

CareerTech Information Management System (CTIMS)

EDI Complete User Guidebook



OKLAHOMA
CareerTech

IMD

Information Management Division

June 2023

Table of Contents

EDI Contacts	6
CTIMS Support	Error! Bookmark not defined.
Help and Troubleshooting.....	6
Approval Process Overview	7
Worksheet Process Flow	9
EDI – Local Coordinator (Worksheet Process)	10
Logging into CTIMS.....	10
EDI Grant Submit Worksheet – Step 1	12
EDI Grant Submit Worksheet – Step 2	13
EDI Grant Submit Worksheet – Step 3	17
EDI – State Regional Coordinator (Worksheet Process)	20
Logging into CTIMS.....	20
EDI Grant Submit Worksheet – Step 2	24
EDI Grant Submit Worksheet – Step 3	26
Worksheet Acknowledgements and Approval	26
EDI – State Initiative Supervisor (Worksheet Process)	27
EDI – Local Coordinator, EDI – State Regional Coordinator, or EDI – State Supervisor (Change Request Process)	27
Logging into CTIMS.....	27
Change Request Process	28
Agreement Process Flow.....	33
EDI – Local Coordinator (Agreement Process).....	34
Logging into CTIMS.....	34
Starting New Agreement	35
Agreement Details	36
Agreement Acknowledgments and Approval	38
EDI – Local BIS Director (Agreement Process)	39
Logging into CTIMS.....	39
Accessing the Agreement List	40
Reviewing the Agreement.....	42
Agreement Acknowledgements and Approval	43

EDI – State Regional Coordinator (Agreement Process)	44
Logging into CTIMS.....	44
Accessing the Agreement List	45
Reviewing the Agreement.....	47
Agreement Acknowledgements and Approval	48
EDI - State Initiative Supervisor (Agreement Process).....	49
EDI-Local Superintendent/CEO (Agreement Process)	49
Logging into CTIMS.....	49
Accessing the Agreement List	50
Reviewing the Agreement.....	52
Agreement Acknowledgements and Approval	53
EDI – Local Finance Coordinator (Agreement Process)	54
Logging into CTIMS.....	54
Accessing the Agreement List	55
Reviewing the Agreement.....	57
Entering OCAS Codes	58
Agreement Acknowledgements and Approval	59
Budget Adjustment Process.....	60
EDI – Local Coordinator (Budget Adjustment Process).....	60
Logging into CTIMS.....	60
Accessing the Agreement List	61
Initiating the Budget Adjustment.....	63
Acknowledgements and Approval	64
Releasing Funds.....	64
Invoice Process.....	65
EDI – Local Coordinator (Invoice Process)	66
Logging into CTIMS.....	66
Accessing the Invoice	67
Creating a New Invoice	68
EDI – Local BIS Director (Invoice Process).....	73
Accessing Invoice	73

EDI Grant Submit Invoice – Step 1	75
EDI Grant Submit Invoice – Step 2	75
Agreement Acknowledgements and Approval	77
Invoice Change Request.....	79
EDI – Local Coordinator (Invoice Change Request).....	79
Accessing Invoice	80
EDI Grant Submit Invoice – Step 1	81
Agreement Acknowledgements and Approval	84
EDI – Local BIS Director (Invoice Process).....	86
Logging into CTIMS.....	86
Accessing Invoice	87
EDI Grant Submit Invoice – Step 1	89
EDI Grant Submit Invoice – Step 2	89
Agreement Acknowledgements and Approval	91
EDI – Local Finance Coordinator (Invoice Process)	93
Logging into CTIMS.....	93
Accessing the Invoice	95
EDI Grant Submit Invoice – Step 1	96
EDI Grant Submit Invoice Step-2.....	96
EDI – State Regional Coordinator (Invoice Process)	99
Logging into CTIMS.....	99
Accessing the Invoice	101
EDI Grant Submit Invoice – Step 1	102
EDI Grant Submit Invoice – Step 2	102
EDI – State Requisition Coordinator (Invoice Process)	105
Logging into CTIMS.....	105
Accessing the Invoice	107
EDI Grant Submit Invoice – Step 1	108
EDI Grant Submit Invoice – Step 2	109
ODCTE – EDI Finance Reviewer (Invoice Process).....	112
Logging into CTIMS.....	112

Accessing the Invoice	114
EDI Grant Submit Invoice – Step 1	115
EDI Grant Submit Invoice – Step 2	116
ODCTE – EDI Finance Reviewer (Invoice Process).....	119
Logging into CTIMS.....	119
Accessing the Invoice	121
EDI Grant Submit Invoice – Step 1	122
EDI Grant Submit Invoice – Step 2	123
Printing a PEF	127
View or Request Business Code	130
Logging into CTIMS.....	130
View Requests.....	140
CTIMS Helpful Hints	141
Where’s my Worksheet, Agreement, or Invoice in the approval process?	142
Where are the Funds?.....	142
Releasing Unused Funds	143

EDI Contacts

Note: For questions about specific EDI requirements or content you need to input or attached with your worksheet, contact your **ODCTE Regional Coordinator**.

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. Someone is always monitoring that inbox and will return your email swiftly.

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

For helpful tips, see the [CTIMS Helpful Hints](#) section of this document.

CTIMS Customer Support Contact

Office: (405) 743-5134

Email: CTIMSSupport@careertech.ok.gov

Approval Process Overview

Worksheet Approval Stage (Stage 1)

EDI Role	Process
Local Coordinator	Initiate the Worksheet Approval process. Budget is added here along with company information. Upload the Excel spreadsheet, as well as supporting documents (i.e. 3 rd party vendor proposal).
State Regional Coordinator	Approve the budget and line items and confirm company information is entered completely.
State Initiative Supervisor	Approve the budget and line items. The Worksheet becomes fully approved.

Agreement Approval Stage (Stage 2)

EDI Role	Process
Local Coordinator	Initiate the Agreement approval process. (No changes should need to be made.)
Local BIS Director	Approve the Agreement
State Regional Coordinator	Approve the Agreement. The approval will generate a signature on the SOU.
State Initiative Supervisor	Approve the Agreement. The approval will generate a signature on the SOU.
Local Superintendent/CEO (or designee)	Approve the Agreement. The approval will generate a signature on the SOU.
State Requisition Coordinator	Generate the SOU, submit the requisition to finance, enter the PO number into the Agreement.
Local Finance Coordinator	Enter OCAS codes and add new codes as needed. The Agreement becomes fully approved.

Budget Adjustment Approval Stage (if Agreement changes are necessary)

EDI Role	Process
Local Coordinator	Initiate the Budget Adjustment process. Budget is adjusted and/or new line items added here.
Local BIS Director	Approve the Budget Adjustment.
State Regional Coordinator	Approve the Budget Adjustment.
State Initiative Supervisor	Approve the Budget Adjustment.
Local Superintendent/CEO (or designee)	Approve the Budget Adjustment.
State Requisition Coordinator	Verify the PO amount is still accurate. (if \$ increased, then request finance increase the PO amount)
Local Finance Coordinator	Verify OCAS codes and add new codes as needed. The Budget Adjustment becomes fully approved.

Invoice Approval Stage (Stage 3)

EDI Role	Process
Local Coordinator	After training is complete, the EDI Local Coordinator initiates the invoice process.
Local BIS Director	Review and approve invoice line items and attachments.
Local Finance Coordinator	Review and approve invoice line items and attachments.
State Regional Coordinator	Review and approve invoice line items and attachments.
State Requisition Coordinator	Verify the invoices, print the documentation, and deliver to the finance department.
ODCTE EDI Finance Reviewer	Review and approve the invoice and documentation. The invoice becomes fully approved. Pay the claim.

Worksheet Process Flow

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 with the company information. The mandatory Excel spreadsheet is uploaded.



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, the worksheet goes to the EDI State Supervisor stage. If rejected, it goes back to stage 1.

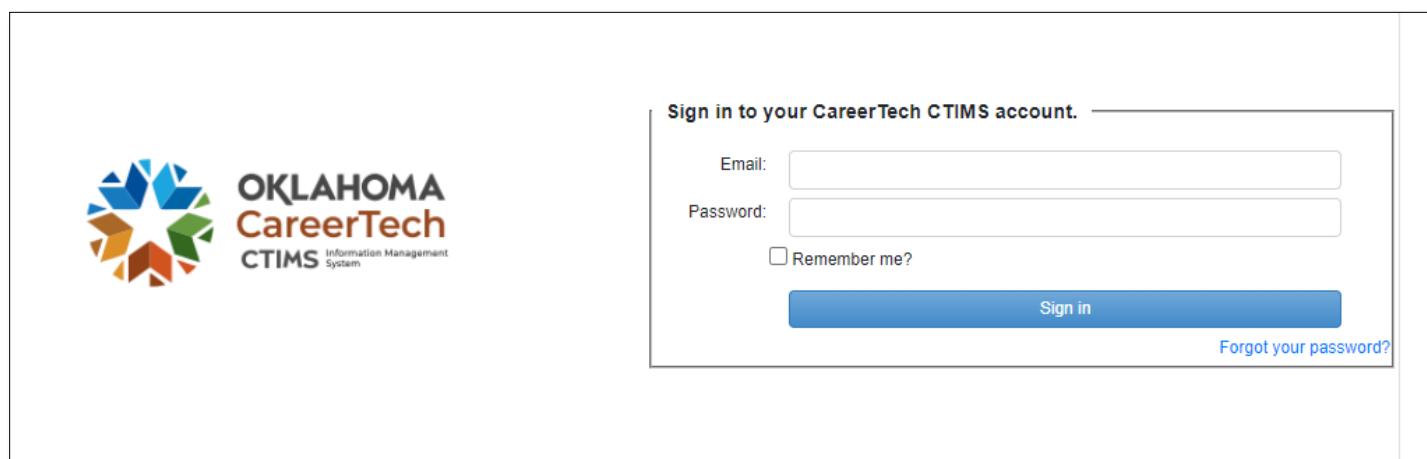


Stage 3 – State Initiative Supervisor - 3rd Approval. ODCTE state staff review and approve or reject the worksheet. If approved, this completes the Worksheet approval. If rejected, goes back to stage 1.

EDI – Local Coordinator (Worksheet Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green **CTIMS Login** button.


CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

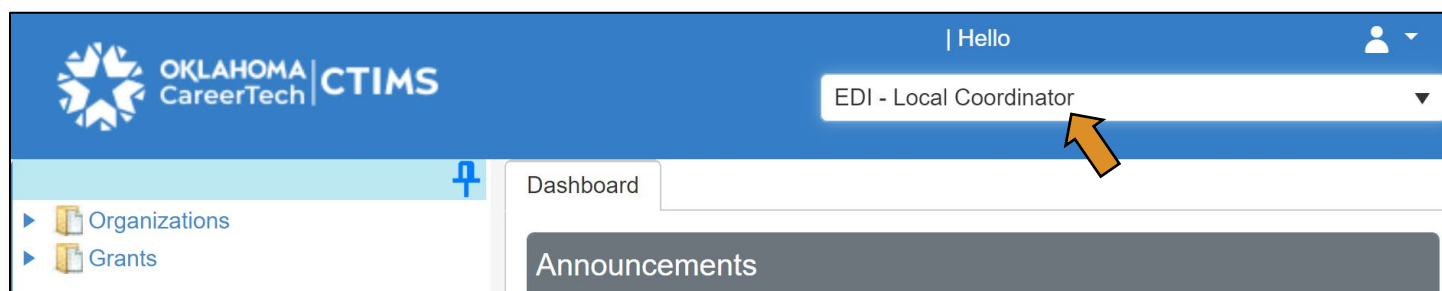
For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

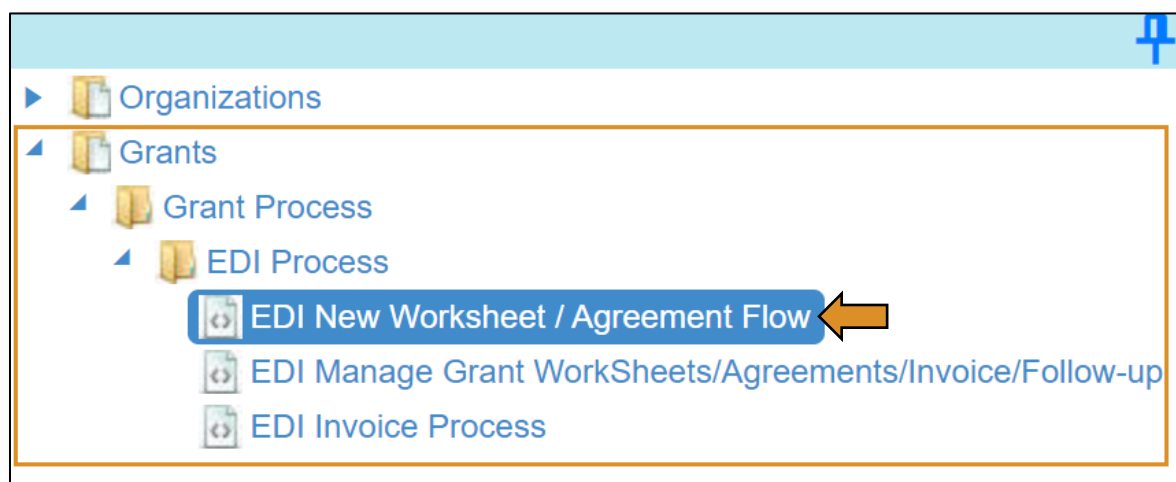
Click here to login to CTIMS 

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator**, contact CTIMSSupport@careertech.ok.gov



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI New Worksheet / Agreement Flow** link.



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 populate based on your organization login credentials.

- Fiscal Calendar Year*** - this field automatically displays the current year. If you are applying for another year, change this field.
- Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
- Organization Type*** - should automatically default to *Technology Center Districts*.
- Organization*** - type the first three letters of your school or organization name and select it.
- Organization District*** - should automatically default to your organization.
- Program Initiative*** - select initiative you are needing from the drop-down menu.
- Worksheet No.*** - automatically displays after selecting the **Program Initiative**.
- Organization Type*** - will automatically display as *Business Masters*.
- Select the appropriate **Client Type*** from the drop-down menu.
- Organization*** - start typing 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**.
- Business Code*** - will automatically display after an **Organization*** is selected.
- After verifying that all information is correct, Click **Save & Next** button.

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

Dashboard | EDI New Worksheet / Agreement Flow

EDI Grant Submit Worksheet - Step 1

12. Save & Next

1. Fiscal Calendar Year*	2022-2023	2. Grant Fund Type*	EDI
3. Organization Type*	Technology Center Districts	4. Organization*	Technology Center
5. Organization District*	Technology Center	6. Program Initiative*	Economic Development - Firefighter (Type 83) -444
7. Worksheet No.*	WS-2223-EDI-EDI-FIREFTR-444-15X111745-CEB3BD6BCB29		

Client Basic Information For work Sheet

8. Organization Type*	Business Masters	9. Client Type*	Business Master (Company)
10. Organization*	FIRE DEPT	11. Business Code*	1172

View Location(s) | View Contact(s)

Year Established		FEI Number	
Primary NAICS Code	Fire Protection (922160)	Secondary NAICS Code	Agriculture, Forestry, Fishing and Hunting (11)
Years in Business		Years in Oklahoma	
No. of hourly Employees	0	No. of Salaried Employees	0
Highest Level of Employment		Client Products	
Approval Status		Vendor Number	
Year Formed		Year Joined	
Year Left		Impact District Id	
Region		DUNS Number	

12. Save & Next

EDI Grant Submit Worksheet – Step 2

- Verify the client information on the *EDI Grant Submit Worksheet – Step 2* page.
- Expand the **Provider Organization Details** section by clicking on the words if it is not already visible.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 2

Provider Organization Details ← Refresh Worksheet Summary Save & Next

Fiscal Calendar Year:* 2022-2023 Grant Fund Type:* EDI

Organization Type:* Technology Center Districts Organization:* Technology Center

Organization District:* Technology Center Program Initiative:* Economic Development - Firefighter (Type ...

Worksheet No.* WS-2223-EDI-EDI-FIREFTR-444-15X111745-CEB3BD6BCB29

Basic Client Information

Funding Request Details

Refresh Worksheet Summary Save & Next

- Verify the *Basic Client Information*.
- Expand the **Basic Client Information** section by clicking on the words.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 2

Provider Organization Details Refresh Worksheet Summary Save & Next

Basic Client Information ←

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

Organization* FIRE DEPT Business Code* 1172 DUNS

Funding Request Details

Refresh Worksheet Summary Save & Next

- Expand the **Funding Request Details** section by clicking on the words.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 2

Provider Organization Details Refresh Worksheet Summary Save & Next

Basic Client Information

Funding Request Details ←

New FFT Worksheet

This form is different for each initiative.

- Scroll down to complete all the sections. You must put something in every box with a red asterisk (*).
- Click the **Save & Next** button at the top or bottom of the form.

NOTE: You can click the **Worksheet Summary** button at the top or bottom of the form to view or save the Worksheet details before going to the next step.

IMPORTANT: You must finish the **EDI Grant Submit Worksheet – Step 2** page and click **Save & Next**.

EDI Grant Submit Worksheet - Step 2

Provider Organization Details

Refresh
Worksheet Summary
Save & Next

Basic Client Information

Funding Request Details

New FFT Worksheet

Fire Station Name *

Fire Station Mailing Address *

Chief's Name *

Chief's Phone *

Chief's Email Address *

Contact's Name *

Contact's Title *

Contact's Phone Number *

Contact's Email Address *

Contract Start Date *

Current Employees * (Numeric value)

Number Of Trainees * (Numeric value)

Why is training being requested?

☐ Maintain

☐ Upgrade

What type of training is being requested?

☐ Assessments

☐ Training

☐ Consumables

☐ Curriculum Books

☐ Curriculum Development

☐ Video Development

☐ Travel

☐ Equipment

☐ Software

Miscellaneous


Refresh
Worksheet Summary
Save & Next

Program Initiative Example Forms

TIP & TIG Worksheet:

EDI Grant Submit Worksheet - Step 2	
Provider Organization Details	Refresh Worksheet Summary Save & Next
Basic Client Information	
Funding Request Details	
New TIP Worksheet	
Client Name *	<input type="text"/>
FEI Number *	<input type="text"/>
NAICS Code *	<input type="text"/>
Client's Mailing Address *	<input type="text"/>
CEO's Name	<input type="text"/>
CEO's Phone	<input type="text"/>
CEO's Email Address	<input type="text"/>
Contact's Name *	<input type="text"/>
Contact's Title *	<input type="text"/>
Contact's Phone Number *	<input type="text"/>
Contact's Email Address *	<input type="text"/>
Client's Product	<input type="text"/>
Years in Business *	<input type="text"/> (Numeric value)
Years in Oklahoma *	<input type="text"/> (Numeric value)
Number of Hourly Employees *	<input type="text"/> (Numeric value)
Number of Salaried Employees *	<input type="text"/> (Numeric value)
What has been the highest level of employment? *	<input type="text"/>

Firefighter Training Worksheet:

EDI Grant Submit Worksheet - Step 2	
Provider Organization Details	Refresh Worksheet Summary Save & Next
Basic Client Information	
Funding Request Details	
New FFT Worksheet	
Fire Station Name *	<input type="text"/>
Fire Station Mailing Address *	<input type="text"/>
Chief's Name *	<input type="text"/>
Chief's Phone *	<input type="text"/>
Chief's Email Address *	<input type="text"/>
Contact's Name *	<input type="text"/>
Contact's Title *	<input type="text"/>
Contact's Phone Number *	<input type="text"/>
Contact's Email Address *	<input type="text"/>
Contract Start Date *	<input type="text"/> 
Current Employees *	<input type="text"/> (Numeric value)
Number Of Trainees *	<input type="text"/> (Numeric value)

New Safety Worksheet:

EDI Grant Submit Worksheet - Step 2	
Provider Organization Details	Refresh Worksheet Summary Save & Next
Basic Client Information	
Funding Request Details	
New Safety Worksheet	
Contact's Name*	<input type="text"/>
Contact's Title*	<input type="text"/>
Contact's Phone Number*	<input type="text"/>
Contact's Email Address*	<input type="text"/>
Contract Start Date*	<input type="text"/>
Current Employees*	<input type="text"/> (Numeric value)
Number Of Trainees*	<input type="text"/> (Numeric value)
Why is training being requested?	
<input type="checkbox"/> Maintain <input type="checkbox"/> Upgrade	
What type of training is being requested?	
<input type="checkbox"/> Assessments <input type="checkbox"/> Training <input type="checkbox"/> Consumables <input type="checkbox"/> Curriculum Books <input type="checkbox"/> Curriculum Development <input type="checkbox"/> Video Development <input type="checkbox"/> Travel <input type="checkbox"/> Equipment <input type="checkbox"/> Software Miscellaneous <input type="text"/>	
Refresh Worksheet Summary Save & Next	

Economic Development – Incubator Worksheet:

EDI Grant Submit Worksheet - Step 2	
+ Provider Organization Details	Refresh Worksheet Summary Save & Next
+ Basic Client Information	
+ Attachments	
- Funding Request Details	
New Incubator Worksheet	
Contact's Name*	<input type="text"/>
Contact's Title*	<input type="text"/>
Contact's Phone Number*	<input type="text"/>
Contact's Email Address*	<input type="text"/>
Contract Start Date*	<input type="text"/>
Current Employees*	<input type="text"/>
Number Of Trainees*	<input type="text"/>
Why is training being requested?	
<input type="checkbox"/> Maintain <input type="checkbox"/> Upgrade	
What type of training is being requested?	

EDI Grant Submit Worksheet – Step 3

- On the *EDI Grant Submit Worksheet – Step 3* page, click on the words **Budget Line Items** to expand the section of the form if it is not automatically expanded. 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 item. Just click in the blank box under the column titles to begin.
 - Complete **Budget Line Desc** with the description of the item.
 - Complete **Req. Units** (Required Units-Zero (0) is not acceptable in this field).
 - Complete **Req. Unit Cost** (Required Unit Cost-Zero (0) is not acceptable in this field).
 - Complete **Req Unit Type** (Required Unit Type)-Select **Req Unit Type** from the drop-down menu.
 - If your school will match any of the funds, enter that amount under **Matched Funds**.
 - Click **Add Budget Line**, to add more budget lines and repeat steps 1-5. (You may need to scroll to the right to see all columns).

EDI Grant Submit Worksheet - Step 3

Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$26,035.00	\$26,035.00	\$23,604.90	\$0.00	\$3,431.00	\$23,604.90

Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched Funds
	0.00	\$0.00		\$0.00	\$0.00	

- Add supporting or required attachments. Expand the **Attachments** section by clicking the words.
- Click **Select files...** and find your document.
- Select **Upload & Save file**.

Attachments

Browse:

Attachment Note:

☒ Active/Inactive file(s)
 ☒ Delete file(s)

Status	File Name	Attachment Note	Uploaded Date	Action
Acknowledgements				

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

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.

- **Save as Draft**
Click **Save as Draft**, it will save all information you have input on the **Funding Request Details** form and the **Budget Line Items** section without submitting for approval. This will let you stop the process and resume later. 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.
- Expand the **Acknowledgements** section by clicking on the word acknowledgements.
- Check the Acknowledgement box.
- Add an **Acknowledgement Note***.
- Click **Submit for Approval** if everything is ready to be submitted.

EDI Grant Submit Worksheet - Step 3

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

B **I** **U** (inherited size) (inherited font) Format

All is correct. AB

NOTE: To make your worksheet is complete and accurate, you can view or print your worksheet summary page before submitting for approval. ****Be sure to Save as Draft** before viewing the Worksheet Summary.

- Click on the **Worksheet Summary** button at the top or bottom of the form.

EDI Grant Submit Worksheet - Step 3

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

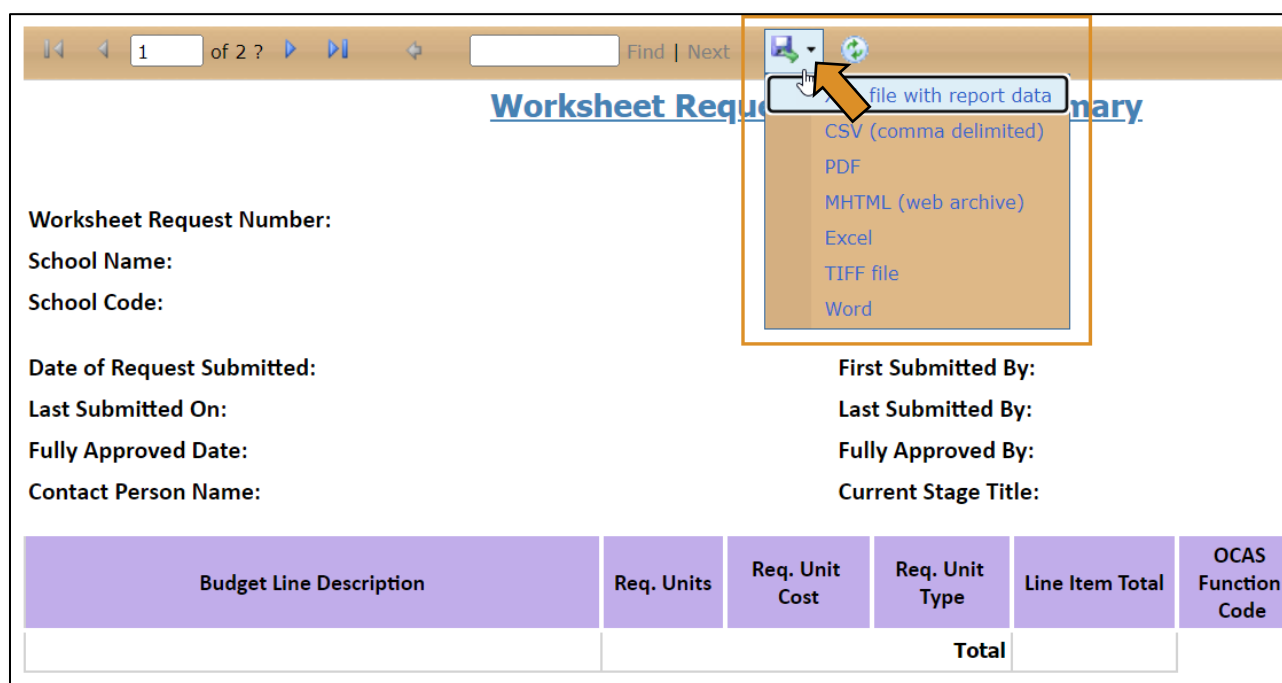
☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

B **I** **U** (inherited size) (inherited font) Format

All is correct. AB

- To export, save and/or print the **Worksheet Summary**, click the blue disc button, and choose *Excel* or *PDF* from the drop-down menu.



The screenshot shows the 'Worksheet Request Individual Summary' form. At the top, there is a navigation bar with '1 of 2' and a 'Find | Next' button. Below this, the title 'Worksheet Request Individual Summary' is displayed. The form contains several input fields for metadata: Worksheet Request Number, School Name, School Code, Date of Request Submitted, Last Submitted On, Fully Approved Date, Contact Person Name, First Submitted By, Last Submitted By, Fully Approved By, and Current Stage Title. A dropdown menu is open, showing options: 'file with report data', 'CSV (comma delimited)', 'PDF', 'MHTML (web archive)', 'Excel', 'TIFF file', and 'Word'. Below the form fields is a table with the following columns: Budget Line Description, Req. Units, Req. Unit Cost, Req. Unit Type, Line Item Total, and OCAS Function Code. The table has a 'Total' row at the bottom.

- To return to the *EDI Grant Submit Worksheet – Step 3* form to submit for approval, click the **X** on the *Grant Worksheet Summary* tab at the top of your screen to close this tab. You should now be on the *EDI Grant Submit Worksheet – Step 3* screen.



The screenshot shows a browser window with multiple tabs. The active tab is 'Grant Worksheet Summary', which is highlighted with an orange box and a red 'X' icon. The browser address bar shows the URL: 'Dashboard EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up WS- -EDI-EDI-FIREFTR-444-15X111745-CEB3BD6BCB29 - New'. The page content shows the 'Worksheet Request Individual Summary' form, similar to the one in the previous screenshot.

- On the *EDI Grant Submit Worksheet – Step 3* form, click the **Submit for Approval** button at the top or bottom of the form.

The *worksheet* will now go to the **EDI – State Regional Coordinator** for approval.

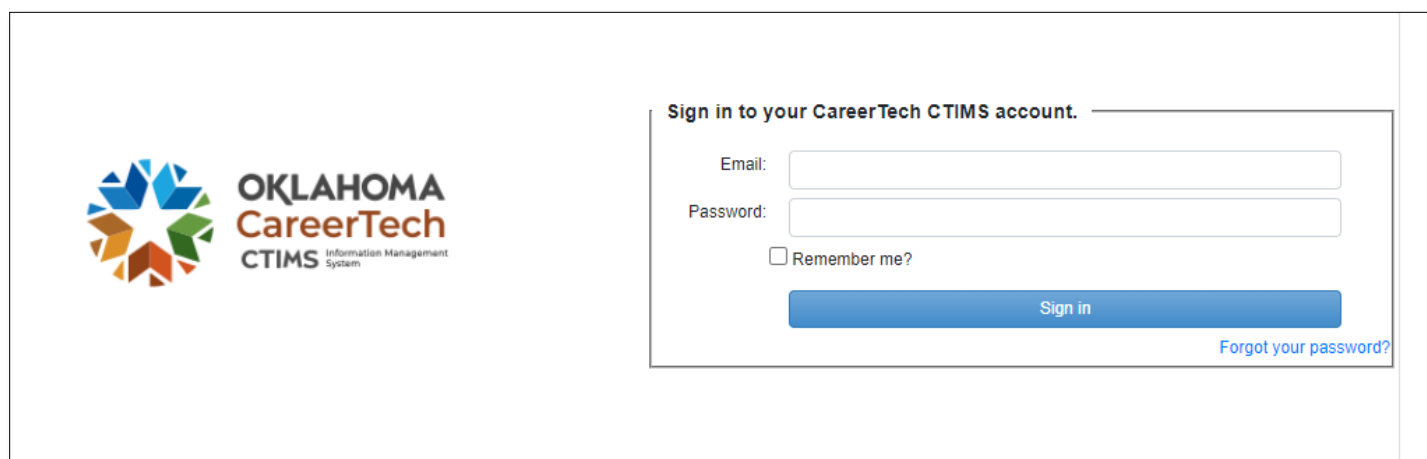
Change Request: After you submit the worksheet/application, if there are any changes that need to be made, due to change in training need or it has been rejected, you will have to use the Change Request process. The *EDI – Local Coordinator* can initiate the change request process at any time before it is fully approved by the ODCTE staff. You can find complete instructions on here.

IMPORTANT: If you need to do a **Change Request**, do not select the **EDI New Worksheet/Agreement Flow** option on the left navigation.

EDI – State Regional Coordinator (Worksheet Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.


CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

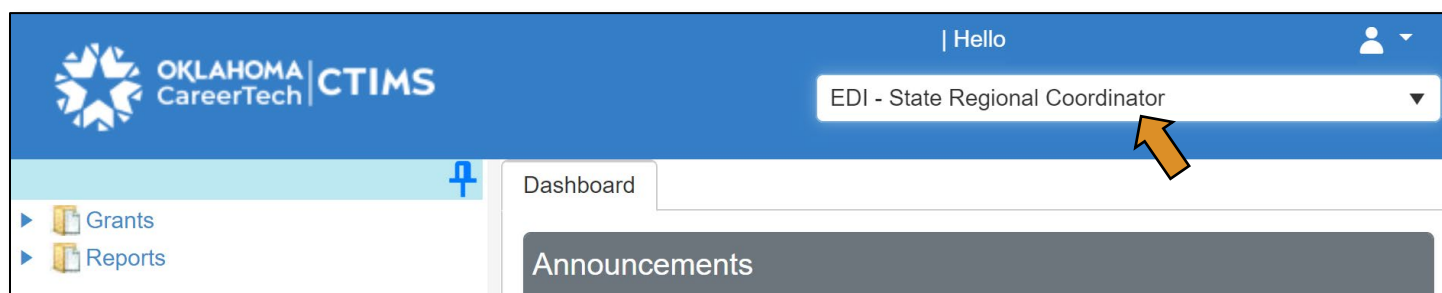
For help with CTIMS, contact the Information Management Division via email:
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Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

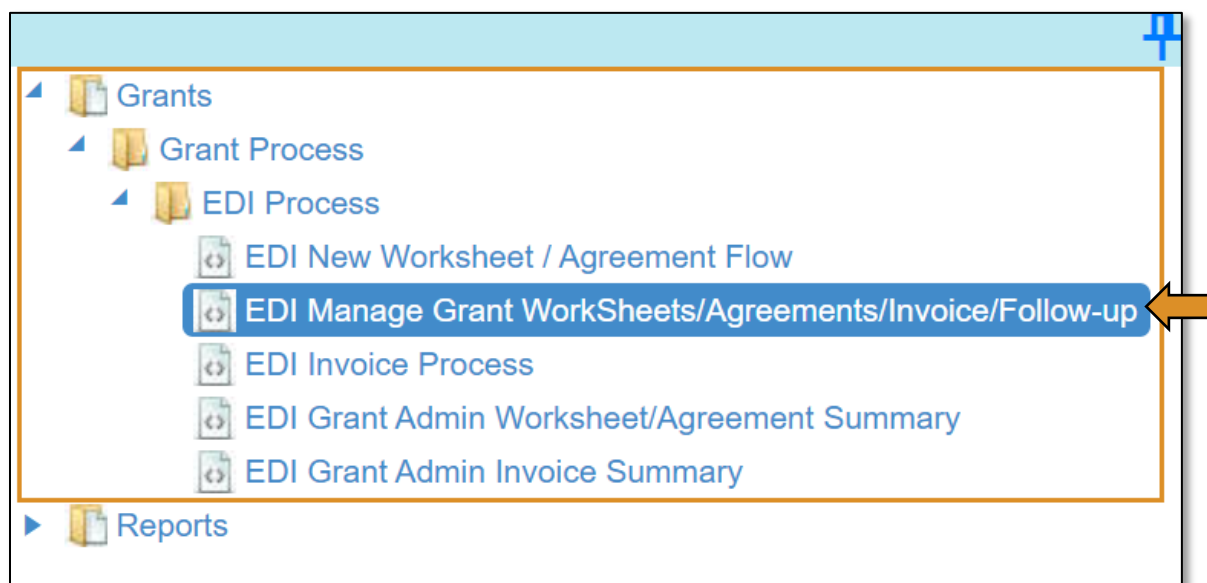
Click here to login to CTIMS 

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

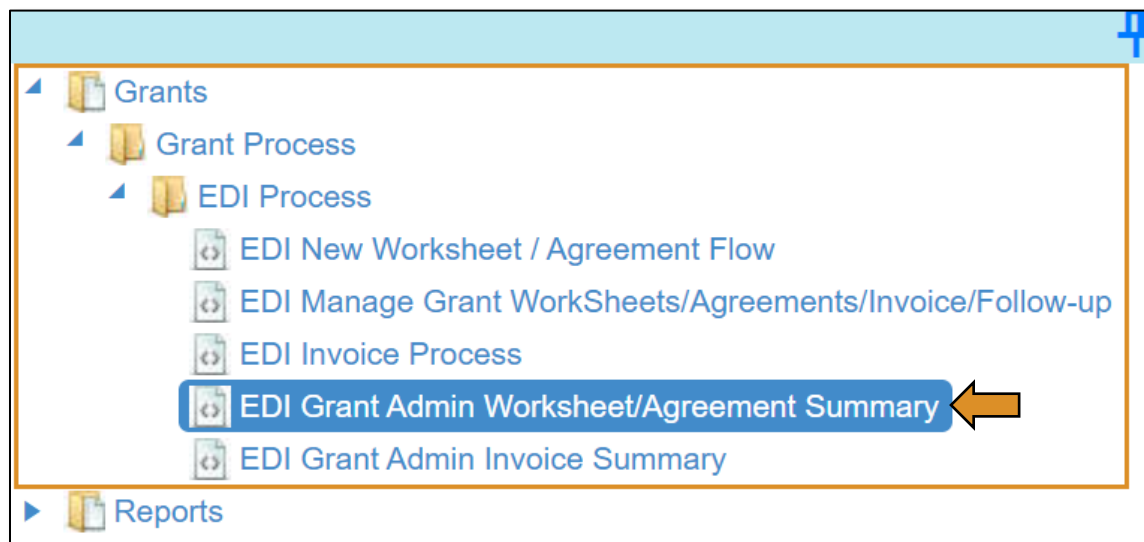
If you do not see **EDI – State Regional Coordinator**, contact CTIMSSupport@careertech.ok.gov



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link 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 for all schools.
- Click **Search** to display all requests in the display screen.

Dashboard | EDI Grant Admin Worksheet/Agreement Summary

EDI Grant Admin Worksheet/Agreement Summary

Fiscal Calendar Year: *

Grant Fund Type: * EDI

Program Initiative: ☒ All * --Select--

Organization Type: ☒ All *

Organization: * S... ☒ All

Approval Function Type: * All

Filter on Status: * All

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet
<input checked="" type="checkbox"/>	Country Technology Center	TECH CENT...	EDI		WS- -EDI-EDI-SAFETY

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. Many of these fields will automatically populate based on your organization login credentials.

NOTE: The red asterisks* represents a required field.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

- Click the black arrow, on the row of the grant you need to approve, to open the worksheet summary of the Approval Stages for the worksheet. The **Worksheet Approval Current Stage** column will show the current role that needs to take action on the worksheet.

EDI Grant Fund Worksheets List

1. Fiscal Calendar Year*:

2. Grant Fund Type*:

3. Organization Type*:

4. Organization*:

5. Organization District*:

6. Program Initiative*:

7. Approval Function Type*:

8. Filter on Status*:

9.

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet
	Technology Center	CENTRAL PL...	EDI - Regional Coordinator		WS- -EDI-EDI-TIP-434-05X111745-

[Worksheet Summary](#) [Agreement Summary](#)

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Ap
EDI Local Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov	

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

Dashboard | EDI Grant Admin Worksheet/Agreement Summary

EDI Grant Admin Worksheet/Agreement Summary

Fiscal Calendar Year: Grant Fund Type: EDI

Program Initiative: ☒ All --Select-- Organization Type: ☒ All

Organization: S... ☒ All

Approval Function Type: All

Filter on Status: All

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet
<input checked="" type="checkbox"/>	Country Technology Center	TECH CENT...	EDI		WS- -EDI-EDI-SAFETY

EDI Grant Submit Worksheet – Step 2

- Click on the words **Basic Client Information** and **Funding Request Details** to expand these sections if you want to review the information.

Dashboard | EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up | WS- -EDI-EDI-TIP-434-05X111745-1BBD05688F36

EDI Grant Submit Worksheet - Step 2

Provider Organization Details

Basic Client Information

Organization Type: Business Masters Client Type: Business Master (Company)

Organization: CENTRAL ... Business Code: 29510 DUNS:

Funding Request Details

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.

- Click the blue disc to export to a pdf.

- Click **Next Step** to proceed.

EDI Grant Submit Worksheet – Step 3

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

Worksheet Acknowledgements and Approval

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

At this point, your *worksheet/application* is successfully submitted. The worksheet will now go to the **EDI – State Initiative Supervisor** for approval.

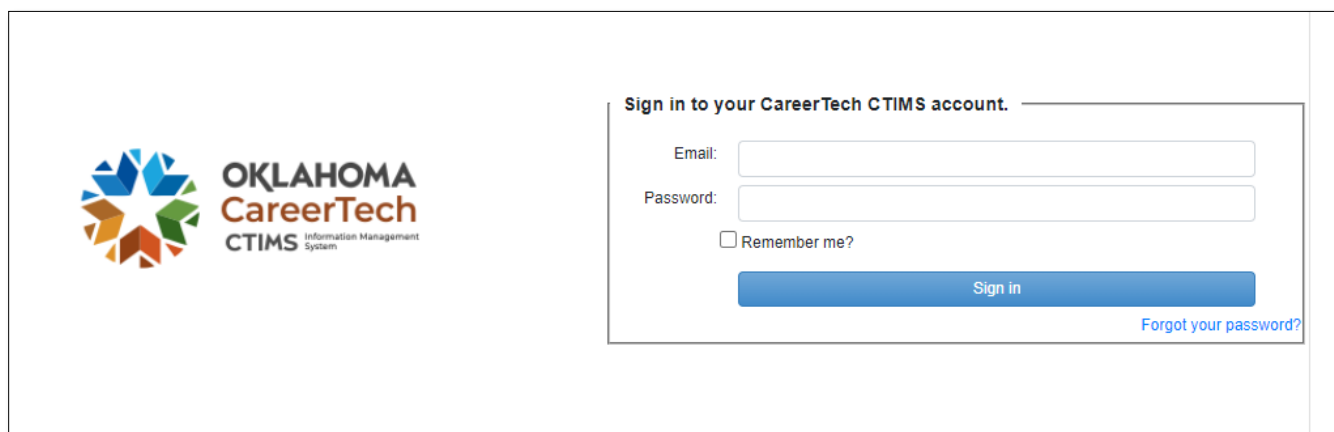
EDI – State Initiative Supervisor (Worksheet Process)

See approval instructions [here](#).

EDI – Local Coordinator, EDI – State Regional Coordinator, or EDI – State Supervisor (Change Request Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](#) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

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Click here to login to CTIMS

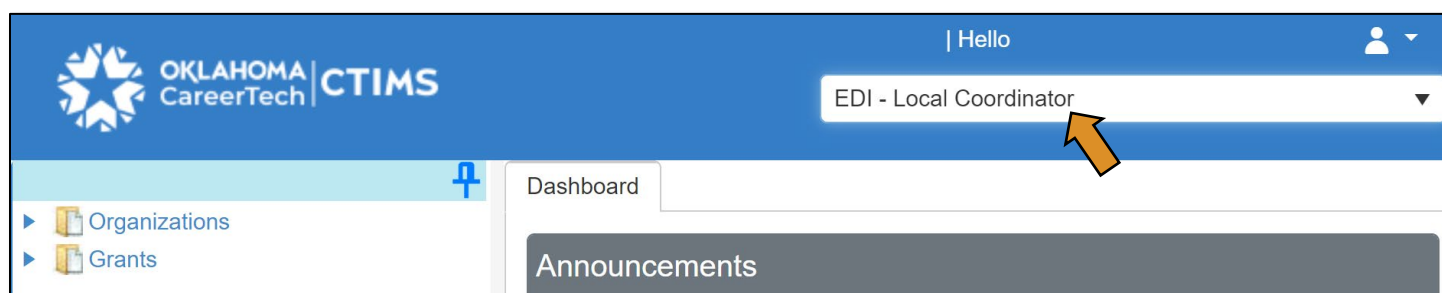


Change Request Process

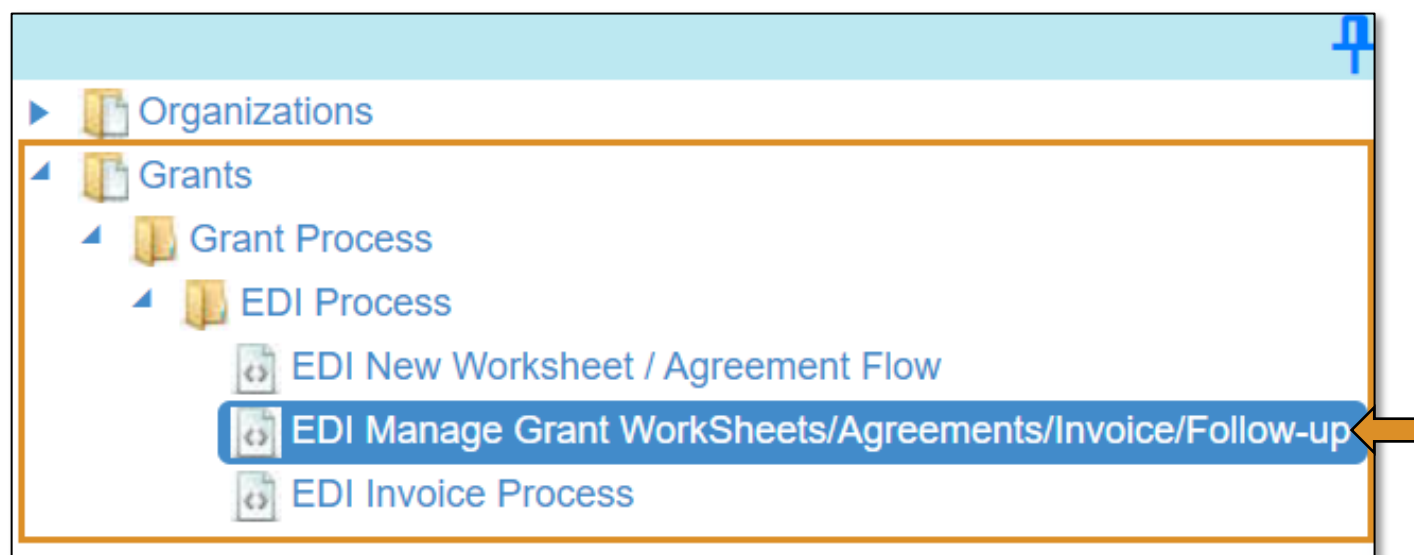
After a **Worksheet** is submitted for approval, you must go through the **Change Request Process** to make any changes. The **EDI – Local Coordinator**, **ODCTE – State Regional Coordinator**, and **ODCTE – State Supervisor** can initiate the change request at any time during the **Worksheet** process. Once the **Worksheet** is fully approved, a change request is no longer an option.

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator**, **EDI – State Regional Coordinator**, or **EDI – State Supervisor** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator**, **EDI – State Regional Coordinator**, or **EDI – State Supervisor** contact CTIMSSupport@careertech.ok.gov



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

NOTE: The red asterisks* represents a required field.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes a navigation bar with 'Dashboard' and 'EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up'. The form contains several dropdown menus and a search button, each with a numbered callout: 1. Fiscal Calendar Year*, 2. Grant Fund Type*, 3. Organization Type*, 4. Organization*, 5. Organization District*, 6. Program Initiative*, 7. Approval Function Type*, 8. Filter on Status*, and 9. Search.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' table after a search. The table has columns: Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement. Two rows are visible, with callouts pointing to the 'Worksheet' column values: 'WS- -EDI-EDI-FIREFTR-444-15X111745-CEB3' and 'WS- -EDI-EDI-FIREFTR-444-15X111745-E970B'.

Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
ENID FIRE DEPT	New-Draft		WS- -EDI-EDI-FIREFTR-444-15X111745-CEB3	
GARFIELD COUNTY PUBLIC SA...	EDI State Regional Coordinator - ...		WS- -EDI-EDI-FIREFTR-444-15X111745-E970B	

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

EDI Grant Submit Worksheet - Step 3

Provider Organization Details

Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval **Change Request**

Fiscal Calendar Year:* 202 -202 Grant Fund Type:* EDI

Organization Type:* Technology Center Districts Organization:* Technology Center

Organization District:* Technology Center Program Initiative:* Economic Development - Firefighter (Type 83) -444

Worksheet No:* WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval **Change Request**

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

EDI Grant Submit Worksheet - Step 3

Change Request

You are going to cancel the approval process and initiating the change request process, Are you sure?

Cancel **OK**

- If changes to the *Operating Unit* or *Purchase Order Number* need to be revised, expand the *Project Details* section by clicking on the words "Project Details".

EDI Grant Submit Worksheet - Step 3

Provider Organization Details

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

Basic Client Information

Project Details

Contact Name: Project Start Date:* 7/1/2022

Operating Unit: Purchase Order Number: Purchase Order Date: 6/14/2023

Budget Line Items

Attachments

Acknowledgements

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

- To revise the budget, expand the *Budget Line Items* section by clicking on the words “*Budget Line Items*”.
 - Change the budget line description by clicking in the field under the **Budget Line Desc.** column.
 - Change the **Req. Units**, **Req. Unit Cost**, and/or the **Req. Unit Type** columns to adjust the budget line items. This will change the Total columns
 - To make a budget line item inactive, click inside the field under the **Status** column to check the box.

EDI Grant Submit Worksheet - Step 3

Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$3,310.00	\$0.00	\$23,725.90	\$3,310.00

+ Add Budget Line Remove Budget Line Cancel Budget Line Changes

Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched Funds	Status
EMR/EMT/AEMT/Paramedic refresher	50.00	\$35.00	Cost Per Hour	\$1,750.00	\$1,750.00	0.00	<input type="checkbox"/>
EMR/EMT/AEMT/Paramedic refresher	10.00	\$30.00	Cost Per Hour	\$300.00	\$300.00	0.00	Active

- After making the changes, go to the *Acknowledgement* section.
- Check the certification box and add an acknowledgment note. Add an explanation of any changes made to the agreement in the budget adjustment justification note box.
 - The **Acknowledgment Note*** is a required field.

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

- Select **Submit for Approval** if the changes to the Worksheet are complete.

EDI Grant Submit Worksheet - Step 3

Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

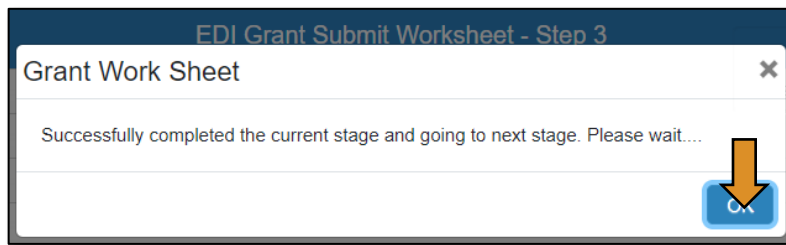
Acknowledgement Note:

B **I** **U** (inherited size) (inherited font) Format

All is correct. AB

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

- Click **OK**.



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

Approval Process - EDI 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.

Request Number: _____

WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
► EDI Local Coordinator - 1st Stag	6/14/2023 2:00:28 ...	EDI - Local Co...	Andra - Beyer	Andra.Beyer@...	Cancel for Cha...	New Process	
EDI State Regional Coordinator - ...	6/14/2023 2:00:58 ...						
EDI State Supervisor - Fully Appro...	6/14/2023 2:00:58 ...						

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

Approval Process - EDI Grant Worksheet Approval

Are you sure?

The *worksheet* will now go back through the regular approval process.

Agreement Process Flow

The Agreement is the working copy of the Budget Line Items that contain 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.)

The Agreement can be started when the **EDI – Local Coordinator receives the email that the Worksheet has been fully approved.

Roles: Agreement Process

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



Stage 2 – Local BIS Director – Approves the Agreement.



Stage 3 – State Regional Coordinator – Approves the Agreement. The approval will generate a signature on the SOU.



Stage 4 – State Initiative Supervisor - Approves the Agreement. The approval will generate a signature on the SOU.



Stage 5 – Local Superintendent/CEO (or designee) – Approves the Agreement. The approval will generate a signature on the SOU.



Stage 6 - State Requisition Coordinator – Generates the SOU, submits the requisition to finance, enters the PO number into the Agreement.



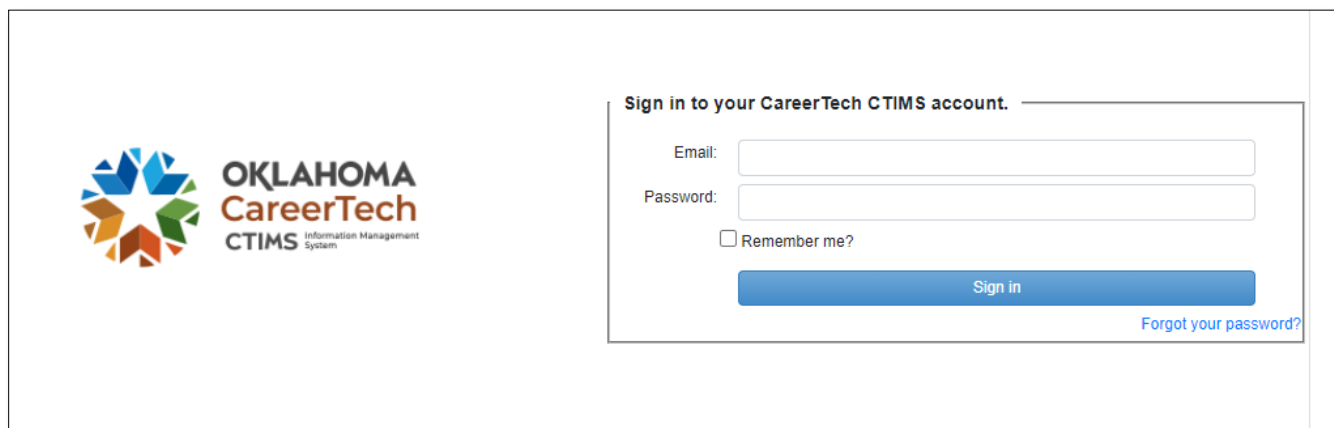
Stage 7 - Local Finance Coordinator – Enters the OCAS codes and adds new codes as needed. The Agreement becomes fully approved. (The tech center is responsible for selecting OCAS codes. See the [OCAS Codes for WED](#) for the codes.)

IMPORTANT: The local coordinator can initiate the budget adjustment process at anytime during the Agreement process IF an invoice has not been started. The local coordinator must contact the regional coordinator prior to initiating the budget adjustment process.

EDI – Local Coordinator (Agreement Process)

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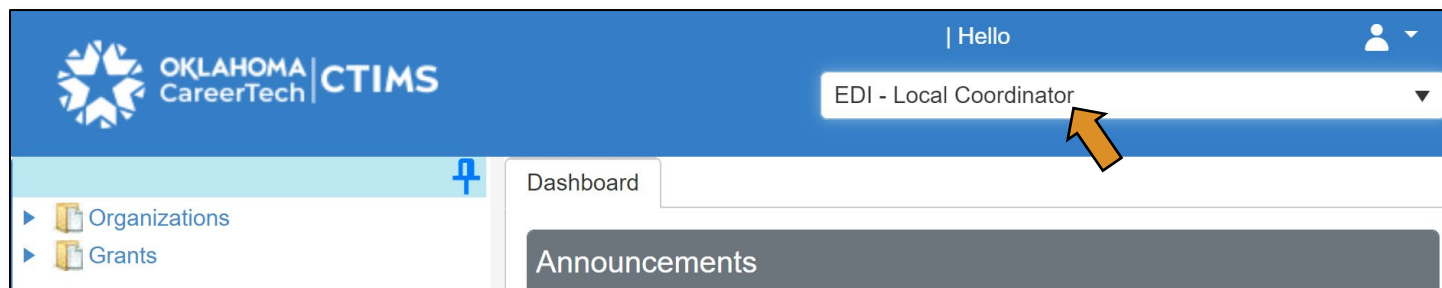
Click here to login to CTIMS



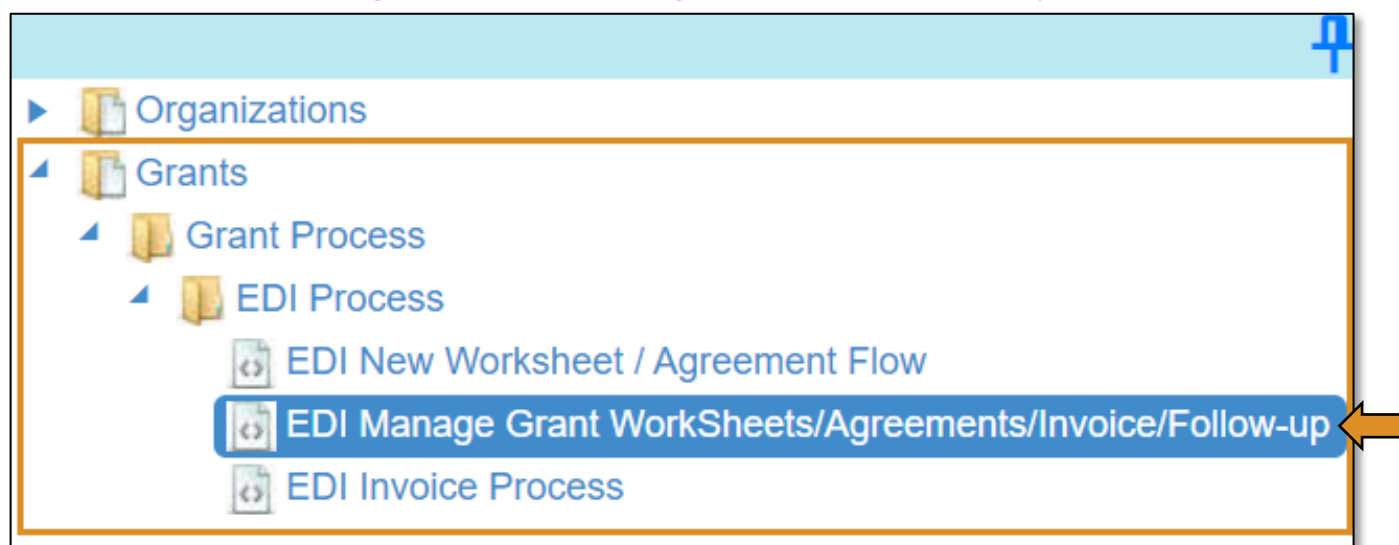
Starting New Agreement

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator** contact CTIMSSupport@careertech.ok.gov



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes the following fields and their values:

- 1. Fiscal Calendar Year*: 2022-2023
- 2. Grant Fund Type*: EDI
- 3. Organization Type*: Technology Center Districts
- 4. Organization*: Enter the first three characters of any ...
- 5. Organization District*: (empty)
- 6. Program Initiative*: --Select--
- Approval Function Type*: All
- Filter on Status*: All
- 9. Search button

Agreement Details

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form after a search. The fields are populated as follows:

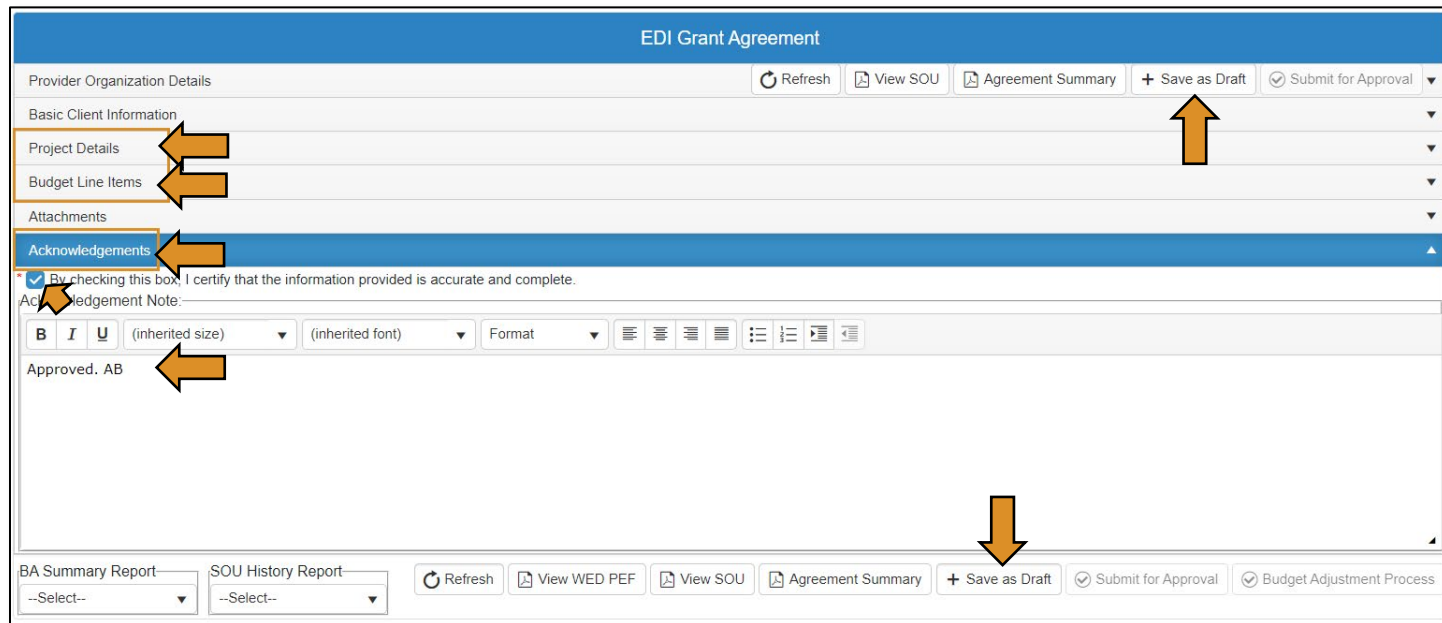
- Fiscal Calendar Year*: 2022-2023
- Grant Fund Type*: EDI
- Organization Type*: Technology Center Districts
- Organization*: Technology Center
- Organization District*: Technology Center
- Program Initiative*: Economic Development - Firefighter (Type 83) -444
- Approval Function Type*: All
- Filter on Status*: All
- Search button

Below the form, there are three buttons: **Save changes**, **Cancel changes**, and **Export to Excel**.

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
▶	Technology Center	GARFIELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS-2223-EDI-EDI-FIREFTR-444-15X111745-C62D...	New

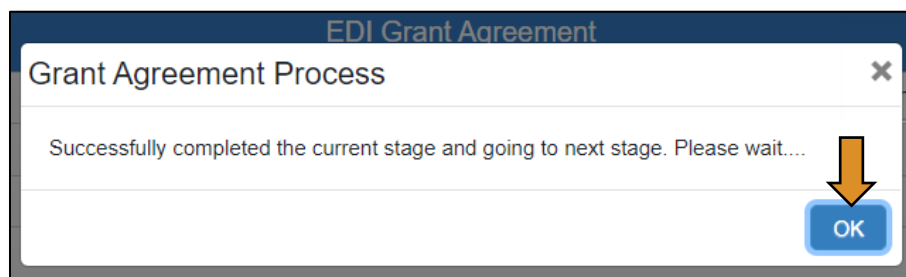
An orange arrow points to the 'New' button in the Agreement column.

Review the Agreement details, if necessary, by clicking the words to expand the *Project Details* or *Budget Line Items* sections. After reviewing the Agreement details, if necessary, click the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete. 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. Click on the **Save as Draft** button.



The screenshot shows the 'EDI Grant Agreement' form. At the top, there are tabs for 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. The 'Acknowledgements' tab is selected and highlighted in blue. Below the tabs, there is a checkbox labeled 'By checking this box, I certify that the information provided is accurate and complete.' which is checked. Below this is a text area for 'Acknowledgement Note:'. Below the text area is a signature line labeled 'Approved, AB'. At the bottom of the form, there are buttons for 'Refresh', 'View WED PEF', 'View SOU', 'Agreement Summary', '+ Save as Draft', 'Submit for Approval', and 'Budget Adjustment Process'. Orange arrows point to the 'Project Details' and 'Budget Line Items' tabs, the 'Acknowledgements' tab, the 'Acknowledgement Note' text area, the 'Approved, AB' signature line, and the '+ Save as Draft' button.

- Click **OK** to acknowledge that the Agreement has saved.



The screenshot shows a dialog box titled 'Grant Agreement Process' with a close button (X) in the top right corner. The message inside the dialog box reads: 'Successfully completed the current stage and going to next stage. Please wait....'. At the bottom right of the dialog box is a blue button labeled 'OK'. An orange arrow points to the 'OK' button.

Agreement Acknowledgments and Approval

- Click **Submit for Approval** at the top or bottom of the screen.

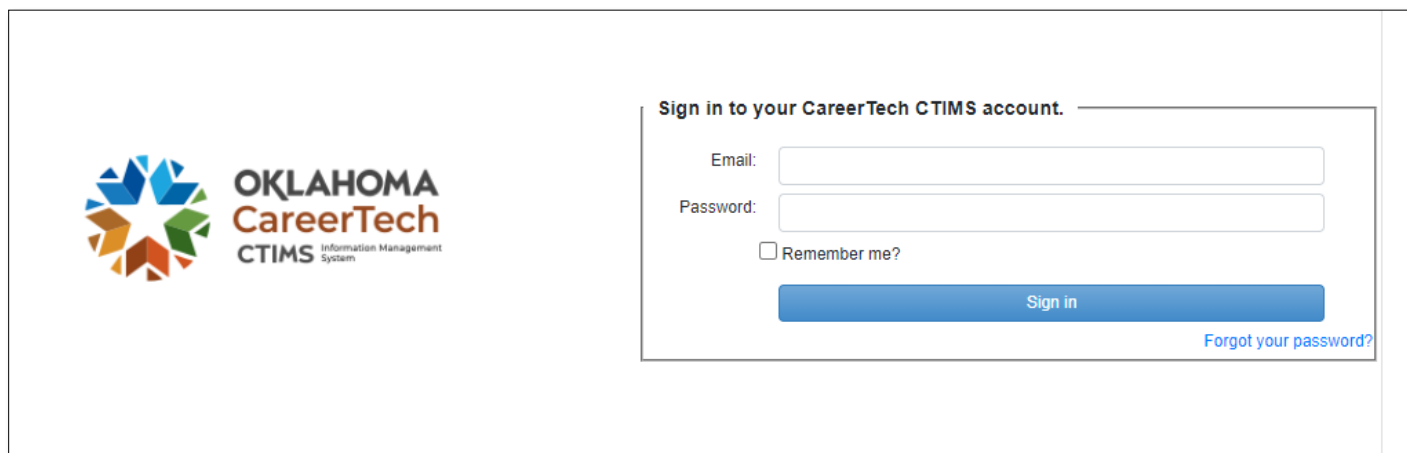
The screenshot displays the 'EDI Grant Agreement' form. The top navigation bar includes buttons for 'Refresh', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Submit for Approval'. The main content area is divided into sections: 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. The 'Acknowledgements' section is expanded, showing a checkbox for 'By checking this box, I certify that the information provided is accurate and complete.' Below this is a text area for 'Acknowledgement Note:' with a rich text editor toolbar. The bottom of the form features a footer with 'BA Summary Report' and 'SOU History Report' dropdowns, and a row of buttons including 'Refresh', 'View WED PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit for Approval', and 'Budget Adjustment Process'. Two orange arrows highlight the 'Submit for Approval' buttons at the top and bottom of the form.

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

EDI – Local BIS Director (Agreement Process)

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CTIMS (CareerTech Information Management System)

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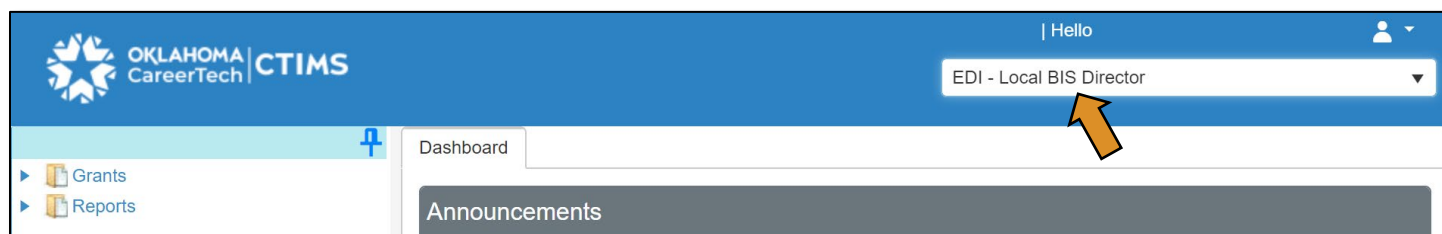
Click here to login to CTIMS



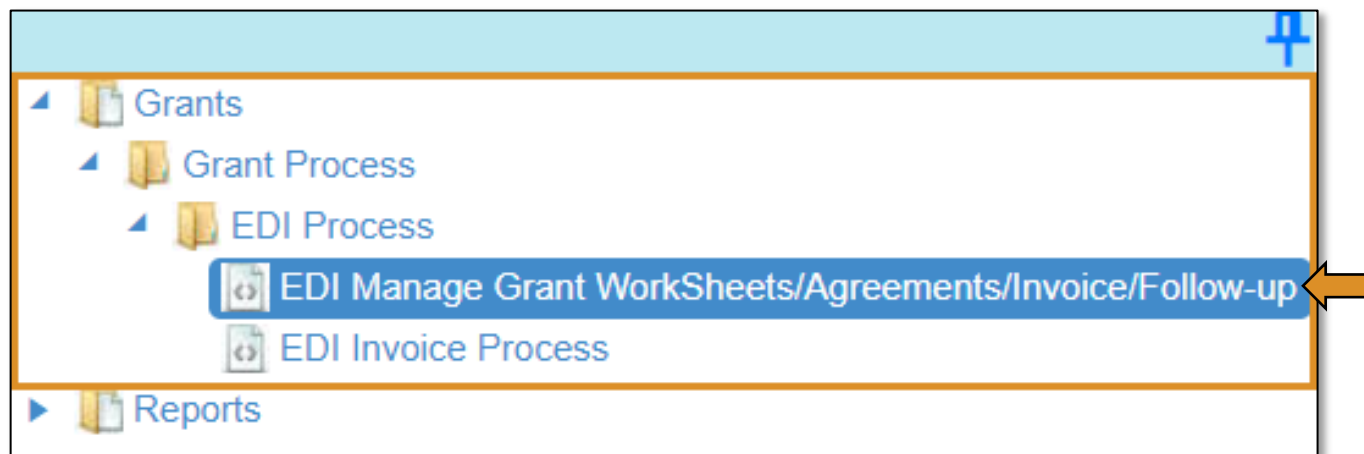
Accessing the Agreement List

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local BIS Director** contact CTIMSSupport@careertech.ok.gov



- Click the arrows next to **Grants, Grant Process & EDI Process.**
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes the following fields and their values:

- 1. Fiscal Calendar Year*: 2022-2023
- 2. Grant Fund Type*: EDI
- 3. Organization Type*: Technology Center Districts
- 4. Organization*: Enter the first three characters of any ...
- 5. Organization District*: (empty)
- 6. Program Initiative*: --Select--
- Approval Function Type*: All (tagged 7.)
- Filter on Status*: All (tagged 8.)
- Search button (tagged 9.)

- The **Agreement** column will display an agreement number.
- Click the agreement number link to open the agreement.

The screenshot shows the 'EDI Grant Fund Worksheets List' form with the following fields and values:

- Fiscal Calendar Year*: 2022-2023
- Grant Fund Type*: EDI
- Organization Type*: Technology Center Districts
- Organization*: Technology Center
- Organization District*: Technology Center
- Program Initiative*: Economic Development - Firefighter (Type 83) -444
- Approval Function Type*: All
- Filter on Status*: All
- Search button
- Buttons: Save changes, Cancel changes, Export to Excel

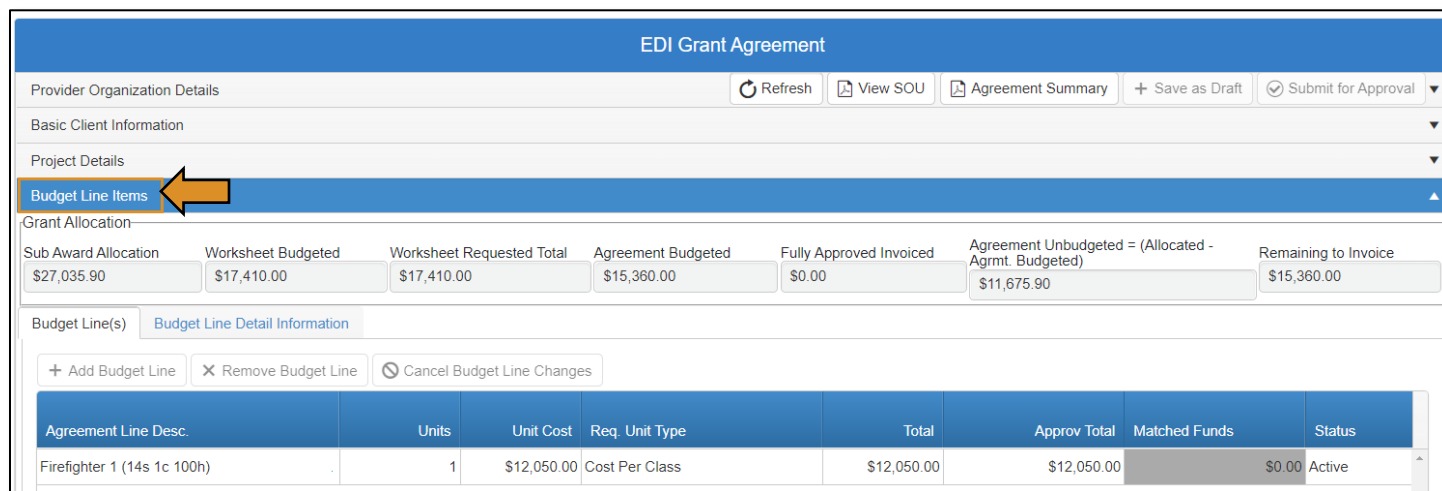
The table below shows the list of worksheets and agreements:

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

An orange arrow points to the 'Agreement' column header, indicating that the agreement number will be displayed in this column.

Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.



EDI Grant Agreement

Provider Organization Details [Refresh](#) [View SOU](#) [Agreement Summary](#) [+ Save as Draft](#) [Submit for Approval](#)

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

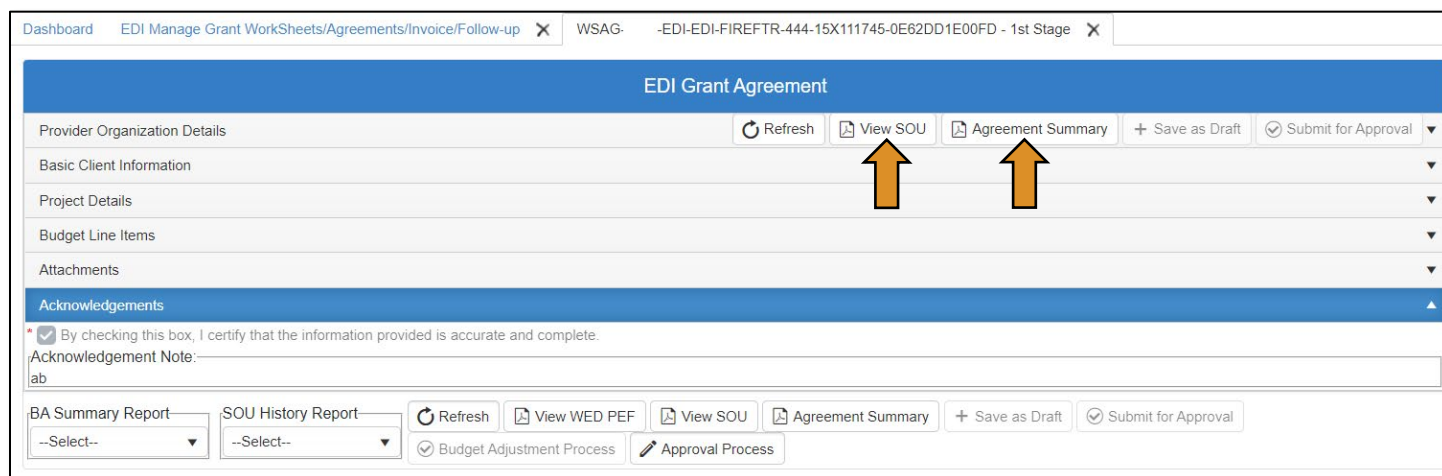
Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s) [Budget Line Detail Information](#)

[+ Add Budget Line](#) [X Remove Budget Line](#) [Cancel Budget Line Changes](#)

Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.



Dashboard [EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up](#) X WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD - 1st Stage X

EDI Grant Agreement

Provider Organization Details [Refresh](#) [View SOU](#) [Agreement Summary](#) [+ Save as Draft](#) [Submit for Approval](#)

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

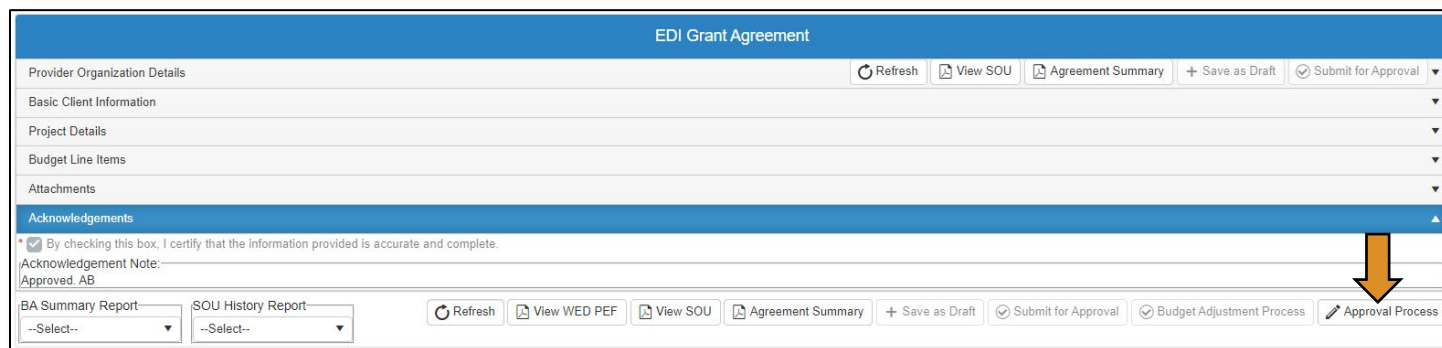
☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:-
ab

BA Summary Report--Select-- SOU History Report--Select-- [Refresh](#) [View WED PEF](#) [View SOU](#) [Agreement Summary](#) [+ Save as Draft](#) [Submit for Approval](#)

[Budget Adjustment Process](#) [Approval Process](#)

- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.



EDI Grant Agreement

Provider Organization Details [Refresh](#) [View SOU](#) [Agreement Summary](#) [+ Save as Draft](#) [Submit for Approval](#)

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:-
Approved. AB

BA Summary Report--Select-- SOU History Report--Select-- [Refresh](#) [View WED PEF](#) [View SOU](#) [Agreement Summary](#) [+ Save as Draft](#) [Submit for Approval](#) [Budget Adjustment Process](#) [Approval Process](#)

Agreement Acknowledgements and Approval

- Add a note to the **Approval/Rejection Note** section.
- Click the **Approve** button at the top or bottom of the screen.
- Click **OK** on the **Are you sure?** message.

Approval Process - EDI Grant Agreement 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: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	6/15/2023 8:32:51 AM	EDI - Local Coordina...	Andra - Beyer	Andra.Beyer@caree...	Approved	New Process	
▶ EDI BIS Director - 2nd Approval Stage	6/15/2023 8:40:39 AM						
EDI State Regional Coordinator - 3rd Approv...	6/15/2023 8:40:39 AM						
EDI State Supervisor - 4th Approval Stage	6/15/2023 8:40:39 AM						
EDI Local Superintendent (or designee) - 5th ...	6/15/2023 8:40:39 AM						
EDI State Requisition Coordinator - 6th Appro...	6/15/2023 8:40:39 AM						
EDI Local Finance Coordinator - Fully Approv...	6/15/2023 8:40:39 AM						

Current Approval Stage Information

Approved By: Beyer Andra
 Approver School: Oklahoma Department of Career and Technology Education
 Approver Email: Andra.Beyer@careertech.ok.gov

Approval Stage: 2nd Approval Stage
 Approver Role: EDI - Local BIS Director
 Approval Date: 06/15/2023

Approval/Rejection Note

Format: **B I U** [Rich Text Editor Icons]

Private Note

Format: **B I U** [Rich Text Editor Icons]

File Name	Uploaded On	Note	Attachment

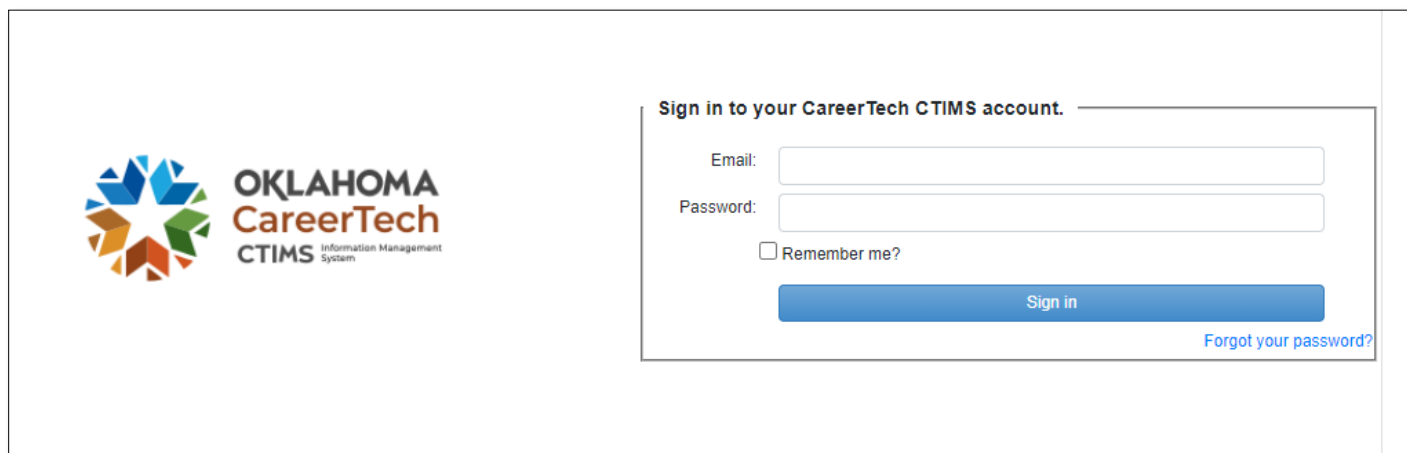
[Back](#)
[Reject](#)
[Approve](#)

The *agreement* will now go to the **EDI – State Regional Coordinator** for approval.

[EDI – State Regional Coordinator \(Agreement Process\)](#)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](#) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

Microsoft Edge  , Mozilla Firefox  , or Google Chrome  are currently the only browsers compatible with CTIMS.

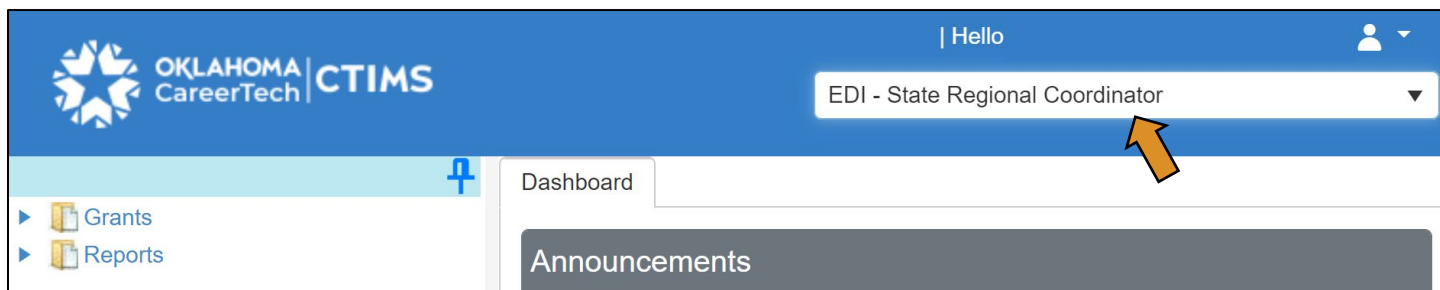
Click here to login to CTIMS



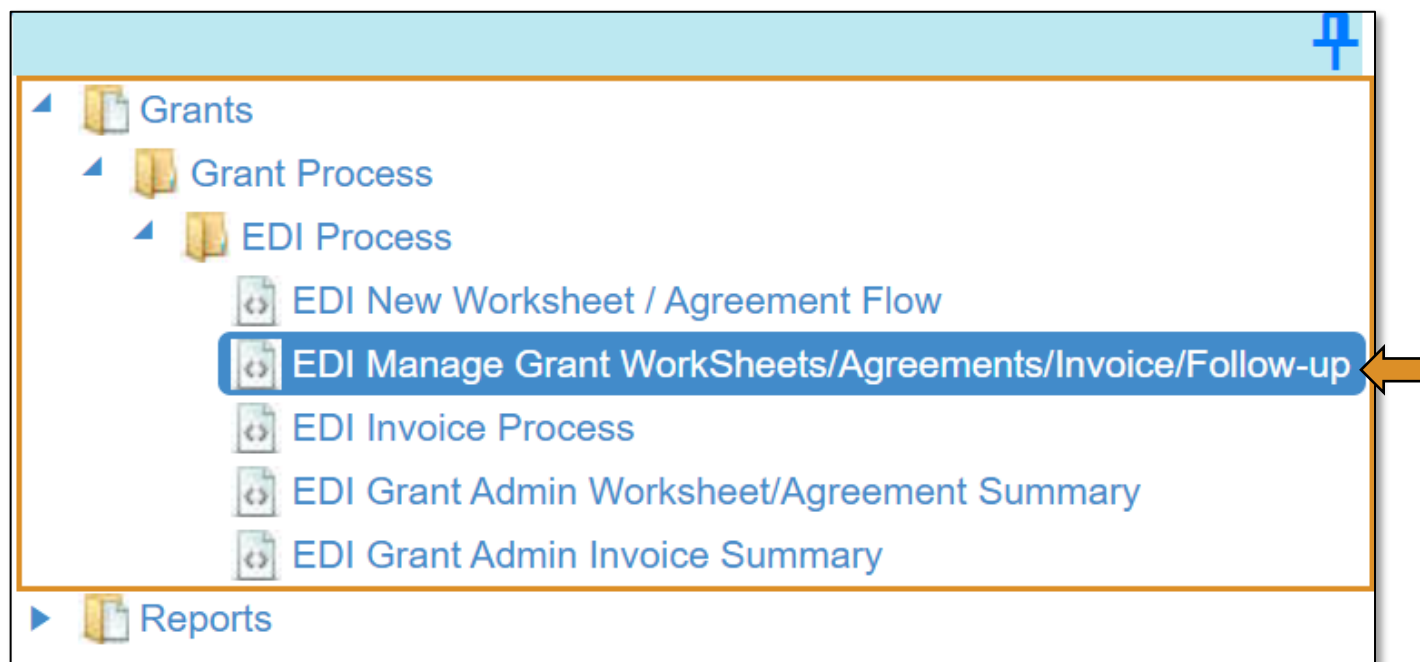
Accessing the Agreement List

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – State Regional Coordinator** contact CTIMSSupport@careertech.ok.gov



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes the following fields and their values:

- 1. Fiscal Calendar Year*: 2022-2023
- 2. Grant Fund Type*: EDI
- 3. Organization Type*: Technology Center Districts
- 4. Organization*: Enter the first three characters of any ...
- 5. Organization District*: Technology Center
- 6. Program Initiative*: --Select--
- 7. Approval Function Type*: All
- 8. Filter on Status*: All
- 9. Search button

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

EDI Grant Fund Worksheets List

Fiscal Calendar Year:2022-2023

Grant Fund Type:EDI

Organization Type:Technology Center Districts

Organization:Technology Center

Organization District:Technology Center

Program Initiative:Economic Development - Firefighter (Type 83) -444

Approval Function Type:All

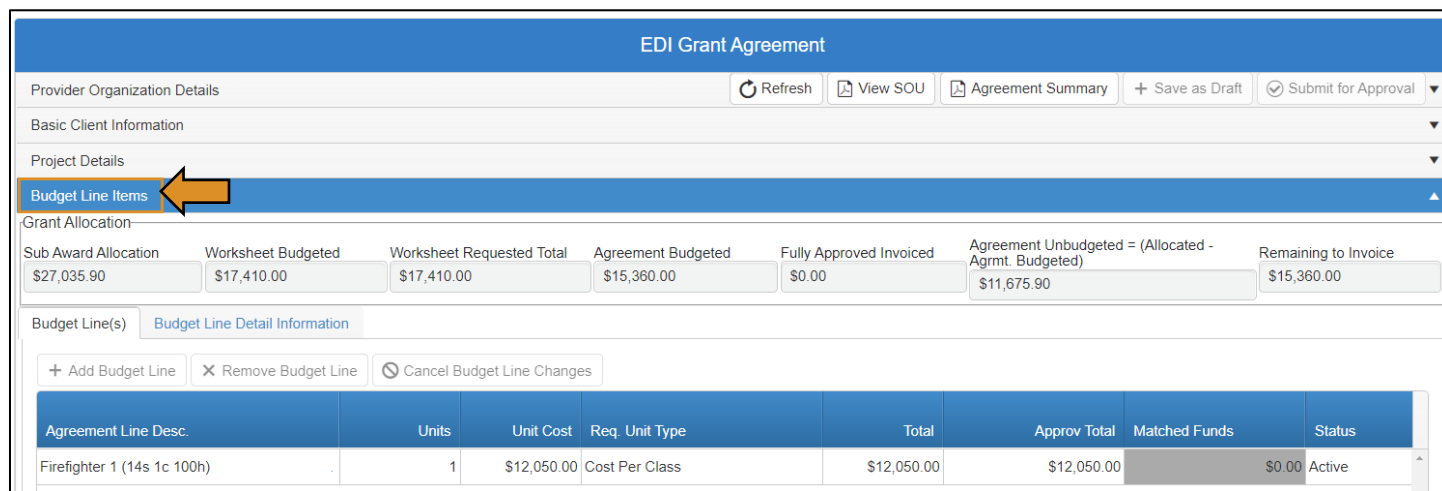
Filter on Status:All

☒ Save changes

☐ Cancel changes

Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.



EDI Grant Agreement

Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

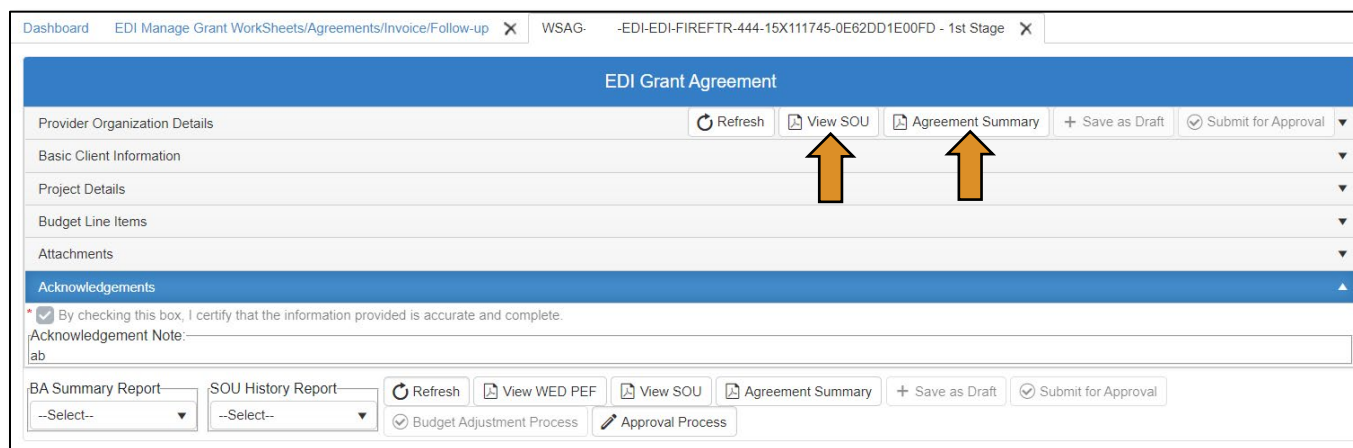
Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s) Budget Line Detail Information

+ Add Budget Line X Remove Budget Line Cancel Budget Line Changes

Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.



EDI Grant Agreement

Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

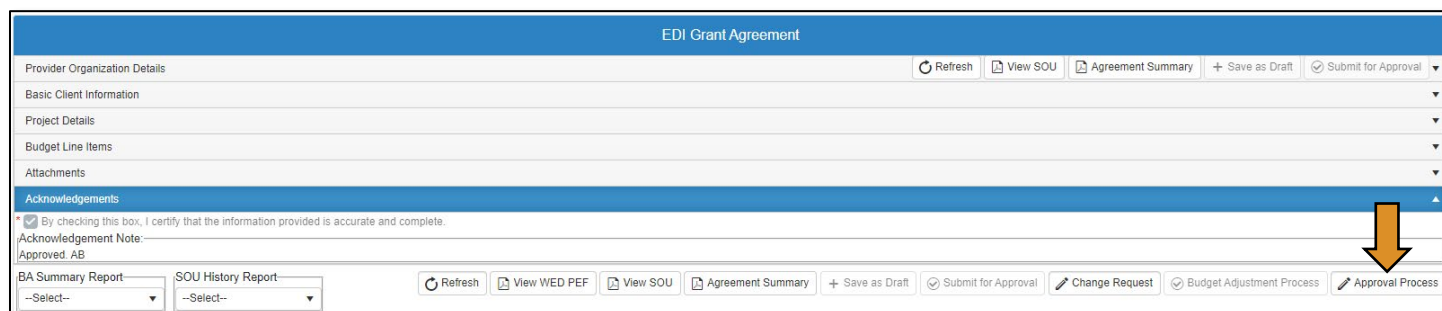
☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note: ab

BA Summary Report: --Select-- SOU History Report: --Select-- Refresh View WED PEF View SOU Agreement Summary + Save as Draft Submit for Approval

☒ Budget Adjustment Process Approval Process

- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.



EDI Grant Agreement

Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note: Approved AB

BA Summary Report: --Select-- SOU History Report: --Select-- Refresh View WED PEF View SOU Agreement Summary + Save as Draft Submit for Approval Change Request Budget Adjustment Process Approval Process

Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.
- Click **OK** on the **Are you sure?** message.

Approval Process - EDI Grant Agreement 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: _____
 WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	12/20/2022 11:40:...	EDI - Local Co...	Andra - Beyer	Andra.Beyer@...	Approved	New Process	
EDI BIS Director - 2nd Approval ...	12/20/2022 1:02:1...	EDI - Local BIS...	Andra - Beyer	Andra.Beyer@...	Approved		
▶ EDI State Regional Coordinator	12/20/2022 1:05:3...						
EDI State Supervisor - 4th Approv...	12/20/2022 1:05:3...						
EDI Local Superintendent (or desl...	12/20/2022 1:05:3...						
EDI State Requisition Coordinator...	12/20/2022 1:05:3...						

Current Approval Stage Information

Approved By*
 Approver School*
 Approver Email*

Approval Stage*
 Approver Role*
 Approval Date*

Approval/Rejection Note

Format ▼ **B** *I* U

 [List Icons]

Private Note

Format ▼ **B** *I* U

 [List Icons]

File Name	Uploaded On	Note	Attachment	
Firefighter			Download	Public
Refresher		Refresher		Public

⏪ Back
✖ Reject
✔ Approve

The *agreement* will now go to the **EDI State Initiative Supervisor** for approval.

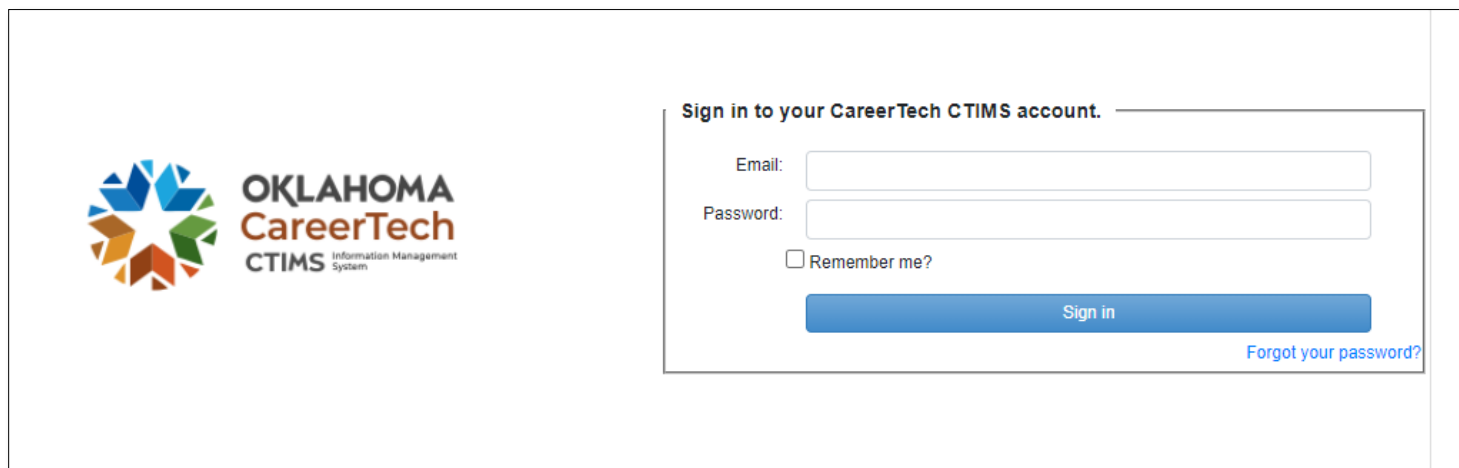
[EDI - State Initiative Supervisor \(Agreement Process\)](#)

See instructions for EDI - State Regional Coordinator [here](#).

[EDI-Local Superintendent/CEO \(Agreement Process\)](#)

Logging into CTIMS

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CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

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Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

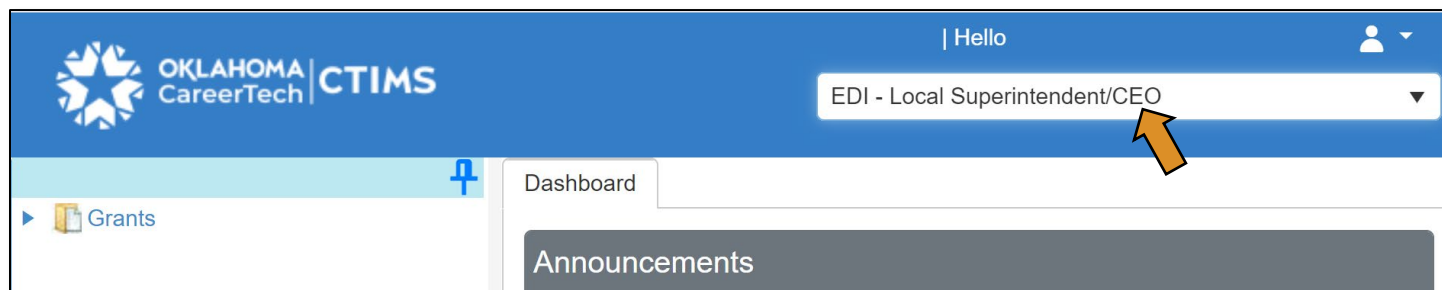
Click here to login to CTIMS



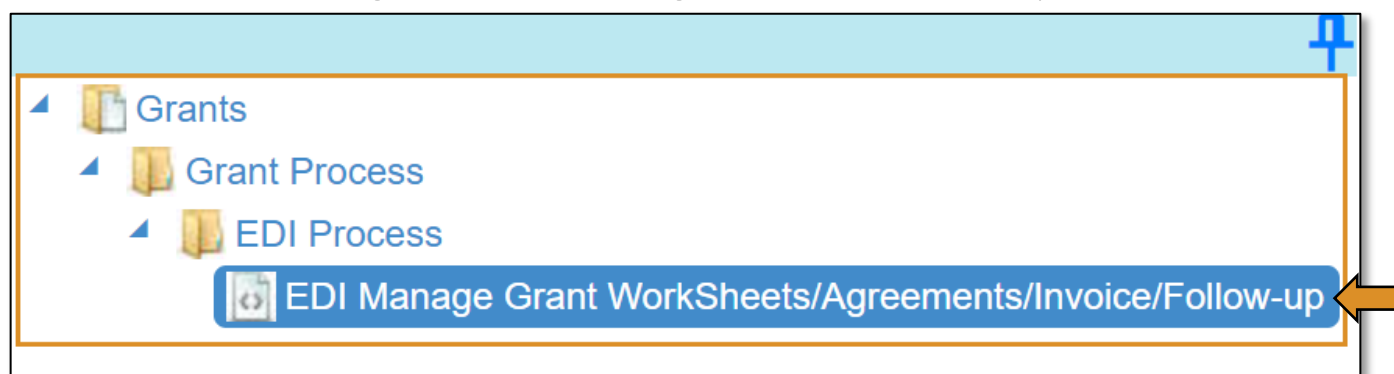
Accessing the Agreement List

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Superintendent/CEO** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Superintendent/CEO** contact CTIMSSupport@careertech.ok.gov



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes the following fields and their values:

- 1. Fiscal Calendar Year*: 2022-2023
- 2. Grant Fund Type*: EDI
- 3. Organization Type*: Technology Center Districts
- 4. Organization*: Enter the first three characters of any ...
- 5. Organization District*: (empty)
- 6. Program Initiative*: --Select--
- Approval Function Type*: All
- Filter on Status*: All
- 9. Search button

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

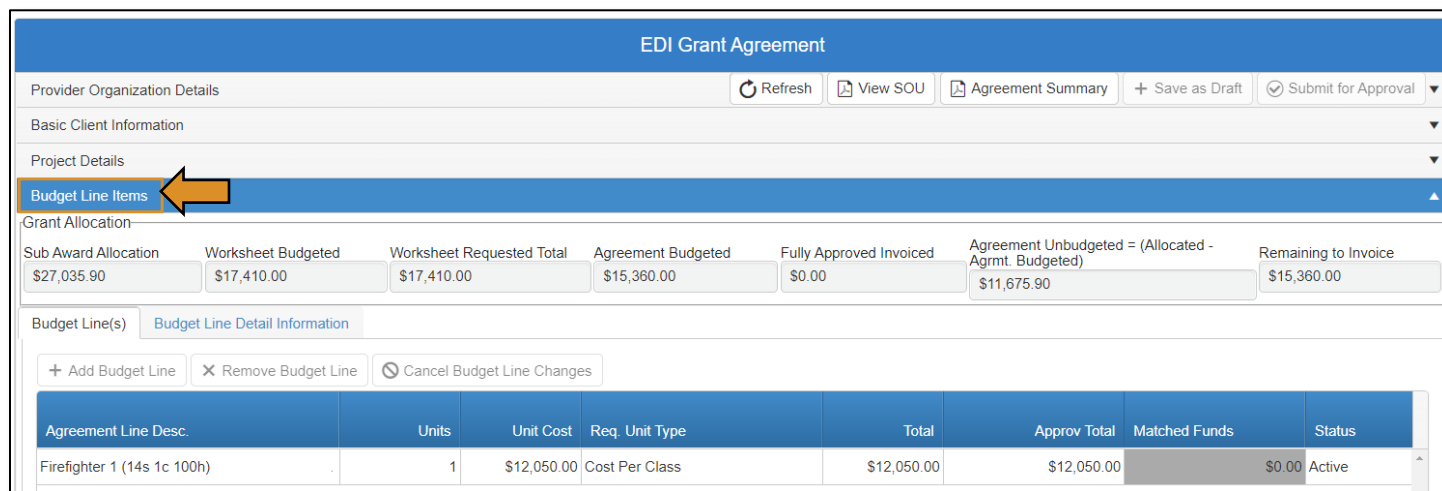
The screenshot shows the 'EDI Grant Fund Worksheets List' table. The table has the following columns: Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, Agreement, and Agreement Approval Stage. The first row of data is:

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

An orange arrow points to the 'Agreement' column header.

Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.

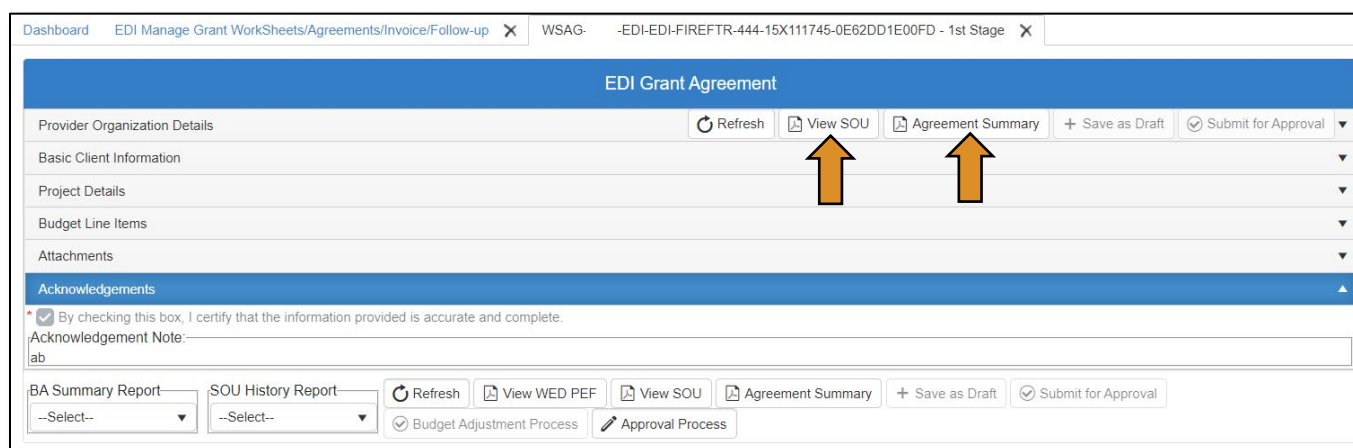


The screenshot shows the 'EDI Grant Agreement' form. The 'Budget Line Items' section is expanded, indicated by an orange arrow. The form includes sections for Provider Organization Details, Basic Client Information, Project Details, and Budget Line Items. The Budget Line Items section displays a table with columns: Agreement Line Desc., Units, Unit Cost, Req. Unit Type, Total, Approv Total, Matched Funds, and Status. The table contains one row for 'Firefighter 1 (14s 1c 100h)' with a unit cost of \$12,050.00 and a total of \$12,050.00.

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

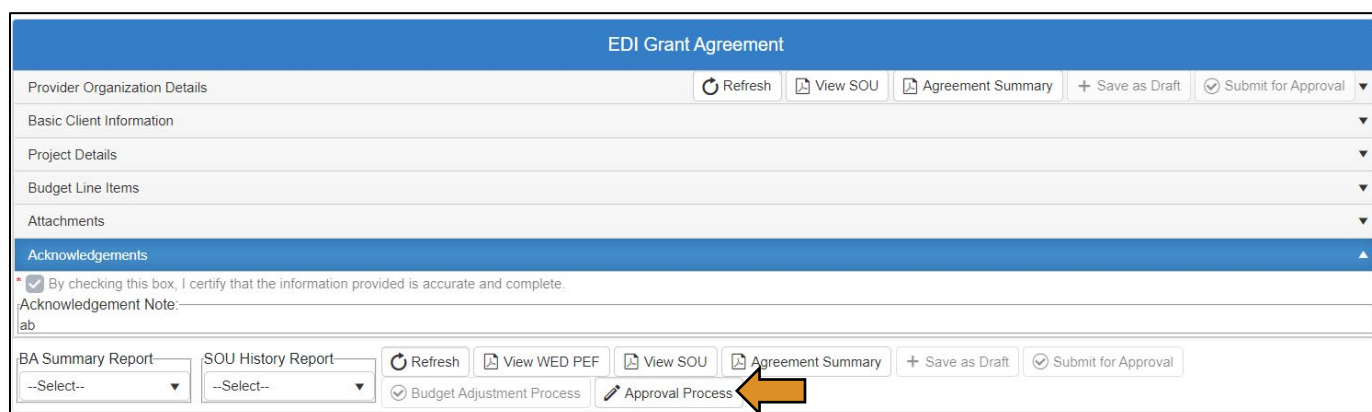
Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.



The screenshot shows the 'EDI Grant Agreement' form. The 'View SOU' and 'Agreement Summary' buttons are highlighted with orange arrows. The form includes sections for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. The Acknowledgements section includes a checkbox for 'By checking this box, I certify that the information provided is accurate and complete.' and a text area for 'Acknowledgement Note:'. The bottom of the form includes buttons for 'BA Summary Report', 'SOU History Report', 'Refresh', 'View WED PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Submit for Approval'.

- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.



The screenshot shows the 'EDI Grant Agreement' form. The 'Approval Process' button is highlighted with an orange arrow. The form includes sections for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. The Acknowledgements section includes a checkbox for 'By checking this box, I certify that the information provided is accurate and complete.' and a text area for 'Acknowledgement Note:'. The bottom of the form includes buttons for 'BA Summary Report', 'SOU History Report', 'Refresh', 'View WED PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Submit for Approval'.

Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the **Approval/Rejection Note** section.
- Click the **Approve** button at the top or bottom of the screen.
- Click **OK** on the **Are you sure?** message.

Approval Process - EDI Grant Agreement Approval

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

Request Number: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	12/20/2022 11:40:31 AM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Approved	New Process	
EDI BIS Director - 2nd Approval Stage	12/20/2022 1:02:17 PM	EDI - Local BIS Di...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI State Regional Coordinator - 3rd A...	12/20/2022 1:16:36 PM	EDI - State Regio...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI State Supervisor - 4th Approval Stage	12/20/2022 1:26:47 PM	EDI - State Initiati...	Andra - Beyer	Andra.Beyer@car...	Approved		
► EDI Local Superintendent (or designe	12/20/2022 1:27:46 PM						
EDI State Requisition Coordinator - 6th ...	12/20/2022 1:27:46 PM						
EDI Local Finance Coordinator - Fully A	12/20/2022 1:27:46 PM						

Current Approval Stage Information

Approved By*
 Approval Stage*

Approver School*
 Approver Role*

Approver Email*
 Approval Date*

Approval/Rejection Note

Format

Private Note

Format

Browse ☐ View to Public

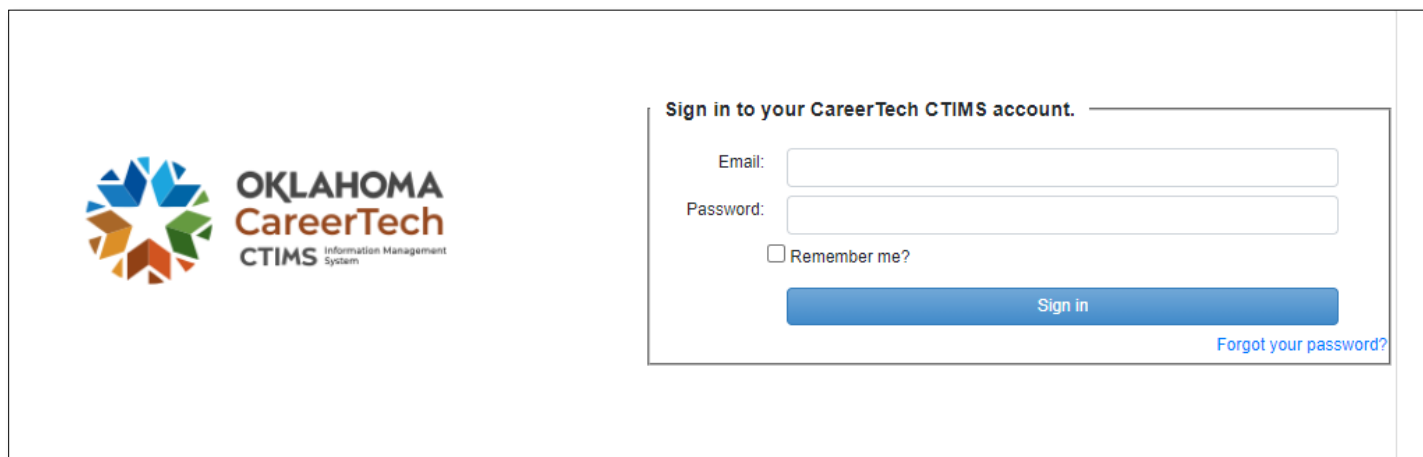
Attachment Note

The *Agreement* will now go to the **EDI – State Requisition Coordinator** for approval and then it will go to the **EDI – Local Finance Coordinator** (instructions below for EDI-Local Finance Coordinator).

[EDI – Local Finance Coordinator \(Agreement Process\)](#)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://ctims.okcareertech.org/CTBDSWeb) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

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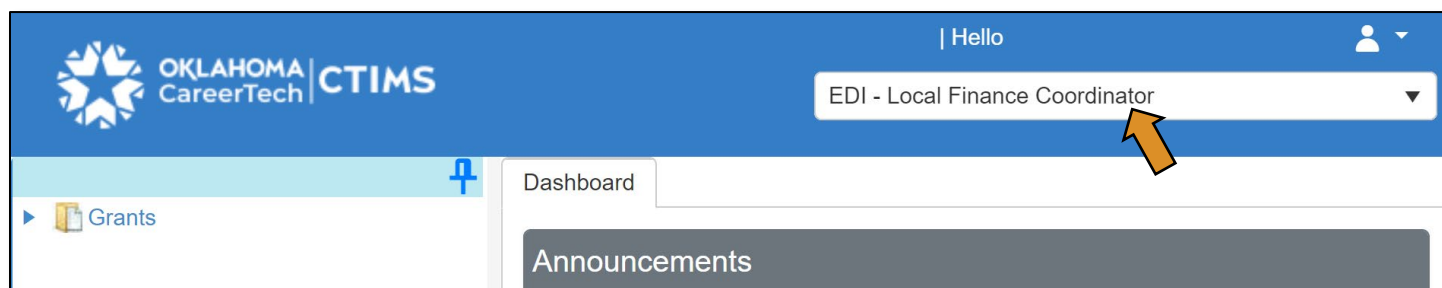
Click here to login to CTIMS



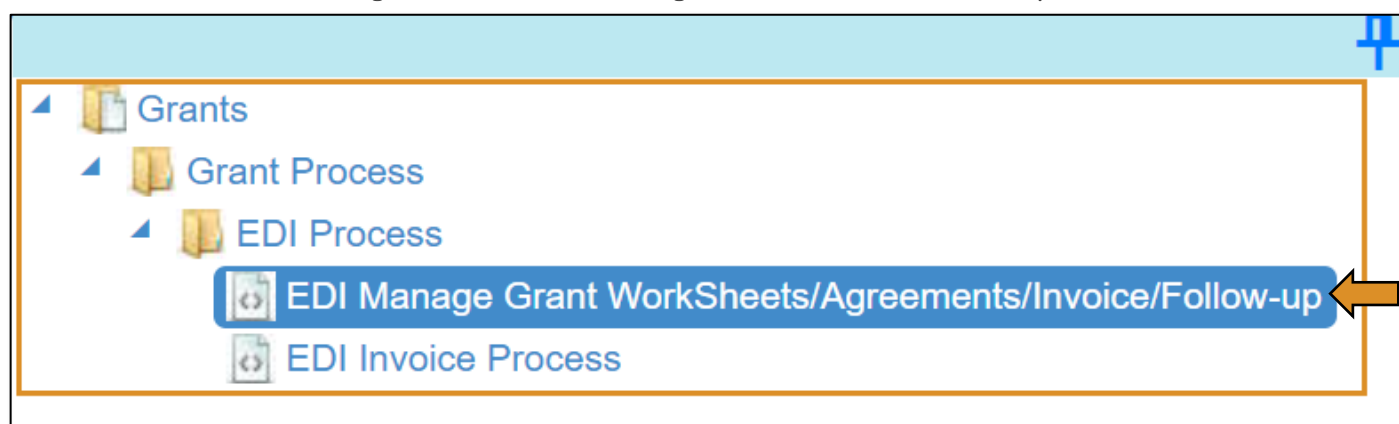
Accessing the Agreement List

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Finance Coordinator** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes the following fields and callouts:

- 1. Fiscal Calendar Year*: 2022-2023
- 2. Grant Fund Type*: EDI
- 3. Organization Type*: Technology Center Districts
- 4. Organization*: Enter the first three characters of any ...
- 5. Organization District*: (empty)
- 6. Program Initiative*: --Select--
- 7. Approval Function Type*: All
- 8. Filter on Status*: All
- 9. Search button

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

The screenshot shows the 'EDI Grant Fund Worksheets List' form with the following fields populated:

- Fiscal Calendar Year*: 2022-2023
- Grant Fund Type*: EDI
- Organization Type*: Technology Center Districts
- Organization*: Technology Center
- Organization District*: Technology Center
- Program Initiative*: Economic Development - Firefighter (Type 83) -444
- Approval Function Type*: All
- Filter on Status*: All
- Buttons: Save changes, Cancel changes, Export to Excel

The table below shows the data for the selected worksheet. A yellow arrow points to the 'Agreement' column, specifically to the agreement number 'ED-EDI-FIREFTR-444-15X11745-0E...'.

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X11745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X11745-0E...	New-Draft

Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.

EDI Grant Agreement

Provider Organization Details

Refresh

View SOU

Agreement Summary

+ Save as Draft

Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s)

Budget Line Detail Information

+ Add Budget Line

X Remove Budget Line

Cancel Budget Line Changes

Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.

Dashboard

EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up

WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD - 1st Stage

EDI Grant Agreement

Provider Organization Details

Refresh

View SOU

Agreement Summary

+ Save as Draft

Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note: lab

BA Summary Report

SOU History Report

Refresh

View WED PEF

View SOU

Agreement Summary

+ Save as Draft

Submit for Approval

Budget Adjustment Process

Approval Process

Entering OCAS Codes

- Enter the OCAS coding for each of the line items by clicking in the field under the Budget Line (OCAS Code) column. Begin typing the code in Object-Program-Function Code (e.g. 610-590-1500) order. 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*.

NOTE: The technology center is responsible for selecting OCAS codes. See the [OCAS Codes for WED](#) document for a list of OCAS codes.

EDI Grant Agreement

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s)

Budget Line(OCAS CODE) Function - Object - Program	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched
Select	firefighter 1 (14s 1c 100h) 9/6/22, Phillip Ott -	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	

- After reviewing the budget information and entering the OCAS codes, click on the **Approval Process** button at the bottom of the screen.

EDI Grant Agreement

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note: ab

BA Summary Report: --Select--

Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.

Approval Process - EDI Grant Agreement Approval

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

Request Number _____

⏪ Back
✖ Reject
✔ Approve

WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	12/20/2022 11:40:31 AM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Approved	New Process	
EDI BIS Director - 2nd Approval Stage	12/20/2022 1:02:17 PM	EDI - Local BIS ...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI State Regional Coordinator - 3rd ...	12/20/2022 1:16:36 PM	EDI - State Regio...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI State Supervisor - 4th Approval St...	12/20/2022 1:26:47 PM	EDI - State Initiati...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local Superintendent (or designe...	12/20/2022 1:39:56 PM	EDI - Local Supe...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI State Requisition Coordinator - 6t...	12/21/2022 8:22:46 AM	EDI - State Requi...	Andra - Beyer	Andra.Beyer@ca...	Approved		
▶ EDI Local Finance Coordinator - Ful 12/21/2022 8:29:00 AM							

Current Approval Stage Information

Approved By*

Approver School*

Approver Email*

Approval Stage*

Approver Role*

Approval Date*

Approval/Rejection Note

Format ▼ **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon]

Private Note

Format ▼ **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon]

Browse

Select files...

☐ View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment	
Firefighter			Download	Public
Refresher		Refresher		Public

⏪ Back
✖ Reject
✔ Approve

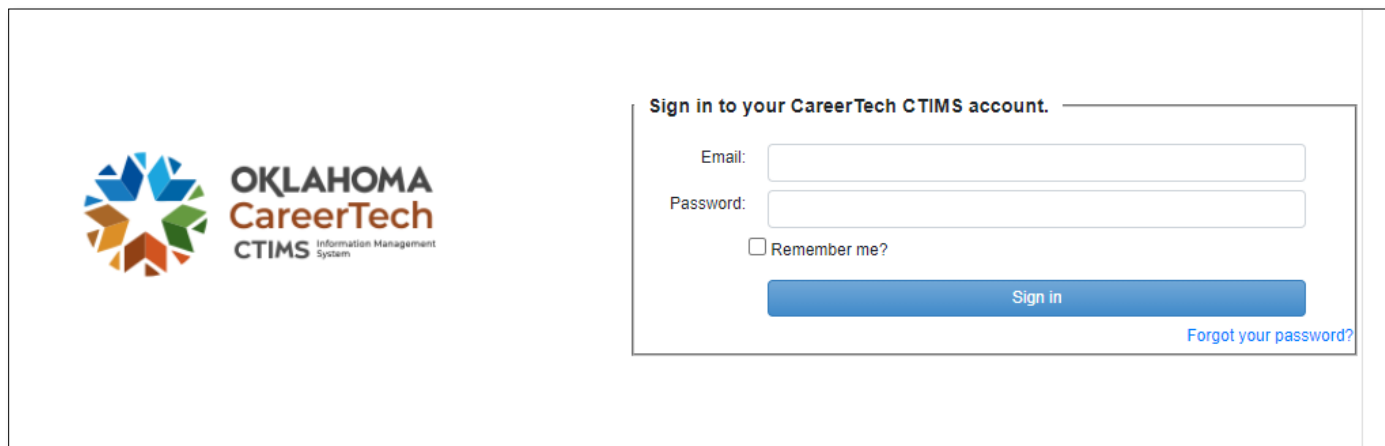
Budget Adjustment Process

IMPORTANT: Initiating the Budget Adjustment will freeze any invoice in process. The agreement will be sent back to your approval stage.

EDI – Local Coordinator (Budget Adjustment Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.


CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

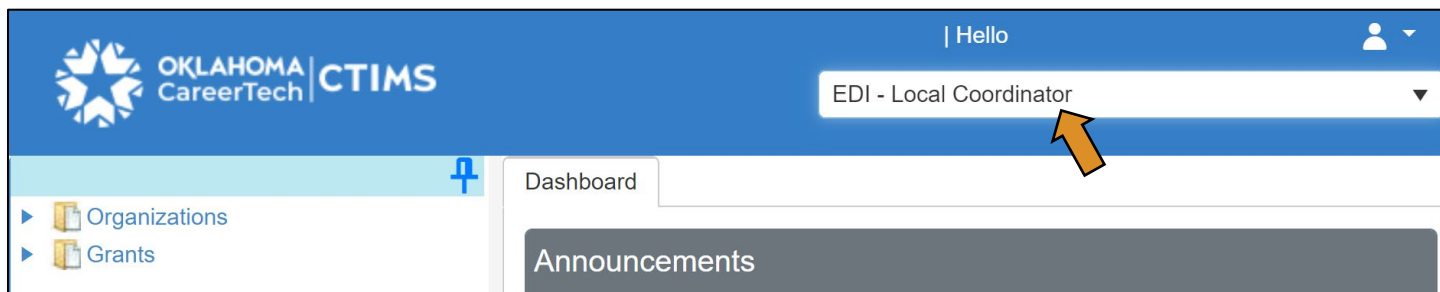
Click here to login to CTIMS 

Accessing the Agreement List

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

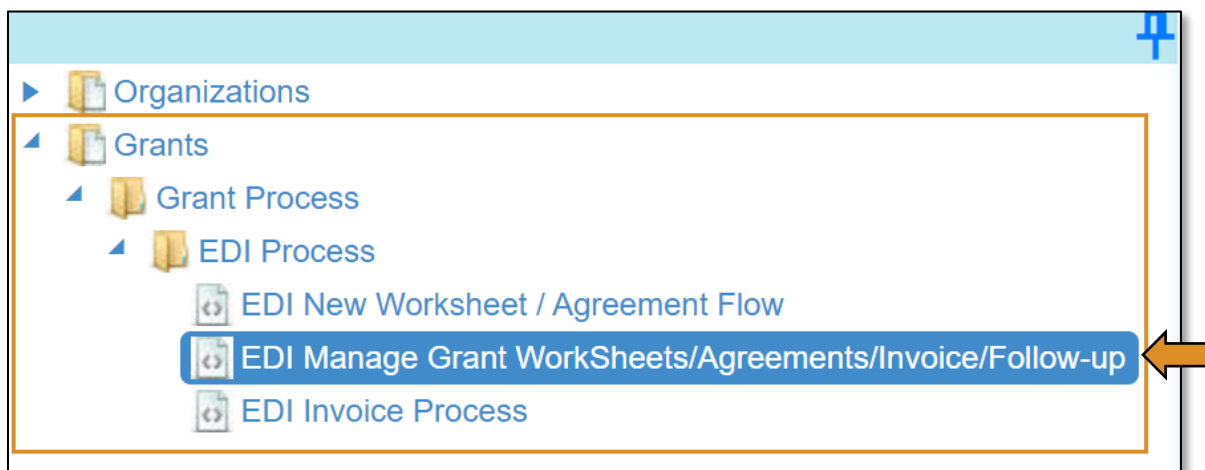
If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Finance Coordinator** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.

IMPORTANT: Do not select the *EDI New Worksheet/Agreement Flow* link on the left navigation. This will start a completely **new** worksheet.



Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the top section of the 'EDI Grant Fund Worksheets List' form. It includes a breadcrumb trail 'Dashboard > EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up' and a close button. The form title is 'EDI Grant Fund Worksheets List'. Below the title, there are several dropdown menus and text input fields, each with a numbered tag: 1. Fiscal Calendar Year* (2022-2023), 2. Grant Fund Type* (EDI), 3. Organization Type* (Technology Center Districts), 4. Organization* (Enter the first three characters of any ...), 5. Organization District* (Technology Center), 6. Program Initiative* (--Select--), 7. Approval Function Type* (All), 8. Filter on Status* (All), and 9. Search button.

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

The screenshot shows the bottom section of the 'EDI Grant Fund Worksheets List' form. It includes a table with columns: Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, Agreement, and Agreement Approval Stage. The table contains one row of data. A yellow arrow points to the 'Agreement' column header. Below the table, there are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'.

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

Initiating the Budget Adjustment

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

The screenshot shows the 'EDI Grant Agreement' interface. At the bottom right, the 'Budget Adjustment Process' button is highlighted with an orange arrow. The interface includes sections for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. A confirmation message at the bottom states: 'This record is fully approved, you are not authorized to change data within this record.'

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

The screenshot shows a confirmation dialog box titled 'Budget Adjustment Process'. The message inside reads: 'You are going to reinitiate the agreement approval process and initiating the budget adjustment process, Are you sure?'. The 'OK' button is highlighted with an orange arrow.

- In the *Budget Line Items* section, make the necessary changes to the budget line item by clicking in the appropriate columns. For example, click in the cell in the *Units* column to change the number of units.
- Do not use **Remove Budget Line** option – it does not work in the Budget Adjustment Process.

IMPORTANT: After changing the units and/or unit cost columns, remember you must manually enter the amount in the Approv Total column to match the Total column. This will release the funds.

Budget Line(OCAS CODE) Function - Object - Program	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Match
1000-100-330	Firefighter	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	

NOTE: Once the changes have been made, you can Save as Draft by clicking **Save as Draft**. This will save the changes that were just made without submitting to the next approval stage, so you can return and finish later.

Recommendation is to always click *Save as Draft* to make sure you don't lose any work.

Acknowledgements and Approval

- Next, expand the **Acknowledgments** section by clicking on the words.
- Add your **Budget Adjustment Justification Note** and **Acknowledgement Note** (these fields are required.)
- Click to check the box to verify that the information provided is accurate and complete.
- Select **Submit for Approval**.

The *agreement* will go back through the Agreement approval process.

Releasing Funds

If a project has completed and not all funds are used, you can release the funds to be used for another project. For example, you can release funds for a fire fighter program to be used for another fire fighter program training project.

- In the Agreement, you will do a budget adjustment. Once the budget adjustment is fully approved, the funds will be released, and you can begin a new Worksheet for the new training.
- If you have a line item that has not been used and need to release the funds to be used for another project, you will make that line item inactive.

For complete instructions to release funds, go to the Releasing Unused Funds section of the guidebook [here](#).

Invoice Process

IMPORTANT: If you have started an invoice and realize you need to do a budget adjustment in the agreement, you must make the current invoice inactive, then begin the budget adjustment process. For information on the budget adjustment process, see instructions [here](#).

****Contact the [regional coordinator](#) prior to initiating a budget adjustment****

Invoice Process Flow

- All enrollments must be uploaded to CTIMS before the invoice process can be initiated.
- Verify you have all supporting documents before submitting an invoice for approval. For more information on funding and reimbursement, please refer to the **Invoicing Checklist** on page 12 of the [WED Guidelines](#).

Roles: Invoice Process

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

Stage 1 - Local Coordinator – After training is complete, the EDI Local Coordinator initiates the invoice process.



Stage 2 - Local BIS Director – Reviews and approves invoice line items and attachments.



Stage 3 - Local Finance Coordinator – Reviews and approves invoice line items and attachments.



Stage 4 - State Regional Coordinator – Reviews and approves invoice line items and attachments.



Stage 5 - State Requisition Coordinator – Verifies the invoice line items and documentation, prints the documentation, and delivers to the finance department.



Stage 6 -ODCTE EDI Finance Reviewer – Reviews and approves the invoice line items and documentation. The invoice becomes fully approved. Pays the claim.

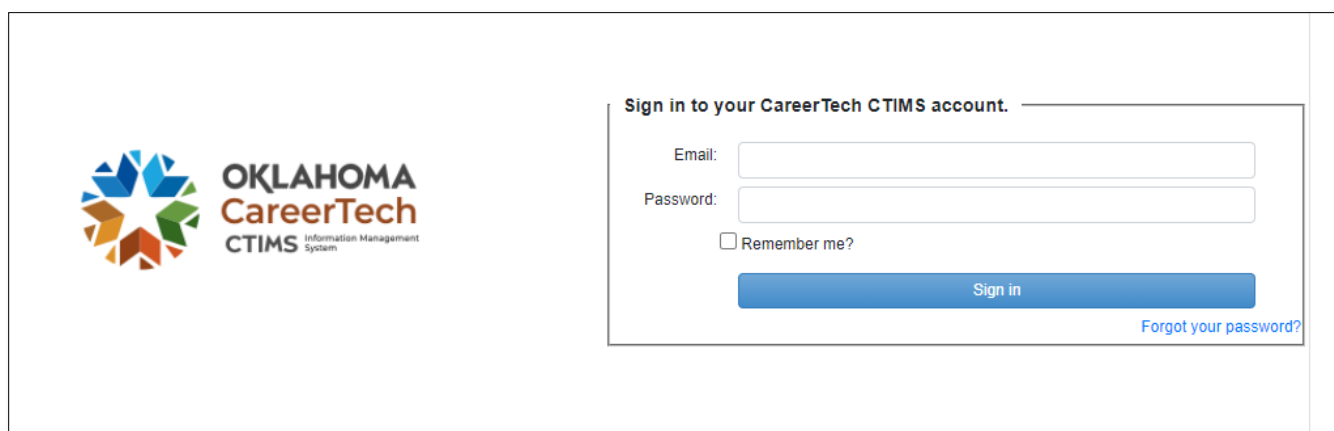
EDI – Local Coordinator (Invoice Process)

After training is complete, the **EDI – Local Coordinator** starts the **EDI Invoice Process**.

IMPORTANT: Before initiating an invoice, all budget adjustments must be fully approved.

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.


CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
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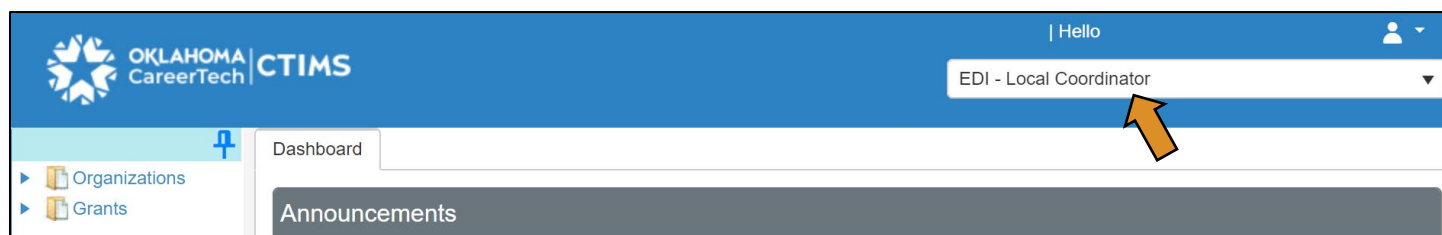
Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS 

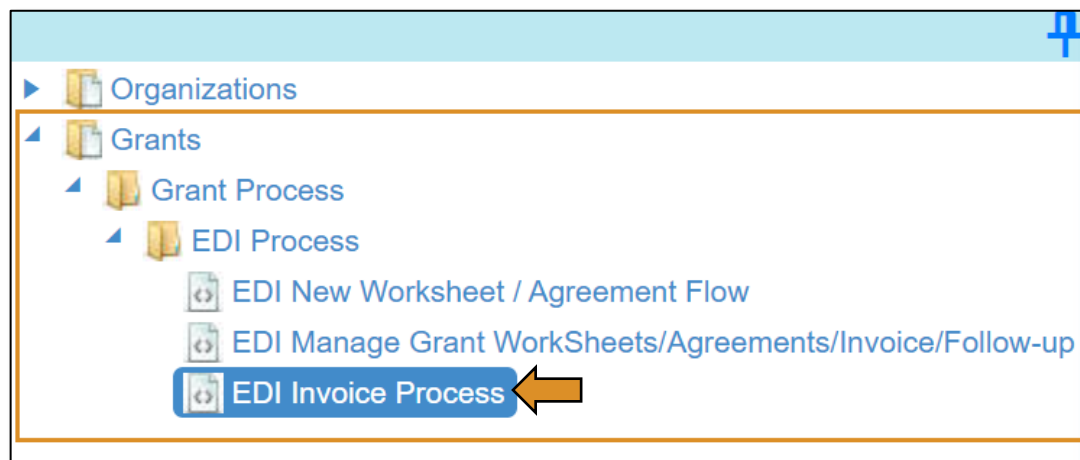
Accessing the Invoice

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Invoice Process** link.



Creating a New Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes the following fields and callouts:

- 1. Fiscal Calendar Year* (2022-2023)
- 2. Grant Fund Type* (EDI)
- 3. Organization Type* (Technology Center Districts)
- 4. Organization* (Technology Center)
- 5. Organization District* (Technology Center)
- 6. Program Initiative* (Economic Development - Firefighter (Type 83) -444)
- 7. Approval Function Type* (All)
- 8. Filter on Status* (All)
- 9. Search button

- After clicking the **Search** button, select **New Invoice** to start a new invoice.

The screenshot shows the 'EDI Grant Fund Invoices List' form after the search process. The 'New Invoice' button is highlighted with an orange arrow. The table below shows the data for the new invoice:

	Provider Name	Client Name	Agreement	BAP Process	Agreement Submission Date
New Invoice	Technology Center	FIRE DEPT	WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D9...	No	06/15/2023 08:29:59

A box will pop up asking if you want to create a **new** invoice or if you would like to view or change **existing** invoice?

- Click on the button you need – this pop-up is to help prevent unnecessary new invoices being created.

- Double check that everything is correct on the screen.
- Click **Save & Next**.

- On the **EDI Grant Submit Invoice-Step 2** screen, select the budget line item you want to invoice by clicking on the checkbox next to the line item. You may select multiple line items to invoice.

Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost
<input checked="" type="checkbox"/> Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25

- Click on the black arrow next to the line item to expand the details.
- Click the **Edit** button to make changes. **NOTE:** Check all invoice line items at once, click the check box in the column header.

Invoice Line Items				
	<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description
▲	<input checked="" type="checkbox"/>	Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...
+ Add Invoice				
		Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program
	<input checked="" type="checkbox"/>	Active	Masks	1000-100-330

↑ (Arrow pointing to the expand icon)

← (Arrow pointing to the Edit button)

- Make the necessary changes to the **Units**, **Unit Cost**, and/or **Req. Unit Type** fields by clicking in the cell or use the arrows on each field. This will update the **Total to be Invoiced** column. Once the necessary adjustments have been made, click the **Update** button.

Invoice Line Items							
	<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type
▲	<input checked="" type="checkbox"/>	Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00	Cost Per Each
+ Add Invoice							
		Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
	<input checked="" type="checkbox"/>	Active	Masks	1000-100-330	20.00	25.00	Cost Per Each

↑ (Arrow pointing to the expand icon)

← (Arrow pointing to the Update button)

- Expand the Attachments section by clicking on the word **Attachments**. Upload required documents. Refer to page 12 of the WED [Guidelines](#) for invoicing requirements.

IMPORTANT: Invoice line items and the attached supporting documents must match.
All attachments must be uploaded in one PDF.

- Click **Select files...** to locate the files on your computer.
- Then, select **Upload & Save file** to attach the file.
 - A message box will say you have successfully uploaded the file. Close this box.
- Add a note in the **Attachment Note:** section for extenuating circumstances related to the line items attachments.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Browse: Select files... Upload & Save file

Attachment Note:

Active/Inactive file(s) Delete file(s) Download all files

Status	File Name	Attachment Note	Uploaded Date	Action
Acknowledgements				

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an Acknowledgment Note in the box.
- Click **Save as Draft**.
- Then, click the **Submit for Approval** button.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

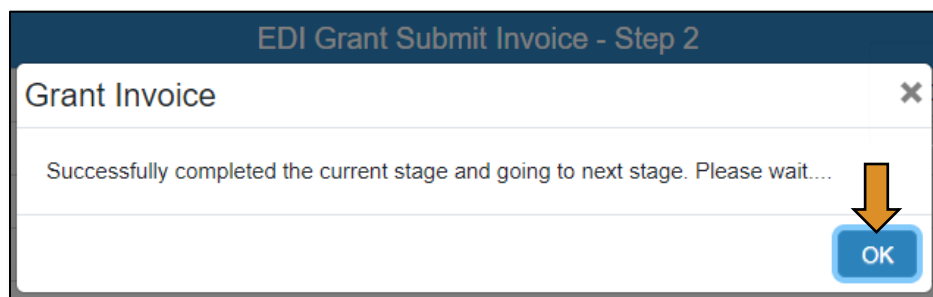
Acknowledgement Note:

B I U (inherited size) (inherited font) Format Text Bulleted List Numbered List Link Unlink Indent Outdent

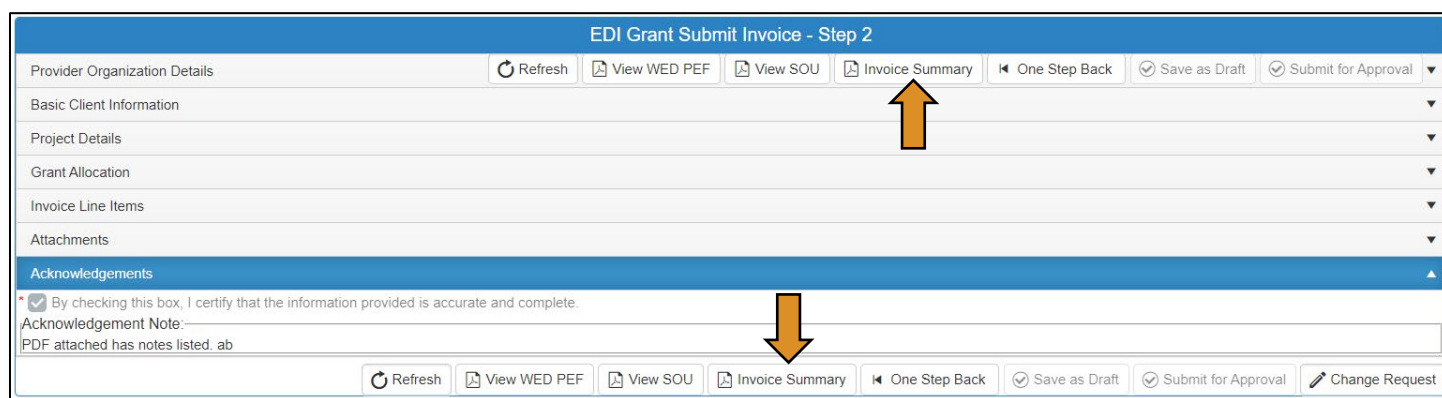
PDF attached has notes listed. ab

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

- A message will pop-up to let you know that you have submitted the invoice successfully.
- Click the OK.



- Click the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

Dashboard EDI Invoice Process INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 Invoice Summary

Technology Center-5470: 1 of 1 Page 1 of 1

PDF

Invoice Individual Summary

Report Generation Date: 6/16/2023 1:08:45 PM

INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 - 5470

Economic Development - Firefighter (Type 83) -444

School Name: Technology Center	Client Name: FIRE DEPT - 15X111745
Vendor Number:	PO Number: 800912345
Date of Request Submitted: 6/16/2023 1:05 PM	First Submitted By: Andra Beyer
Last Submitted On: 6/16/2023 1:05 PM	Last Submitted By: Andra Beyer
Fully Approved Date :	Fully Approved By:
	Fully Approver Role:

Budget Line Description	Units	Unit Cost	Unit Type Code	Request Item Total
Masks	20.00	\$25.00	Each	\$500.00
Total Invoiced				\$500.00

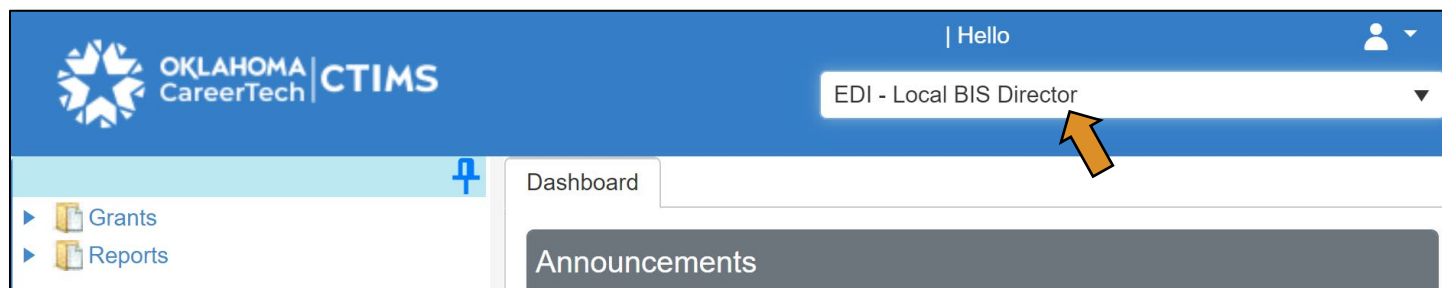
The invoice has been successfully submitted and will go to the **EDI – Local BIS Director**.

EDI – Local BIS Director (Invoice Process)

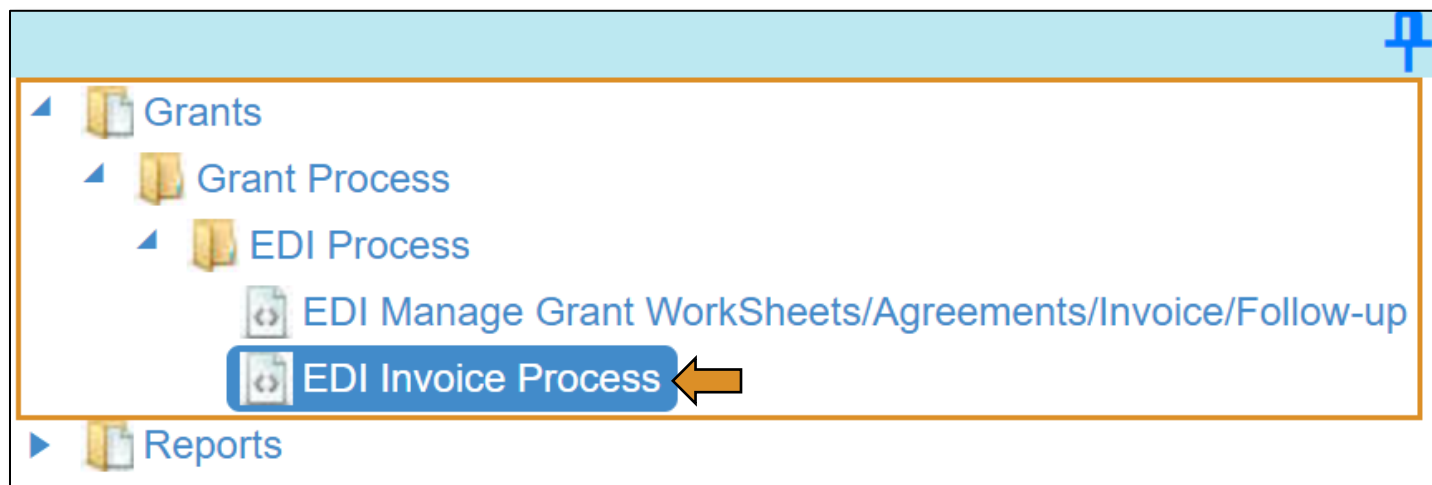
Accessing Invoice

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local BIS Director** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Invoice Process** link.



Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes several dropdown menus and a search button. Numbered callouts (1-9) are placed over specific fields: 1. Fiscal Calendar Year (2022-2023), 2. Grant Fund Type (EDI), 3. Organization Type (Technology Center Districts), 4. Organization (Technology Center), 5. Organization District (Technology Center), 6. Program Initiative (Economic Development - Firefighter (Type 83) -444), 7. Approval Function Type (All), 8. Filter on Status (All), and 9. Search button.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details. Click on the blue Invoice link to open the invoice.

The screenshot shows the 'EDI Grant Fund Invoices List' form with the 'Manage Grant Invoices' tab selected. Below the form, there is a table of invoices. One invoice is expanded, showing an 'Invoice Approval Summary' table. Orange arrows point to the 'Manage Grant Invoices' tab, the 'Invoice' link in the table, and the 'Approval Stage' in the expanded summary.

Status	BAP Process	Paymer Days	Organization	Client Name	Program Initiative	Invoice
Yes	No	0	Technology Center	FIRE DEPT	Economic Development - Firefight...	INV-2223-EDI-EDI-FIREFTR-444-15X111

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Ap
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov	06/16/2023 13:05:43	EDI

EDI Grant Submit Invoice – Step 1

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

Dashboard EDI Invoice Process INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2022-2023 Grant Fund Type: EDI
 Organization Type: Technology Center Districts Organization: Technology Center
 Organization District: Technology Center Program Initiative: Economic Development - Firefighter (Type 83) -...
 Worksheet No: WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9
 Agreement No: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA
 Invoice No: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information
 Project Details

Refresh Next Step

EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice-Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Expand the Attachments section by clicking on the word **Attachments**.
- Upload required documents and/or double check the attachments that were uploaded by the EDI – Local Coordinator. Refer to page 12 of the WED [Guidelines](#) for invoicing requirements.
- Click **Select files...** to locate the files on your computer.
- Select **Upload & Save file** to attach the file.
 - A message box will say you have successfully uploaded the file. Close this box.
- Add a note in the **Attachment Note:** section for extenuating circumstances related to the line items attachments.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information
 Project Details
 Grant Allocation
 Invoice Line Items

Attachments

Browse: Select files... Upload & Save file

Attachment Note:

Active/Inactive file(s) Delete file(s) Download all files

Status	File Name	Attachment Note	Uploaded Date	Action	
<input type="checkbox"/> Active	DataRequestForm.pdf		06/16/2023 13:05:11	Download	Public

Acknowledgements Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

IMPORTANT: Invoice line items and the attached supporting documents must match.
All attachments must be uploaded in one PDF.

- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an acknowledgment note in the box.
 - If you don't have a note to add, type your initials, as this field is required.
- Click the **Approval Process** button.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

PDF attached has notes listed. ab

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Invoice Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.

Approval Process - EDI Grant Invoice Approval

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

Request Number: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 1:05:43 PM	EDI - Local Coordi...	Andra - Beyer	Andra.Beyer@car...	Approved	New Process	
▶ EDI Local BIS Director - 2nd Approval	6/16/2023 1:58:28 PM						
EDI Local Finance Coordinator - 3rd Appr...	6/16/2023 1:58:28 PM						
EDI State Regional Coordinator - 4th App...	6/16/2023 1:58:28 PM						
EDI State Requisition Coordinator - 5th A...	6/16/2023 1:58:28 PM						
ODCTE EDI Finance Reviewer - Fully Ap...	6/16/2023 1:58:28 PM						

Current Approval Stage Information

Approved By: Beyer Andra
 Approver School: Oklahoma Department of Career and Technology Educati...
 Approver Email: Andra.Beyer@careertech.ok.gov

Approval Stage: 2nd Approval Stage
 Approver Role: EDI - Local BIS Director
 Approval Date: 06/16/2023

Approval/Rejection Note

Format: B I U [Rich Text Editor Icons]

Private Note

Format: B I U [Rich Text Editor Icons]

Browse: Select files... View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment	Public
DataRequestForm.pdf	06/16/2023		Download	Public

Back Reject Approve

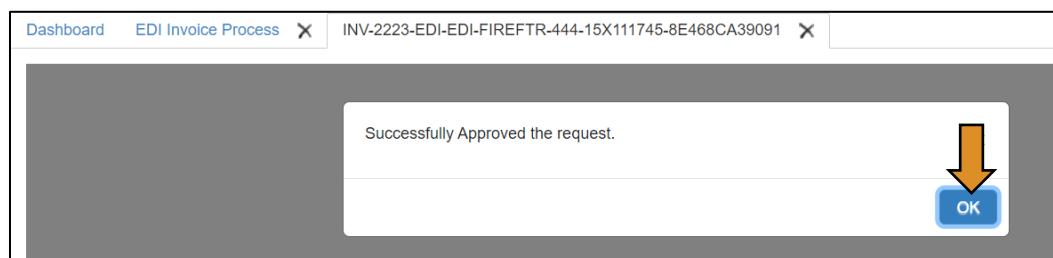
- A message will pop up asking if you are sure. Click **OK**.

Approval Process - EDI Grant Invoice Approval

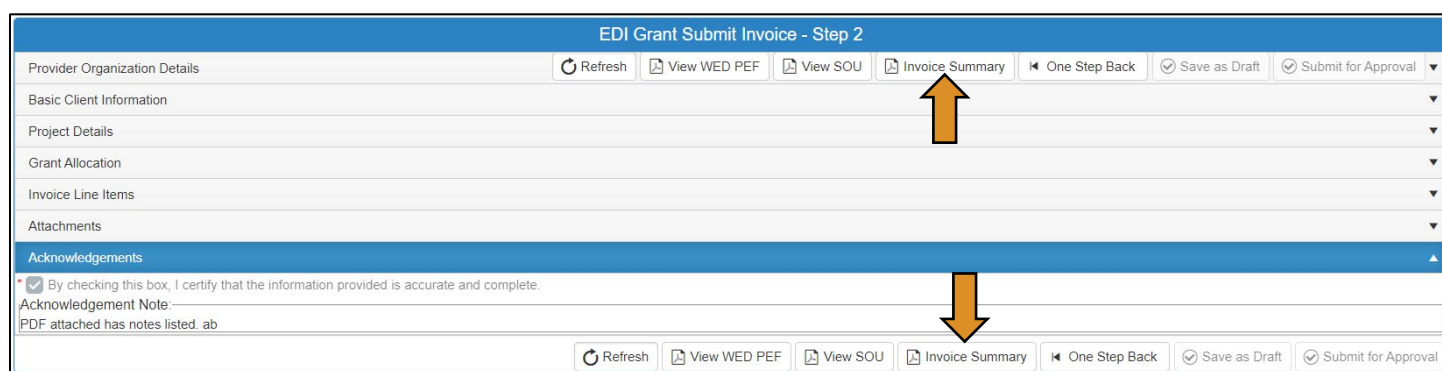
Are you sure?

Cancel OK

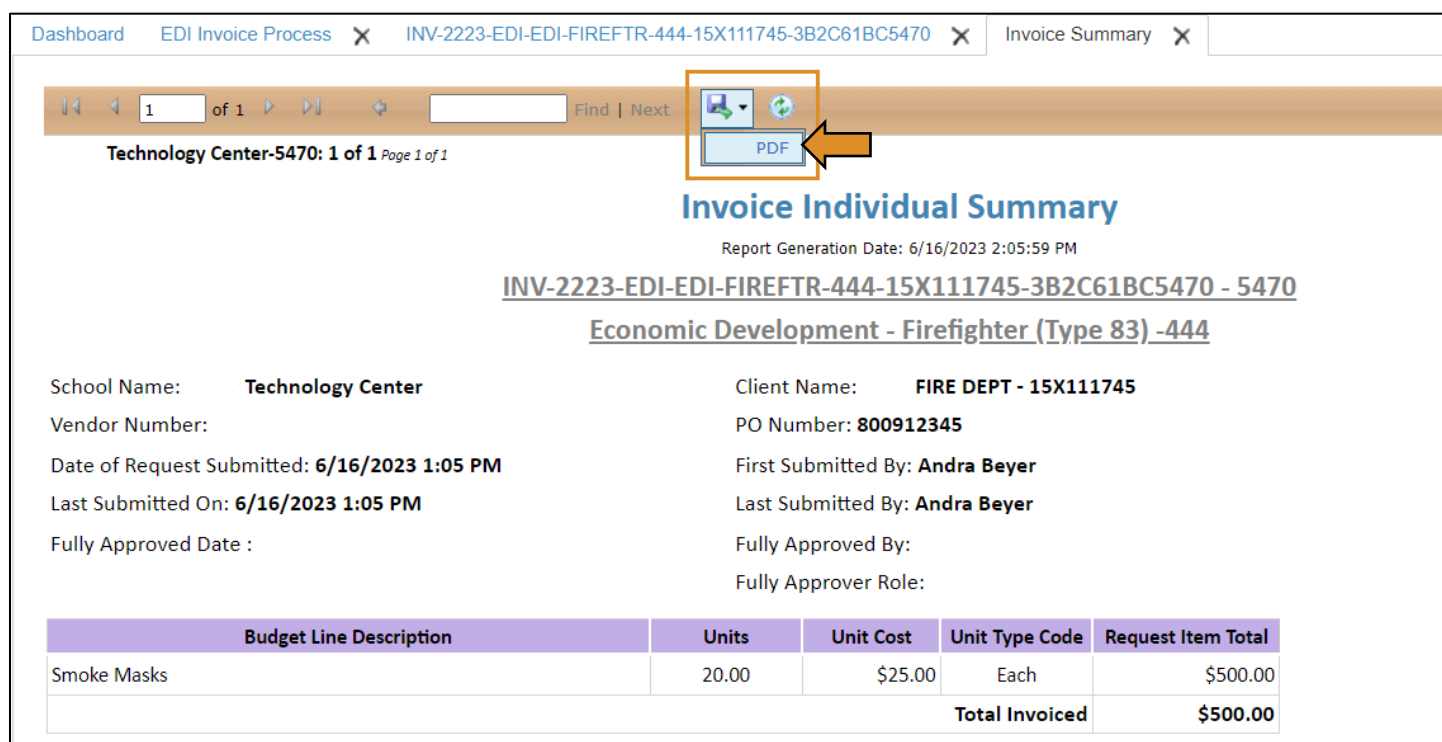
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.



The *invoice* has been successfully submitted and will go to the **EDI – Local Finance Coordinator**.

Invoice Change Request

To make changes to an invoice after it has been submitted for approval, you will need to do a change request in the invoice.

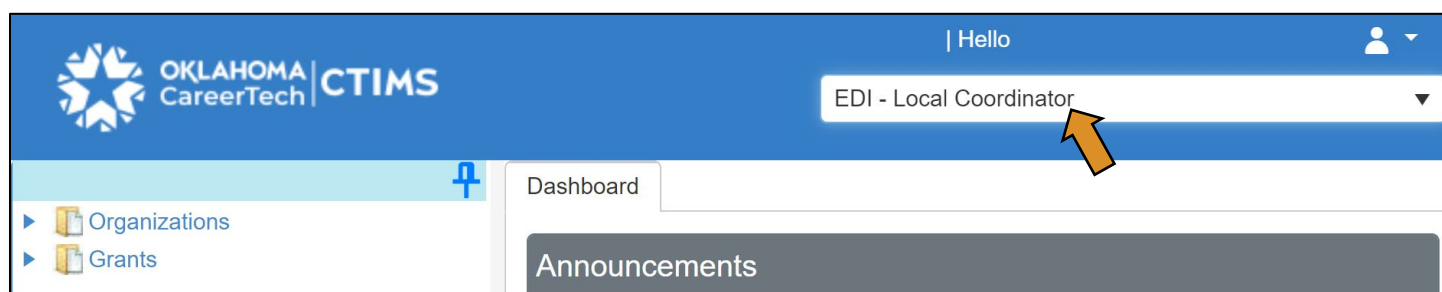
IMPORTANT: Changes to an Invoice can only be made by the EDI – Local Coordinator.

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 must contact the ODCTE Finance Reviewer to request they reject the invoice. Then, you can initiate the change request.

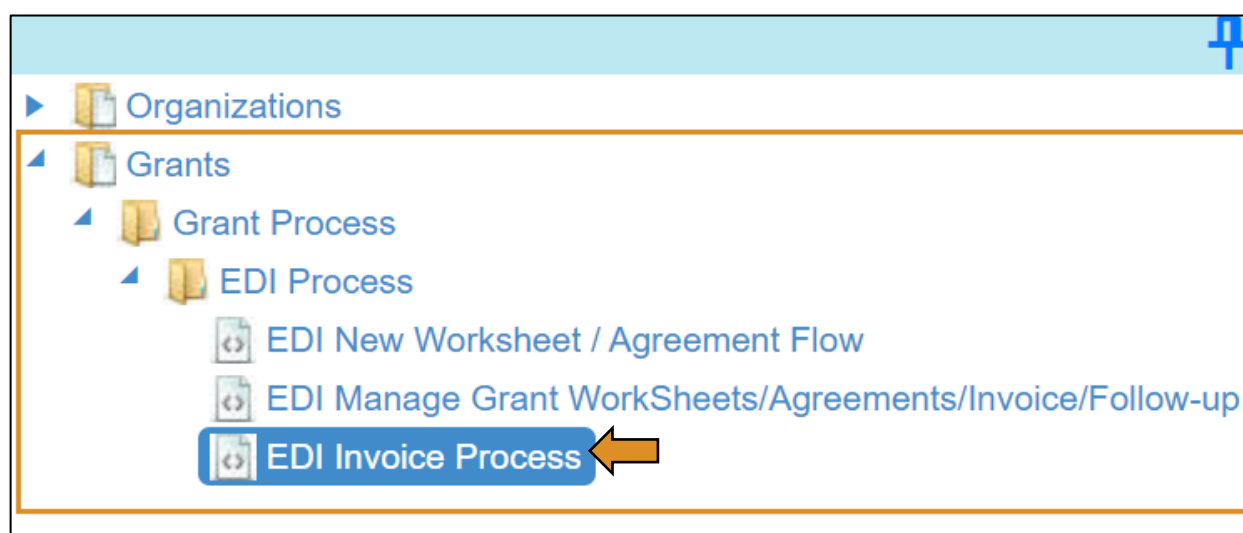
EDI – Local Coordinator (Invoice Change Request)

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Invoice Process** link.



Accessing Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes a navigation bar with 'Dashboard' and 'EDI Invoice Process' tabs. The form contains several dropdown menus and a search button, each labeled with a circled number corresponding to the instructions:

- 1. Fiscal Calendar Year* (2022-2023)
- 2. Grant Fund Type* (EDI)
- 3. Organization Type* (Technology Center Districts)
- 4. Organization* (Technology Center)
- 5. Organization District* (Technology Center)
- 6. Program Initiative* (Economic Development - Firefighter (Type 83) -444)
- 7. Approval Function Type* (All)
- 8. Filter on Status* (All)
- 9. Search button

At the bottom, there are tabs for 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details.
- Click on the blue Invoice link to open the invoice.

EDI Grant Fund Invoices List

Fiscal Calendar Year:* 2022-2023
 Organization Type:* Technology Center Districts
 Organization District:* Technology Center
 Grant Fund Type:* EDI
 Organization:* Technology Center
 Program Initiative:* Economic Development - Firefighter (Type 83) -444

Grant Worksheet/Agreement/Invoice List | **Manage Grant Invoices**

✓ Save changes | ⏹ Cancel changes | 📄 Export to Excel | ↻ Refresh

Status	BAP Process	Payment Days	Organization	Client Name	Program Initiative	Invoice
Yes	No	0	Technology Center	FIRE DEPT	Economic Development - Firefight...	INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C6...

Invoice Approval Summary

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver Role
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov	06/16/2023 13:05:43	EDI - Local Coordina
EDI Local BIS Director - 2nd Approval ...	Approved		Andra.Beyer@careertech.ok.gov	06/16/2023 14:03:18	EDI - Local BIS Direc
EDI Local Finance Coordinator - 3rd Ap...					EDI - Local Finance

EDI Grant Submit Invoice – Step 1

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

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year:* 2022-2023
 Organization Type:* Technology Center Districts
 Organization District:* Technology Center
 Grant Fund Type:* EDI
 Organization:* Technology Center
 Program Initiative:* Economic Development - Firefighter (Type 83) -...

Worksheet No:* WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9
 Agreement No:* WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA
 Invoice No:* INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information

Project Details

↻ Refresh | ➡ Next Step

- Collapse the **Invoice Line Items** section by clicking on another row/section. For example: click on the **Grant Allocation** row. You should now see the **Change Request** button at the bottom right of the screen.

EDI Grant Submit Invoice - Step 2

Provider Organization Details View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$26,535.00	\$26,535.00	\$24,104.90	\$0.00	\$2,931.00	\$24,104.90

Invoice Line Items

Attachments

Acknowledgements

View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval 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.

EDI Grant Submit Invoice - Step 2

Change Request

You are going to cancel the approval process and initiating the change request process, Are you sure?

- Click the black arrow to the left of the invoice line item you need to change.
- Click the **Edit** button to make the changes.

Invoice Line Items

	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description
	<input checked="" type="checkbox"/> Firefighter	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...
	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program
	Active	Firefighter	1000-100-330

Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Invoice Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.

Approval Process - EDI Grant Invoice 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: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
▶ EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coordi...	Andra - Beyer	Andra.Beyer@car...	Cancel for Change...	New Process	
EDI Local BIS Director - 2nd Approval St...	6/16/2023 2:37:27 PM						
EDI Local Finance Coordinator - 3rd Appr...	6/16/2023 2:37:27 PM						
EDI State Regional Coordinator - 4th App...	6/16/2023 2:37:27 PM						
EDI State Requisition Coordinator - 5th A...	6/16/2023 2:37:27 PM						
ODCTE EDI Finance Reviewer - Fully Ap...	6/16/2023 2:37:27 PM						

Current Approval Stage Information

Approved By: Beyer Andra
 Approver School: Oklahoma Department of Career and Technology Educati...
 Approver Email: Andra.Beyer@careertech.ok.gov

Approval Stage: 2nd Approval Stage
 Approver Role: EDI - Local BIS Director
 Approval Date: 06/16/2023

Approval/Rejection Note

Format: **B I U** [List Icons]

Private Note

Format: **B I U** [List Icons]

Browse: ☐ View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

[Back](#)
[Reject](#)
[Approve](#)

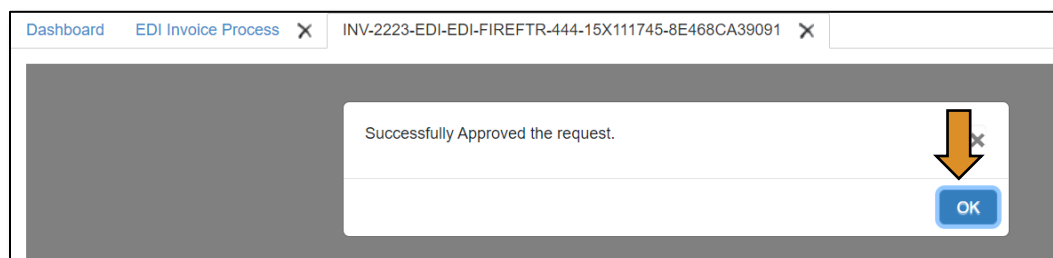
- A message will pop up asking if you are sure. Click **OK**.

Approval Process - EDI Grant Invoice Approval

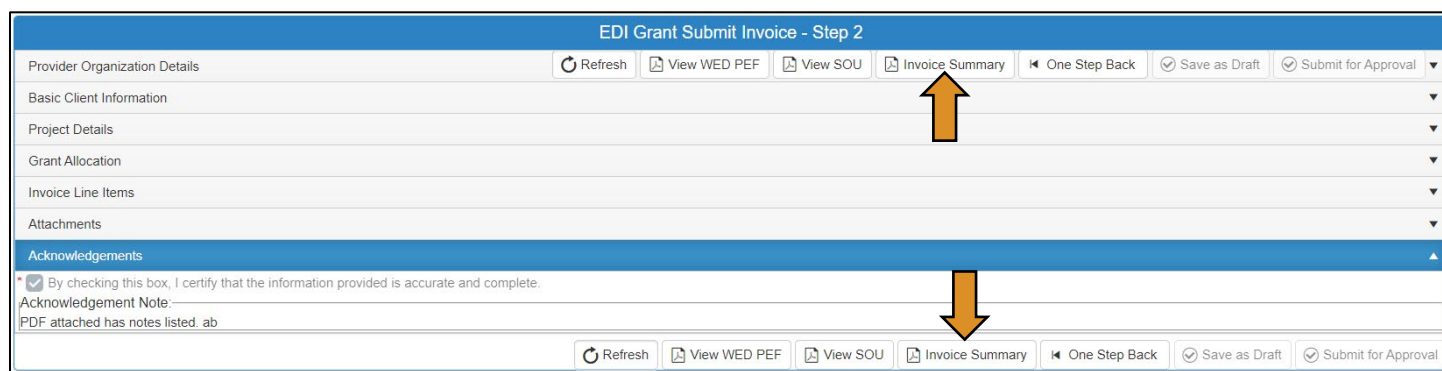
Are you sure?

[Cancel](#)
[OK](#)

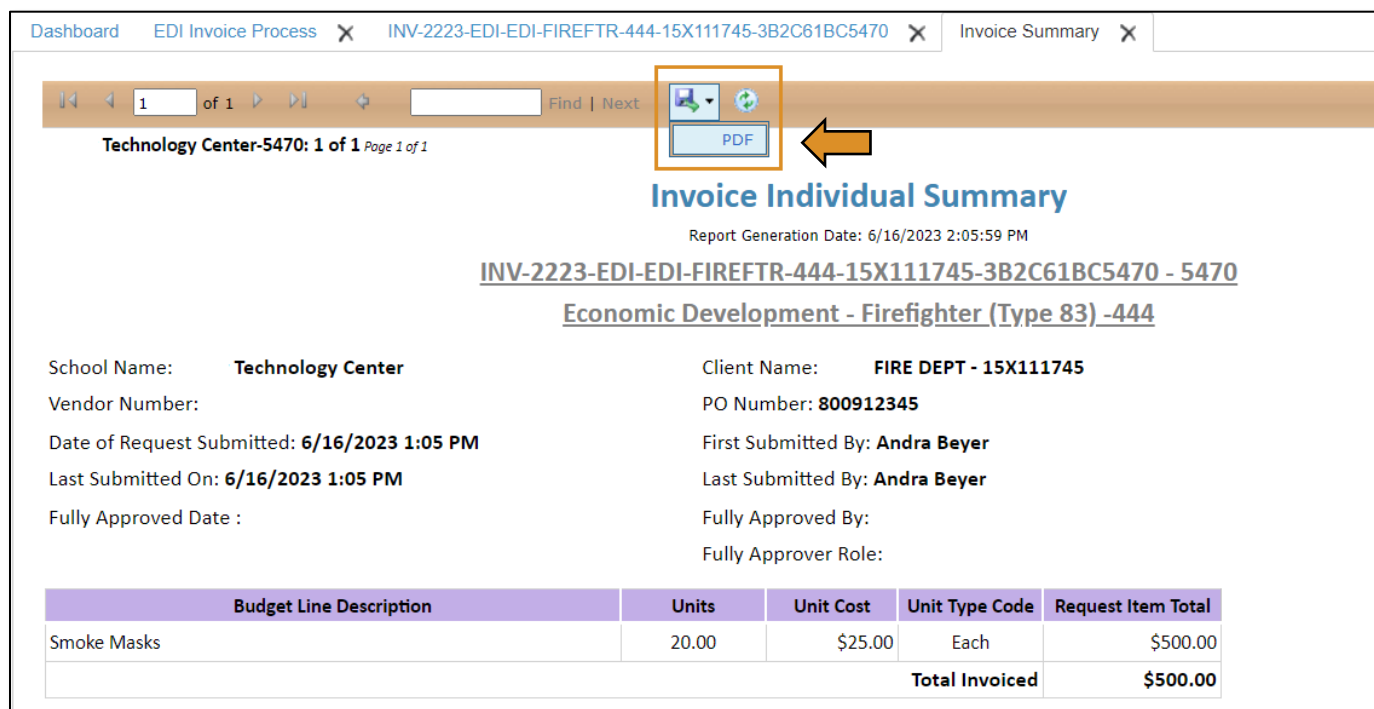
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

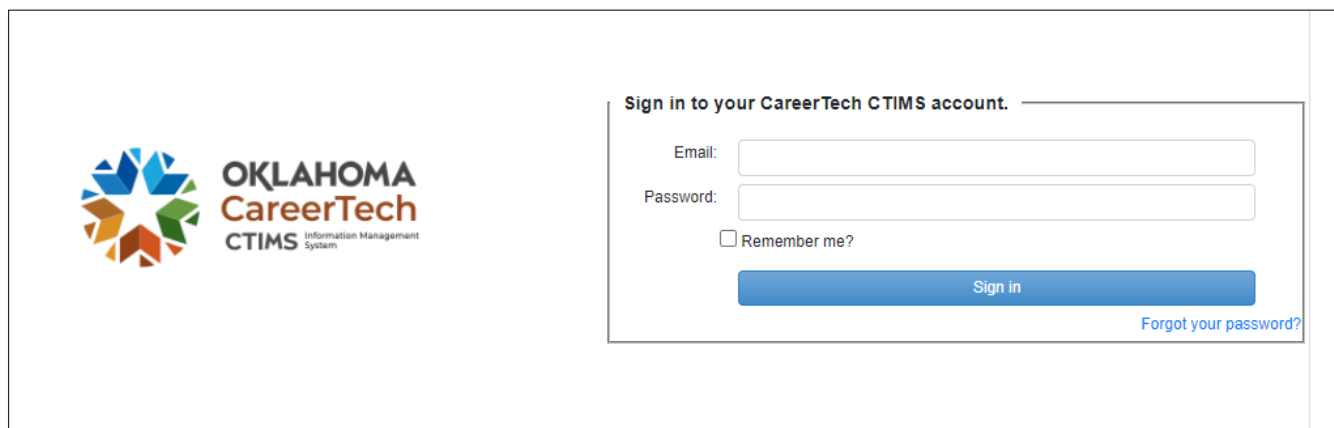


The *invoice* has been successfully submitted and will go to the EDI – Local BIS Director.

EDI – Local BIS Director (Invoice Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)


CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

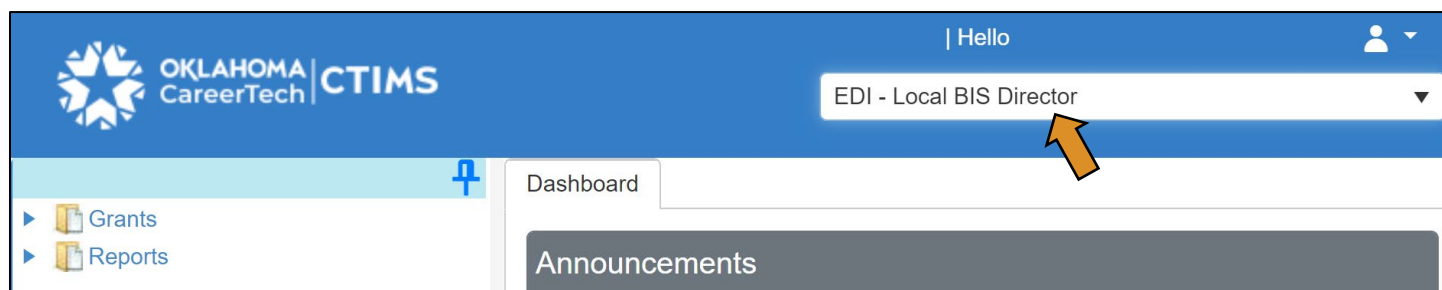
Click here to login to CTIMS



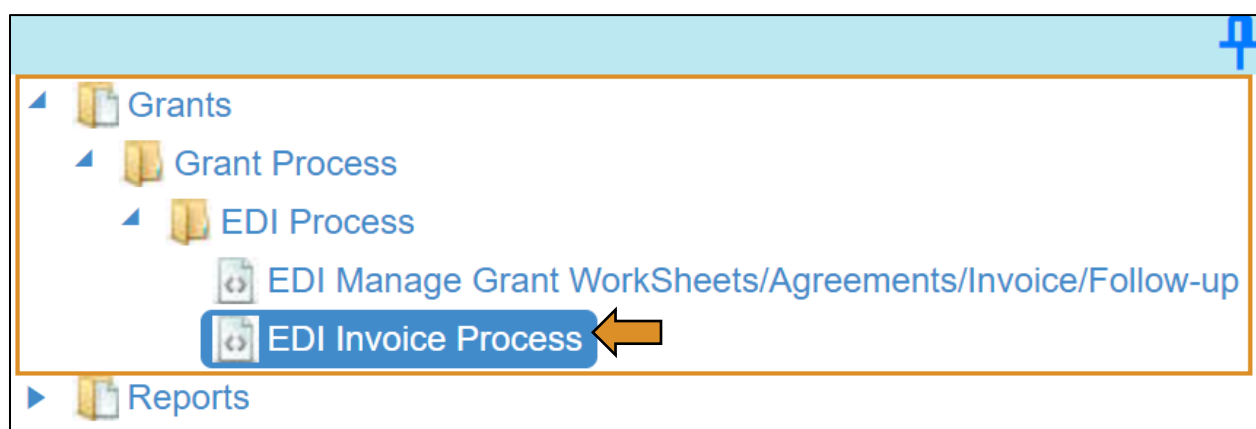
Accessing Invoice

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local BIS Director** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Invoice Process** link.



Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes several dropdown menus and a search button. Numbered callouts (1-9) are placed over specific fields: 1. Fiscal Calendar Year, 2. Grant Fund Type, 3. Organization Type, 4. Organization, 5. Organization District, 6. Program Initiative, 7. Approval Function Type, 8. Filter on Status, and 9. Search button.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details.
- Click on the blue Invoice link to open the invoice.

This screenshot shows the 'Manage Grant Invoices' tab selected. It displays a table of invoices. One invoice is expanded, showing an 'Invoice Approval Summary' table. Orange arrows point to the 'Manage Grant Invoices' tab, the 'Invoice' link in the table, and the 'Approval Stage' in the summary table.

Status	BAP Process	Paymer Days	Organization	Client Name	Program Initiative	Invoice
Yes	No	0	Technology Center	FIRE DEPT	Economic Development - Firefight...	INV-2223-EDI-EDI-FIREFTR-444-15X111

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov	06/16/2023 13:05:43

EDI Grant Submit Invoice – Step 1

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

Dashboard EDI Invoice Process INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2022-2023 Grant Fund Type: EDI
 Organization Type: Technology Center Districts Organization: Technology Center
 Organization District: Technology Center Program Initiative: Economic Development - Firefighter (Type 83) -...
 Worksheet No: WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9
 Agreement No: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA
 Invoice No: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information
 Project Details

Refresh Next Step

EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice-Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Expand the Attachments section by clicking on the word **Attachments**.
- Upload required documents and/or double check the attachments that were uploaded by the EDI – Local Coordinator. Refer to page 12 of the WED [Guidelines](#) for invoicing requirements.
- Click **Select files...** to locate the files on your computer.
- Select **Upload & Save file** to attach the file.
 - A message box will say you have successfully uploaded the file. Close this box.
- Add a note in the **Attachment Note:** section for extenuating circumstances related to the line items attachments.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information
 Project Details
 Grant Allocation
 Invoice Line Items

Attachments

Browse: Select files... Upload & Save file

Attachment Note:

Active/Inactive file(s) Delete file(s) Download all files

Status	File Name	Attachment Note	Uploaded Date	Action	
<input type="checkbox"/> Active	DataRequestForm.pdf		06/16/2023 13:05:11	Download	Public

Acknowledgements Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

IMPORTANT: Invoice line items and the attached supporting documents must match.
All attachments must be uploaded in one PDF.

- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an acknowledgment note in the box.
 - If you don't have a note to add, type your initials, as this field is required.
- Click the **Approval Process** button.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

PDF attached has notes listed. ab

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Invoice Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.

Approval Process - EDI Grant Invoice 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:
INV-2223-EDI-EDI-FIREFTR-444-15X11745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Approved		
▶ EDI Local BIS Director - 2nd Approval	6/19/2023 9:32:41 AM						
EDI Local Finance Coordinator - 3rd A...	6/19/2023 9:32:41 AM						
EDI State Regional Coordinator - 4th A...	6/19/2023 9:32:41 AM						
EDI State Requisition Coordinator - 5t...	6/19/2023 9:32:41 AM						

Current Approval Stage Information

Approved By* Beyer Andra
 Approver School* Oklahoma Department of Career and Technology Educati...
 Approver Email* Andra.Beyer@careertech.ok.gov

Approval Stage* 2nd Approval Stage
 Approver Role* EDI - Local BIS Director
 Approval Date* 06/16/2023

Approval/Rejection Note

Format **B I U** [List Icons]

Private Note

Format **B I U** [List Icons]

Browse ☐ View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

[Back](#)
[Reject](#)
[Approve](#)

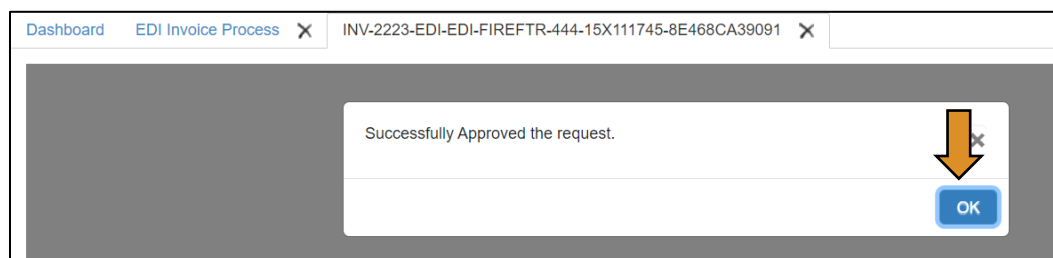
- A message will pop up asking if you are sure. Click **OK**.

Approval Process - EDI Grant Invoice Approval

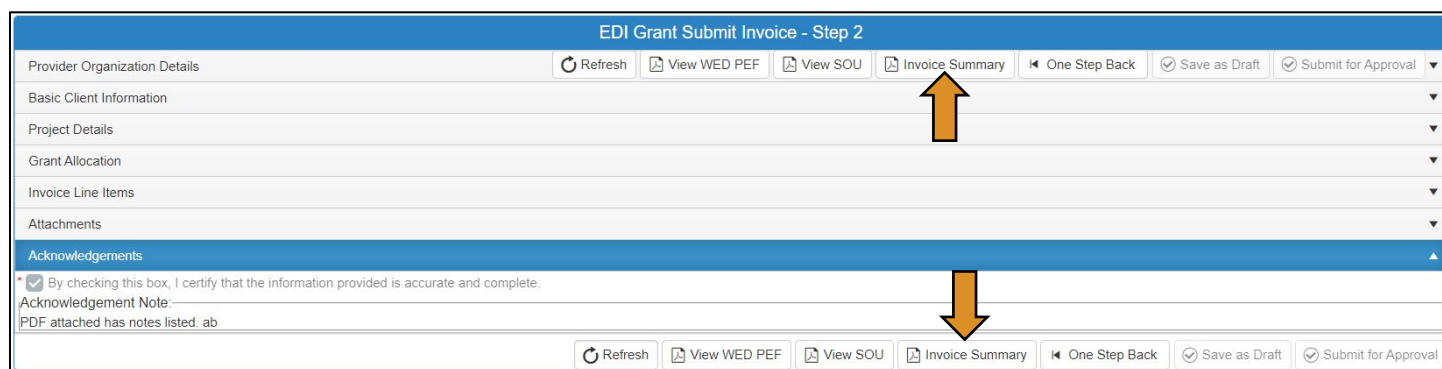
Are you sure?

[Cancel](#)
[OK](#)

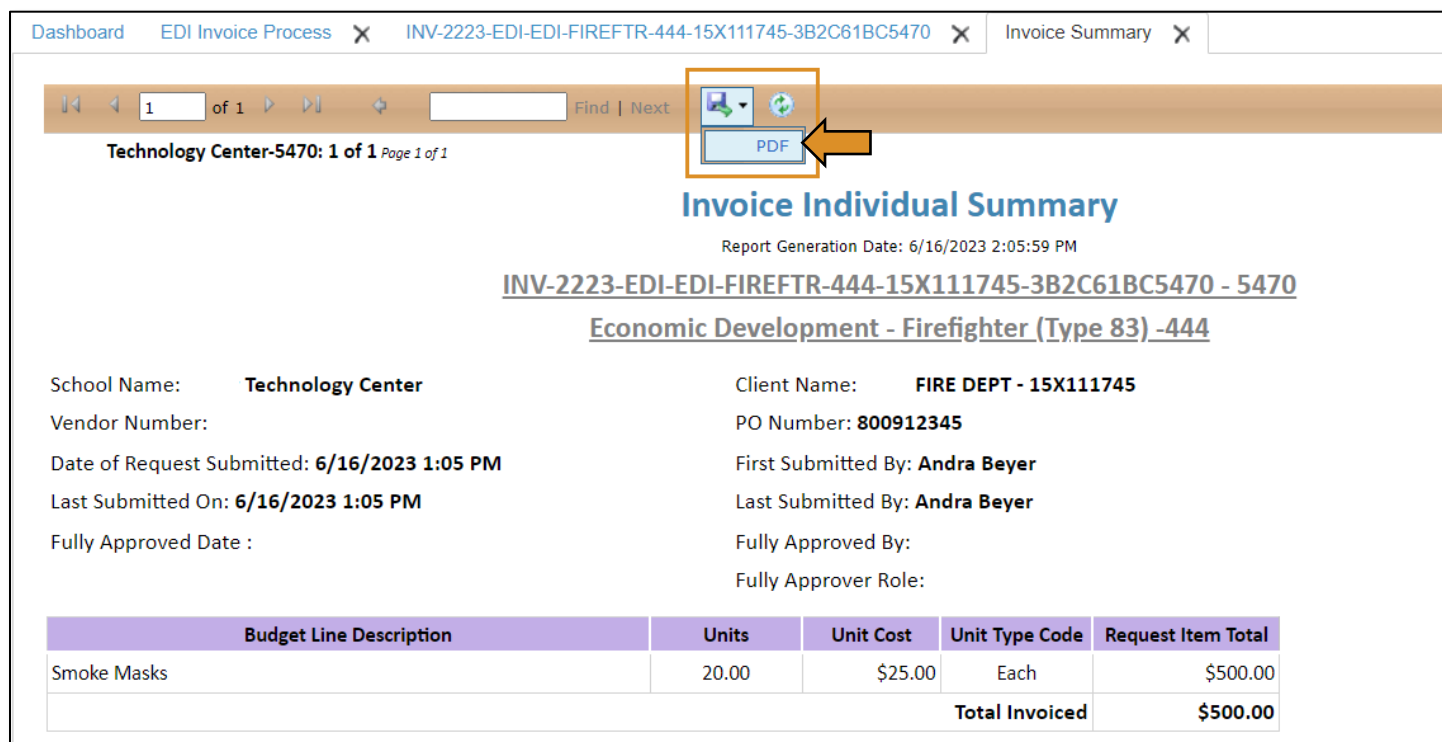
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

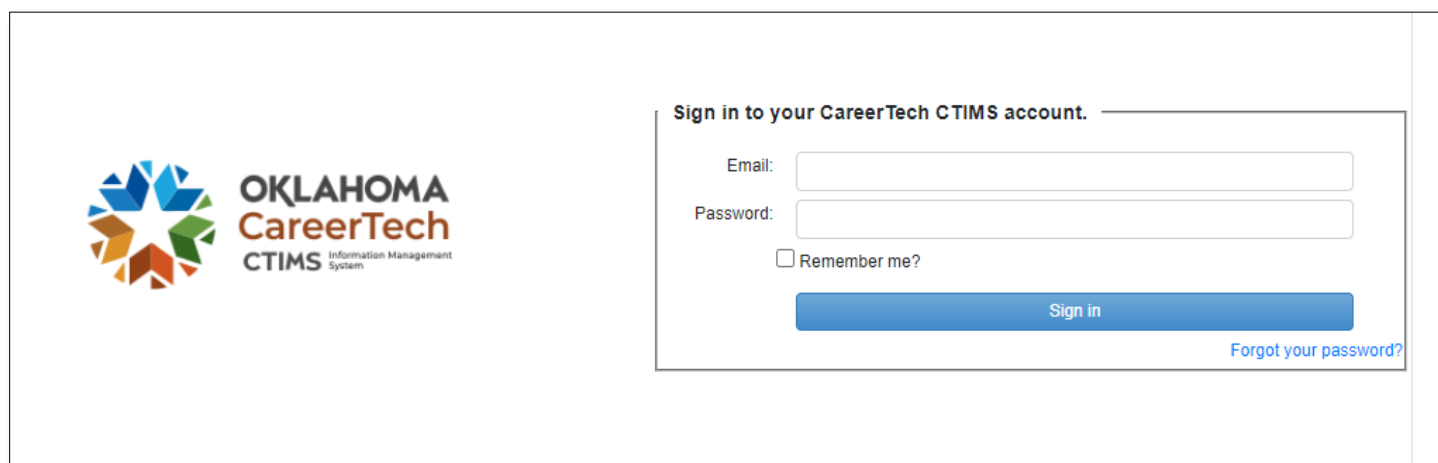


The *invoice* has been successfully submitted and will go to the **EDI – Local Finance Coordinator**.

EDI – Local Finance Coordinator (Invoice Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

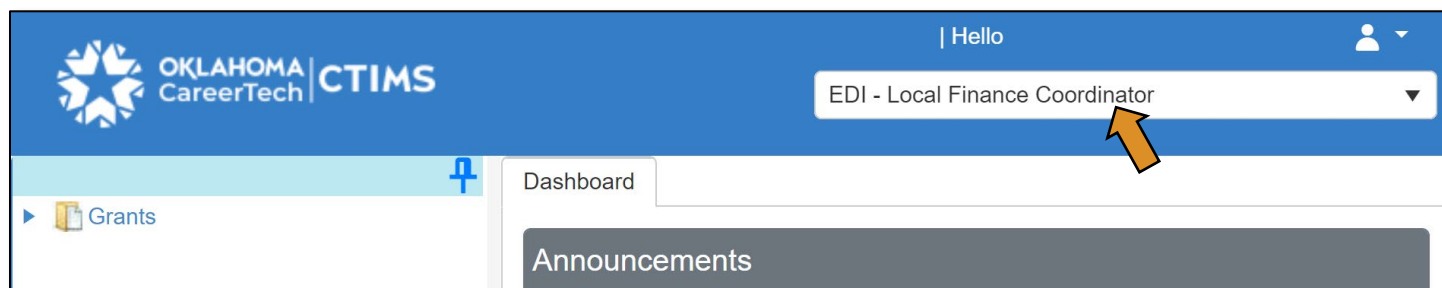
Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

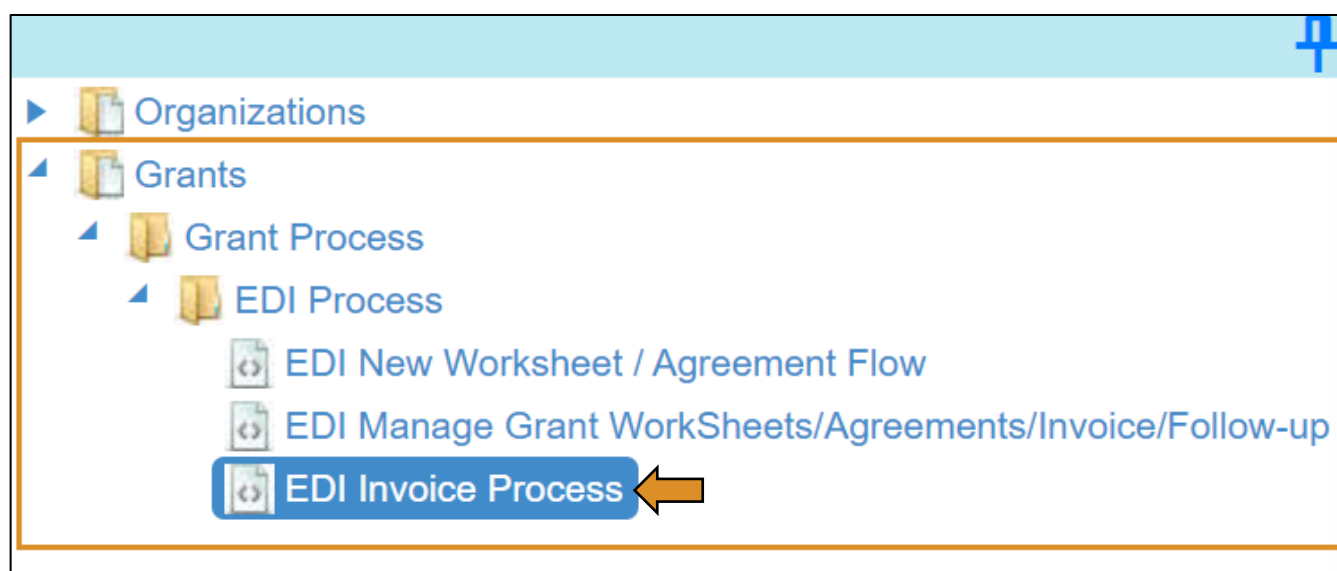


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Finance Coordinator** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Invoice Process** link.



Accessing the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes several dropdown menus and a search button. Numbered callouts (1-9) are placed over specific fields: 1. Fiscal Calendar Year, 2. Grant Fund Type, 3. Organization Type, 4. Organization, 5. Organization District, 6. Program Initiative, 7. Approval Function Type, 8. Filter on Status, and 9. Search button.

- After clicking the **Search** button, select **Manage Grant Invoices** tab to open an invoice that has already been started. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details.
- Click on the blue Invoice link to open the invoice.

The screenshot shows the 'Manage Grant Invoices' tab selected. It displays a table of invoices. An orange arrow points to the 'Manage Grant Invoices' tab. Another orange arrow points to the 'Invoice' column header. A third orange arrow points to the 'Invoice' link in the table. A fourth orange arrow points to the 'Approval Summary' section below the table. The 'Approval Summary' section shows the approval status of the invoice.

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approve
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov		EDI - Loc...
EDI Local BIS Director - 2nd Approval					EDI - Loc...

EDI Grant Submit Invoice – Step 1

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

Dashboard EDI Invoice Process X INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091 X

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year:*	2022-2023	Grant Fund Type:*	EDI
Organization Type:*	Technology Center Districts	Organization:*	Technology Center
Organization District:*	Technology Center	Program Initiative:*	Economic Development - Firefighte...
Worksheet No:*	WS- -EDI-EDI-FIREFTR-444-15X111745-C62DB6CB8978		
Agreement No:*	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD		
Invoice No:*	INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091		

Basic Client Information

Project Details

Refresh Next Step

EDI Grant Submit Invoice Step-2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type
<input checked="" type="checkbox"/>	Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00	Cost Per Each

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Matched Funds	Total
Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each	\$0.00	

- Verify the documents that are attached match the line items by clicking on the Attachments row.

IMPORTANT: Invoice line items and the attached supporting documents must match.
All attachments must be uploaded in one PDF.

- Click the **Approval Process** button at the bottom of the screen. The invoice will now go to the next approval stage.

EDI Grant Submit Invoice - Step 2

Provider Organization Details [Refresh](#) [View WED PEF](#) [View SOU](#) [Invoice Summary](#) [One Step Back](#) [Save as Draft](#) [Submit for Approval](#)

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

PDF attached has notes listed. ab

[Refresh](#) [View WED PEF](#) [View SOU](#) [Invoice Summary](#) [One Step Back](#) [Save as Draft](#) [Submit for Approval](#) [Approval Process](#)

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

Approval Process - EDI Grant Invoice Approval

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

Request Number: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

[Back](#) [Reject](#) [Approve](#)

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local BIS Director - 2nd Approval...	6/19/2023 9:37:10 AM	EDI - Local BIS ...	Andra - Beyer	Andra.Beyer@ca...	Approved		
► EDI Local Finance Coordinator - 3rd	6/19/2023 9:58:40 AM						
EDI State Regional Coordinator - 4th A...	6/19/2023 9:58:40 AM						
EDI State Requisition Coordinator - 5t...	6/19/2023 9:58:40 AM						
ODCTF FDI Finance Reviewer - Fully	6/19/2023 9:58:40 AM						

Current Approval Stage Information

Approved By* Beyer Andra

Approval Stage* 2nd Approval Stage

Approver School* Oklahoma Department of Career and Technology Educati...

Approver Role* EDI - Local BIS Director

Approver Email* Andra.Beyer@careertech.ok.gov

Approval Date* 06/16/2023

Approval/Rejection Note

Format **B I U** [Rich Text Editor Icons]

Private Note

Format **B I U** [Rich Text Editor Icons]

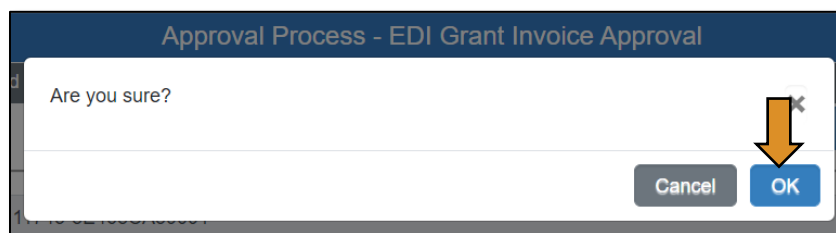
Browse ☐ View to Public

Attachment Note

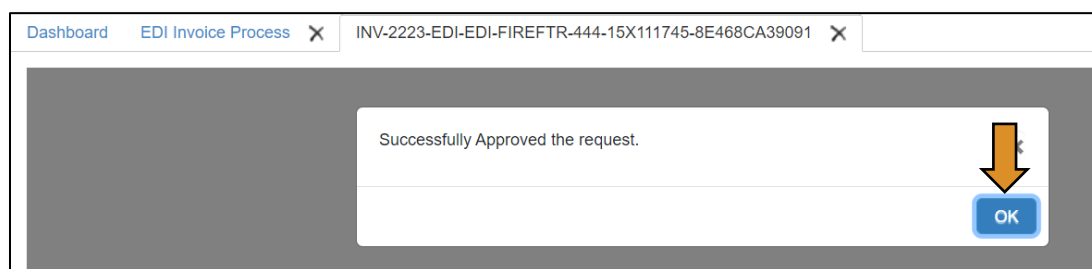
File Name	Uploaded On	Note	Attachment	Public
DataRequestForm.pdf	06/16/2023		Download	Public

[Back](#) [Reject](#) [Approve](#)

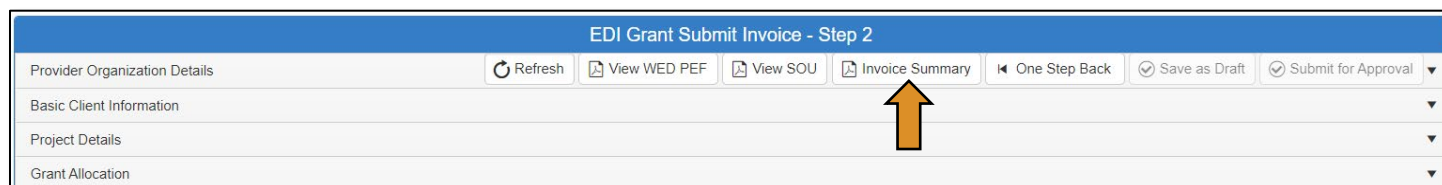
- A message will pop up asking if you are sure. Click **OK**.



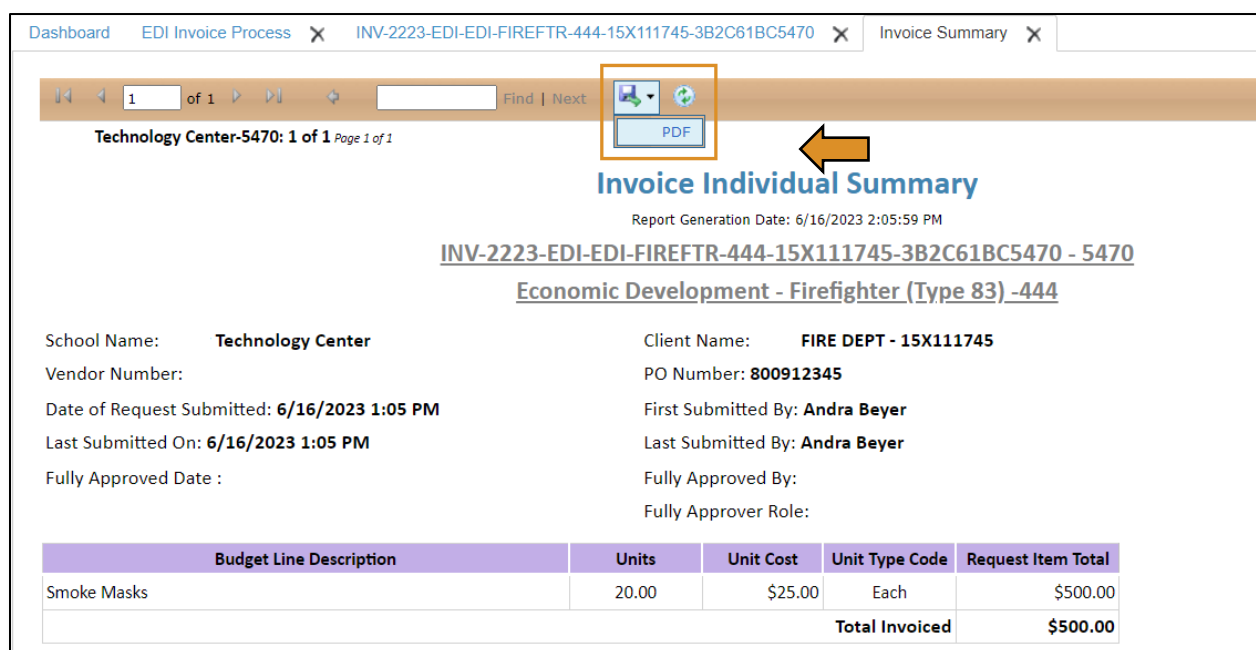
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

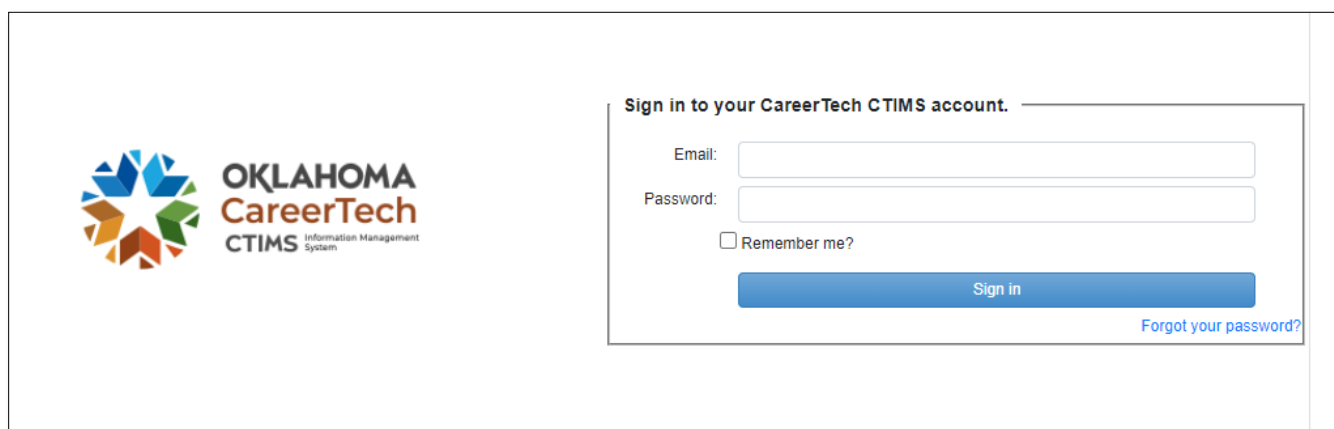


The *invoice* has been successfully submitted and will go to the EDI – State Regional Coordinator.

[EDI – State Regional Coordinator \(Invoice Process\)](#)

Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

☐ Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](#) and select the green CTIMS Login button.


CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

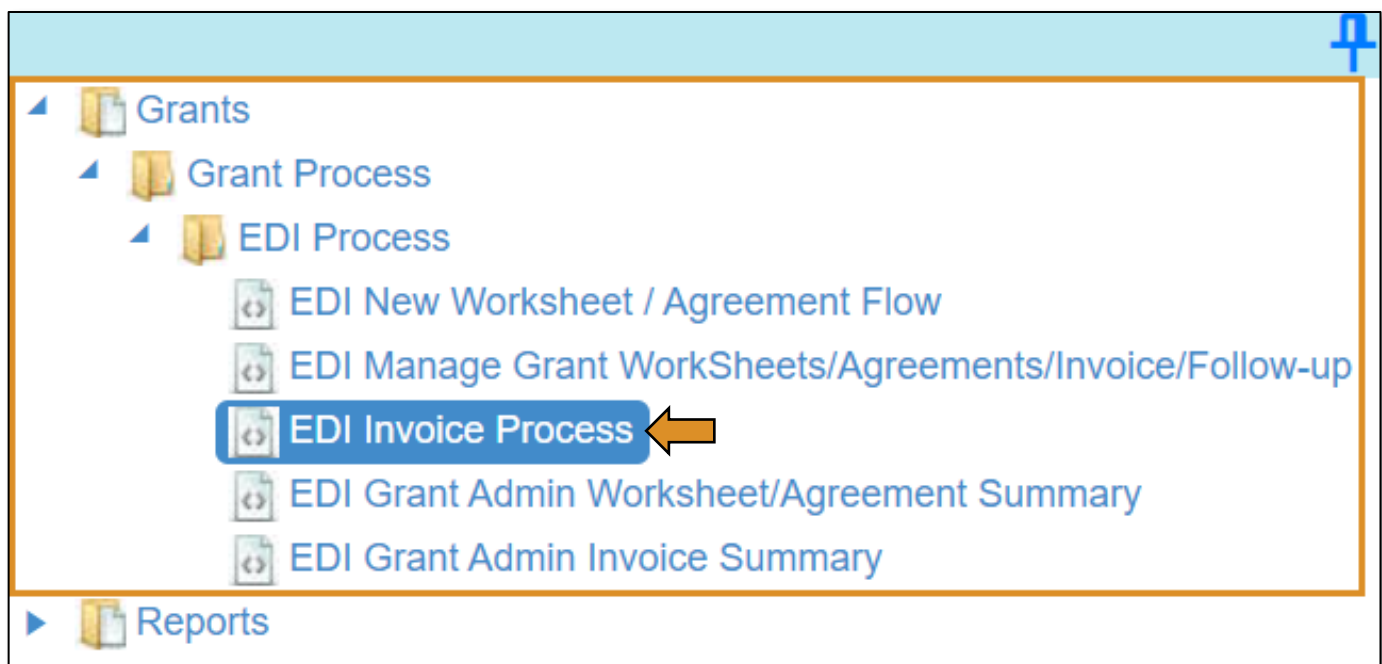
Click here to login to CTIMS 

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – State Regional Coordinator** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Invoice Process** link.



Accessing the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization*** - type the first three letters of your school or organization name and select it.
5. **Organization District*** - should automatically default to your organization.
6. **Program Initiative*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type*** - this will remain as *All*.
8. **Filter on Status*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes fields for Fiscal Calendar Year, Grant Fund Type, Organization Type, Organization, Organization District, Program Initiative, Approval Function Type, and Filter on Status. A 'Search' button is located at the bottom right. Numbered callouts (1-9) are placed over specific fields and the search button to correspond with the instructions.

- After clicking the **Search** button, select **Manage Grant Invoices** tab to open an invoice that has already been started, but not submitted for approval.
- Click on the blue Invoice link to open the invoice.

This screenshot shows the 'Manage Grant Invoices' tab selected. It displays a table of invoices with columns for Status, BAP Process, Paymer Days, Organization, Client Name, Program Initiative, and Invoice. An orange arrow points to the 'Manage Grant Invoices' tab, and another points to a blue 'INV-' link in the 'Invoice' column. Below the table, there is an 'Invoice Approval Summary' section with a table of approval stages.

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approve
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra Beyer@careertech.ok.gov		EDI - Loc
EDI Local BIS Director - 2nd Approval ...					EDI - Loc

EDI Grant Submit Invoice – Step 1

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

[Dashboard](#)
[EDI Invoice Process](#)
INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year:*	2022-2023	Grant Fund Type:*	EDI
Organization Type:*	Technology Center Districts	Organization:*	Technology Center
Organization District:*	Technology Center	Program Initiative:*	Economic Development - Firefighte...
Worksheet No:*	WS- -EDI-EDI-FIREFTR-444-15X111745-C62DB6CB8978		
Agreement No:*	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD		
Invoice No:*	INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091		

Basic Client Information

Project Details

Refresh
 Next Step

EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

EDI Grant Submit Invoice - Step 2

[Provider Organization Data](#)
 Refresh
 View WED PEF
 View SOU
 Invoice Summary
 One Step Back
 Save as Draft
 Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost
	<input checked="" type="checkbox"/> Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
 - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.
- Click the **Approval Process** button at the bottom of the screen.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements

* ☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:
PDF attached has notes listed. ab

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

Approval Process - EDI Grant Invoice Approval

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

Request Number: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Back Reject Approve

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local BIS Director - 2nd Approval...	6/19/2023 9:37:10 AM	EDI - Local BIS ...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local Finance Coordinator - 3rd A...	6/19/2023 10:01:46 AM	EDI - Local Finan...	Andra - Beyer	Andra.Beyer@ca...	Approved		
► EDI State Regional Coordinator - 4th	6/19/2023 10:48:37 AM						
EDI State Requisition Coordinator - 5th	6/19/2023 10:48:37 AM						
ODCTE EDI Finance Reviewer - Fully	6/19/2023 10:48:37 AM						

Current Approval Stage Information

Approved By* Beyer Andra
Approver School* Oklahoma Department of Career and Technology Educati...
Approver Email* Andra.Beyer@careertech.ok.gov

Approval Stage* 2nd Approval Stage
Approver Role* EDI - Local BIS Director
Approval Date* 06/16/2023

Approval/Rejection Note

Format **B I U** [Rich Text Editor Icons]

Private Note

Format **B I U** [Rich Text Editor Icons]

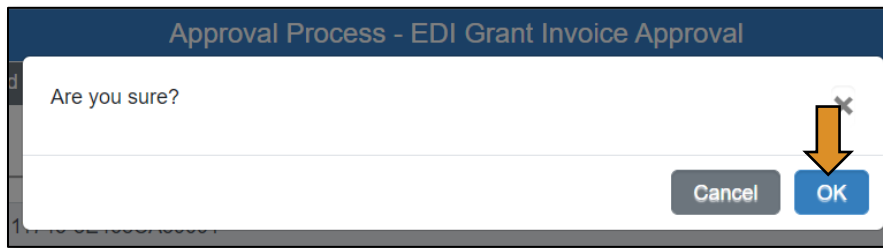
Browse ☐ View to Public

Attachment Note

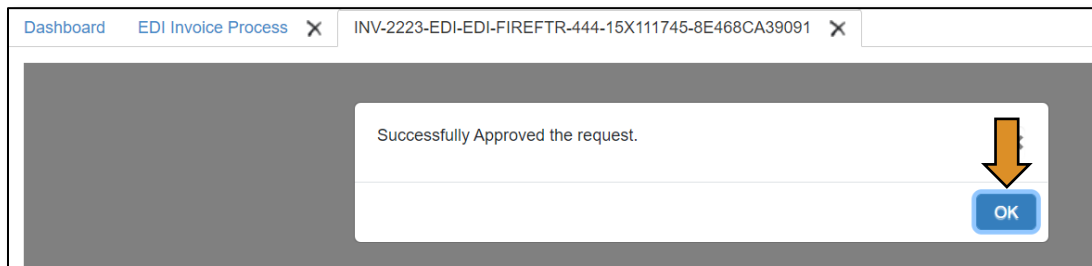
File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

Back Reject Approve

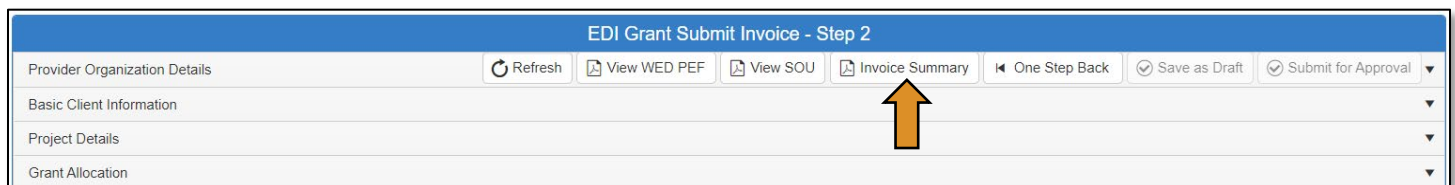
- A message will pop up asking if you are sure. Click **OK**.



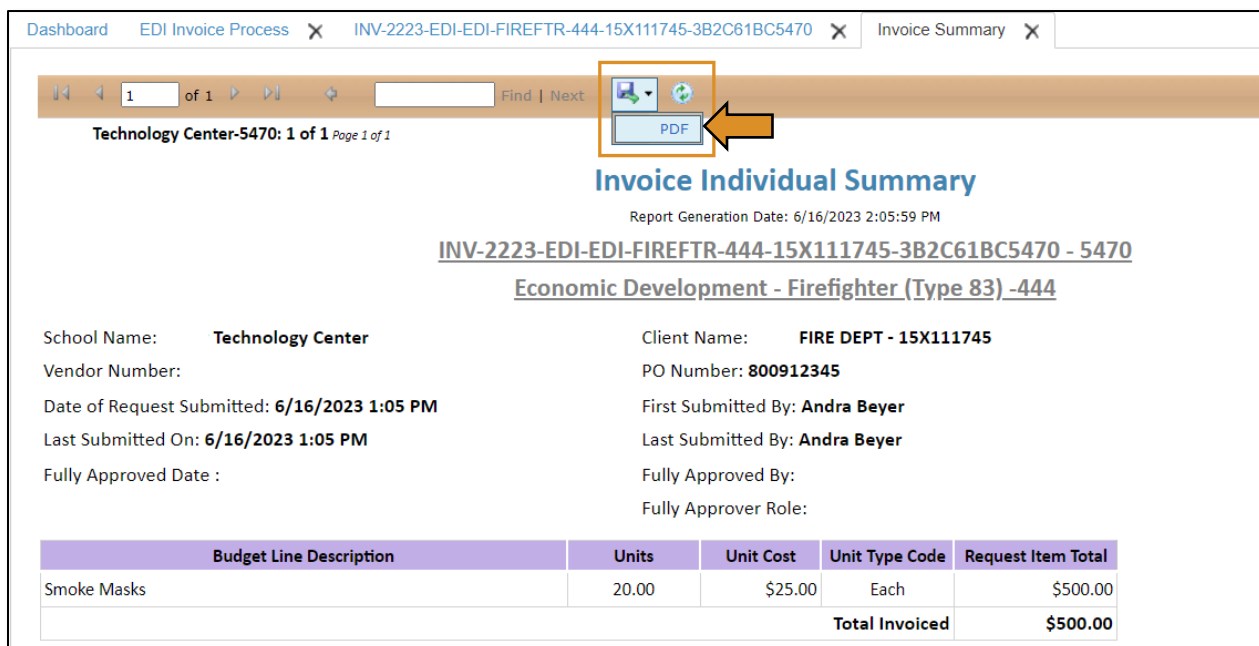
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

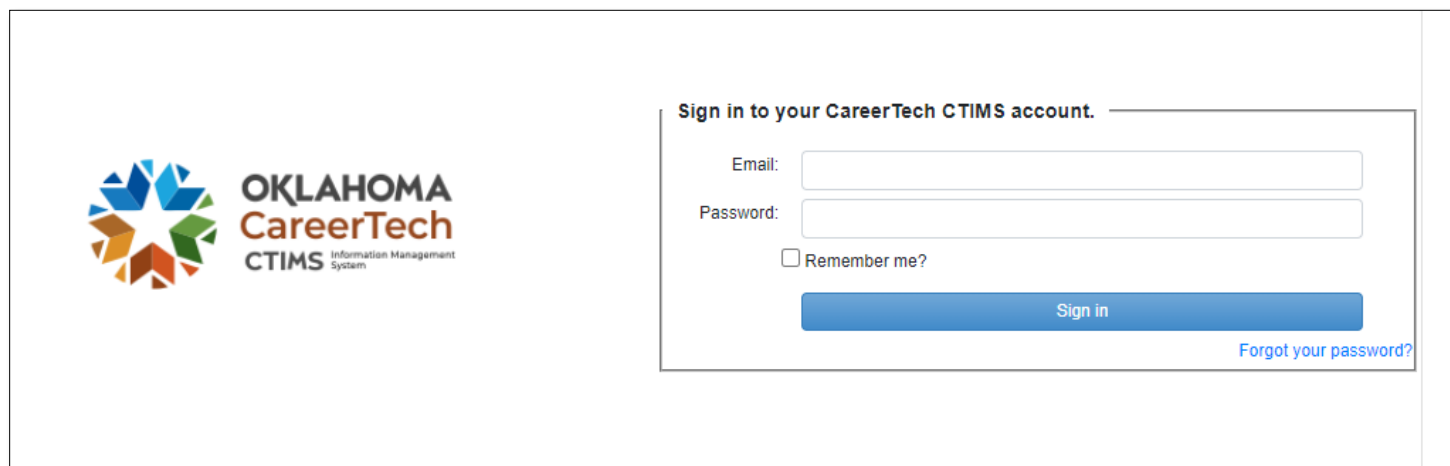


The *invoice* has been successfully submitted and will go to the EDI – State Requisition Coordinator.

EDI – State Requisition Coordinator (Invoice Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](#) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

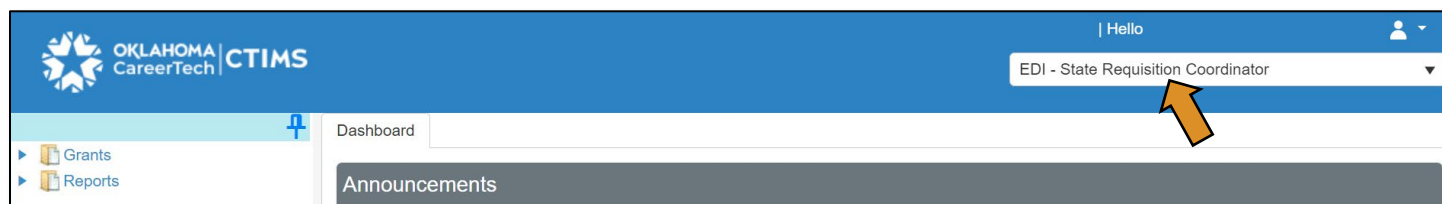
Microsoft Edge  , Mozilla Firefox  , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

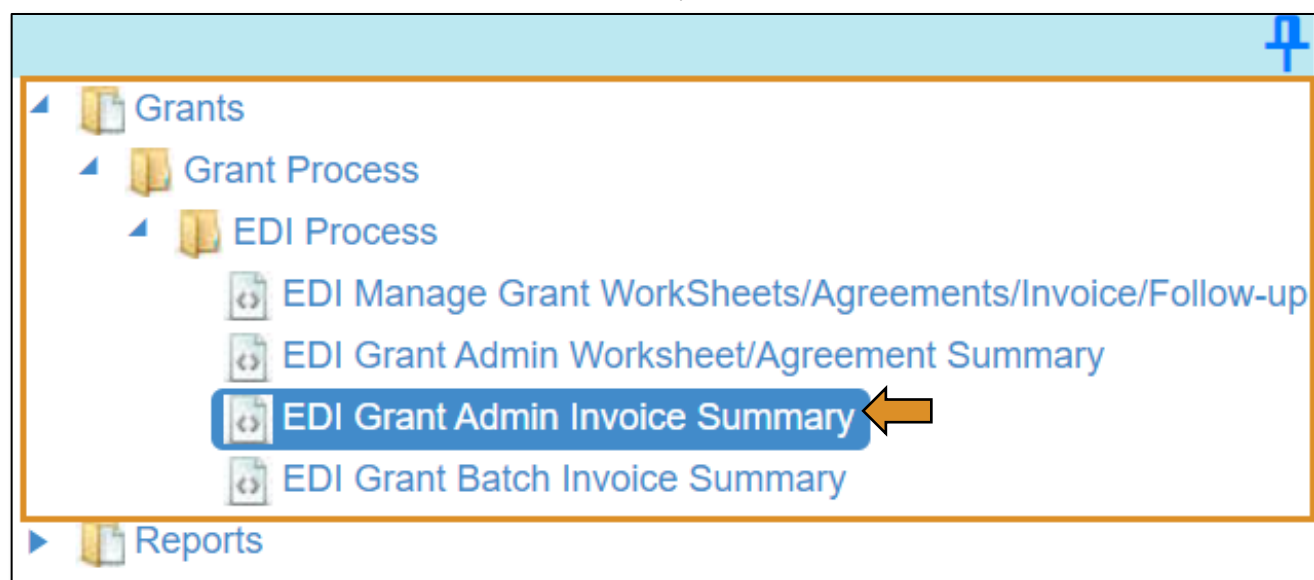


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – State Requisition Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – State Requisition Coordinator** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Grant Admin Invoice Summary** link.



Accessing the Invoice

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

1. **Fiscal Calendar Year:** * - this field automatically displays the current year.
2. **Grant Fund Type:** * - automatically defaults to EDI due to your login credentials and role.
3. **Program Initiative:** * - select initiative you are needing from the drop-down menu or...
 - a. Click the **All** box.
4. **Organization Type:** * - should automatically default to *Technology Center Districts* or...
 - a. Click the **All** box.
5. **Organization:** * - type the first three letters of the school or organization name and select it or...
 - a. Click the **All** box.
6. **Approval Function Type:** * - this will remain as **All**.
7. **Filter on Status:** * - this will remain as **All**.
8. Click **Search**.

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

The screenshot shows the 'EDI Admin Grant Fund Invoices List' form. It includes the following fields and callouts:

- Fiscal Calendar Year:** * (1.) 2022-2023
- Grant Fund Type:** * (2.) EDI
- Program Initiative:** (3a.) ☐ All * (3.) EDI-FIREFTR-444 - Economic Devel...
- Organization Type:** (4.) ☐ All * (4a.) Technology Center Districts
- Organization:** * (5.) Search Organizations... (5a.) ☐ All
- Approval Function Type:** * (6.) All
- Filter on Status:** * (7.) All
- Search:** (8.) [Search button]

At the top, there are tabs for 'Dashboard' and 'EDI Grant Admin Invoice Summary'. Below the form, there are tabs for 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.

EDI Admin Grant Fund Invoices List

Fiscal Calendar Year: 2022-2023
 Program Initiative: ☐ All EDI-FIREFTR-444 - Economic Development - Firefighter (Typ...
 Organization: ☐ All

Grant Fund Type: EDI
 Organization Type: ☐ All Technology Center Districts

Grant Worksheet/Agreement/Invoice List **Manage Grant Invoices**

☒ Save changes
 ☐ Cancel changes
 ☒ Export to Excel
 ☐ Refresh

Status	BAP Process	Paymen Days	Organization	Client Name	Program Initiative	Invoice
<input type="checkbox"/>	Yes	No	0	Technology Center	ENID FIRE DEPT	Economic Development - Firefight... INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Invoice Approval Summary

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver Role	Private No
EDI Local BIS Coordinator - 1st ...	Approved	New Process	Andra.Beyer@careertech.ok...	06/16/2023 13:05:43	EDI - Local Coordinator	

EDI Grant Submit Invoice – Step 1

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

Dashboard EDI Grant Admin Invoice Summary INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2022-2023 Grant Fund Type: EDI
 Organization Type: Technology Center Districts Organization: Technology Center
 Organization District: Technology Center Program Initiative: Economic Development - Firefighter (Type 8...
 Worksheet No: WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9
 Agreement No: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA
 Invoice No: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information

Project Details

EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval ▼

Basic Client Information ▼

Project Details ▼

Grant Allocation ▼

Invoice Line Items ▲

	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost
	<input checked="" type="checkbox"/> Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
 - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.
- Click the **Approval Process** button at the bottom of the screen.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval ▼

Basic Client Information ▼

Project Details ▼

Grant Allocation ▼

Invoice Line Items ▼

Attachments ▼

Acknowledgements ▲

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:-
PDF attached has notes listed. ab

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Change Request Approval Process

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

Approval Process - EDI Grant Invoice Approval

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

Request Number _____

INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI Local BIS Director - 2nd Approval ...	6/19/2023 9:37:10 AM	EDI - Local BIS D...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI Local Finance Coordinator - 3rd Ap...	6/19/2023 10:01:46 AM	EDI - Local Finan...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI State Regional Coordinator - 4th A...	6/19/2023 1:23:18 PM	EDI - State Regio...	Andra - Beyer	Andra.Beyer@car...	Approved		
► EDI State Requisition Coordinator - 5	6/19/2023 1:25:08 PM						
ODCTE EDI Finance Reviewer - Fully	6/19/2023 1:25:08 PM						

Current Approval Stage Information

Approved By*
 Approver School*
 Approver Email*

Approval Stage*
 Approver Role*
 Approval Date*

Approval/Rejection Note.

Format ▼

Private Note.

Format ▼

Browse
☐ View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

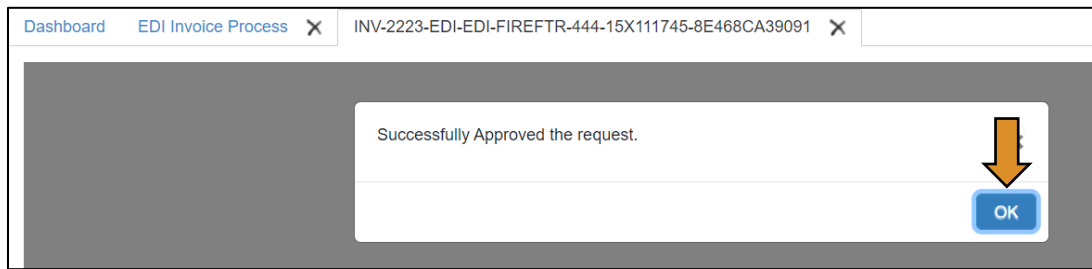
- A message will pop up asking if you are sure. Click **OK**.

Approval Process - EDI Grant Invoice Approval

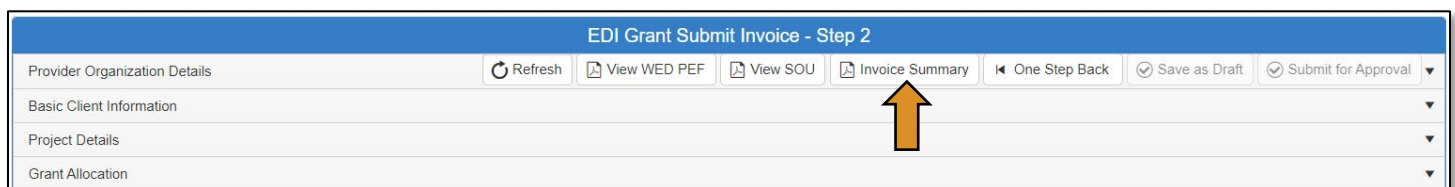
Are you sure?

Cancel OK

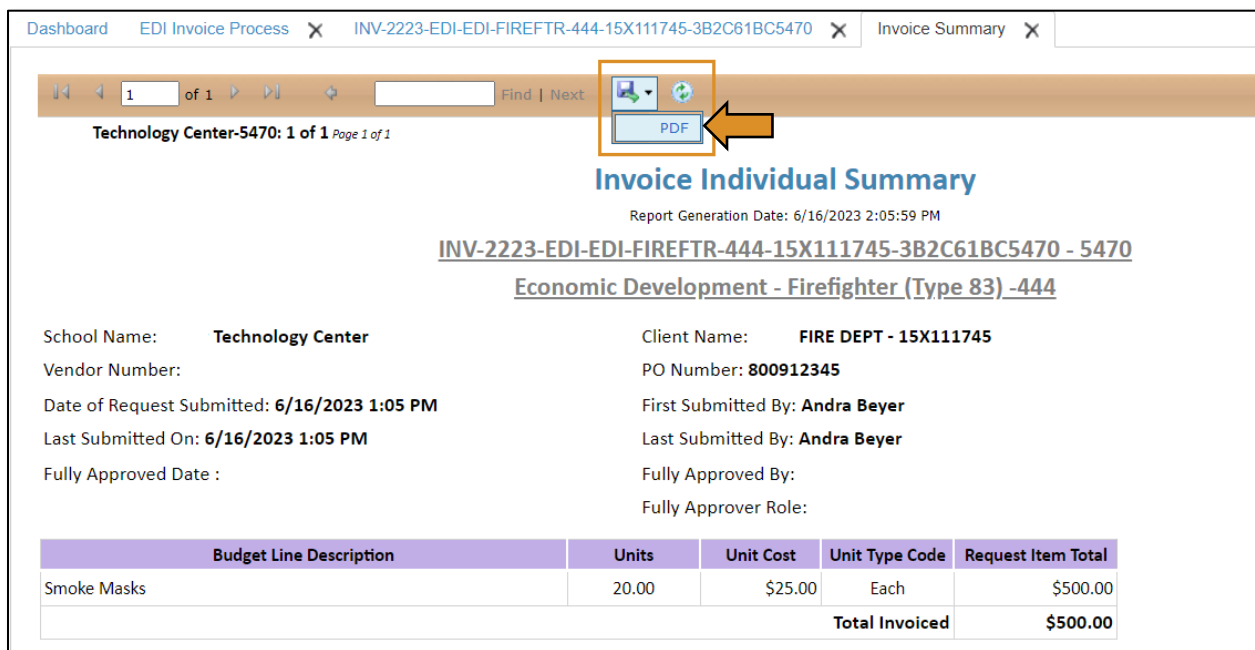
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

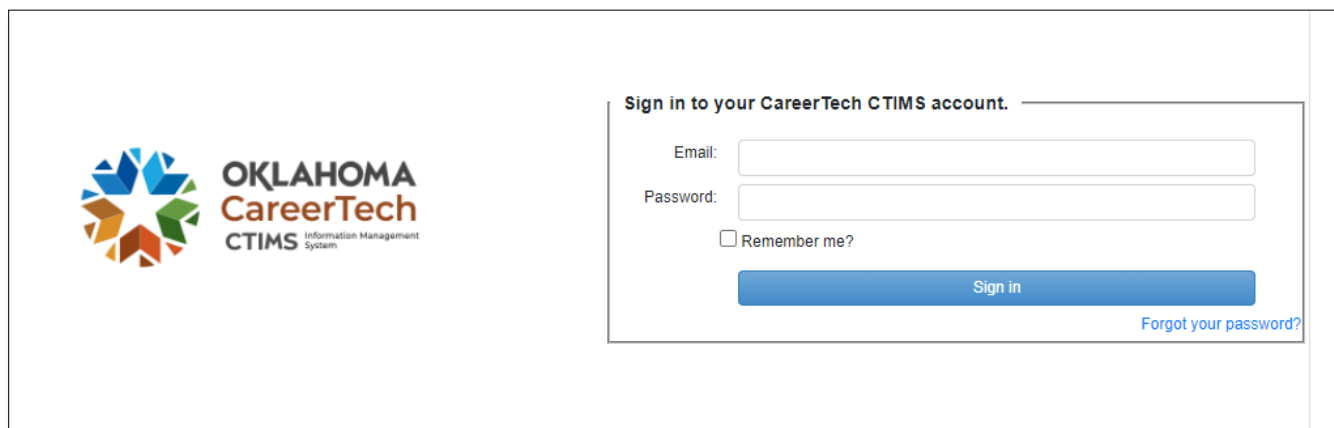


The *invoice* has been successfully submitted and will go to the **ODCTE – EDI Finance Reviewer** (final approval).

ODCTE – EDI Finance Reviewer (Invoice Process)

Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)


CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

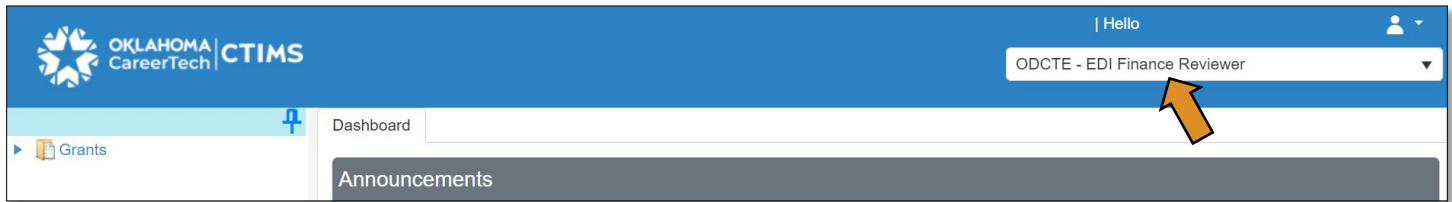
Microsoft Edge  , Mozilla Firefox  , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

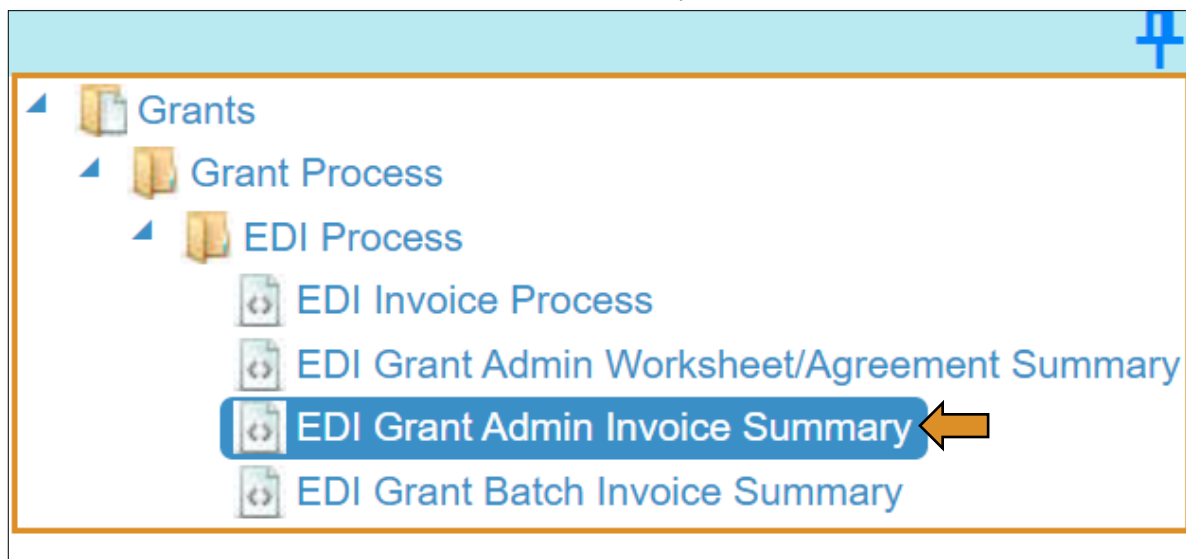


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **ODCTE – EDI Finance Reviewer** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **ODCTE – EDI Finance Reviewer** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants**, **Grant Process** & **EDI Process**.
- Click on the **EDI Grant Admin Invoice Summary** link.



Accessing the Invoice

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

1. **Fiscal Calendar Year:** * - this field automatically displays the current year.
2. **Grant Fund Type:** * - automatically defaults to EDI due to your login credentials and role.
3. **Program Initiative:** * - select initiative you are needing from the drop-down menu or...
 - a. Click the **All** box.
4. **Organization Type:** * - should automatically default to *Technology Center Districts* or...
 - a. Click the **All** box.
5. **Organization:** * - type the first three letters of the school or organization name and select it or...
 - a. Click the **All** box.
6. **Approval Function Type:** * - this will remain as **All**.
7. **Filter on Status:** * - this will remain as **All**.
8. Click **Search**.

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

The screenshot shows the 'EDI Admin Grant Fund Invoices List' form. It includes the following fields and callouts:

- Fiscal Calendar Year:** * (1.) 2022-2023
- Grant Fund Type:** * (2.) EDI
- Program Initiative:** * (3a.) All * (3.) EDI-FIREFTR-444 - Economic Devel...
- Organization Type:** * (4.) All * (4a.) Technology Center Districts
- Organization:** * (5.) Search Organizations... (5a.) All
- Approval Function Type:** * (6.) All
- Filter on Status:** * (7.) All
- Search** button (8.)

At the bottom, there are two tabs: 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.

EDI Admin Grant Fund Invoices List

Fiscal Calendar Year: 2022-2023
 Program Initiative: ☐ All EDI-FIREFTR-444 - Economic Development - Firefighter (Typ...
 Organization: ☐ All

Grant Fund Type: EDI
 Organization Type: ☐ All Technology Center Districts

Grant Worksheet/Agreement/Invoice List **Manage Grant Invoices**

☒ Save changes
 ☐ Cancel changes
 ☒ Export to Excel
 ☐ Refresh

Status	BAP Process	Paymen Days	Organization	Client Name	Program Initiative	Invoice
<input type="checkbox"/>	Yes	No	0	Technology Center	ENID FIRE DEPT	Economic Development - Firefight... INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Invoice Approval Summary

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver Role	Private No
EDI Local BIS Coordinator - 1st ...	Approved	New Process	Andra.Beyer@careertech.ok...	06/16/2023 13:05:43	EDI - Local Coordinator	

EDI Grant Submit Invoice – Step 1

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

Dashboard EDI Grant Admin Invoice Summary INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2022-2023 Grant Fund Type: EDI
 Organization Type: Technology Center Districts Organization: Technology Center
 Organization District: Technology Center Program Initiative: Economic Development - Firefighter (Type 8...
 Worksheet No: WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9
 Agreement No: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA
 Invoice No: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

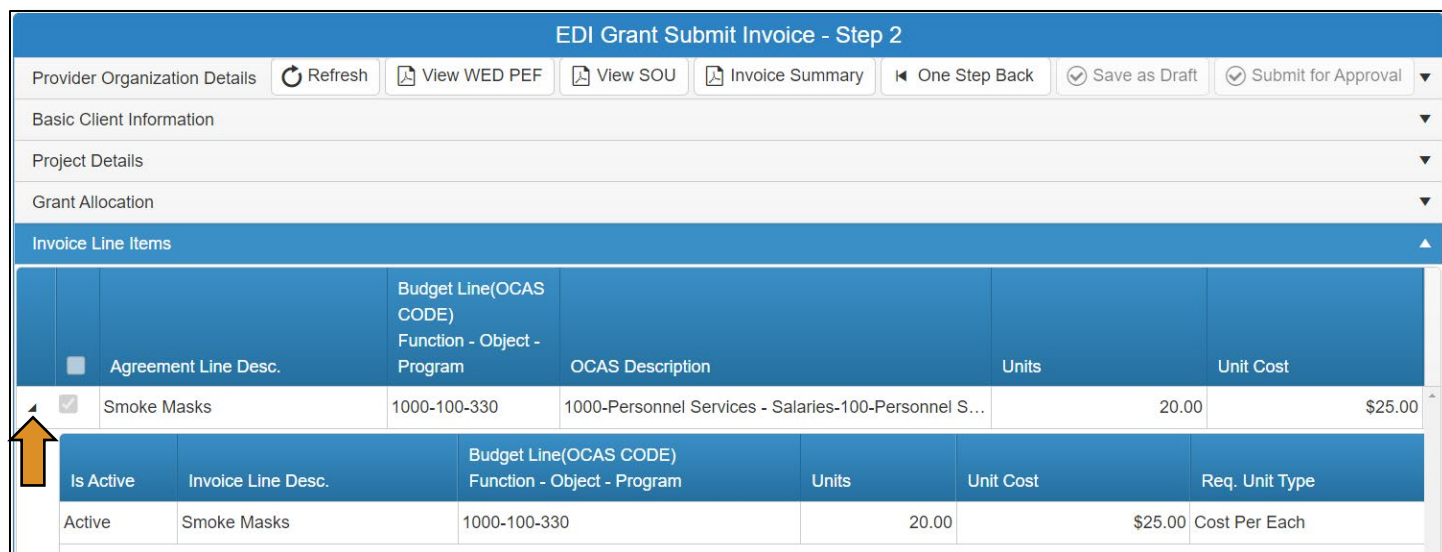
Basic Client Information

Project Details

EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.



EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval ▼

Basic Client Information ▼

Project Details ▼

Grant Allocation ▼

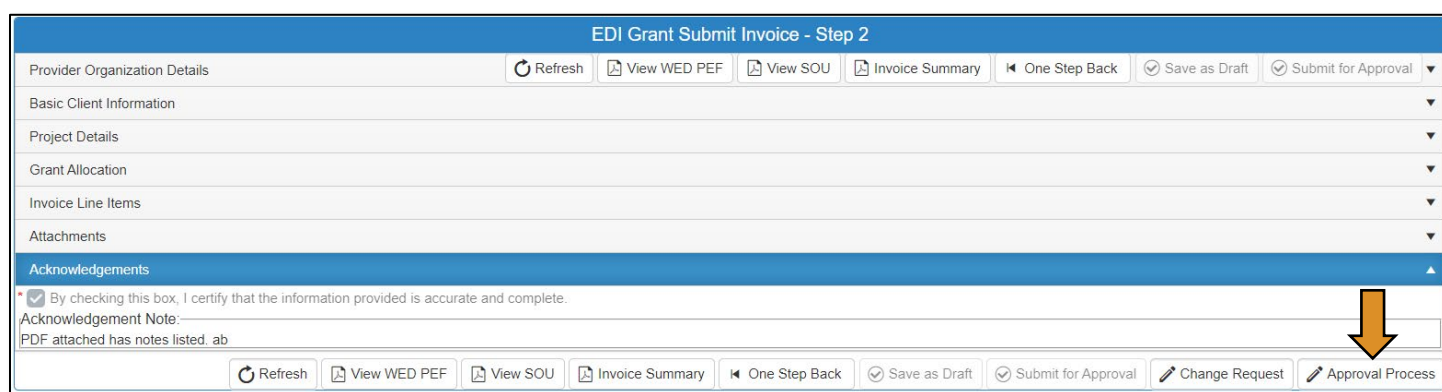
Invoice Line Items ▲

	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost
<input checked="" type="checkbox"/>	Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00

▲

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
 - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.
- Click the **Approval Process** button at the bottom of the screen.



EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval ▼

Basic Client Information ▼

Project Details ▼

Grant Allocation ▼

Invoice Line Items ▼

Attachments ▼

Acknowledgements ▲

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:-

PDF attached has notes listed. ab

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Change Request Approval Process

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

Approval Process - EDI Grant Invoice 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 _____

INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra Beyer@car...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra Beyer@car...	Approved		
EDI Local BIS Director - 2nd Approval ...	6/19/2023 9:37:10 AM	EDI - Local BIS D...	Andra - Beyer	Andra Beyer@car...	Approved		
EDI Local Finance Coordinator - 3rd Ap...	6/19/2023 10:01:46 AM	EDI - Local Finan...	Andra - Beyer	Andra Beyer@car...	Approved		
EDI State Regional Coordinator - 4th A...	6/19/2023 1:23:18 PM	EDI - State Regio...	Andra - Beyer	Andra Beyer@car...	Approved		
► EDI State Requisition Coordinator - 5	6/19/2023 1:25:08 PM						
ODCTF EDI Finance Reviewer - Fully	6/19/2023 1:25:08 PM						

Current Approval Stage Information

Approved By*

Approver School*

Approver Email*

Approval Stage*

Approver Role*

Approval Date*

Approval/Rejection Note.

Format ▼ **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon]

Private Note.

Format ▼ **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon]

Browse ☐ View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

Back
Reject
Approve

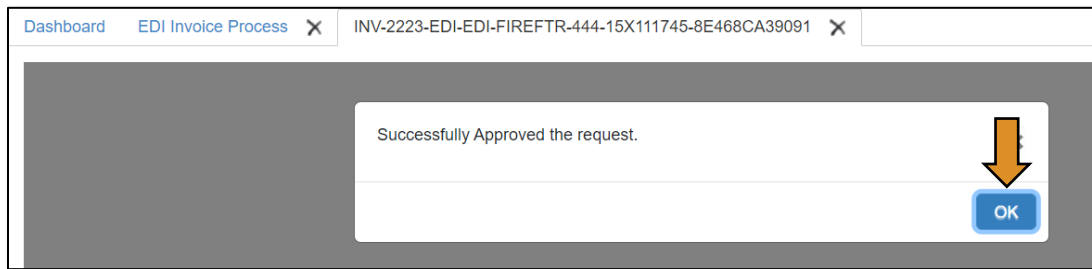
- A message will pop up asking if you are sure. Click **OK**.

Approval Process - EDI Grant Invoice Approval

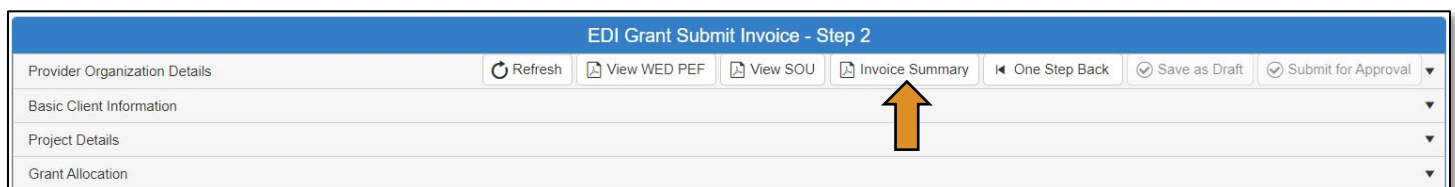
Are you sure?

Cancel OK

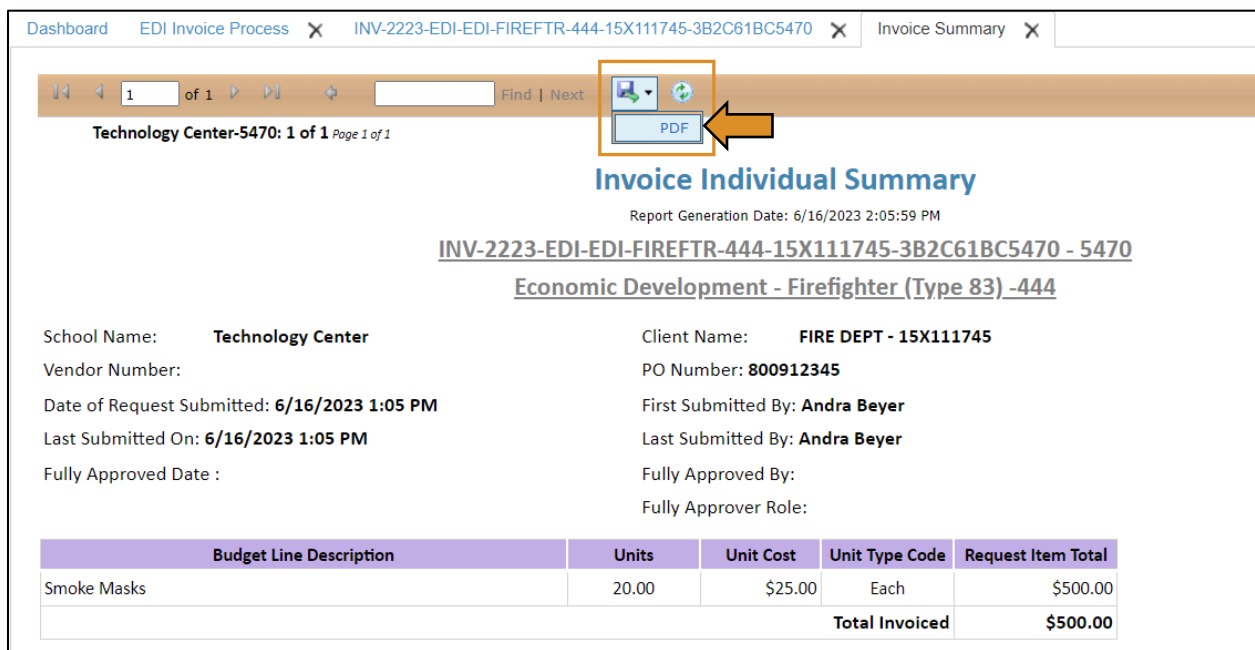
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

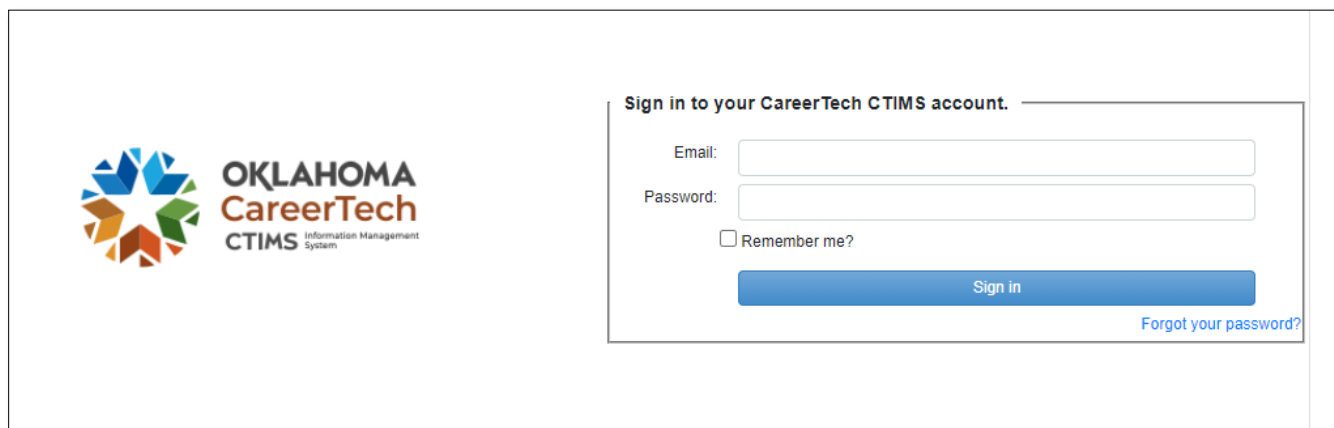


The *invoice* has been successfully submitted and will go to the **ODCTE – EDI Finance Reviewer** (final approval).

ODCTE – EDI Finance Reviewer (Invoice Process)

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Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)


CTIMS Login and Assistance

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CTIMSSupport@careertech.ok.gov

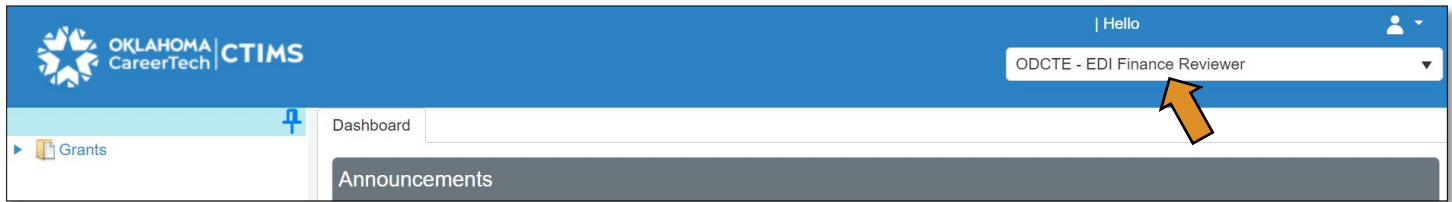
Microsoft Edge  , Mozilla Firefox  , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

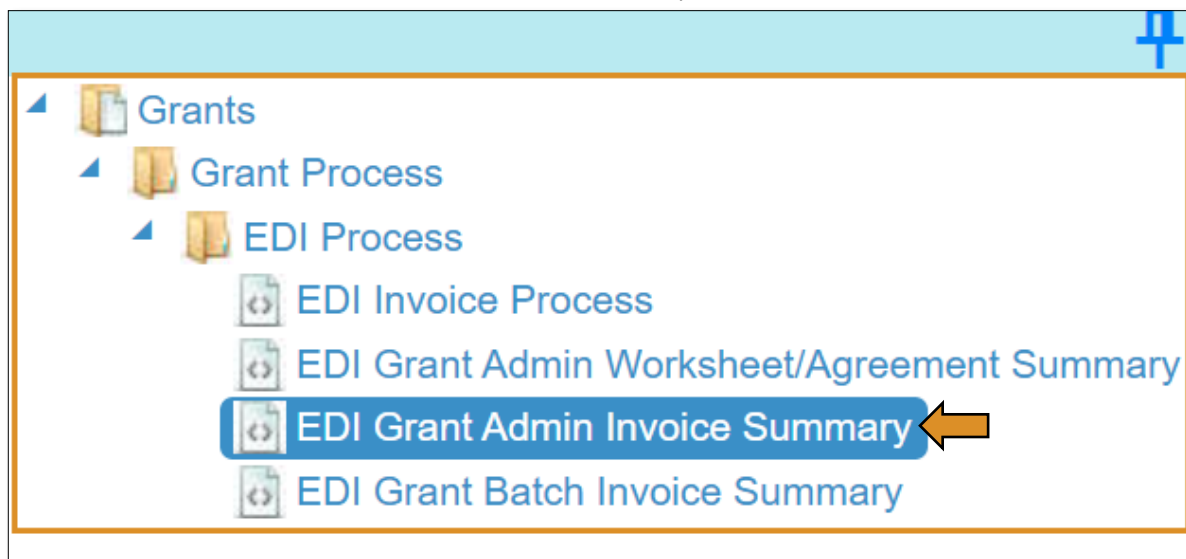


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **ODCTE – EDI Finance Reviewer** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **ODCTE – EDI Finance Reviewer** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Grant Admin Invoice Summary** link.



Accessing the Invoice

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

1. **Fiscal Calendar Year:** * - this field automatically displays the current year.
2. **Grant Fund Type:** * - automatically defaults to EDI due to your login credentials and role.
3. **Program Initiative:** * - select initiative you are needing from the drop-down menu or...
 - a. Click the **All** box.
4. **Organization Type:** * - should automatically default to *Technology Center Districts* or...
 - a. Click the **All** box.
5. **Organization:** * - type the first three letters of the school or organization name and select it or...
 - a. Click the **All** box.
6. **Approval Function Type:** * - this will remain as **All**.
7. **Filter on Status:** * - this will remain as **All**.
8. Click **Search**.

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

The screenshot shows the 'EDI Admin Grant Fund Invoices List' form. It includes the following fields and callouts:

- Fiscal Calendar Year:** * (1.) 2022-2023
- Grant Fund Type:** * (2.) EDI
- Program Initiative:** * (3a.) All * (3.) EDI-FIREFTR-444 - Economic Devel...
- Organization Type:** * (4.) All * (4a.) Technology Center Districts
- Organization:** * (5.) Search Organizations... (5a.) All
- Approval Function Type:** * (6.) All
- Filter on Status:** * (7.) All
- Search** button (8.)

At the bottom, there are tabs for 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.

EDI Admin Grant Fund Invoices List

Fiscal Calendar Year: 2022-2023
 Program Initiative: ☐ All EDI-FIREFTR-444 - Economic Development - Firefighter (Typ...
 Organization: ☐ All

Grant Fund Type: EDI
 Organization Type: ☐ All Technology Center Districts

Grant Worksheet/Agreement/Invoice List **Manage Grant Invoices**

☒ Save changes
 ☐ Cancel changes
 ☒ Export to Excel
 ☐ Refresh

Status	BAP Process	Paymen Days	Organization	Client Name	Program Initiative	Invoice
<input type="checkbox"/>	Yes	No	0	Technology Center	ENID FIRE DEPT	Economic Development - Firefight... INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Invoice Approval Summary

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver Role	Private No
EDI Local BIS Coordinator - 1st ...	Approved	New Process	Andra.Beyer@careertech.ok...	06/16/2023 13:05:43	EDI - Local Coordinator	

EDI Grant Submit Invoice – Step 1

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

Dashboard EDI Grant Admin Invoice Summary INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

EDI Grant Submit Invoice - Step 1

Provider Organization Details

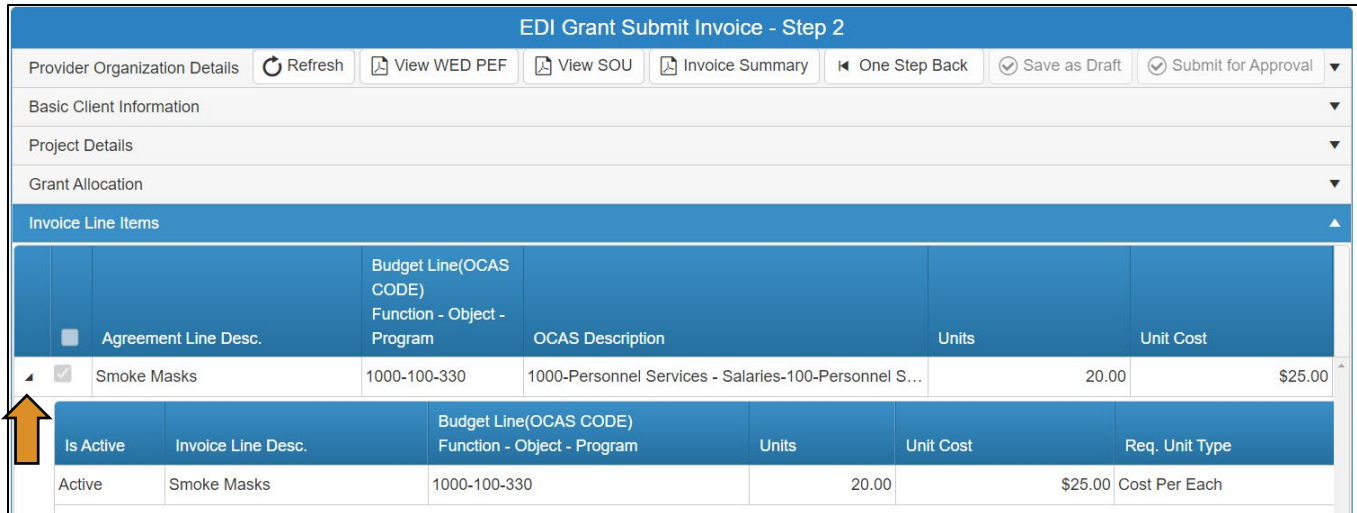
Fiscal Calendar Year: 2022-2023 Grant Fund Type: EDI
 Organization Type: Technology Center Districts Organization: Technology Center
 Organization District: Technology Center Program Initiative: Economic Development - Firefighter (Type 8...
 Worksheet No: WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9
 Agreement No: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA
 Invoice No: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information
 Project Details

EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.



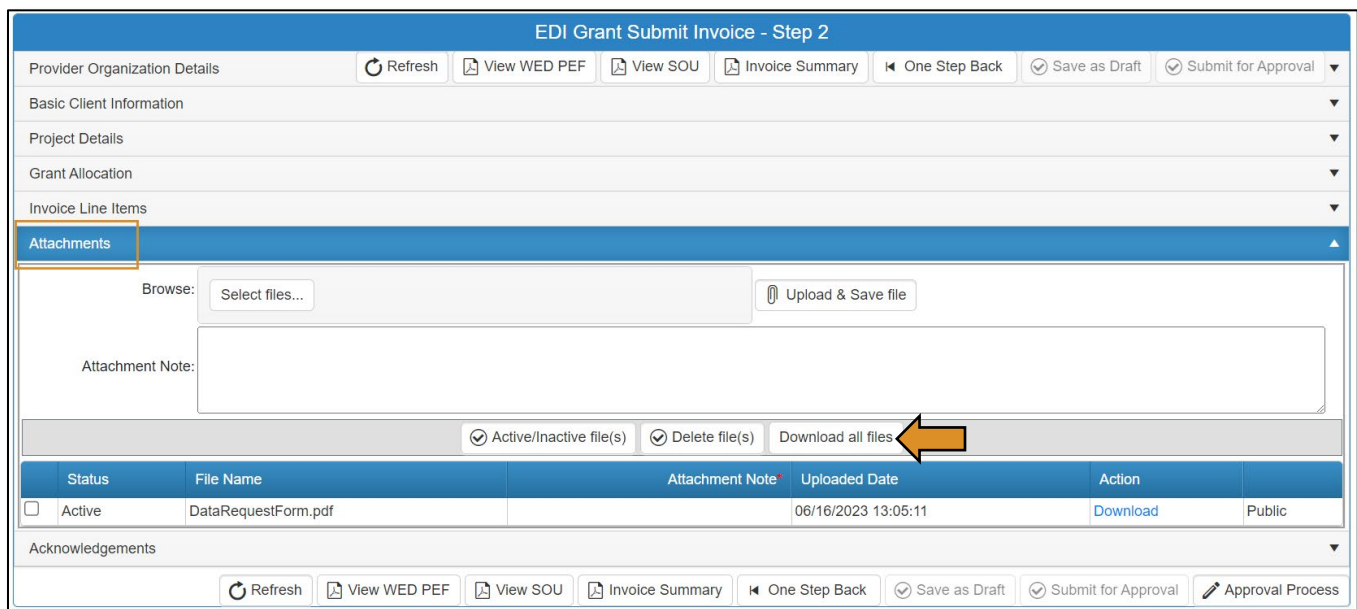
The screenshot shows the 'EDI Grant Submit Invoice - Step 2' interface. The 'Invoice Line Items' section is expanded. The table below shows the details for the 'Smoke Masks' line item.

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.

o **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.

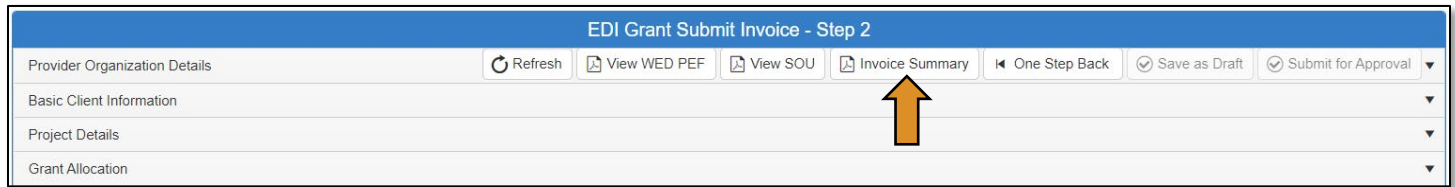
- Verify the invoice information and print the documentation to deliver to the finance department.
- Download the attachments by expanding the **Attachments** section.
 - Click the **Download all files** button.



The screenshot shows the 'EDI Grant Submit Invoice - Step 2' interface with the 'Attachments' section expanded. The 'Attachments' section includes a file upload area and a table of existing attachments. An orange arrow points to the 'Download all files' button.

Status	File Name	Attachment Note	Uploaded Date	Action	
<input type="checkbox"/> Active	DataRequestForm.pdf		06/16/2023 13:05:11	Download	Public

- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted.
(Optional)



EDI Grant Submit Invoice - Step 2

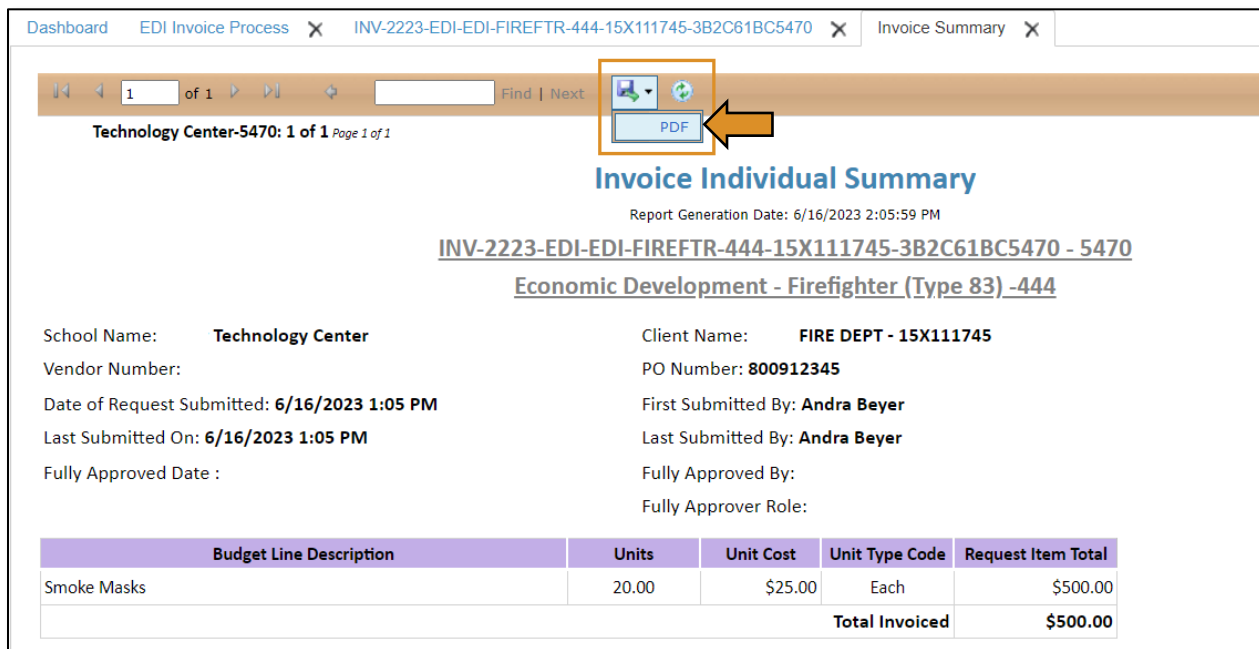
Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

- Click on the blue disc to download a PDF of your invoice summary.



Dashboard EDI Invoice Process INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 Invoice Summary

Technology Center-5470: 1 of 1 Page 1 of 1

PDF

Invoice Individual Summary

Report Generation Date: 6/16/2023 2:05:59 PM

INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 - 5470

Economic Development - Firefighter (Type 83) -444

School Name: **Technology Center** Client Name: **FIRE DEPT - 15X111745**

Vendor Number: PO Number: **800912345**

Date of Request Submitted: **6/16/2023 1:05 PM** First Submitted By: **Andra Beyer**

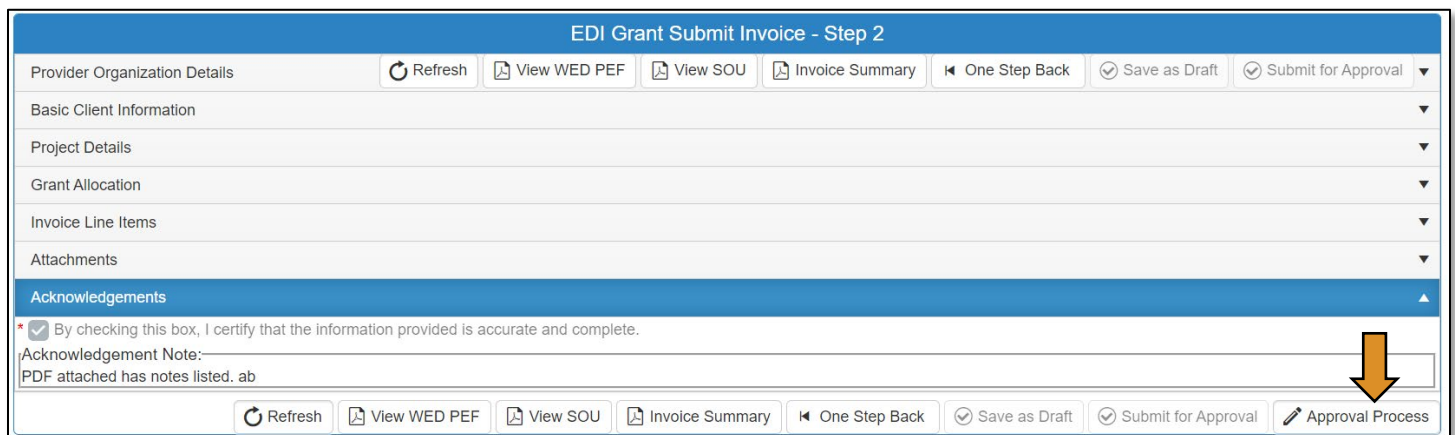
Last Submitted On: **6/16/2023 1:05 PM** Last Submitted By: **Andra Beyer**

Fully Approved Date : Fully Approved By:

Fully Approver Role:

Budget Line Description	Units	Unit Cost	Unit Type Code	Request Item Total
Smoke Masks	20.00	\$25.00	Each	\$500.00
Total Invoiced				\$500.00

- Click the **Approval Process** button at the bottom of the screen.



EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements

* ☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:
PDF attached has notes listed. ab

Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

Approval Process - EDI Grant Invoice 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: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st St...	6/16/2023 2:37:23 ...	EDI - Local Co...	Andra - Beyer	Andra.Beyer@...	Cancel for Cha...	New Process	
EDI Local BIS Coordinator - 1st St...	6/16/2023 2:39:29 ...	EDI - Local Co...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI Local BIS Director - 2nd Appr...	6/19/2023 9:37:10 ...	EDI - Local BIS...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI Local Finance Coordinator - 3...	6/19/2023 10:01:4...	EDI - Local Fin...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI State Regional Coordinator - ...	6/19/2023 1:23:18 ...	EDI - State Re...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI State Requisition Coordinator ...	6/19/2023 1:27:20 ...	EDI - State Re...	Andra - Beyer	Andra.Beyer@...	Approved		
► ODCTE EDI Finance Reviewer -	6/19/2023 1:54:14 ...						

Current Approval Stage Information:

Approved By: Beyer Andra
 Approver School: Oklahoma Department of Career and Technology Educati...
 Approver Email: Andra.Beyer@careertech.ok.gov

Approval Stage: 2nd Approval Stage
 Approver Role: EDI - Local BIS Director
 Approval Date: 06/16/2023

Approval/Rejection Note

Format: **B I U** [Rich Text Editor Icons]

Private Note

Format: **B I U** [Rich Text Editor Icons]

Browse: ☐ View to Public

Attachment Note:

File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

[Back](#)
[Reject](#)
[Approve](#)

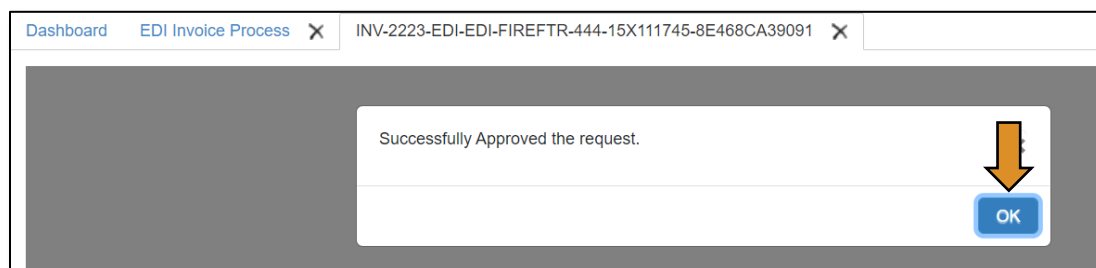
- A message will pop up asking if you are sure. Click **OK**.

Approval Process - EDI Grant Invoice Approval

Are you sure?

[Cancel](#)
[OK](#)

- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



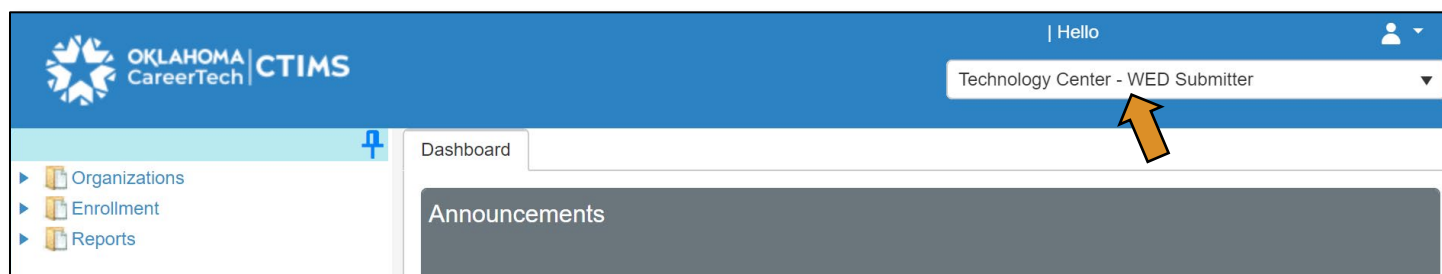
- You will now see that the record is fully approved.

A screenshot of the "EDI Grant Submit Invoice - Step 2" form. The form has a blue header bar with the title "EDI Grant Submit Invoice - Step 2". Below the header bar are several tabs: "Provider Organization Details", "Basic Client Information", "Project Details", "Grant Allocation", "Invoice Line Items", "Attachments", and "Acknowledgements". The "Acknowledgements" tab is selected and highlighted in blue. Below the tabs are several buttons: "Refresh", "View WED PEF", "View SOU", "Invoice Summary", "One Step Back", "Save as Draft", and "Submit for Approval". Below the buttons is a text area for "Acknowledgement Note:" with the text "PDF attached has notes listed. ab". Below the text area is a red error message: "This record is fully approved, you are not authorized to change data within this record." An orange arrow points to this message. At the bottom of the form are the same buttons as above: "Refresh", "View WED PEF", "View SOU", "Invoice Summary", "One Step Back", "Save as Draft", and "Submit for Approval".

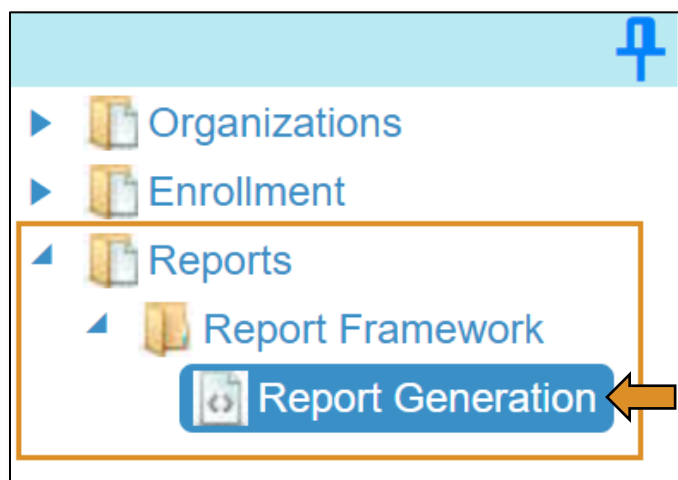
Printing a PEF

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **Technology Center – WED Submitter** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

- If you do not see **Technology Center – WED Submitter** contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Reports & Report Framework**.
- Click on the **Report Generation** link.



Complete the **Report Manager** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. **Module:** * - select *Enrollment*.
2. **Sub Module:** * - select *ACD / WED Reports*.
3. **Report Title:** * - select the report that you are wanting to run.
 - a. Select the *Tech Center: WED PEF Detail Report – 511*.
4. **Report Type/School Type:** * - select *District*.
5. **Calendar Code:** * - choose the school year you are wanting to run.
6. **Organization Type:** * - choose *Technology Site Districts*.
7. **Organization:** * - choose your school.
8. Click **Generate Report**.

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

The screenshot shows the 'Report Manager' form with the following fields and values:

- Module:** Enrollment (1)
- Sub Module:** ACD / WED Reports (2)
- Report Title:** Tech Center: WED PEF Detail Report - 511 (3)
- Report Type/School Type:** District (4)
- Calendar Code:** (5)
- Organization Type:** Technology Center Districts (6)
- Organization:** Technology Center (7)
- Generate Report** button (8)

- A list of the PEFs will populate the field below. In the search field in the tan bar above the report, type in the contract number for the PEF you wish to print.
- Click **Find**.
- The contract number you are searching for will be highlighted in blue.

The screenshot shows the search results for the 'Tech Center: WED PEF Detail Report'. The search bar at the top contains '0002' and the 'Find' button is highlighted. Below the search bar, the report title 'Tech Center: WED PEF Detail Report' is displayed. The report is for School Year: 2223, with a Report Generation Date of 6/19/2023 2:37:38 PM. The results table shows the following data:

CONT #	PROG TYPE	COURSE NAME	TEACHER
G0002	Adult and Career Development	FrontLine Leadership: 10 Part Series	White

- Click the contract number link to open the PEF. The PEF information will display.
- Click on the blue disc to download a PDF. You can save it for your records or print it after exporting.

The screenshot shows the top of a report titled "BIS CONTRACT INFORMATION G0002". Below the title is a table with the following data:

FrontLine Leadership: 10 Part	
PROG TYPE: 15	MIS CODE:
BEG DATE: 20220803	END DATE: 20230503
COURSE HRS: 40.00	STUDENTS ENROLLED: 16
STUDENTS IN COURSE FILE: 16	

At the top right, there is a toolbar with a "Find | Next" button and a blue disc icon. A dropdown menu is open from the disc icon, showing the following options: XML file with report data, CSV (comma delimited), PDF, MHTML (web archive), Excel, TIFF file, and Word. An orange arrow points to the PDF option.

The PEF will contain the information for the training: contract number, the name of the training, program type, beginning and end date, course hours, number of students enrolled, and the list of students with student details.

Example:

The screenshot shows the full report titled "BIS CONTRACT INFORMATION G0002". Below the title is a table with the following data:

FrontLine Leadership: 10 Part Series	
PROG TYPE: 15	MIS CODE:
BEG DATE: 20220803	END DATE: 20230503
COURSE HRS: 40.00	STUDENTS ENROLLED: 16
STUDENTS IN COURSE FILE: 16	

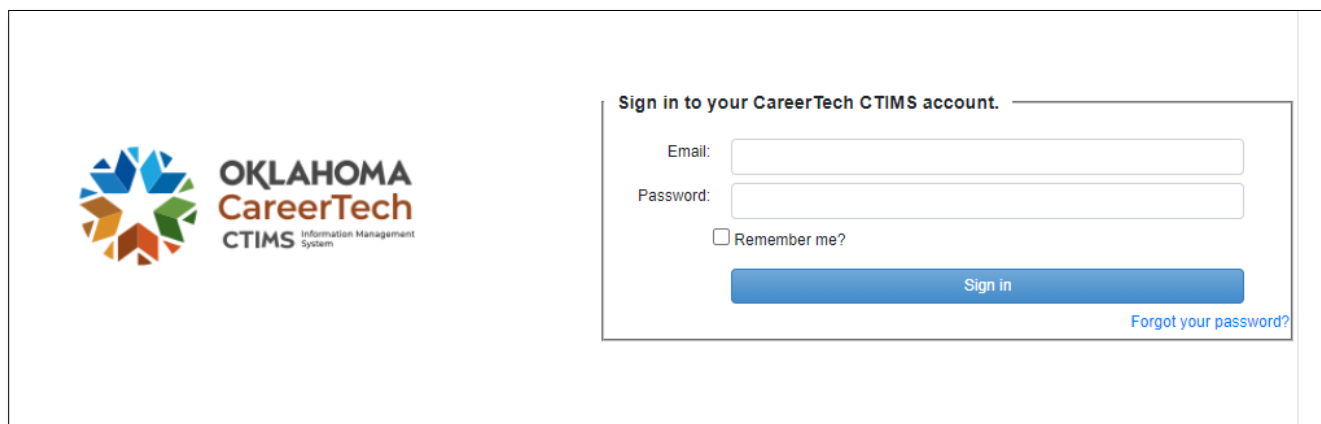
Below this table is a table with the following columns: FIRST NAME, LAST NAME, GENDER, AGE, RACE, CLOCK HRS, and INDUSTRY. The data is as follows:

FIRST NAME	LAST NAME	GENDER	AGE	RACE	CLOCK HRS	INDUSTRY
		M	48	03	40.00	PARRISH MANUFACTURING GROUP
		M	53	03	40.00	OPEN

[View or Request Business Code](#)

[Logging into CTIMS](#)

Sign in using your school email and CTIMS password at [Contact — CareerTech \(CT\) - okcareertech.org](https://okcareertech.org).



Sign in to your CareerTech CTIMS account.

Email:

Password:

☐ Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

For help with CTIMS, contact the Information Management Division via email:
CTIMSSupport@careertech.ok.gov

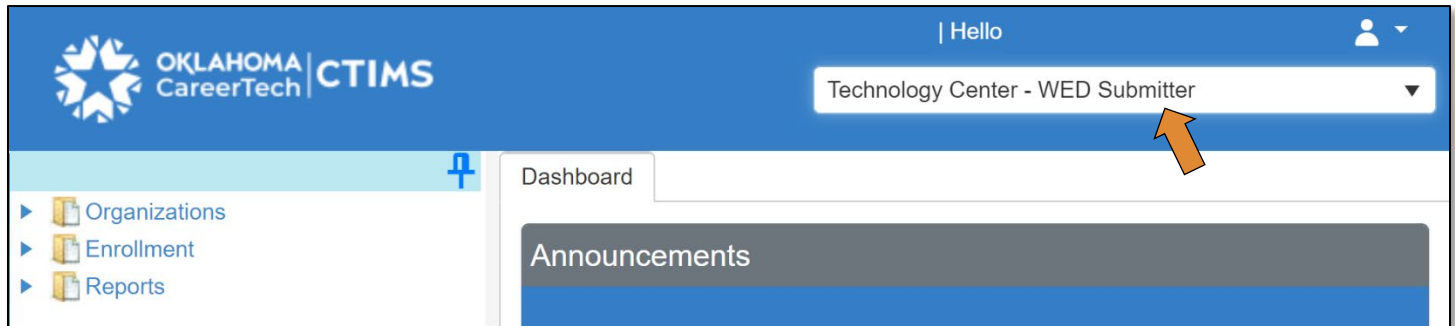
Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

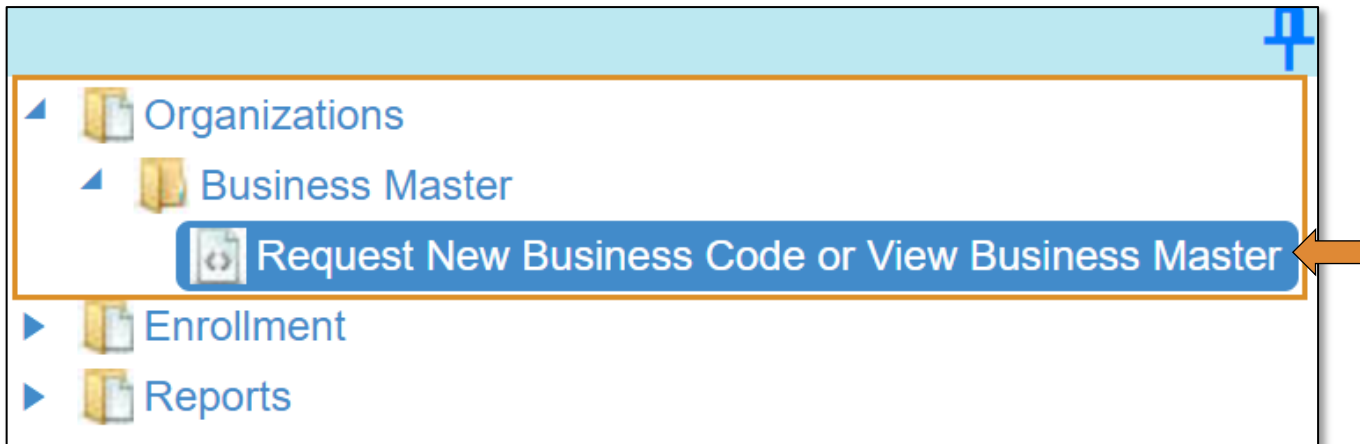


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **Technology Center – Full-time Submitter**, **Technology Center – WED Submitter** or **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **Technology Center – Full-time Submitter**, **Technology Center – WED Submitter** or **EDI – Local Coordinator**, contact CTIMSSupport@careertech.ok.gov.



- Click the arrows next to **Organizations & Business Master**.
- Click on the **Request New Business Code or View Business Master** link.



NOTE: Search the Business Master before requesting a new business code to verify that the business does not already have a code in CTIMS. If you find a business code that is inactive, please email CTIMSSupport@careertech.ok.gov, we will make it active for you.

The tagged numbers in the screenshot correspond to the instruction steps below.

NOTE: The red asterisks* represents a required field.

1. To search for an existing business record, select **Find Existing Business**.
2. Click on the down arrow on the **Business Name** box to select different search options.
 - You can search by **Business Name**, **Business Code**, **City** or **All**.
3. If you choose **Business Name**, **Business Code** or **City**, type at least one character in the **Enter Search Text** box, then select the **Search** button.
 - If you select **ALL** and do not enter in any criteria, all records will be displayed.
4. Click **Search**.

The screenshot shows the 'Business Master Request Summary' form. At the top, there's a 'School Type' dropdown set to 'Business Masters'. Below it, two radio buttons are present: 'Find Existing Business' (selected) and 'View Requests'. A search section includes a 'Business Name' dropdown (tagged with a '2.'), an 'Enter search text' input field (tagged with a '3.'), and a 'Search' button (tagged with a '4.'). The dropdown menu is open, showing options: 'Business Name', 'Business Code', 'City', and 'All'. Below the search section are buttons for 'Save changes', 'Cancel changes', and '+ New Business Request'.

There may be more than one business with the same name. Match your business name with the address. Also, the same business name could have hyphens or could have been entered as one word. If a business name has hyphens, try searching with and without the hyphens. **NOTE:** You can expand columns by hovering over the line between the columns, the pointer changes to a double arrow, move the arrow right or left to change the size of the column.

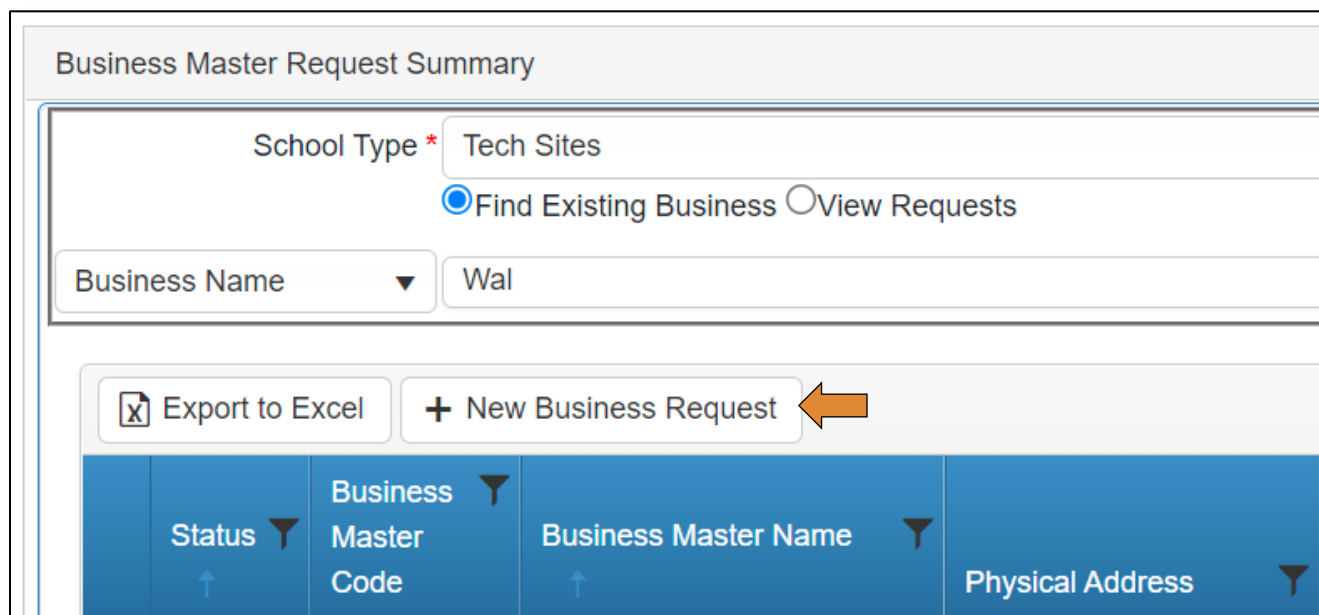
The screenshot shows the 'Business Master Request Summary' form with the search results table. The 'Business Name' dropdown is set to 'All' (tagged with a '2.'). The 'Search' button is visible (tagged with a '4.'). Below the search section are buttons for 'Export to Excel' and '+ New Business Request'. The table has columns: Status, Business Master Code, Business Master Name, Physical Address, Mailing Address, NAICS Code, NAICS Name, and FEI Number. Three rows are visible, each with a play button icon in the first column.

Status	Business Master Code	Business Master Name	Physical Address	Mailing Address	NAICS Code	NAICS Name	FEI Number
▶ Active	7131	WALMART - ANADARKO	1201 WEST PETREE R...		452910	Warehouse Clubs and Supercenters	710794416
▶ Active	49965	Superior Drywall	2547 E. Seminole, Tulsa...		236118	Residential Remodelers	
▶ Active	30329	DENVER ACOUSTICS & ...		P O BOX 82872, Oklaho...	238310	Drywall and Insulation Contractors	

Requesting a New Business Code

If a business is not found:

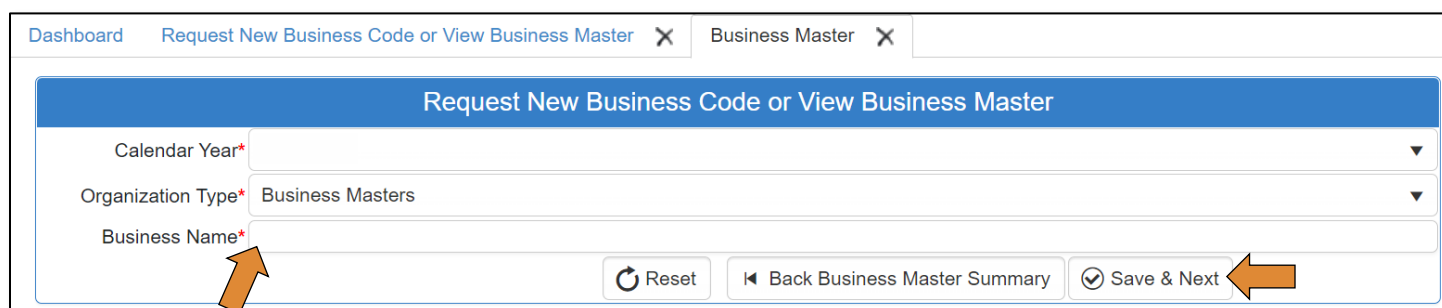
- Request a new business code by clicking on the **+ New Business Request** button.
 - You will be directed to a new screen.



The image shows a web form titled "Business Master Request Summary". It contains the following elements:

- School Type ***: A dropdown menu with "Tech Sites" selected.
- Find Existing Business**: A radio button that is selected.
- View Requests**: An unselected radio button.
- Business Name**: A dropdown menu with "Wal" selected.
- Export to Excel**: A button with a file icon.
- + New Business Request**: A button with an orange arrow pointing to it from the right.
- Table Headers**: A table with four columns: "Status", "Business Master Code", "Business Master Name", and "Physical Address". Each header has a dropdown arrow.

- In the box next to **Business Name**, enter the name of the business. The business name must be unique. If the business is a chain or the name already exists, you will need to add a unique identifier, such as a town name or store number to define it.
- Click **Save & Next**.
 - You will be directed to a new screen.



The image shows a web form titled "Request New Business Code or View Business Master". It contains the following elements:

- Calendar Year ***: A dropdown menu.
- Organization Type ***: A dropdown menu with "Business Masters" selected.
- Business Name ***: A text input field with an orange arrow pointing to it from the bottom left.
- Reset**: A button with a circular arrow icon.
- Back Business Master Summary**: A button with a left arrow icon.
- Save & Next**: A button with a checkmark icon and an orange arrow pointing to it from the right.

Entering Information for New Business

- Click the drop-down to choose the **Primary NAICS Code**, start typing in the NAICS number or a title keyword, the selection will filter down the more you type in.
- Enter the **FEI Number** and **DUNS Number**, if applicable.
- If the NAICS code begins with a **92**, you must select the **Business Type** (City Business, County Business, State Business, or Federal Business.)

Request New Business Code or View Business Master

Business Code *****

Business Name* Andra's Flower Shop

Primary NAICS Code* Please enter 2 characters and Select from the List

DUNS Number Please enter 2 characters and Select from the List

FEI Number

Vendor Number

Business Type* Federal Business

Type	Street*	City*	State*	Zip*
Physical*				
Mailing				

- Complete the **Physical** and **Mailing** addresses. The Physical address is mandatory. Enter the mailing address if it is different than the physical address. **NOTE:** When information is entered in the address fields, a red triangle will appear in the upper left corner of the box; this does not mean there is an error, only that data has been entered in the field.
- Click on the **Refresh** button if you would like to clear the form and start over.
- Click **Submit for Approval**.
 - If you are missing any data elements, you will get an error message when you try to submit. Correct the errors and resubmit.

Request New Business Code or View Business Master

Business Code *****

Business Name* Andra's Flower Shop

Primary NAICS Code* (424930) Flower, Nursery Stock, and Florists' Supplies Merchant W... (Note: Enter Number or Name)

DUNS Number

FEI Number

Vendor Number

Business Type Required for NAISC code starting with 92*

☐ City Business ☐ County Business ☐ State Business ☐ Federal Business

Type	Street*	City*	State*	Zip*
Physical*	123 Main Street	Stillwater	Oklahoma	74076-____
Mailing				


Save Changes Submit for Approval Refresh



- Click the **OK** button.
 - Your request has now been successfully submitted for review.


Feel free to email CTIMSSupport@careertech.ok.gov to let us know you have submitted a business code request.

You will receive an email from CTIMS@careertech.ok.gov indicating that your request was successfully submitted.

No additional action is required from you at this point.

**CareerTech** <ctims@careertech.ok.gov>
New Business Master - Action Required - Fully Approved

To  Andra Beyer
Cc  Andra Beyer


Business Code: 50142 

Business Name: Andra's Flower Shop

Approval Stage: Fully Approved Stage

Approver School Name: Oklahoma Department of Career and Technology Education

Approver Name: Beyer Andra


Approval Status: Submitted successfully 

Approval Process Note:
If action is required by your role, click the URL to access the CTIMS application: <https://ctims.okcareertech.org/CTBDSWeb>


****Note:**
The following browsers are recommended:
Microsoft Edge ,Google Chrome ,Mozilla Firefox
CTIMS is not recommended with other browsers.

For assistance, contact us at ctimssupport@careertech.ok.gov
Thank you,
CareerTech Information Management Division

If your Business Code request is rejected, you will get an email stating that your Approval Status is **Rejected**. The reason for the rejection will be listed in the **Approval Process Note** in the rejection email. See instructions for the [Change Request](#) process to make corrections and resubmit your request.



CareerTech <ctims@careertech.ok.gov>
New Business Master - Action Required - Pending

To  Andra Beyer

Cc

Business Name: Hobby Lobby Distribution- S OKC
Approval Stage: Fully Approved Stage
Approver School Name: Oklahoma Department of Career and Technology Education
Approver Name: Beyer Andra
Approval Status: **Rejected**

Approval Process Note: Please add physical address.

Action Required Details
Next Stage: Business Submitter
Next Stage User: kumarendra.mishra@omes.ok.gov
Approval Status: Pending

If action is required by your role, click the URL to access the CTIMS application: <https://ctims.okcareertech.org/CTBDSWeb>

****Note:**

The following browsers are recommended:

Microsoft Edge ,Google Chrome ,Mozilla Firefox

CTIMS is not recommended with other browsers.

For assistance, contact us at ctimssupport@careertech.ok.gov

Thank you,

CareerTech Information Management Division

Change Request (Business Code Process)

If changes need to be made after submitting a Business Code request, but before it is fully approved, or if your request is rejected, you will need to go through the change request process to make changes.

- Select the **View Requests** radio button.
 - To see only the requests submitted by your site, uncheck the box next to **All Sites**.
- Type the first 3 letters of your school name in the **School Name(s)** box and select your school.
- Click on the **Search** button.

Dashboard | Request New Business Code or View Business Master X

Business Master Request Summary

School Type * Tech Sites
☐ Find Existing Business ☒ View Requests

Calendar Year * 2021-2022

School Name(s) Select
☒ All Sites

All Enter search text Search

Export to Excel + New Business Request

Sta tus	Submitted Date	Approval Stage	Approved Status	Request Business Master Name	Submitter	Submitter Email	Organization	Submitter Role
------------	-------------------	----------------	-----------------	------------------------------	-----------	-----------------	--------------	----------------

- Select the request you wish to change by clicking on the blue Business Master Name hyperlink.

Dashboard | Request New Business Code or View Business Master X

Business Master Request Summary

School Type * Tech Sites
☐ Find Existing Business ☒ View Requests

Calendar Year * 2021-2022

School Name(s) Select
☒ All Sites

All Enter search text

Export to Excel + New Business Request

Sta tus	Submitted Date	Approval Stage	Approved Status	Request Business Master Name
▶ Active	10/22/2021	IMD Approver - Fully Ap...	Fully Approved	Andra's Flower Shop

- Click the **Change Request** button.

Request New Business Code or View Business Master

Business Code: *****

Business Name: Andra's Flower Shop

(424930) Flower, Nursery Stock, and Florists' Supplies Merchant Whole...

Primary NAICS Code: Please enter 2 characters and Select from the List (Note: Enter Number or Name)

FEI Number:

DUNS Number:

Vendor Number:

Business Type Required for NAISC code starting with 92*

☐ City Business ☐ County Business ☐ State Business ☐ Federal Business

Type	Street*	City*	State*	Zip*
Physical*	123 Main Street	Stillwater	Oklahoma	74076
Mailing				

Save Changes Change Request Submit for Approval Refresh

You will get a popup indicating you are going to cancel the approval process and initiate the change request process.

- Click **OK**.

Change Request

You are going to cancel the approval process and initiating the change request process, Are you sure?

Cancel OK

- Make the necessary changes to your request.
- Click on **Submit for Approval**.

Request New Business Code or View Business Master

Business Code: *****

Business Name: Andra's Flower Shop

(424930) Flower, Nursery Stock, and Florists' Supplies Merchant Whole...

Primary NAICS Code: Please enter 2 characters and Select from the List (Note: Enter Number or Name)

FEI Number:

DUNS Number:

Vendor Number:

Business Type Required for NAISC code starting with 92*

☐ City Business ☐ County Business ☐ State Business ☐ Federal Business

Type	Street*	City*	State*	Zip*
Physical*	123 Main Street	Stillwater	Oklahoma	74076
Mailing				

Save Changes Submit for Approval Refresh

- Click **OK** on the popup screen.
 - You will be directed to another screen.



- Click on the **Approve** button if you are ready to finalize your changes.

Approval Process - New Business Master 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.

Request Number: OBM-BI-50142

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
► Business Submitter - 1st Stage	10/22/2021 1:58:04 PM	Tech Center BIS S...	Andra - Beyer	Andra.Beyer@car...	Cancel for Change...	Change Request Process	
IMD Approver - Fully Approved Stage	10/22/2021 1:58:37 PM						

Current Approval Stage Information

Approved By*	Beyer Andra	Approval Stage*	1st Stage
Approver School*	Oklahoma Department of Career and Technology Educa...	Approver Role*	Tech Center BIS Submitter
Approver Email*	Andra.Beyer@careertech.ok.gov	Approval Date*	10/22/2021

- Click **Ok**.
- Click **Ok**, again.

View Requests

View the business requests that you have submitted by returning to the screen with the tab entitled **Request New Business Code or View Business Master**.

- Select the radio button beside **View Requests**.
- To see only the requests submitted by your site, clear the check mark beside **All Sites**.
- Type the first 3 letters of your school name in the **School Name(s)** box and select your school.
- Click on the **Search** button.

Dashboard Request New Business Code or View Business Master X

Business Master Request Summary

School Type * Tech Sites

☐ Find Existing Business ☒ View Requests

Calendar Year * 2021-2022

School Name(s) Select

☒ All Sites

All Enter search text Search

This will bring up the list of requests.

- To see the status of the request, click on the black arrow to the left of the Status column.

Business Master Request Summary

School Type * Tech Sites

☐ Find Existing Business ☒ View Requests

Calendar Year * 2021-2022

School Name(s) Select

☒ All Sites

All Enter search text

Export to Excel + New Business Request

	Status	Submitted Date	Approval Stage	Approved Status	Request Business Master Name
▶	Active	10/22/2021	IMD Approver - Fully Ap...	Fully Approved	Andra's Flower Shop

You can view the details of the business request as it moves through the approval process.

Export to Excel

New Business Request

	Status	Submitted Date	Approval Stage	Approved Status	Request Business Master Name
Active	10/22/2021	IMD Approver - Fully Ap...	Fully Approved	Andra's Flower Shop	

Approval Stage	Approval Status	Approval/Rejection Note
Business Submitter - 1st Stage	Approved	New Process
Business Submitter - 1st Stage	Cancel for Change ...	Initiated Change request process.
Business Submitter - 1st Stage	Cancel for Change ...	Change Request Process
Business Submitter - 1st Stage	Approved	
IMD Approver - Fully Approved Stage	Approved	

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 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.
- 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 to view more detailed information by clicking on the arrow next to the section header or line (row).
- On your keyboard, hold down the **Ctrl** key and tap on the **+** or **-** keys to zoom in or out.
- 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 **X** 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 in the approval process?

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 black arrow 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 black arrow 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.

Releasing Unused Funds

If a project has completed and not all funds are used, you can release the funds to be used for another project.

Releasing Funds to be used for the Same Program Type

For example, you can release funds for a fire fighter program to be used for another fire fighter program training project.

- In the Agreement, you will do a budget adjustment. Once the budget adjustment is fully approved, the funds will be released, and you can begin a new Worksheet for the new training. Click [here](#) for instructions on completing the budget adjustment process.

If you have a line item that has not been used and need to release the funds to be used for another project, you will make that line item inactive:

- To make a budget line item inactive, click inside the field under the Status column to check the box.
- Check the box, then **Save as Draft**.
- Make sure the line is inactive, then click **Submit for Approval**.
- Go back into the Agreement and click **Approval Process**.
- **Add a note explaining changes made.**
- Click **Approve**.
- On the pop-up screen, click **OK**.
- Verify the submission by clicking **OK**.
- To inactivate a budget line, scroll to the right, click the box to uncheck it in the **Status** column.
- **Save as Draft**.

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$115,643.00	\$80,880.00	\$80,880.00	\$69,800.00	\$0.00	\$45,843.00	\$69,800.00

Budget Line(s) Budget Line Detail Information

+ Add Budget Line

✕ Remove Budget Line

ⓧ Cancel Budget Line Changes

st	Req. Unit Type	Total	Approv Total	Matched Funds	Status	Budget Line Desc.	Req. Unit Type	Req. Units	Req. Unit Cost	Work She Req. Total
00	Cost Per Student	\$5,000.00	\$5,000.00	\$0.00	✓	New Hire Orientati	Student	50	\$100.00	\$5,000.00
00	Cost Per Hour	\$7,200.00	\$7,200.00	\$0.00	Active	Initial technical,...	Hour	240	\$30.00	\$7,200.00
00	Cost Per Hour	\$9,600.00	\$9,600.00	\$0.00	Active	Technical and ...	Hour	160	\$60.00	\$9,600.00
00	Cost Per Hour	\$48,000.00	\$48,000.00	\$0.00	Active	Lean Training -...	Hour	240	\$200.00	\$48,000.00

The request has been successfully submitted and will go to the EDI – Local BIS Director.