, click on the **+(plus)** sign next to **FLA Manage Grant Worksheet/Agreement** on the left navigation panel to go into your worksheet or budget to update.

Note: Do not select the **FLA New Worksheet/Agreement Flow** option, as this will start a whole new worksheet.



Step 9: Attach supporting and required documents by clicking on the **+(plus)** sign before **Attachments**. Browse to find the correct attachment on your computer, then hit the upload and save file button. You will need to follow this procedure for each file that you upload.

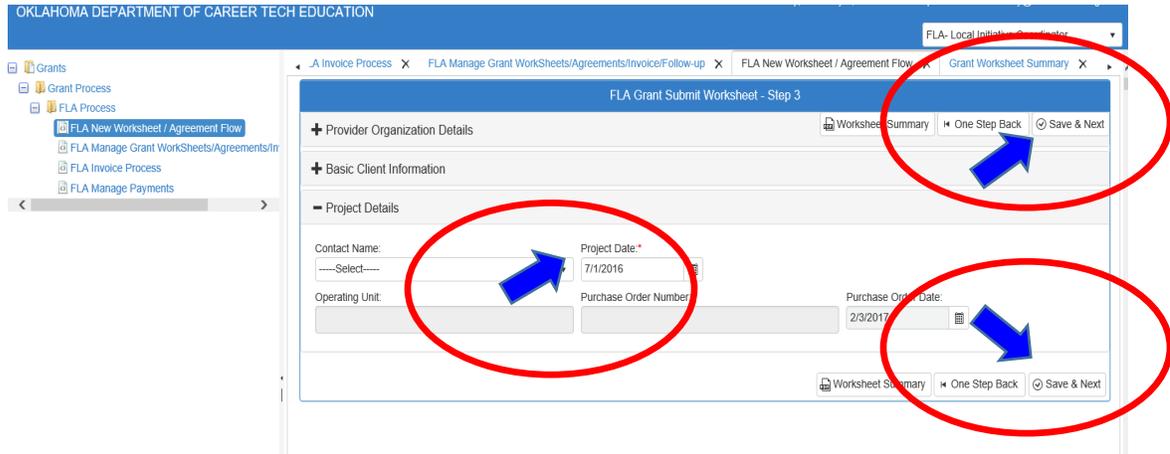


Step 10: After completing the **Funding Request Details** form and attaching the required documents, click on either of the **Save & Next** buttons to continue to the next page.

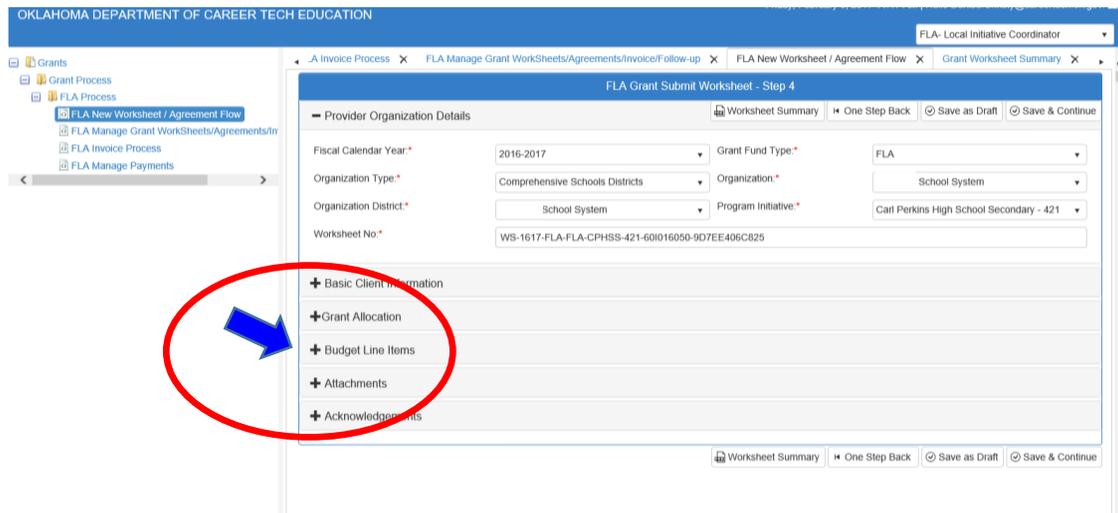


Step 11: FLA Grant Submit Worksheet – Step 3

Verify **Project Date** is July 01 of the funding year, then hit **Save and Next**.



Step 12: Open the Budget Line Items tab by clicking on the +(plus) sign.



Step 13: On the **Budget Line Items** screen, you can click the **Add Budget Line**, **Remove Budget Line**, or **Cancel Budget Line Changes**.

1. Type a **Budget Line Desc** (Budget Line Description)
2. Complete **Req. Units** (Required Units)
3. Complete **Req. Unit Cost** (Required Unit Cost)
4. Complete **Req Unit Type** (Required Unit Type)
5. Hit **Add Budget Line** to add more budget lines and repeat steps 1-4.
6. Type a **Note** in the space below the line item budget area if desired
7. Add supporting or required attachments by clicking on the **+Attachments** tab.
8. 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.

Oklahoma Department of Career and Technology Education Friday, April 14, 2017 1:45 PM | Hello Denise.Christy@careertech.ok.gov

FLA- Local Initiative Coordinator

Grants > Grant Process > FLA Process > FLA New Worksheet / Agreement Flow

FLA Grant Submit Worksheet - Step 4

Budget Line Desc	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Status
1	2	3	4	\$0.00	\$0.00	Active
				\$0.00	\$0.00	

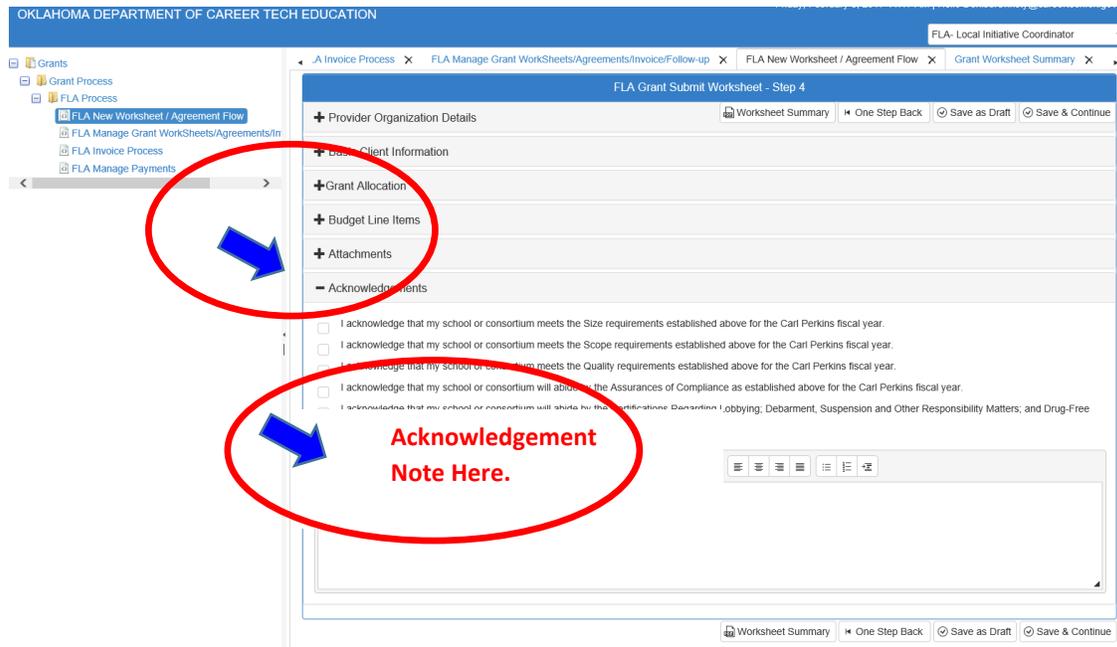
Note

6

Step 14: Do Not click Save & Continue yet because you will be required to complete the Acknowledgements section.

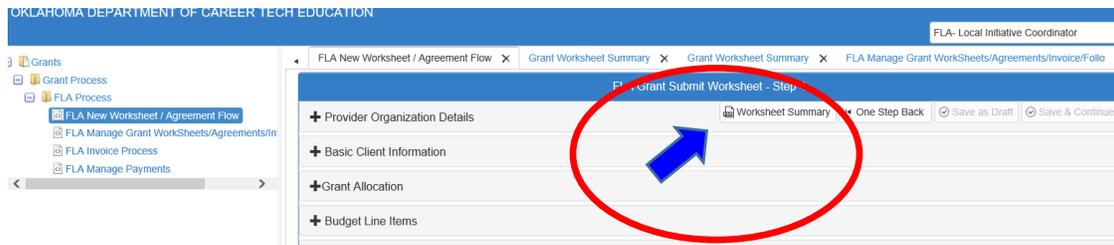
Go to the **Acknowledgements** by clicking the **+(plus)** sign.

Check all the Acknowledgement buttons, then add an **Acknowledgement Note** (required).

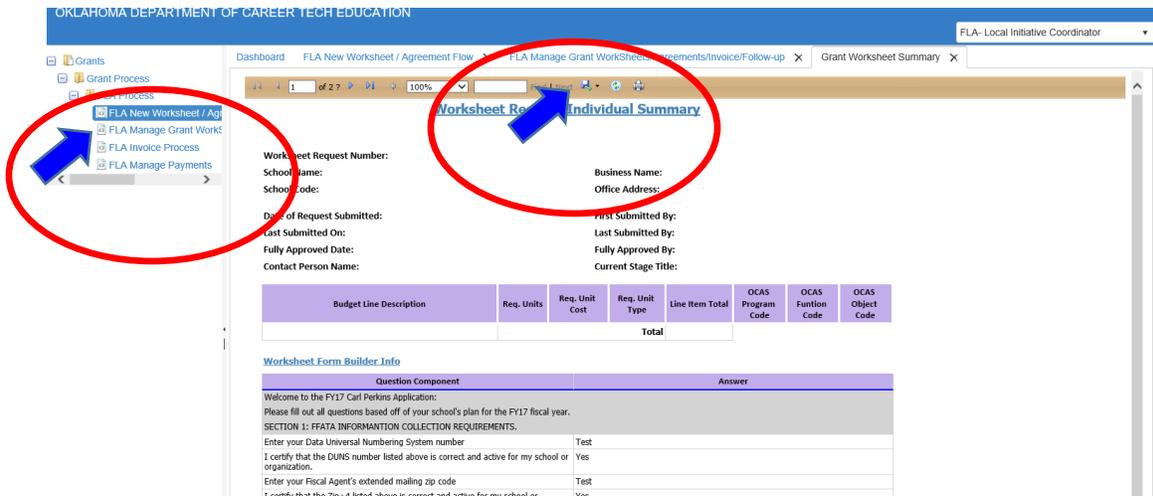


Step 15: Worksheet Summary

You can view or print your worksheet summary page to review before submitting to ensure your worksheet/application is complete and accurate. If you need to make any changes, use the **FLA Manage Grant Worksheet/Agreement** to go into your worksheet or budget to update. **Do not** use the **FLA New Worksheet/Agreement Flow** as this will start a new worksheet.



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



Step 16: Submitting the Worksheet

Click the Save and Continue button.

At this point your worksheet/application has been successfully submitted. You will receive an email from the CTIMS system stating your worksheet/application has been submitted successfully to the FLA Local Finance Coordinator.

After you submit the worksheet/application, if there are any changes, you will have to use the **Change Request process**.

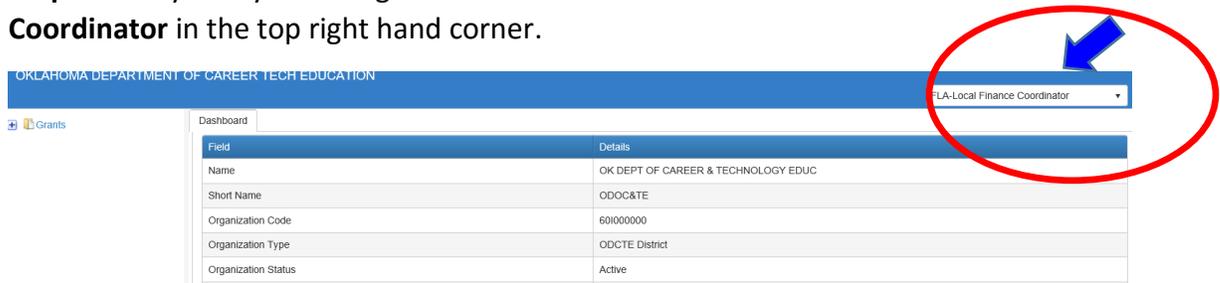
Role: Local Finance Coordinator

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

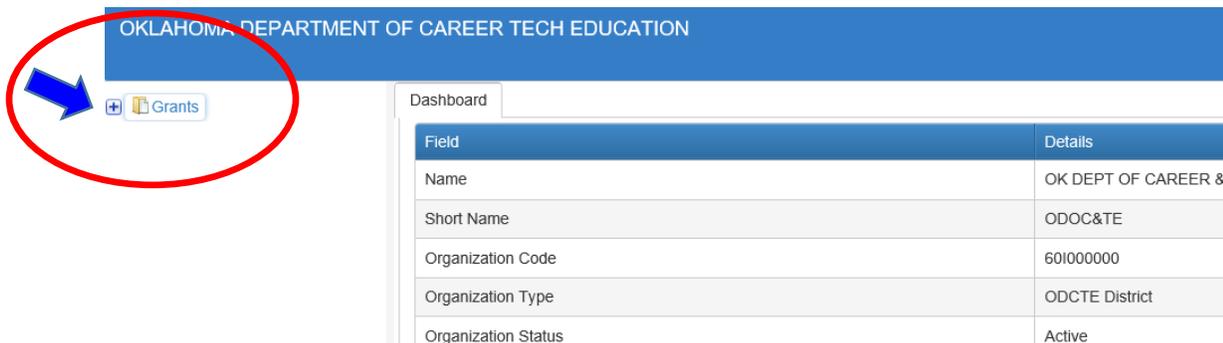
Step 1: Sign in using your school email and CTIMS password at <https://ctims.okcareertech.org/CTBDSWeb/>.

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

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



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



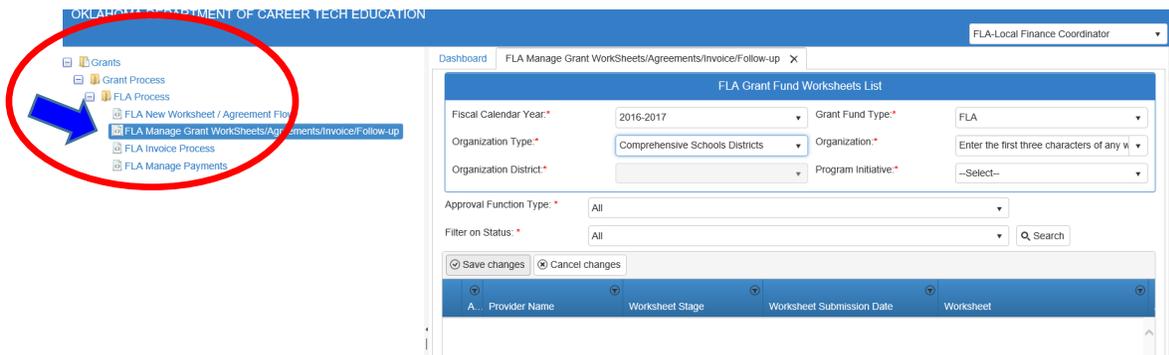
Step 4. Hit + (plus) sign next to Grant Process.



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



Step 6. Select FLA Manage Grant Worksheets/Agreements/Invoice/Follow-up. Do not select FLA New Worksheet/Agreement Flow as that would create a new worksheet.



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

Note: The red asterisks* represents a required field.

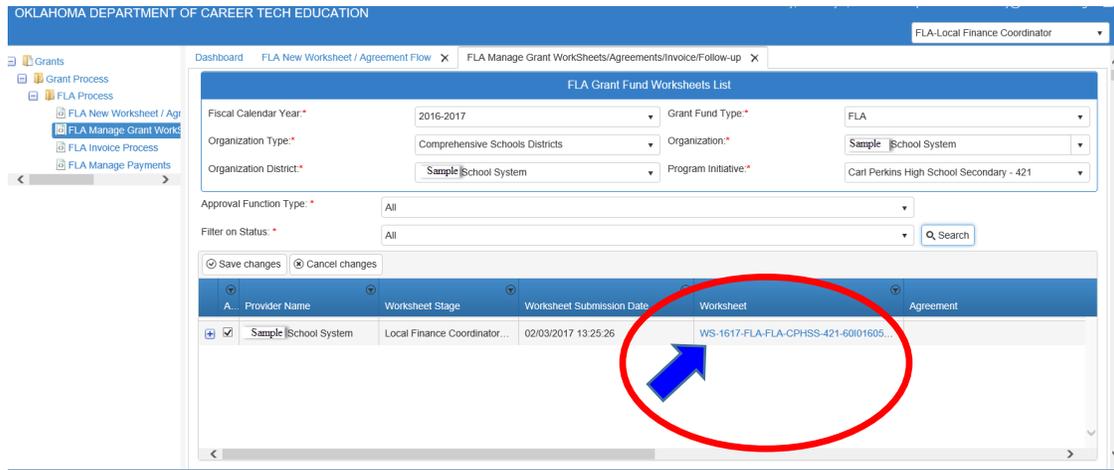
1. Verify **Fiscal Calendar Year*** .
2. Verify **Grant Fund Type** is set to FLA* .
3. Select your correct **Organization Type** from the drop down menu.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District*** .
6. Select a **Program Initiative*** .
7. **Approval Function Type** will remain as All.
8. **Filter on Status** will remain as All.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

The screenshot shows the 'FLA Grant Fund Worksheets List' form. The form is titled 'FLA Grant Fund Worksheets List' and is part of the 'FLA Manage Grant Worksheets/Agreements/Invoice/Follow-up' section. The form includes the following fields and buttons:

- Fiscal Calendar Year***: A dropdown menu with '2016-2017' selected. (Tagged 1)
- Grant Fund Type***: A dropdown menu with 'FLA' selected. (Tagged 2)
- Organization Type***: A dropdown menu with 'Colleges' selected. (Tagged 3)
- Organization***: A text input field with the placeholder 'Enter the first three characters of any word that is in'. (Tagged 4)
- Organization District***: A dropdown menu with an empty selection. (Tagged 5)
- Program Initiative***: A dropdown menu with '-Select-' selected. (Tagged 6)
- Approval Function Type***: A dropdown menu with 'All' selected. (Tagged 7)
- Filter on Status***: A dropdown menu with 'All' selected. (Tagged 8)
- Search**: A button with a magnifying glass icon and the text 'Search'. (Tagged 9)
- Save changes**: A button with a checkmark icon.
- Cancel changes**: A button with an 'X' icon.

The form also includes a table with the following columns: 'A... Provider Name', 'Worksheet Stage', 'Worksheet Submission Date', 'Worksheet', and 'Agreement'. The table is currently empty.

Step 8: After hitting the **Search** button, the worksheet/application that needs to be approved will be listed. Select the worksheet number to open the worksheet.

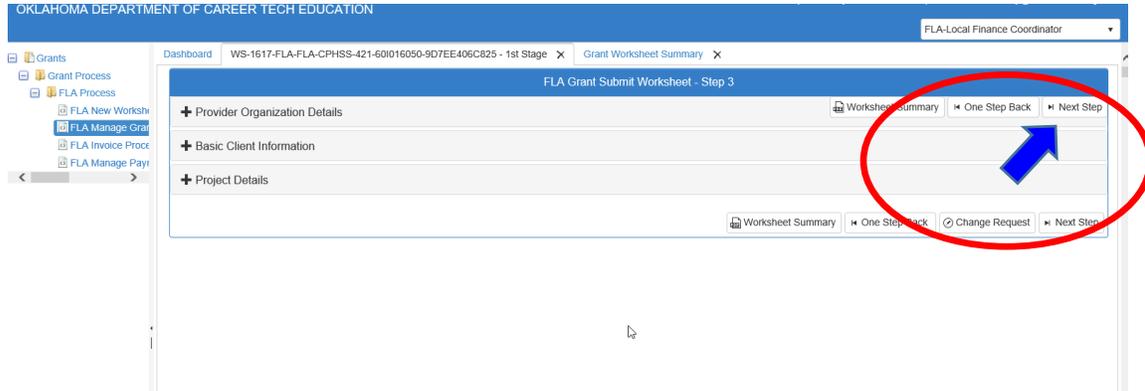


Step 9: FLA Grant Submit Worksheet - Step 2. Open each section of the worksheet by hitting the + (plus) sign beside the title. Verify the contents of each section of the worksheet. We recommend you print a pdf of the worksheet summary to help with project and budget verification.

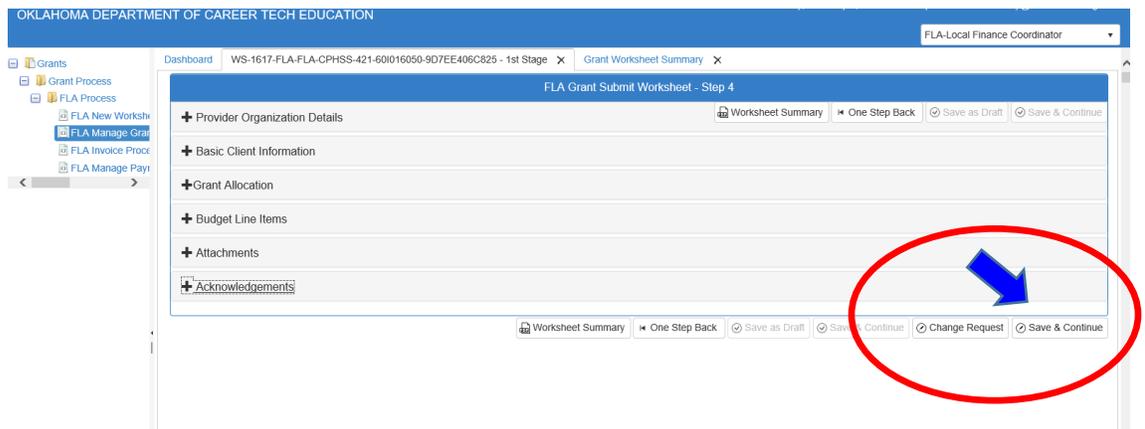


Step 10: FLA Grant Submit Worksheet – Step 3

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



Step 11: FLA Grant Submit Worksheet – Step 4. Verify the information in each section by hitting the + (plus) sign to open the pages. If everything is correct, select **Save and Continue**.



Step 12: Approval Process - FLA Grant Worksheet Approval.

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

After hitting the Reject or Approve button, the system will ask, "Are you sure?" Hit cancel or ok. If ok, the application has been successfully approved or rejected. If approved, an email will be sent to you and the next approver (FLA Local Superintendent/CEO).

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

Dashboard WS-1617-FLA-FLA-CPHSS-421-601016050-9D7EE406C825 - 1st Stage Grant Worksheet Summary

Approval Process - FLA Grant Worksheet Approval

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

Back Reject Approve

Request Number

WS-1617-FLA-FLA-CPHSS-421-601016050-9D7EE406C825

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
Local Coordinator - 1st Stage	2/3/2017 3:18:23...	FLA-Local Int...	Denise - Christy	Denise.Christ...	Approved	New Process	
1 Local Finance Coordinator - 2nd	2/7/2017 2:53:24...						
Superintendent / President - 3rd A...	2/7/2017 2:53:24...						
State Local Coordinator - 4th App...	2/7/2017 2:53:24...						

Current Approval Stage Information

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

Approver School* OK DEPT OF CAREER & TECHNOLOGY EDUC Approval Role* FLA-Local Finance Coordinator

Approver Email* Denise.Christy@careertech.ok.gov Approval Date* 02/07/2017

Approval/Rejection Note

Format B I U [Icons]

2

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 FLA Local Superintendent/CEO for their review.

Role: FLA Local Superintendent/CEO

Steps 1-12 are the same as the FLA Local Finance Coordinator above: After the **FLA Local Finance Coordinator** approves the worksheet/application, the **FLA Local Superintendent/CEO** will receive an email that a worksheet/application is ready for review. They will use the same steps outlined above, using the role of **FLA Local Superintendent/CEO** in **Step 2** and following each step.

At this point, your worksheet/application is fully submitted. You will receive an email from the CTIMS system stating your worksheet/application has been submitted successfully to the FLA State Staff for review.

Role: FLA State Initiative Coordinator, and

Role: FLA State Initiative Supervisor

Steps 1-12 are the same as the FLA Local Finance Coordinator above: The review and approval or rejection process continues using the steps above for the **FLA State Initiative Coordinator** and the **FLA State Initiative Supervisor**. After the worksheet/application is approved by the FLA State Initiative Supervisor, the **Agreement Approval Process** begins.

If you need to return to the worksheet or budget, go to **Grants – Grant Process – FLA Process – FLA Manage Grant Worksheet** in the left navigation area. **Do not** select FLA New Worksheet again.

FLA Agreement Process

Creating and Submitting the Agreement

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

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.

Roles: Worksheet/Application Agreement Process

FLA Local Finance Coordinator



FLA State Initiative Coordinator



FLA State Initiative Supervisor

After the Worksheet/Application has been approved through the FLA State Initiative Supervisor level, the school will receive an email from the ODCTE FLA office with the official approval notification and a pdf of the subaward agreement. **The subaward agreement must be signed by the school superintendent and sent in the U.S. mail back to ODCTE before the processing of invoices can begin.**

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

The following steps should be followed to finish the approval and agreement process in CTIMS.

Role: Local Finance Coordinator

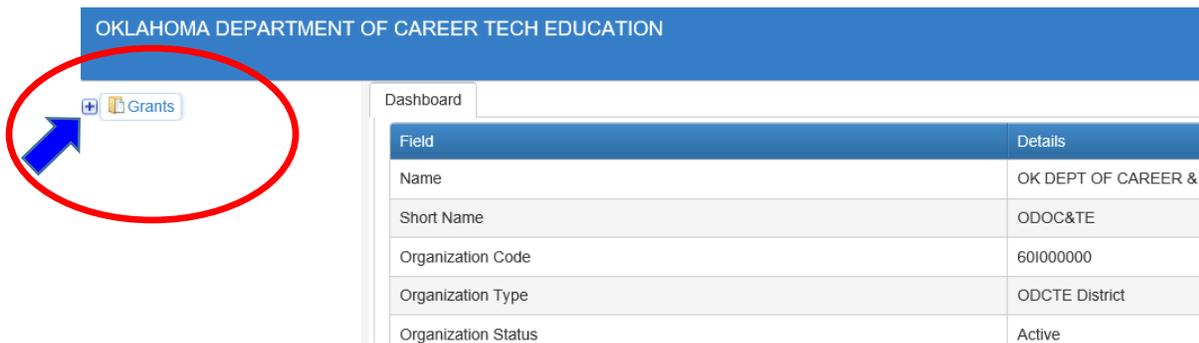
Step 1: Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your email and CTIMS password.

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

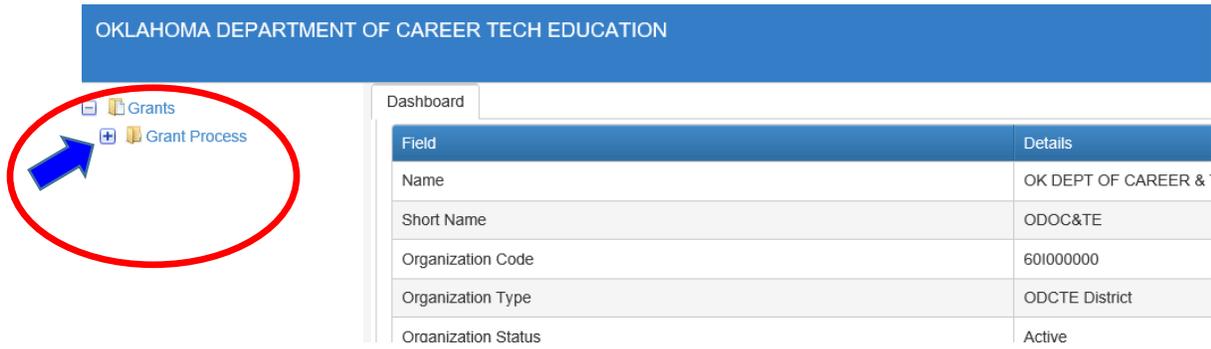
Step 2: Verify that you are signed on with the role of a **FLA-Local Finance Coordinator** in the top right hand corner. Your account will probably automatically come up as FLA-Local Finance Coordinator, but if not, use the drop down arrow to select the correct role.



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



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



OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

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

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

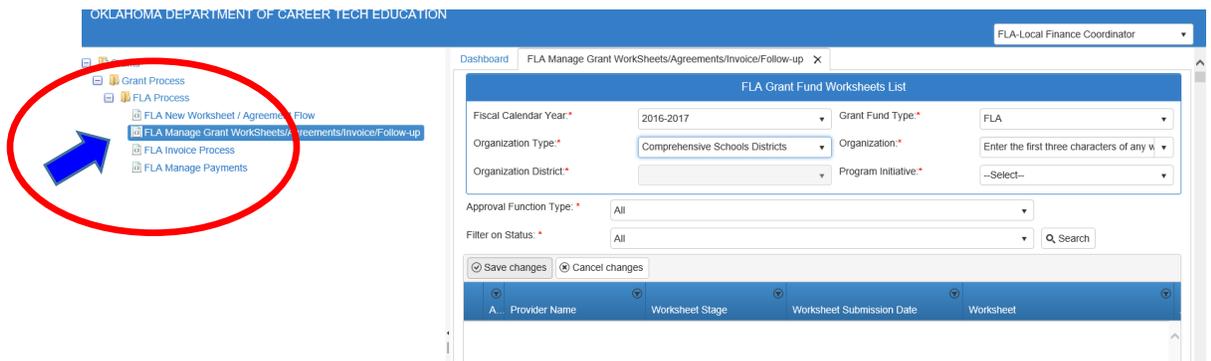


OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

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

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



OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

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

FLA Grant Fund Worksheets List

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

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

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

Approval Function Type: All

Filter on Status: All

Save changes | Cancel changes

Provider Name	Worksheet Stage	Worksheet Submission Date	Worksheet
---------------	-----------------	---------------------------	-----------

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

Note: The red asterisks* represents a required field.

1. Verify **Fiscal Calendar Year** to make sure correct year is showing*.
2. Verify **Grant Fund Type** is set to FLA*.
3. Select your correct **Organization Type** from the 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.

The screenshot shows the 'FLA Grant Fund Worksheets List' form within the Oklahoma Department of Career Tech Education system. The form includes several dropdown menus and a search button, each marked with a red circle and a number corresponding to the instruction steps:

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

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

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

The screenshot shows the 'FLA Grant Fund Worksheets List' interface. The table below the filters contains the following data:

A...	Provider Name	Worksheet Approval Curre...	Worksheet	Worksheet	Agreement	Agreement Appr
<input checked="" type="checkbox"/>	Sample School System	State Supervisor - Fully Ap...	08/30/201...	WS-1617-FLA-F	FLA-CPHSS-421-601010...	New

© 2016 - Production Site. Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers. | Version: 1.0 | CTBDS

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

The screenshot shows the 'FLA Grant Agreement' interface. The 'Budget Line Items' section is expanded, showing the following table:

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

© 2016 - Production Site. Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers. | Version: 1.0 | CTBDS

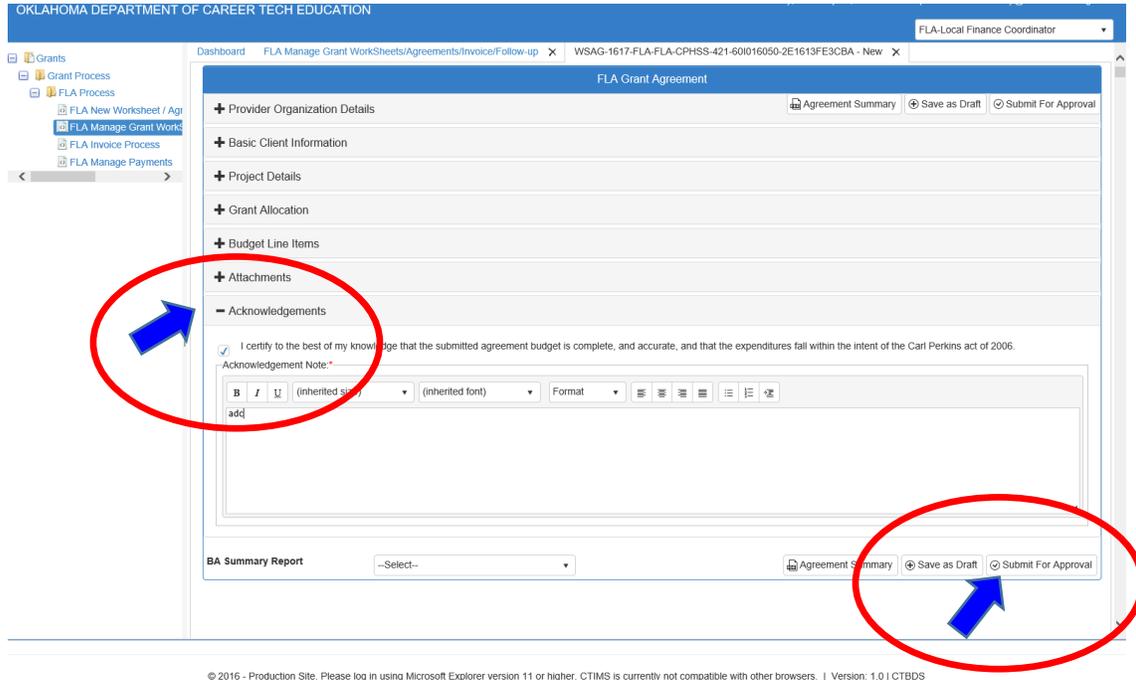
Step 10: FLA Grant Agreement – OCAS Codes. Go to the Budget Line Items. Enter the OCAS coding for each of the line items in the following order: Program-Function-Object Code (e.g. 330-1000-100). As you begin typing the OCAS code, a drop down of OCAS codes will come up that you can select from. Select the valid OCAS code for each budget item. After entering all OCAS codes, click on the **Save as Draft** button.

The screenshot displays the 'FLA Grant Agreement' interface. The 'Budget Line Items' section is expanded, showing a table with the following data:

Budget Line(OCAS CODE)	Program - Function - Object	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Action
330-1000-100		Technology	1	\$14,596.00	Cost Per Each	\$14,596.00	\$14,596.00	Approved
330-2000-100		Professional Development	1	\$4,828.67	Cost Per Each	\$4,828.67	\$4,828.67	Approved
330-2110-100		Coordinator's Salary & Benefits	1	\$38,587.33	Cost Per Each	\$38,587.33	\$38,587.33	Approved
						\$58,012.00	\$58,012.00	

Two red circles with blue arrows highlight the 'Save as Draft' button in the top right and the 'Add Budget Line' button in the table header.

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



Role: FLA State Initiative Coordinator, and

Role: FLA State Initiative Supervisor

Steps 1-11 are the same as the FLA Local Finance Coordinator above: The review and approval or rejection process continues using the steps above for the **FLA State Initiative Coordinator** and the **FLA State Initiative Supervisor**. After the **Agreement** is approved by the FLA State Initiative Supervisor and **the Signed Sub-Award Agreement** is returned to ODCTE, the **Local Finance Coordinator** can begin submitting invoices.

FLA Grant Process

How to Submit Invoices for Reimbursement

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

Roles: FLA Invoice Process

FLA Local Finance Coordinator



FLA State Initiative Coordinator



FLA State Initiative Supervisor



ODCTE Finance Reviewer

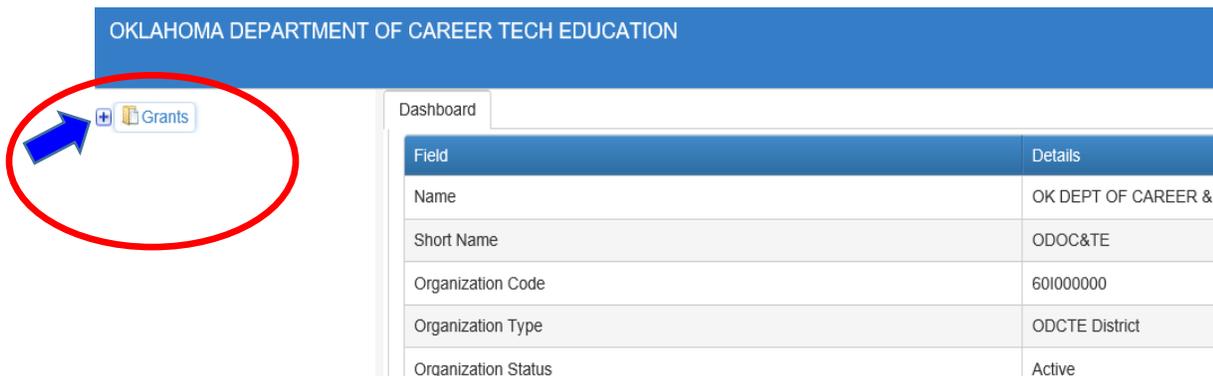
Role: Local Finance Coordinator

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

Step 2: Verify that you are signed in with the role of a **FLA-Local Finance Coordinator** in the top right hand corner. If not, use the drop down arrow to select the correct role.



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



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

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

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

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

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

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

Step 6. Select FLA Invoice Process.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

FLA Invoice Process

FLA Grant Fund Invoices List

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

Organization Type: Colleges Organization: Enter the first three characters of any word that

Organization District: Program Initiative: --Select--

Grant Worksheet/Agreement/Invoice List Manage Grant Invoices

Approval Function Type: All

Filter on Status: All Search

New Invoi...	Provider Name	Agreement	Agreement Submission Date	Agreement Approv...	Agreement Approv
--------------	---------------	-----------	---------------------------	---------------------	------------------

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

Note: The asterisks* represents a required field.

1. Verify **Fiscal Calendar Year** to make sure correct year is showing*.
2. Verify **Grant Fund Type** is set to FLA*.
3. Select your correct **Organization Type** from the drop down menu (College District, Comprehensive School Districts or Tech Centers Districts).
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District*** (Auto Fills)
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as All.
8. **Filter on Status** will remain as All.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

Grants

Grant Process

FLA Process

FLA New Worksheet / Agr

FLA Manage Grant Work

FLA Invoice Process

FLA Manage Payments

Dashboard | FLA Invoice Process

FLA Grant Fund Invoices List

Fiscal Calendar Year:* 1 2016-2017 Grant Fund Type:* 2 FLA

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

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

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

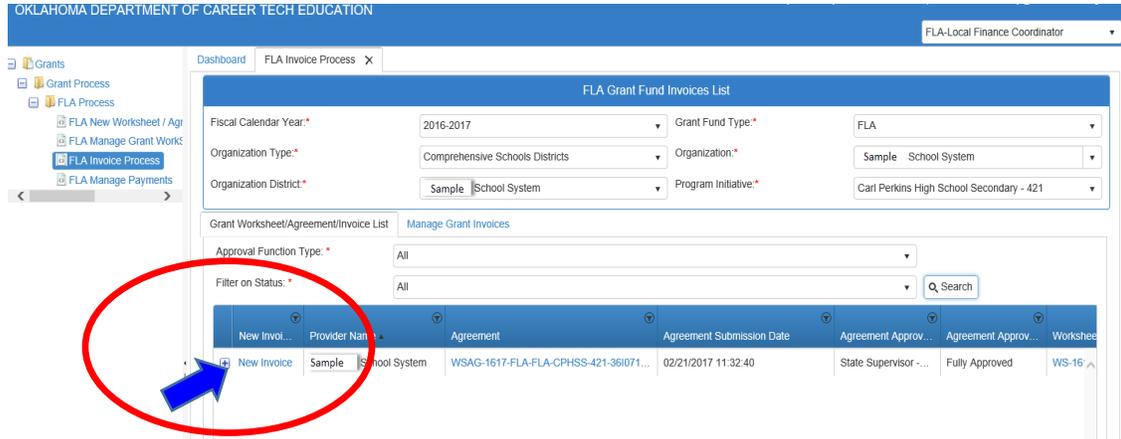
Approval Function Type:* 7 All

Filter on Status:* 8 All Search 9

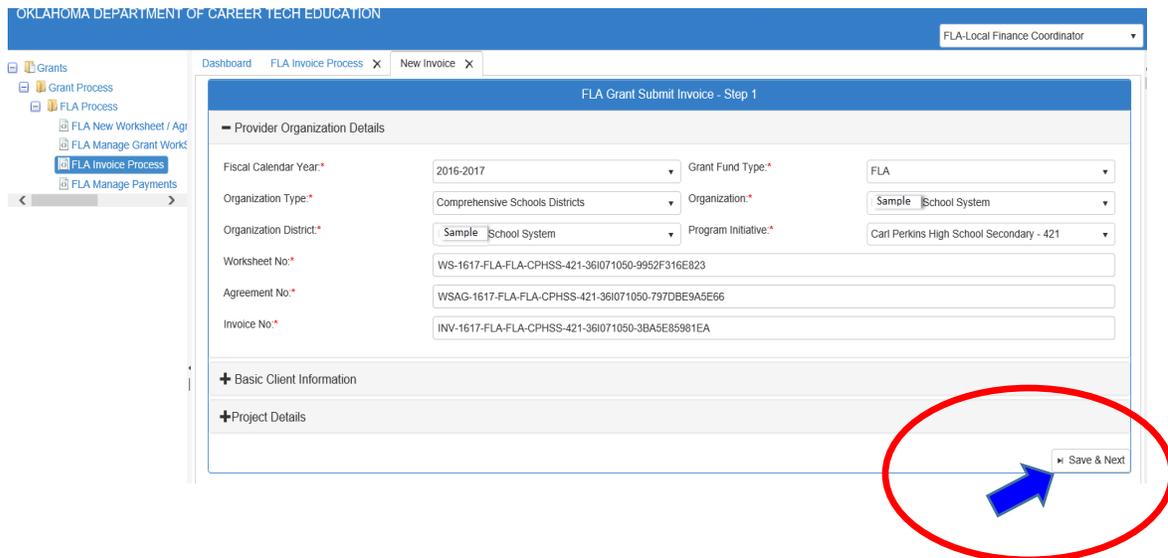
New Invoi...	Provider Name	Agreement	Agreement Submission Date	Agreement Approv...	Agreement Approv
--------------	---------------	-----------	---------------------------	---------------------	------------------

Step 8: FLA Grant Fund Invoices List - After hitting the **Search** button, select **New Invoice** to start the invoice process, not the + (plus) sign.

Note: To see the status of an invoice already submitted, click the **+ (plus) sign**.



Step 9: FLA Grant Submit Invoice - Step 1 - Verify that the information is correct, then select **Save & Next**.



Step 10: Under the **Invoice Line Items** tab, select the budget line item you want to invoice by clicking on the **+ (plus)** sign. This will add a check mark in the box next to that line item.

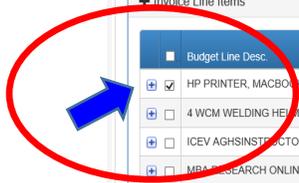
OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION FLA-Local Finance Coordinator

Dashboard FLA Invoice Process New Invoice

FLA Grant Submit Invoice - Step 2 Invoice Summary One Step Back Save as Draft Submit For Approval

- Provider Organization Details
- Basic Client Information
- Project Details
- Grant Allocation
- Invoice Line Items**

<input type="checkbox"/>	Budget Line Desc.	Budget Line Program - Functi	OCAS Description	Agreement Line Desc.	Total	Approv Total	Balance	Current
<input checked="" type="checkbox"/>	HP PRINTER, MACBOOK...	332-2200-100	332 - Carl Perkins - Use of Technology-22...	HP PRINTER, MACBOOK...	\$6,629.00	\$6,629.00	\$6,629.00	
<input type="checkbox"/>	4 WCM WELDING HELME...	330-2120-100	330 - Carl Perkins - Academic Integration...	4 WCM WELDING HELME...	\$543.00	\$543.00	\$543.00	
<input type="checkbox"/>	ICEV AGHSINSTRUCTOR...	330-1000-100	330 - Carl Perkins - Academic Integration...	ICEV AGHSINSTRUCTOR...	\$850.00	\$850.00	\$850.00	
<input type="checkbox"/>	MBA RESEARCH ONLINE...	332-2110-100	332 - Carl Perkins - Use of Technology-21...	MBA RESEARCH ONLINE...	\$4,995.00	\$4,995.00	\$4,995.00	
<input type="checkbox"/>	ALL PURPOSE LASER M...	331-3300-100	331 - Carl Perkins - All Aspects of the Indu...	ALL PURPOSE LASER M...	\$36,000.00	\$36,000.00	\$36,000.00	
<input type="checkbox"/>	FORM LAB STEREO LIG...	330-2100-100	330 - Carl Perkins - Academic Integration...	FORM LAB STEREO LIG...	\$4,600.00	\$4,600.00	\$4,600.00	
<input type="checkbox"/>	REGISTRATION FOR ISTE	330-2000-100	330 - Carl Perkins - Academic Integration...	REGISTRATION FOR ISTE	\$1,200.00	\$1,200.00	\$1,200.00	
<input type="checkbox"/>	GRANT PLANNING SALA...	332-2100-100	332 - Carl Perkins - Use of Technology-21...	GRANT PLANNING SALA...	\$1,930.00	\$1,930.00	\$1,930.00	
<input type="checkbox"/>	BENEFITS FOR GRANT P...	332-2100-100	332 - Carl Perkins - Use of Technology-21...	BENEFITS FOR GRANT P...	\$570.00	\$570.00	\$570.00	
					\$57,317.00	\$57,317.00	\$57,317.00	



Step 11: Select the Edit button.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

Grants | Grant Process | FLA Process | FLA New Worksheet / Agr | FLA Manage Grant Work | **FLA Invoice Process** | FLA Manage Payments

Dashboard | FLA Invoice Process | New Invoice

FLA Grant Submit Invoice - Step 2

Invoice Summary | One Step Back | Save as Draft | Submit For Approval

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Budget Line Desc.	Budget Line(Program - Functir	OCAS Description	Agreement Line Desc.	Total	Approv Total	Balance	Current
HP PRINTER, MACBOOK...	332-2200-100	332 - Carl Perkins - Use of Technology-22...	HP PRINTER, MACBOOK...	\$6,629.00	\$6,629.00	\$6,629.00	

Add Invoice

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Program - Function - Object	Units	Unit Cost	Req. Unit Type	Total
Active	HP PRINTER, MA...	332-2200-100	1.00	\$6,629.00	Cost Per Each	\$6,629.00

ⓘ Edit

\$6,629.00

\$57,317.00 | \$57,317.00 | \$57,317.00

Step 12: The system defaults to claiming the full amount, but you can edit **Units**, **Unit Cost** and **Req Unit Type** to claim a portion of the expense to match the invoice you are requesting payment. Use the scroll bar to go to the end of the line to enter the **Date of Expense**. After you enter the amount of the budget line you are invoicing, select the Update button to add the line to the invoice. To add another invoice line, select the **Add Invoice** button.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION FLA-Local Finance Coordinator

Dashboard | FLA Invoice Process | New Invoice

FLA Grant Submit Invoice - Step 2

- Provider Organization Details
- Basic Client Information
- Project Details
- Grant Allocation
- Invoice Line Items

Budget Line Desc.	Budget Line Program - Functi	OCAS Description	Agreement Line Desc.	Total	Approv Total	Balance	Curren
<input type="checkbox"/> HP PRINTER, MACBOOK...	332-2200-100	332 - Carl Perkins - Use of Technology-22...	HP PRINTER, MACBOOK...	\$6,629.00	\$6,629.00	\$6,629.00	
<input checked="" type="checkbox"/> 4 WCM WELDING HELME...	330-2120-100	330 - Carl Perkins - Academic Integrati...	4 WCM WEL... HELME...	\$543.00	\$543.00	\$543.00	

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Program - Function - Project	Units	Unit Cost	Req. Unit Type	Total
<input type="checkbox"/>	4 WCM WELDING HE	330-2120-100	1	543	Each	543

				\$57,317.00	\$57,317.00	\$57,317.00
--	--	--	--	-------------	-------------	-------------

Step 13: If you make a mistake and enter a line you do not want, you can **Cancel** the line if you have not selected the **Update** button. After you update a line, you must select the box under the column **Is Active** to put a check mark in that box and select **Update**, and that line becomes inactive. The **Inactive** line will remain there, but you can use the **Add Invoice** tab to put in the correct Invoice line. Another way to inactivate a line is to put zeroes in the Units and Unit Cost boxes and select **Update**.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION FLA-Local Finance Coordinator

FLA Grant Submit Invoice - Step 2

Provider Organization Details Invoice Summary | One Step Back | Save as Draft | Submit For Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Budget Line Desc.	Budget Line (Program - Functi...)	OCAS Description	Agreement Line Desc.	Total	Approv Total	Balance	Current Li...	Total Inv...
<input checked="" type="checkbox"/>	Technology	330-1000-100	330 - Carl Perkins - Academic Integration...	Technology	\$14,596.00	\$14,596.00	\$14,596.00	\$0.00

Add Invoice

	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Program - Function - Object	Units	Unit Cost	Req. Unit Type	Total	Total To Be Invoic...
<input type="checkbox"/> Update <input checked="" type="checkbox"/> Cancel	<input type="checkbox"/>	Technology	330-1000-100	1.00	5,000.00	Cost Per Each	5000	5000
<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/>	Technology	330-1000-100	1.00	\$7,200.00	Cost Per Each	\$7,200.00	\$7,200.00
<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/>	Technology	330-1000-100	1.00	\$1,000.00	Cost Per Each	\$1,000.00	\$1,000.00
							\$13,200.00	\$13,200.00
							\$58,012.00	\$58,012.00
							\$58,012.00	\$58,012.00
							\$0.00	\$0.00

Step 14: Verify that the Total Invoiced column is correct for the amount of reimbursement you are requesting. Verify that the Invoice OCAS codes and the line item amounts match the OCAS report you will attach in Step 15.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION FLA-Local Finance Coordinator

+ Basic Client Information

+ Project Details

+ Grant Allocation

+ Invoice Line Items

Budget Line Desc.	Budget Line(O... Program - Functior	OCAS Description	Agreement Line Desc.	Total	Approv Total	Balance	Current Lin...	Total Invoiced
<input checked="" type="checkbox"/> HP PRINTER, MACBOOKS,...	332-2200-100	332 - Carl Perkins - Use of Technology-2200 ...	HP PRINTER, MACBOOKS,...	\$6,629.00	\$6,629.00	\$0.00	\$6,629.00	\$6,629.00
<input checked="" type="checkbox"/> 4 WCM WELDING HELMETS	330-2120-100	330 - Carl Perkins - Academic Integration-212...	4 WCM WELDING HELMETS	\$543.00	\$543.00	\$0.00	\$543.00	\$543.00
<input type="checkbox"/> ICEV AGHSINSTRUCTOR L...	330-1000-100	330 - Carl Perkins - Academic Integration-100...	ICEV AGHSINSTRUCTOR L...	\$850.00	\$850.00	\$850.00	\$0.00	\$0.00
<input type="checkbox"/> MBA RESEARCH ONLINE L...	332-2110-100	332 - Carl Perkins - Use of Technology-2110 ...	MBA RESEARCH ONLINE L...	\$4,995.00	\$4,995.00	\$4,995.00	\$0.00	\$0.00
<input type="checkbox"/> ALL PURPOSE LASER MAC...	331-3300-100	331 - Carl Perkins - All Aspects of the Industry...	ALL PURPOSE LASER MAC...	\$36,000.00	\$36,000.00	\$36,000.00	\$0.00	\$0.00
<input type="checkbox"/> FORM LAB STEREO LIGHO...	330-2100-100	330 - Carl Perkins - Academic Integration-210...	FORM LAB STEREO LIGHO...	\$4,600.00	\$4,600.00	\$4,600.00	\$0.00	\$0.00
<input type="checkbox"/> REGISTRATION FOR ISTE	330-2000-100	330 - Carl Perkins - Academic Integration-200...	REGISTRATION FOR ISTE	\$1,200.00	\$1,200.00	\$1,200.00	\$0.00	\$0.00
<input type="checkbox"/> GRANT PLANNING SALARY	332-2100-100	332 - Carl Perkins - Use of Technology-2100 ...	GRANT PLANNING SALARY	\$1,930.00	\$1,930.00	\$1,930.00	\$0.00	\$0.00
<input type="checkbox"/> BENEFITS FOR GRANT PL...	332-2100-100	332 - Carl Perkins - Use of Technology-2100 ...	BENEFITS FOR GRANT PL...	\$570.00	\$570.00	\$570.00	\$0.00	\$0.00
				\$57,317.00	\$57,317.00	\$50,148.00	\$7,172.00	\$7,172.00

+ Attachments

Step 15: Attach the OCAS Expenditure Summary and Detailed Reports that match the amount of reimbursement you are requesting. Attach required receipts and vendor invoices. To attach a document, use your mouse scroll button to go down to the **Attachments** tab, hit the **+(plus)** sign, browse your computer for the file, select **Upload and Save File**.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION FLA-Local Finance Coordinator

+ Basic Client Information

+ Project Details

+ Grant Allocation

+ Invoice Line Items

- Attachments

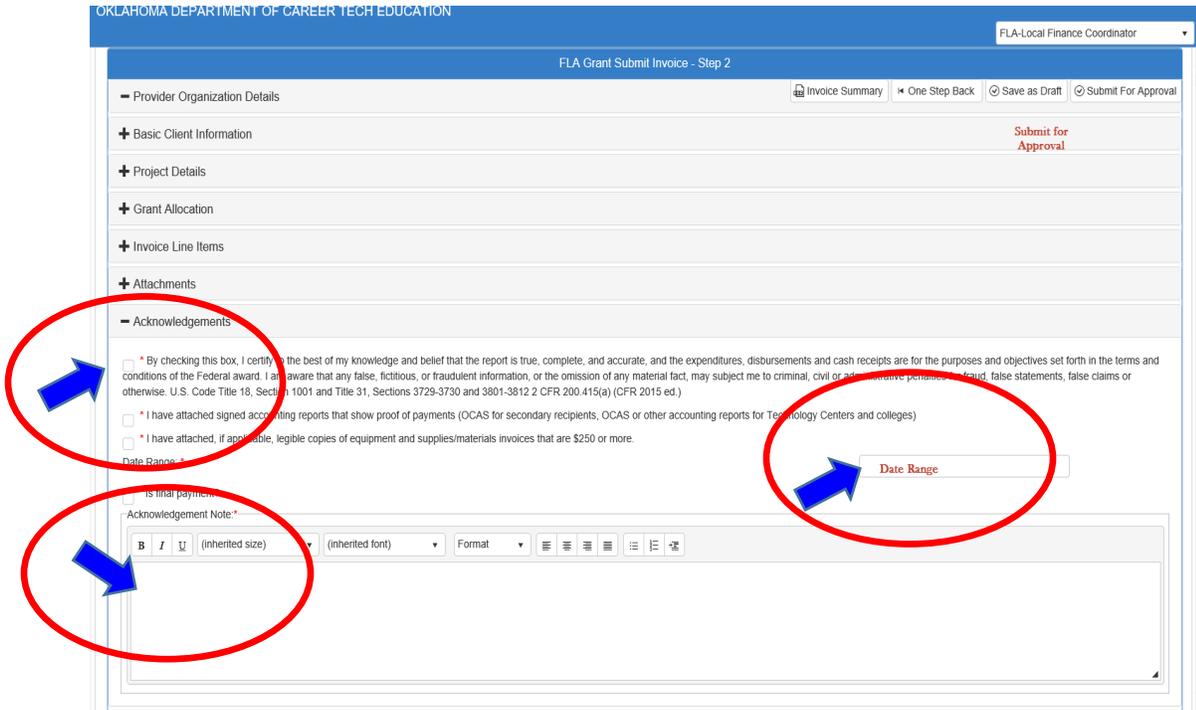
Browse:

Attachment Note:

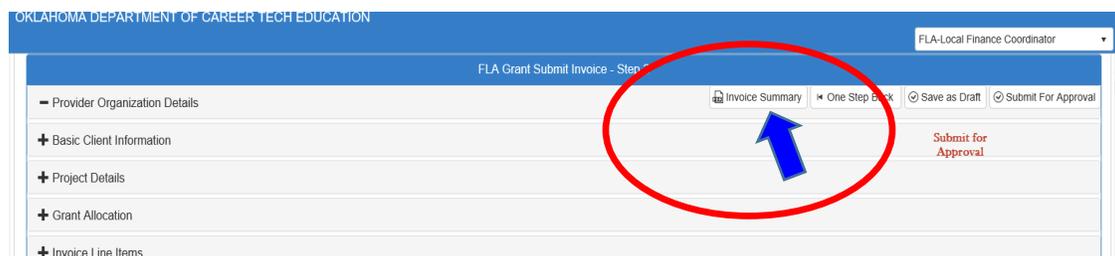
File Name	Date	Note	Action	Detail Status
-----------	------	------	--------	---------------

+ Acknowledgements

Step 16: Go to the **Acknowledgements** tab. Check the required acknowledgement boxes. Input the required date range. If this is a final payment request, check the “is final payment?” box. Type an acknowledgement note in the box. Select the **Submit for Approval** button.



Step 17: Go to Invoice Summary to print a pdf report of the claim you have submitted.



The Invoice has been successfully submitted and will go to ODCTE for review and processing.

Process: FLA Change Request

Change Request or Budget Adjustment?

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

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

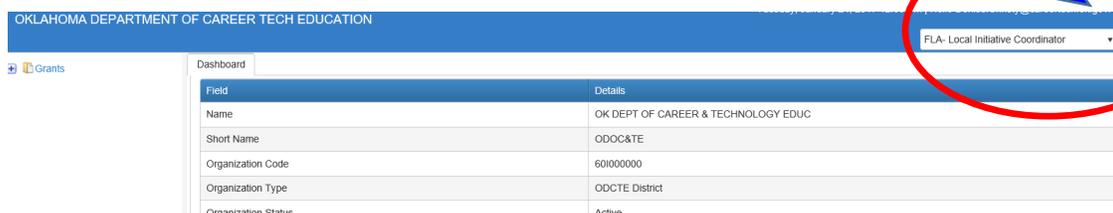
Making a Change Request

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

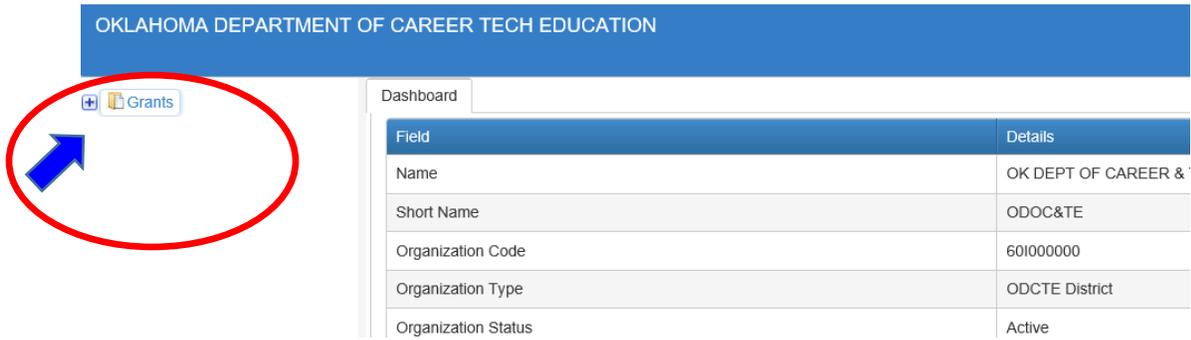
Step 1: Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

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

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



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



OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

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

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



OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

Dashboard

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

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

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

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

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

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

FLA Grant Fund Worksheets List

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

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

Organization District: Program Initiative: --Select--

Approval Function Type: All

Filter on Status: All Search

Save changes Cancel changes

Provider Name	Worksheet Stage	Worksheet Submission Date	Worksheet
---------------	-----------------	---------------------------	-----------

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

Note: The red asterisks* represents a required field.

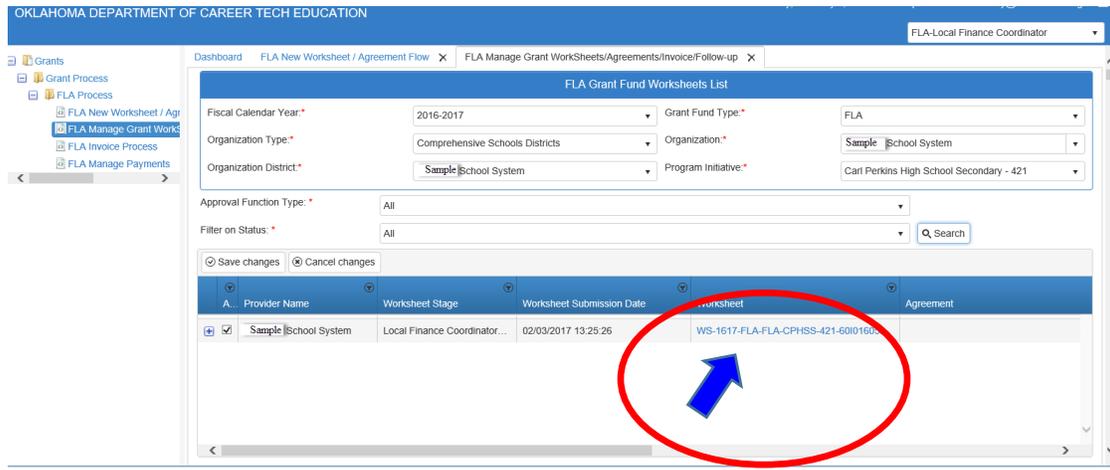
1. Verify **Fiscal Calendar Year** to make sure correct year is showing*.
2. Verify **Grant Fund Type** is set to FLA*.
3. Select your correct **Organization Type** from the drop down menu.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization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

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

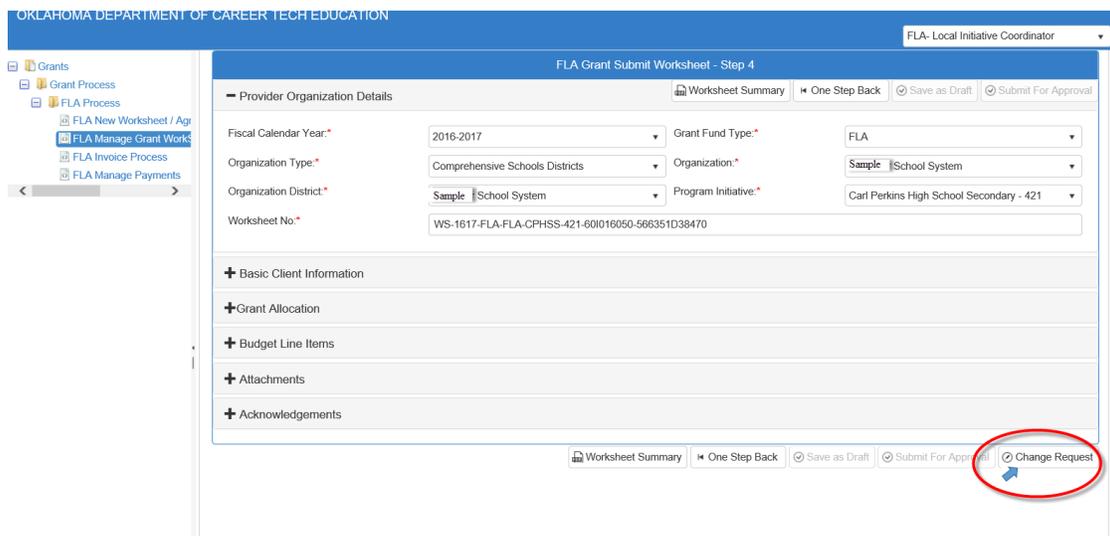
- 1:** Fiscal Calendar Year* (set to 2016-2017)
- 2:** Grant Fund Type* (set to FLA)
- 3:** Organization Type* (set to Colleges)
- 4:** Organization* (text input field with placeholder: 'Enter the first three characters of any word that is in...')
- 5:** Organization District* (empty dropdown menu)
-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

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

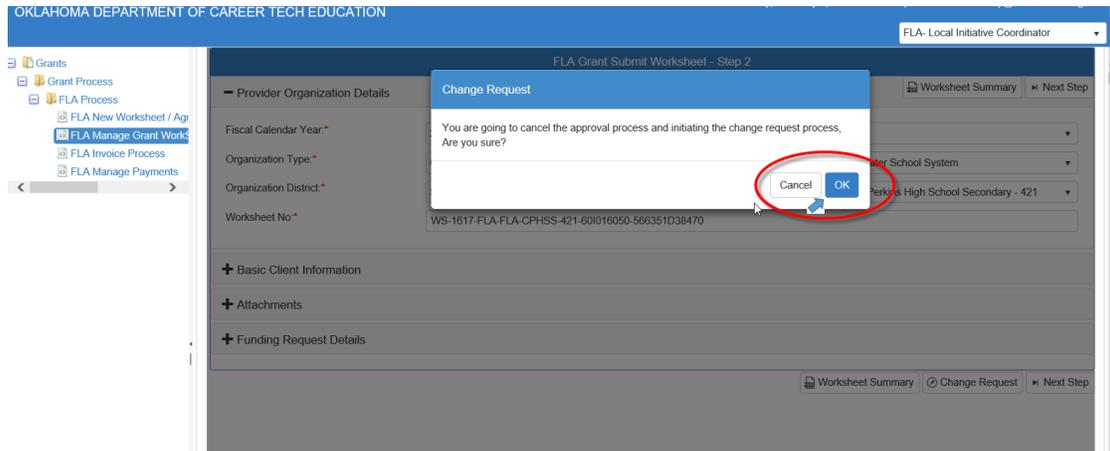
Step 8: After hitting the **Search** button, the worksheet/applications that are in the approval process will be listed. Select the worksheet number to open it.



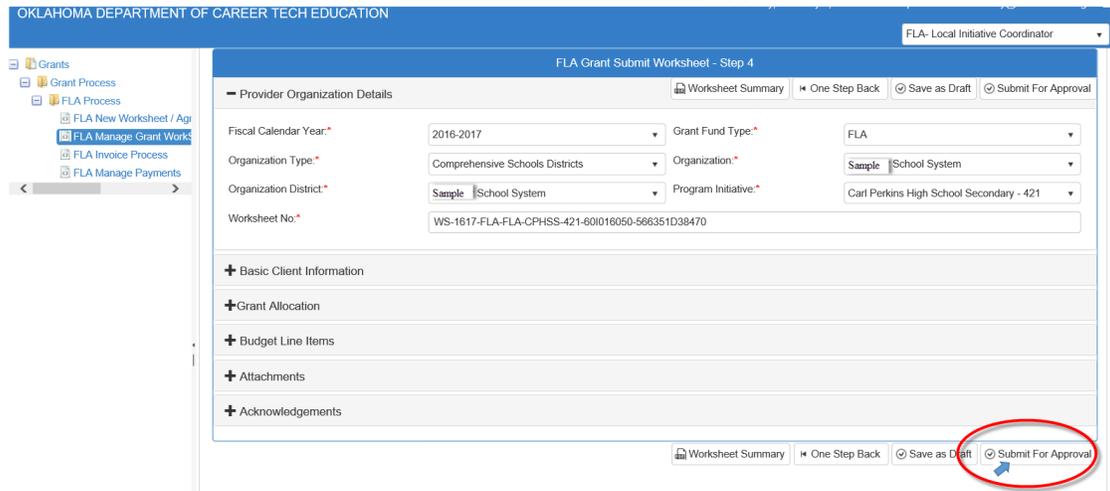
Step 9: To make changes to your Worksheet/Application or Budget, select Change Request.



Step 10: The Change Request process cancels the worksheet/application approval process. Click **OK** to continue.



Step 11: You can now make any changes to the worksheets or budget line items. After making the changes, you must enter **Submit for Approval**.



Step 12: Select Approval Process.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA- Local Initiative Coordinator

FLA Grant Submit Worksheet - Step 4

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

Provider Organization Details

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

Organization Type: Comprehensive Schools Districts | Organization: Sample School System

Organization District: Sample School System | Program Initiative: Carl Perkins High School Secondary - 421

Worksheet No.: WS-1617-FLA-FLA-CPHSS-421-601016050-566351D38470

Basic Client Information

Grant Allocation

Budget Line Items

Attachments

Acknowledgements

Worksheet Summary | One Step Back | Save as Draft | Submit For Approval | Change Request | **Approval Process**

Step 13: Select Approve to send changes to next approval level.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA- Local Initiative Coordinator

Approval Process - FLA Grant Worksheet Approval

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

Click on Approval button to finalize your changes and submission to ODCTE.

Back | **Reject** | **Approve**

Request Number: WS-1617-FLA-FLA-CPHSS-421-601016050-566351D38470

Approval Stage	Approval Date	Approver Role	Approved By	Approver E...	Approval ST...	Note	Private Note
Local Coordinator - 1st Stage	2/8/2017 11:38:...	FLA- Local I...	Denise - Ch...	Denise.Chri...	Cancel for C...	New Process	
Local Finance Coordinator - 2...	2/8/2017 11:38:...						
Superintendent / President - 3...	2/8/2017 11:38:...						
State Local Coordinator - 4th...	2/8/2017 11:38:...						

Current Approval Stage Information

Approved By: Christy Denise | Approval Stage: 1st Stage

Approver School: OK DEPT OF CAREER & TECHNOLOGY EDUC | Approver Role: FLA- Local Initiative Coordinator

Approver Email: Denise.Christy@careertech.ok.gov | Approval Date: 02/08/2017

Approval/Rejection Note

Format | B | I | U | [Text Alignment] | [List] | [Link] | [Image]

Step 14: If a worksheet/application is rejected at any local approval level, it will go back to the First Stage for changes.

FLA Budget Adjustment Process

Change Request or Budget Adjustment?

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

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

Requesting a Budget Adjustment

Logging in to CTIMS

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

Or,

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

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

Roles: Budget Adjustment Process

FLA Local Finance Coordinator



State Initiative Coordinator

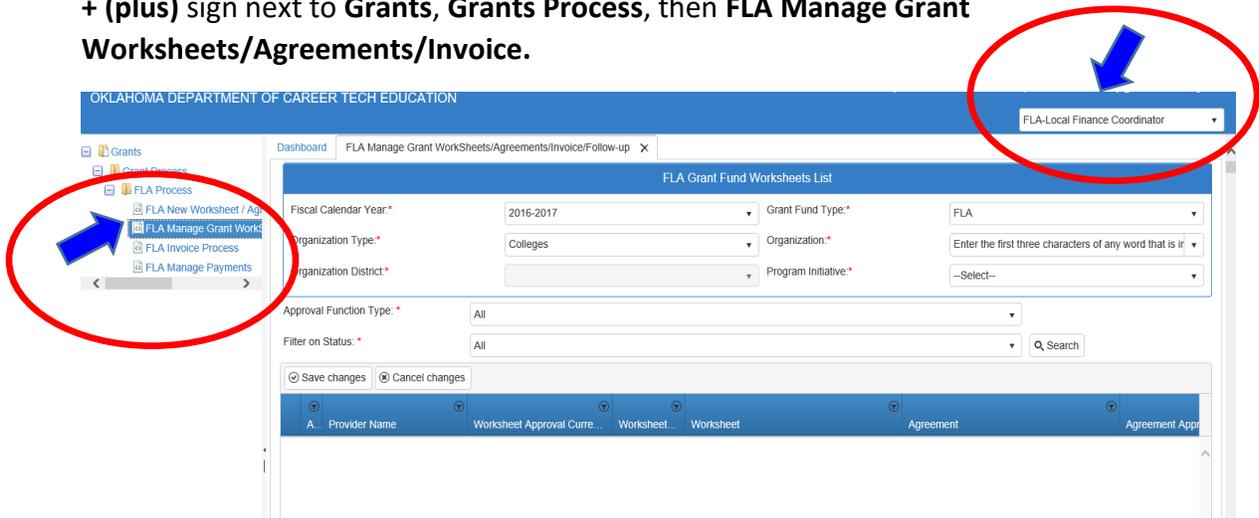


State Initiative Spervisor

Process: FLA Change Request

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

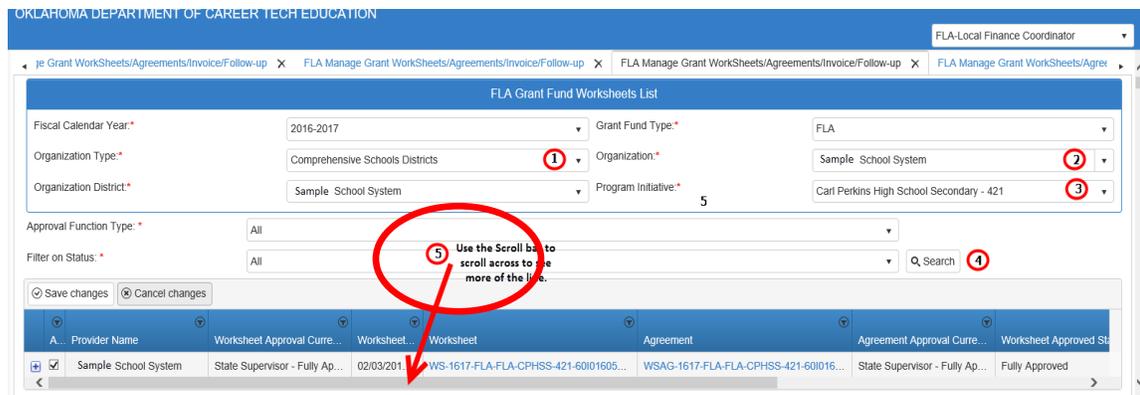
Step 1: After logging in to your CTIMS account, verify that you are logged in with the role of a **FLA-Local Finance Coordinator** in the top right hand corner. Select the **+ (plus)** sign next to **Grants**, **Grants Process**, then **FLA Manage Grant Worksheets/Agreements/Invoice**.



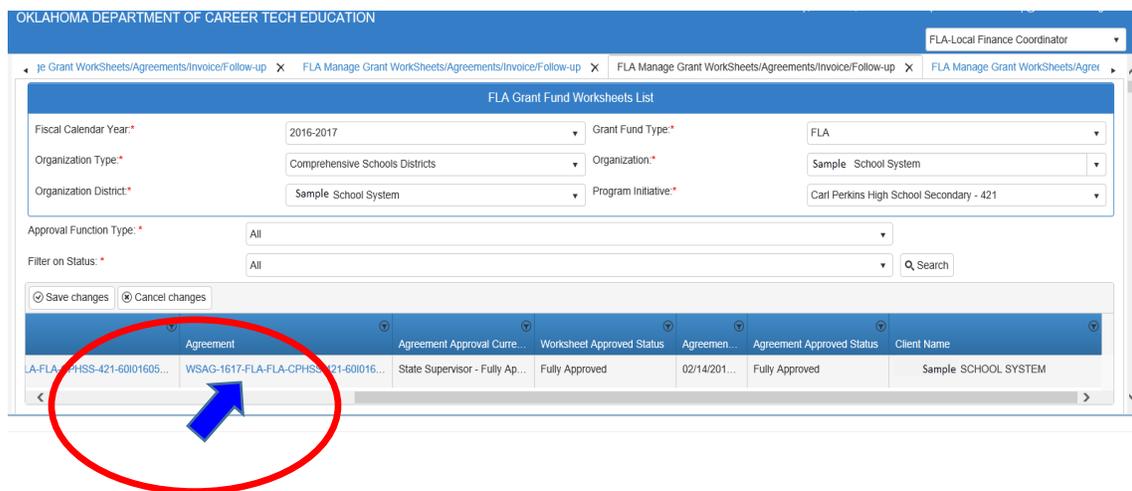
Step 2. Complete the **FLA Manage Grant Worksheets/Agreements/Invoice** form. The tagged numbers on the screen shot correspond to the instruction steps below.

Note: The red asterisks* represents a required field.

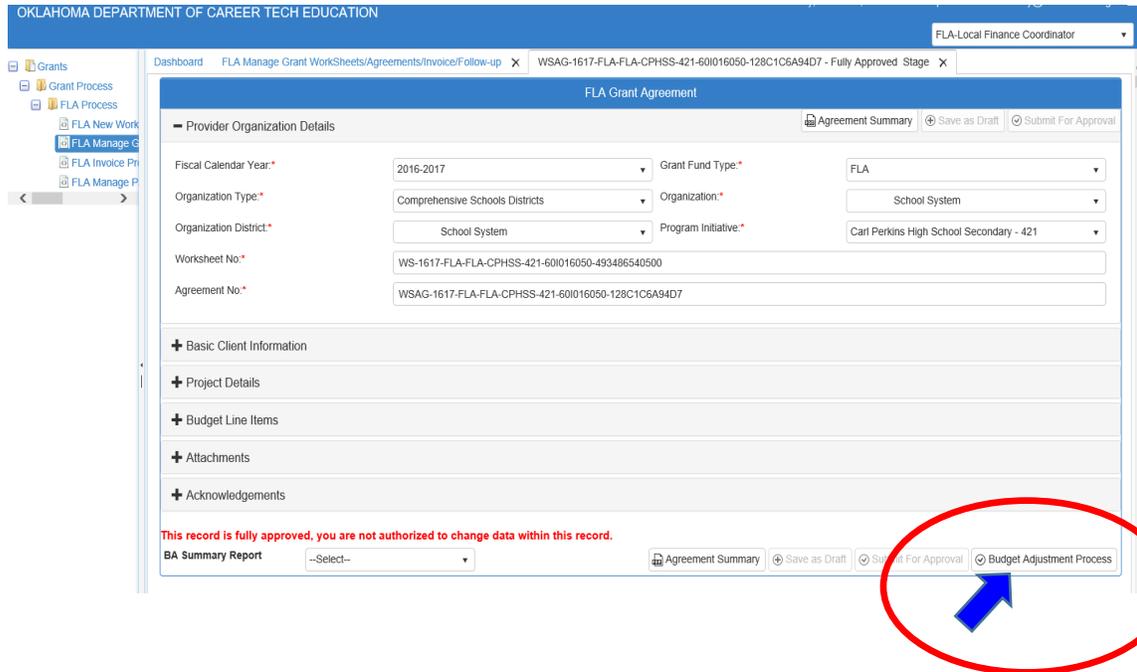
1. Select your correct **Organization Type** from the drop down menu.
2. Select your **Organization** by typing in the first three characters of the name.
3. Select a **Program Initiative** *.
4. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.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



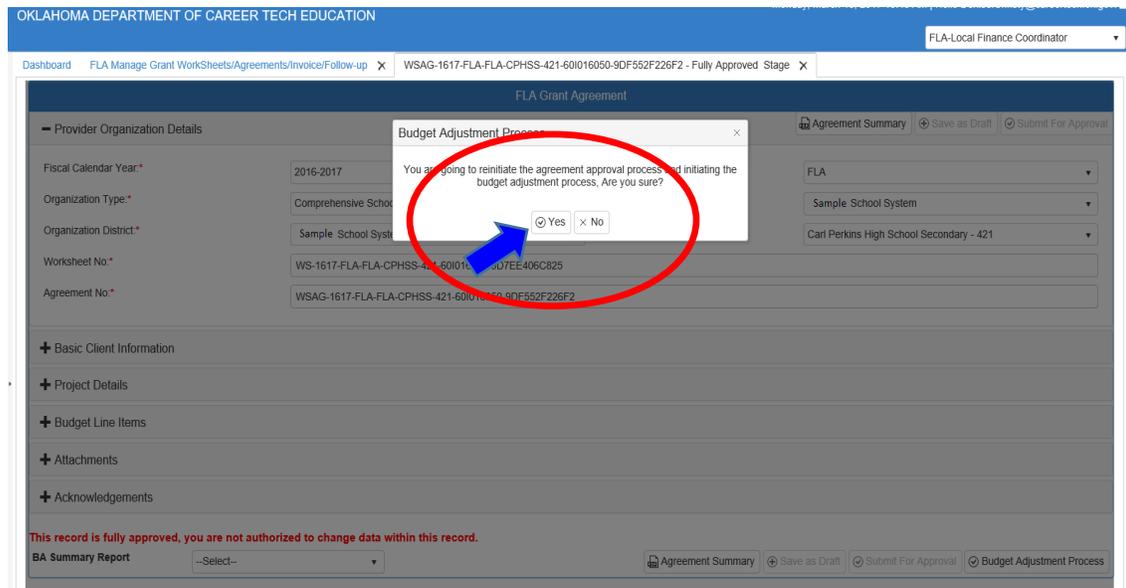
Step 3: In the **Budget Adjustment Process**, you will change the agreement, not the worksheet. Select the number under the **Agreement** column.



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



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



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

The screenshot shows the 'FLA Grant Agreement' interface. The 'Budget Line Items' section is expanded, showing a table with columns: Program - Function - Object, Agreement Line Desc, Units, Unit Cost, Req. Unit Type, Total, Approv Total, Status, Budget Lin., Req. Units, and Req. Un. The table contains two rows: '330-2000-100 Test Budget Adjustment' and '330-1000-500 test'. Below the table, there are buttons for 'Add Budget Line', 'Remove Budget Line', and 'Cancel Budget Line Changes'. A red circle highlights the plus sign next to 'Budget Line Items', and a blue arrow points to the 'Add Budget Line' button.

Step 7: Before submitting your budget changes, you must go into the **Acknowledgements** tab and put in a **Budget Adjustment Justification Note**.

The screenshot shows the 'FLA Grant Agreement' interface. The 'Attachments' section is expanded, showing a 'Budget Adjustment Justification Note' text area with a rich text editor toolbar. Below the text area, there is a checkbox for 'I certify to the best of my knowledge that the submitted agreement budget is complete, and accurate, and that the expenditures fall within the intent of the Carl Perkins act of 2006.' and a 'Submit for Agreement' button. A red circle highlights the plus sign next to 'Attachments', and a blue arrow points to the 'Budget Adjustment Justification Note' text area. Another red circle highlights the 'Submit for Agreement' button, with a blue arrow pointing to it.

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



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

