CareerTech Information Management System (CTIMS)

FLA Grants Complete User Guidebook

OKLAHOMA CareerTech

IMD Information Management Division

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IMPORTANT: For questions about specific FLA requirements or what you need to input or attach with your worksheet, contact your ODCTE FLA Contact.

Help & 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's 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)

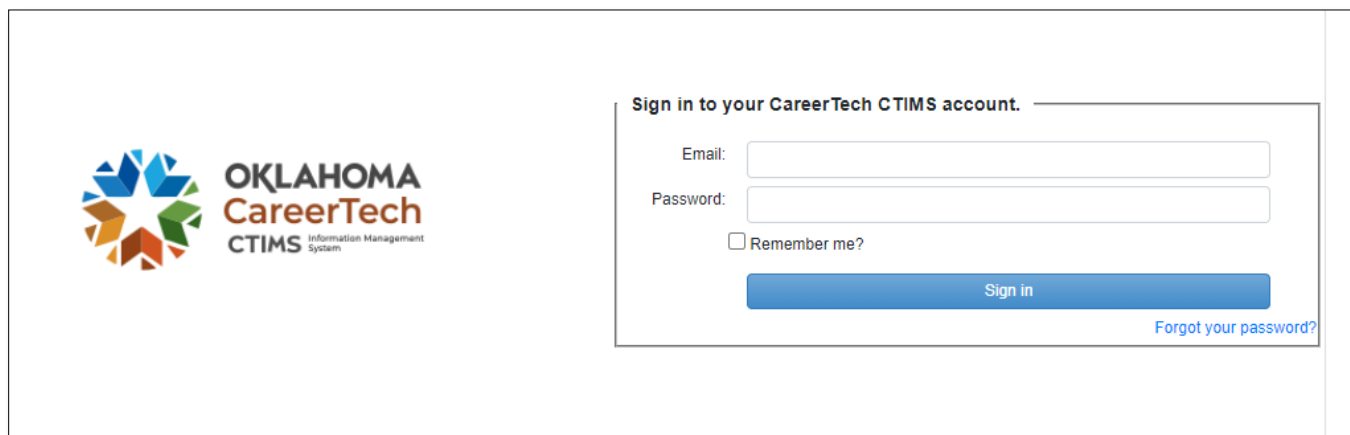| FLA Role	Process
FLA Local Initiative Coordinator	Creates, completes, saves, and submits the requests.
FLA Local Finance Coordinator	1st approval. Reviews & approves/rejects requests.
FLA Local Superintendent/President	2nd approval. Reviews & approves/rejects requests.
FLA State Initiative Coordinator	3rd approval. Reviews & approves/rejects requests.
FLA State Initiative Supervisor	4th approval. Reviews & approves/rejects requests.
ODCTE Contract Reviewer	Final approval. Reviews & approves/rejects requests.

Agreement Approval Stage (Stage 2)

FLA Role	Process
FLA Local Finance Coordinator	1st approval. Reviews & approves/rejects requests.
FLA State Initiative Coordinator	2nd approval. Reviews & approves/rejects requests.
FLA State Supervisor	Final approval. Reviews & approves/rejects requests.

Invoice Approval Stage (Stage 3)

FLA Role	Process
FLA Local Finance Coordinator	1st approval. Reviews & approves/rejects requests.
ODCTE Finance Document Coordinator	2nd approval. Reviews & approves/rejects requests.
ODCTE Finance Reviewer	Final approval. Reviews & approves/rejects requests.

Approval Process Overview

Logging into CTIMS

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

Or go to the CTIMS website and select the green **CTIMS Login** button.

Worksheet Process Flow

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

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

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

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

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

Stage 5 - State Initiative Supervisor: 4th Approval. ODCTE State Supervisor approves or rejects the worksheet. If approved goes to the final approval stage.

Stage 6 – ODCTE Contract Reviewer: Final Approval. After the worksheet is approved through Stage 6, the Agreement Process begins with the FLA Local Finance Coordinator.
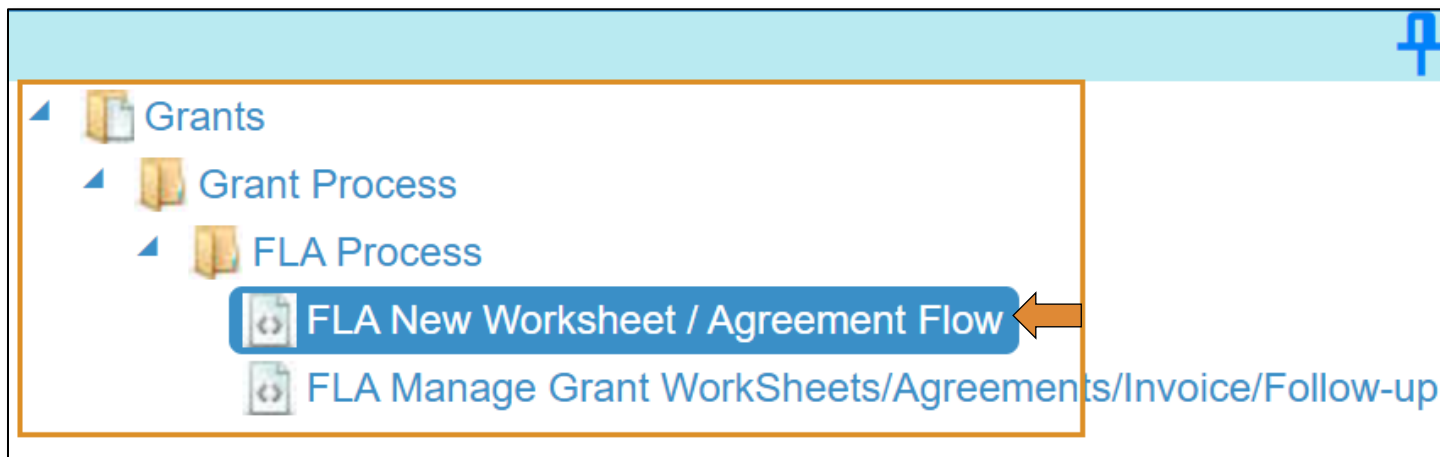
New Worksheet

Local Coordinator

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 **FLA – Local Initiative Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **FLA – Local Initiative Coordinator**, contact CTIMSSupport@careertech.ok.gov
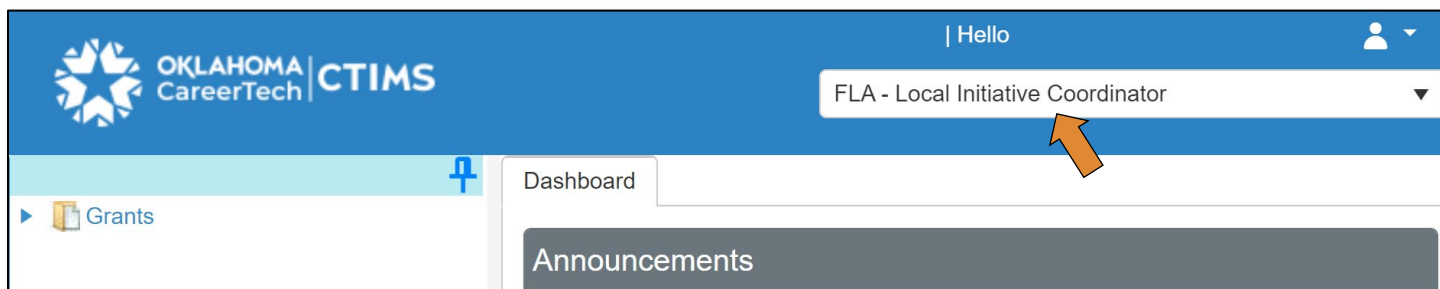
- Click the arrows next to **Grants, Grant Process** & **FLA Process**.
- Click on the **FLA New Worksheet / Agreement Flow** link.

Complete the **FLA Grant Submit Worksheet – Step 1** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year: *** - should default to the current fiscal year.
2. **Grant Fund Type: *** - should default to FLA.
3. **Organization Type: *** - choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization: *** - Type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District: *** - should auto-populate with what was chosen for Organization.
6. **Program Initiative: *** - choose the initiative you are needing from the drop-down menu.
7. **Worksheet No. : *** - automatically populates/displays after selecting the Program Initiative.
8. **Organization Type: *** - automatically populates to Business Masters.
9. **Client Type: *** - should default to Business Master (Company).
10. **Organization: *** - type the first three letters of the organization name.
11. **Business Code: *** - should default to the code assigned to the business.
12. After verifying that all information is correct, click the **Save & Next** button.

- Complete each section of the form under the **Funding Request Details** tab on the **FLA Grant Submit Worksheet – Step 2** screen. This process contains several sections, so you must scroll down to access and complete all the sections.

NOTE: You must put something in each box that has a red asterisk (*). There are some small, required check boxes you must check to certify the information. There are links to other resources that will help you complete the form, as well as links to required templates and forms for you to download, complete and attach.

TIP: You can cut and paste from another document to fill in the boxes.

- Click **Save & Next**.

IMPORTANT:

- You must finish the Funding request Details section and click Save & Next for any of the information that was entered to be saved.
- If you cannot finish all fields, you can put a placeholder character in the fields (all required fields must have something in them) and click **Save & Next**.
- When you return to edit these fields, use the **FLA Manage Grant Worksheet/Agreement** to go into your worksheet or budget to update. Do not use the **FLA New Worksheet/Agreement Flow** option, as this will start a whole new worksheet.

- On the FLA Grant Submit Worksheet – Step 3, under the **Budget Line Items** section, click the Add Budget Line, Remove Budget Line, or Cancel Budget Line Changes.

To add a Budget Line Item:

1. Type a **Budget Line Desc** (Budget Line Description).
2. Complete **Req. Units** (Required Units).
3. Complete **Req. Unit Cost** (Required Unit Cost).
4. Complete **Req. Unit Type** (Required Unit Type).
5. Click **+Add Budget Line** to add more budget lines and repeat steps 1-4.

6. Type a **Note** in the space below the line-item budget area if desired.
7. Add supporting or required attachments by clicking on the **Attachments** row.
8. You can **Save as Draft** at this point, and it will save all the information on the **Funding Request Details** form and the **Budget Line Items** 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.

9. After completing the Funding Request Details form expand the **Attachments** section by clicking on the word *Attachments*.
10. To attach the required documents, click the *Select files…* button and find the document on your computer.
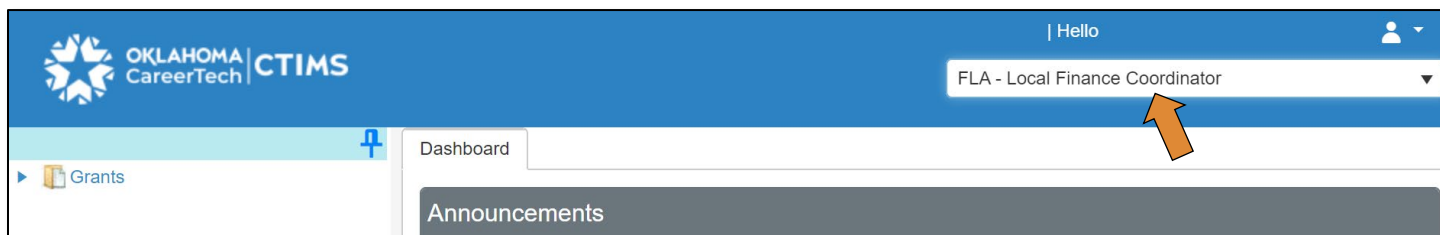11. Click **Upload & Save file**.

- When the worksheet is ready for submission, expand the **Acknowledgments** section by clicking on the word *Acknowledgements*.
- Check each of the acknowledgement boxes, then add an **Acknowledgement Note**.
- Click **Submit for Approval** at the top or bottom of the screen.

The worksheet will go to the **FLA – Local Finance Coordinator** approval stage.

FLA Local Finance Coordinator

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 **FLA – 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 **FLA – Local Finance Coordinator**, contact CTIMSSupport@careertech.ok.gov.

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

Complete the **FLA Grant Submit Worksheets List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year:** * - should default to the current fiscal year.
2. **Grant Fund Type:** * - should default to FLA.
3. **Organization Type:** * - choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * - Type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * - should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * - choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type:** * - automatically defaults to All.
8. **Filter on Status:** * - automatically defaults to All.
9. Click the **Search** button.

- From the list that populates, choose the worksheet to approve. Click on the Worksheet number link in the worksheet column.

- On the **FLA Grant Submit Worksheet – Step 2**, click **Next Step**.
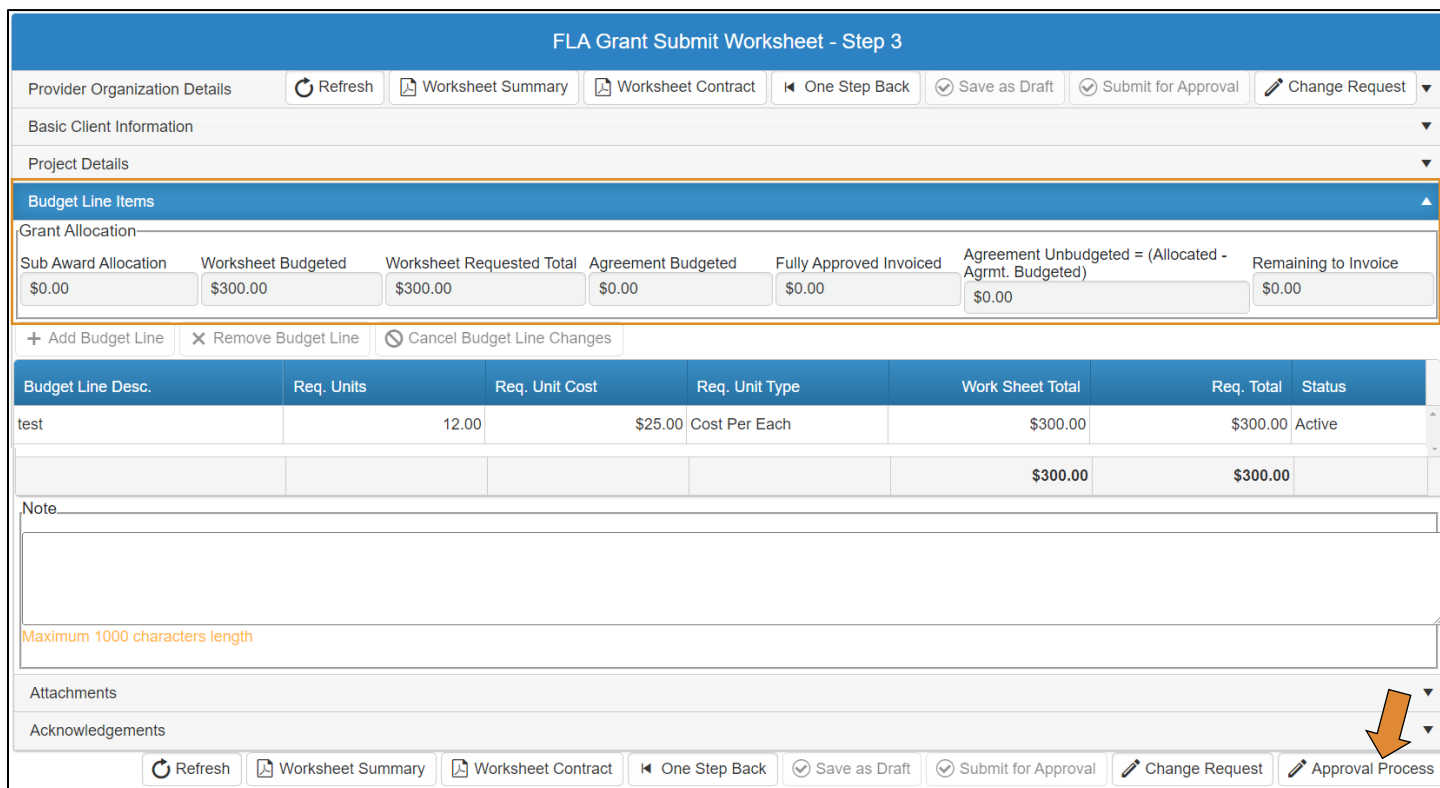
FLA Grant Submit Worksheet - Step 2				
Provider Organization Details		↻ Refresh	🅿 Worksheet Summary	🅿 Worksheet Contract	⏭ Next Step	▼
Basic Client Information				▼
Funding Request Details				▲

Each Innovation in Career Exploration Perkins Innovation Grant Application should contain brief written responses to the following sections and will be reviewed and scored on a competitive basis to identify and fund the best proposals.

- On the **FLA Grant Submit Worksheet - Step 3** screen, review the budget line items.
- Click **Submit for Approval** on the bottom of the screen.

FLA Grant Submit Worksheet - Step 3

Provider Organization Details	↻ Refresh	🅿 Worksheet Summary	🅿 Worksheet Contract	⏮ One Step Back	⊘ Save as Draft	⊘ Submit for Approval	✎ Change Request	▼

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
$0.00	$300.00	$300.00	$0.00	$0.00	$0.00	$0.00

+ 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	Status
test	12.00	$25.00	Cost Per Each	$300.00	$300.00	Active
				$300.00	$300.00	

Note

Maximum 1000 characters length

Attachments ▼

Acknowledgements ▼

↻ Refresh	🅿 Worksheet Summary	🅿 Worksheet Contract	⏮ One Step Back	⊘ Save as Draft	⊘ Submit for Approval	✎ Change Request	✎ Approval Process

- Click **Approve** on the **Approval Process – FLA Grant Worksheet Approval** screen.

The Worksheet will go to the **FLA – Local Superintendent** for approval stage.

Change Request

- Follow the steps for FLA – Local Coordinator. Once in the worksheet, click on the **Change Request** button.
- Make the necessary changes.
- Submit it for approval, again.

FLA Local Superintendent/President

- Follow the instructions for FLA – Local Finance Coordinator to approve the FLA Worksheet.
- The Worksheet will go to the FLA – State Initiative Coordinator for approval.

FLA State Initiative Coordinator

- Follow the instructions for FLA – Local Finance Coordinator to approve the FLA Worksheet.
- The Worksheet will go to the FLA – State Initiative Supervisor for approval.

FLA State Initiative Supervisor

- Follow the instructions for FLA – Local Finance Coordinator to approve the FLA Worksheet.
- The Worksheet will go to the FLA – State ODCTE Contract Reviewer for approval.

ODCTE Contract Reviewer

- This is the final approval stage for the FLA Worksheet.

Agreement Process Flow

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

Stage 1 – FLA Local Finance Coordinator: Creates, completes, saves and submits agreement.

Stage 2 – FLA State Initiative Coordinator: 1st Approval. Reviews and approves or rejects agreement. If approved, goes to next stage. If rejected, goes back to stage 1

Stage 3 – FLA State Supervisor: 2nd Approval. Reviews and approves or rejects agreement. If approved, goes to State approval stage. If rejected, goes back to stage 1.

Accessing the Agreement

FLA Local Finance Coordinator

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 **FLA – 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 **FLA – Local Finance Coordinator**, contact CTIMSSupport@careertech.ok.gov.

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

Complete the **FLA Grant Fund Worksheets List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year: *** - should default to the current fiscal year.
2. **Grant Fund Type: *** - should default to FLA.
3. **Organization Type: *** - choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization: *** - Type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District: *** - should auto-populate with what was chosen for Organization.
6. **Program Initiative: *** - choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type: *** - automatically defaults to All.
8. **Filter on Status: *** - automatically defaults to All.
9. Click the **Search** button.

- From the list that populates, find the worksheet that is needing an agreement started.
- Click on the New link in the agreement column.

For each budget line item, enter the OCAS code. OCAS codes are in the following format:

Program-Function-Object Code (e.g. 330-1000-100).

For a list of codes and descriptions, go to [Frequently Used OCAS Codes](#).

- On each budget line item, enter the OCAS coding. In each field under the OCAS code column, begin typing the code, then select from the drop-down.

- Add a note in the notes field, if necessary.
- **Save as Draft**.

- Click Acknowledgements and check the certify box(es).
- Add an **Acknowledgement note**, this is required.
- Click **Submit for Approval**.

The Agreement will go to the **FLA – State Initiative Coordinator** for approval.

FLA – State Initiative Coordinator

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 **FLA – State Initiative Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **FLA – State Initiative Coordinator**, contact [CTIMSSupport@careertech.ok.gov.](mailto:CTIMSSupport@careertech.ok.gov)

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

Complete the **FLA Grant Fund Worksheets List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

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2. **Grant Fund Type:** * should default to FLA.
3. **Organization Type:** * choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type:** * automatically defaults to All.
8. **Filter on Status:** * automatically defaults to All.
9. Click the **Search** button.

- From the list that populates, find the agreement you need to approve.
- Click on the agreement link in the agreement column.

- Review the **budget line items**.
- Approve by clicking **Submit for Approval**.
- The agreement will go to the **FLA – State Supervisor** approval stage.

NOTE: If the agreement needs to be rejected, click Reject and add a rejection note. The agreement will go back to the FLA – Local Finance Coordinator.

FLA – State Initiative Supervisor

- Follow the instructions for **FLA – State Initiative Coordinator** to approve the FLA Agreement.
- This is the final approval stage for the FLA Agreement.

Invoice Process Flow

The following roles represent the stages required in CTIMS for the submission of a new Invoice.

Stage 1 – FLA Local Finance Coordinator: Creates, completes, saves, and submits new invoice.

Stage 2 – ODCTE Finance Document Coordinator: ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If rejected, goes back to stage 1.

Stage 3 – ODCTE Finance Reviewer: ODCTE State Supervisor approves or rejects the worksheet. If approved goes to the final approval stage.

Accessing the Invoice

FLA – Local Finance Coordinator

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 **FLA – 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 **FLA – Local Finance Coordinator**, contact CTIMSSupport@careertech.ok.gov.
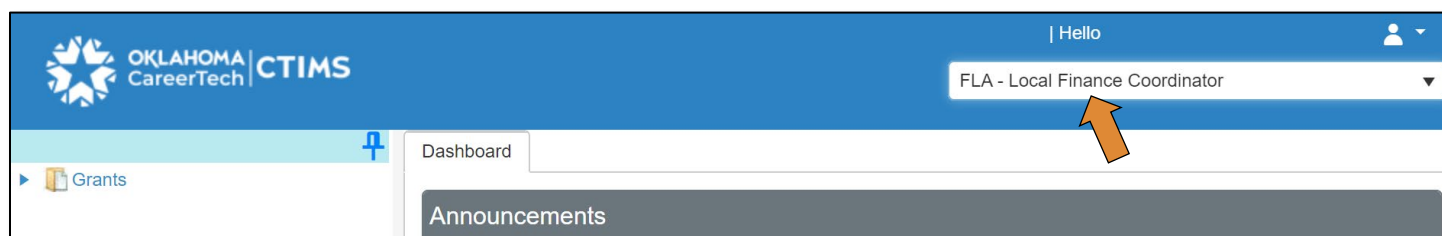
- Click the arrows next to **Grants, Grant Process** & **FLA Process**.
- Click on the **FLA Invoice Process** link.
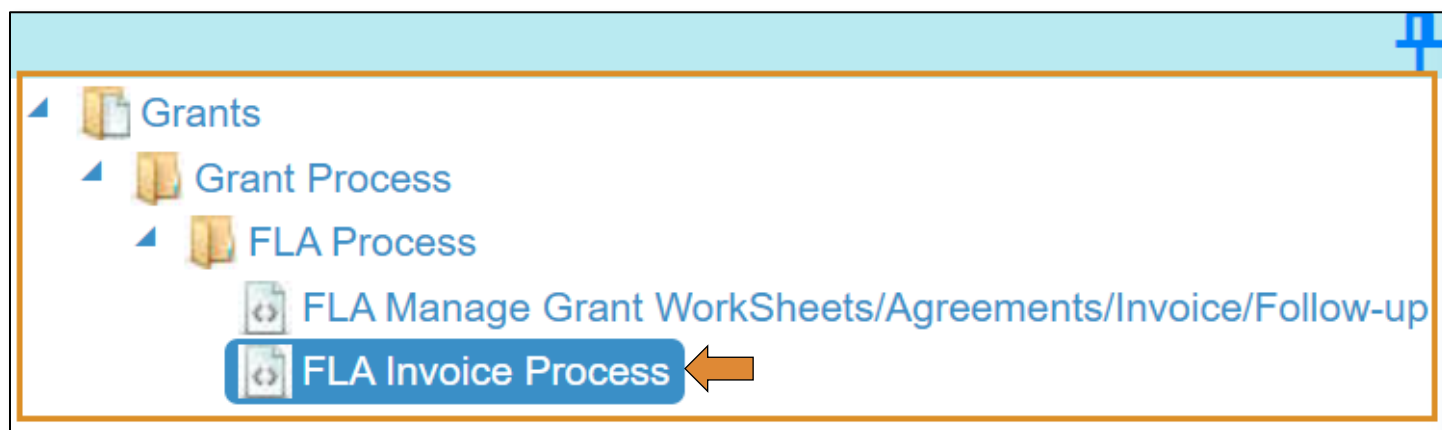
Complete the **FLA Grant Fund Invoice List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year:** * should default to the current fiscal year.
2. **Grant Fund Type:** * should default to FLA.
3. **Organization Type:** * choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type:** * automatically defaults to All.
8. **Filter on Status:** * automatically defaults to All.
9. Click the **Search** button.

- From the list that populates, find the agreement you need to start a new invoice on.
- Click on the New Invoice link in the New Invoice column.

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.

- On the **FLA Grant Submit Invoice – Step 1** screen, click **Save & Next**.

- On the **FLA Grant Submit Invoice – Step 2** screen, check the box(es) next to the line item you need to invoice.

- If you need to make a change to the line item, click on the arrow next to the line to expand the details and click the **Edit** button.

- Once the changes have been made, click **Update**.

- After the changes have been made and the line items to invoice have been checked, click the **Save as Draft** button at the top or bottom of the screen.

- To add attachments, expand the **Attachments** section by clicking on the word Attachment.
- In the Attachments section, click the **Select Files** button to find the files on your computer.
- When your file is selected, click the **Upload & Save File** button.
- Add an **Attachment Note**.

NOTE: You can make attached files inactive/active, delete files, or download files by checking the box next to the file name and using the corresponding buttons.

- Expand the **Acknowledgement** section by clicking on the word Acknowledgements.
- Check the appropriate acknowledgement boxes, add the date, and a note in the note field.
- Click the **Submit for Approval** button.

The invoice will now go to the **ODCTE – Finance Document Coordinator** and then **ODCTE – Finance Reviewer** for approval.

CTIMS Helpful Tips

- There are scroll bars located at the bottom and right of some of the screens in CTIMS. If you cannot see all of the information on a screen, go to the right or bottom of the screen and use the scroll bar to see navigate over to view additional columns and rows.
- You can flip between screens or tabs in CTIMS. Click on any open tab at the top of your screen to toggle between them.
- 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.
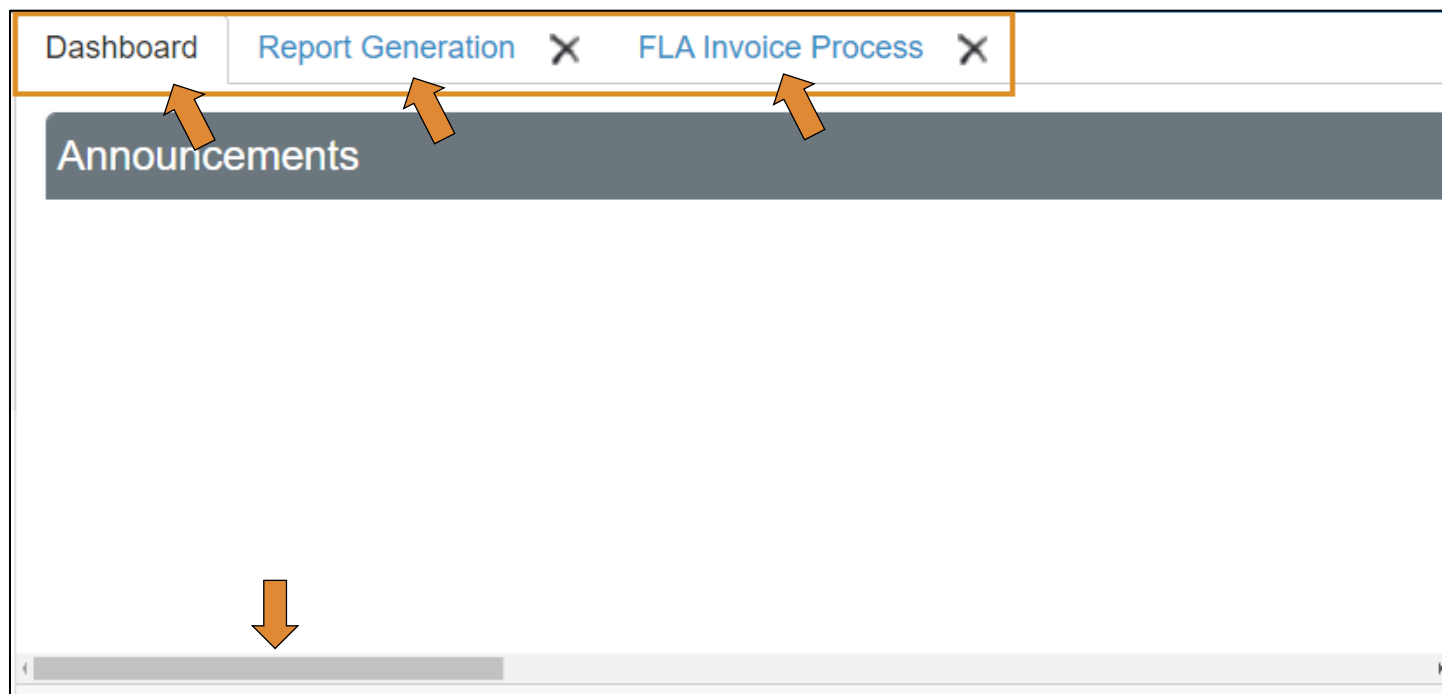
- Many sections in CTIMS can be expanded to view more detailed information by clicking on the black arrow next to the section header or line (row).
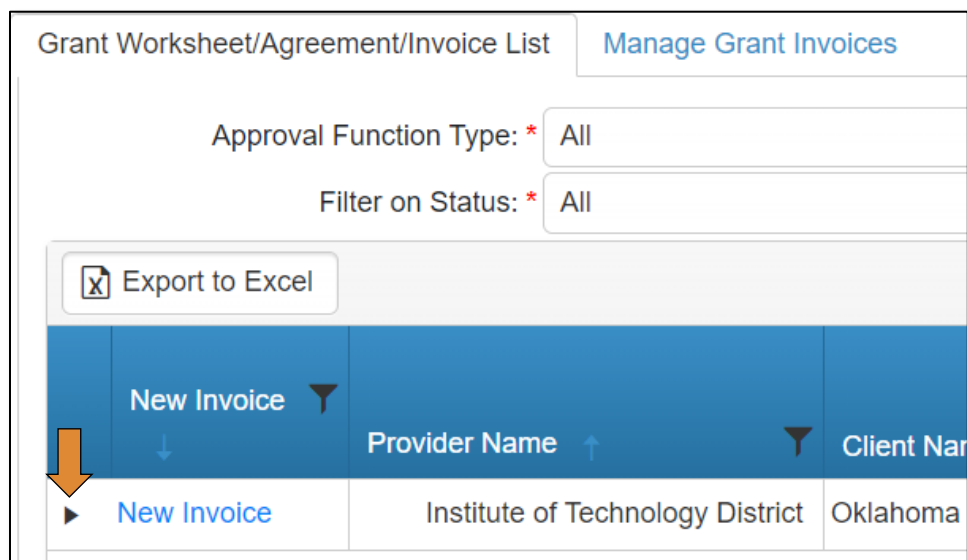
- Hold down the **Ctrl** key and click on the **+** or **–** keys to zoom in or out.