

CareerTech Information Management System (CTIMS)

EDI Complete Process Guidebook

IMD

*career***tech**

Revised August 27, 2019

Table of Contents

EDI Contacts	1
Complete Approval Process.....	2
Help and Troubleshooting.....	4
Logging into CTIMS.....	4
Worksheet	6
Worksheet Approval Process	6
Stage 1-Local Coordinator.....	7
Starting a New Worksheet	7
EDI Grant Submit Worksheet – Step 1	9
EDI Grant Submit Worksheet – Step 2.....	11
EDI Grant Submit Worksheet – Step 3.....	15
EDI Grant Submit Worksheet – Step 4.....	18
Stage 2 - EDI State Regional Coordinator	19
EDI Grant Fund Worksheet List – Step 1	22
EDI Grant Submit Worksheet - Step 2.....	23
EDI Grant Submit Worksheet - Step 3.....	23
Approval Process - EDI Grant Worksheet Approval.....	24
Stage 3 - EDI State Supervisor	24
EDI Change Request Process.....	25
Logging in and Accessing the Worksheet.....	25
Initiating and Completing the Change Request	27
Agreement Process.....	30
Agreement Approval Process.....	30
Stage 1- Local Coordinator	31
Accessing the Agreement List	31
Stage 2-Local BIS Director.....	36
Accessing the Agreement List	36

Stage 3-State Regional Coordinator.....	42
Accessing the Agreement	42
Stage 4-State Initiative Supervisor.....	48
Accessing the Agreement	48
Stage 5-Local Superintendent/CEO (or Designee)	54
Accessing the Agreement	54
Stage 6-State Requisition Coordinator.....	60
Accessing the Agreement	60
Stage 7-Local Finance Coordinator	66
Accessing Agreement List	66
Reviewing the Agreement.....	69
Budget Adjustment Process	72
Accessing the Agreement List	72
Opening Agreement – Step 1.....	73
Initiating the Budget Adjustment – Step 2.....	75
Invoice Process	78
Invoice Submission & Approval Process.....	78
Stage 1- Local Coordinator	79
Accessing the Invoice	79
Opening/Creating the Invoice.....	80
Making Changes to an Invoice	85
Stage 2- Local BIS Director.....	87
Accessing the Invoice	87
Opening the Invoice	89
EDI Grant Submit Invoice Step-1.....	90
EDI Grant Submit Invoice Step-2.....	91
Stage 3-Local Finance Coordinator	91
Stage 4-State Regional Coordinator.....	91
Stage 5-State Requisition Coordinator.....	91

Stage 6-ODCTE EDI Finance Reviewer	91
TIPS and Tricks	92
CTIMS Helpful Hints	92
Where's my Worksheet, Agreement or Invoice?	93

EDI Contacts

Whitney Blaylock

Approval Role: State Regional Coordinator
Cell (918) 839-2592
Email: whitney.blaylock@careertech.ok.gov

Andrea Bradley

Approval Role: State Requisition Coordinator
Office: (405) 743-5572
Email: andrea.bradley@careertech.ok.gov

Lori Broyles

Approval Role: State Regional Coordinator
Cell (405) 361-5268
Email: lori.broyles@careertech.ok.gov

Patrick Clanin

Approval Role: State Regional Coordinator
Cell (405) 747-6114
Email: patrick.clanin@careertech.ok.gov

Gina Hubbard

Approval Role: State Initiative Supervisor
Office: (405) 743-5167
Email: gina.hubbard@careertech.ok.gov

Lori Laufer

Approval Role: State Regional Coordinator
Cell: (405) 385-3176
Email: lori.laufer@careertech.ok.gov

Delbo Leach

Approval Role: State Regional Coordinator
Cell: (405) 929-0436
Email: delbo.leach@careertech.ok.gov

Max McKnight

Approval Role: State Initiative Supervisor
Cell: (405) 714-7246
Email: max.mcknight@careertech.ok.gov

Cara Pattison

Approval Role: State Regional Coordinator
Cell: (405) 664-3679
Email: cara.pattison@careertech.ok.gov

Karen Talbott

Approval Role: State Regional Coordinator
Cell: (580) 336-8676
Email: karen.talbott@careertech.ok.gov

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

Complete Approval Process

Worksheet Approval Stage (Stage 1)

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

Agreement Approval Stage (Stage 2)

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

Budget Adjustment Approval Stage (if Agreement changes are necessary)

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

Invoice Approval Stage (Stage 3)

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

Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact CTIMSSupport@careertech.ok.gov. Send a message describing your problem. Include your school name and your telephone number and we will contact you.

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

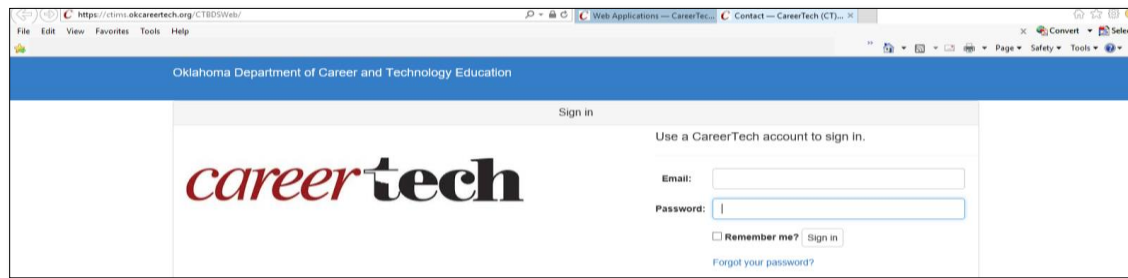
For helpful tips, see the [Tips and Tricks](#) section of this document.

IMPORTANT:

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

Logging into CTIMS

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

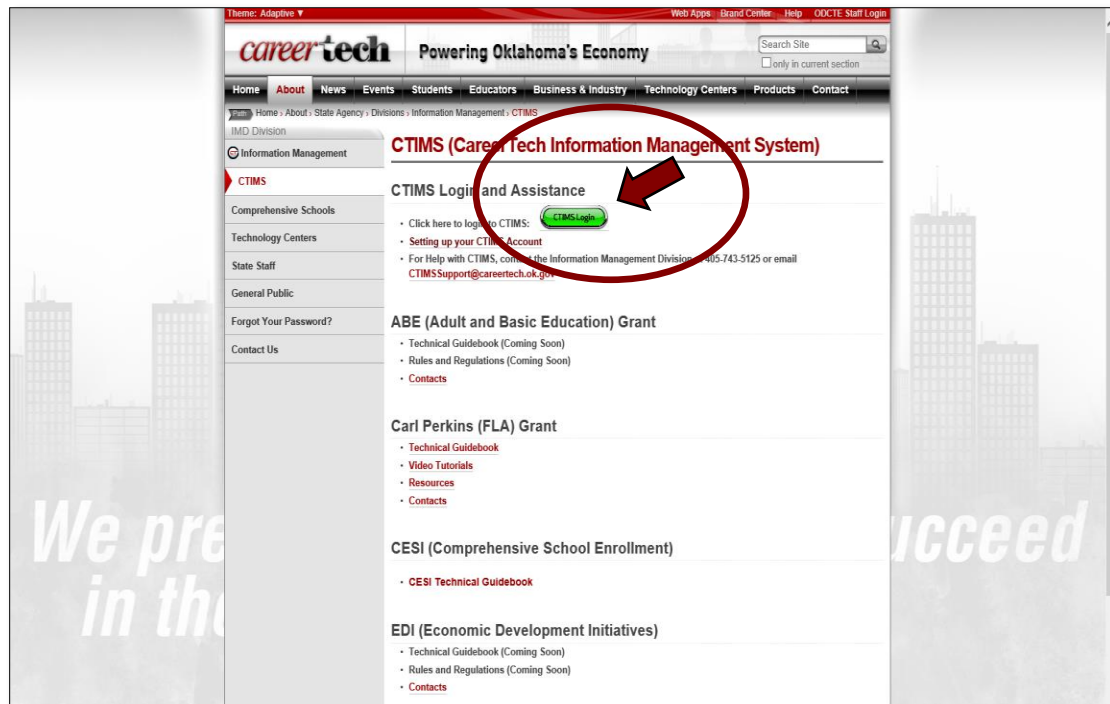


Or,

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



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



Worksheet

Worksheet Approval Process

Roles: Worksheet Approval Process

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

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



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

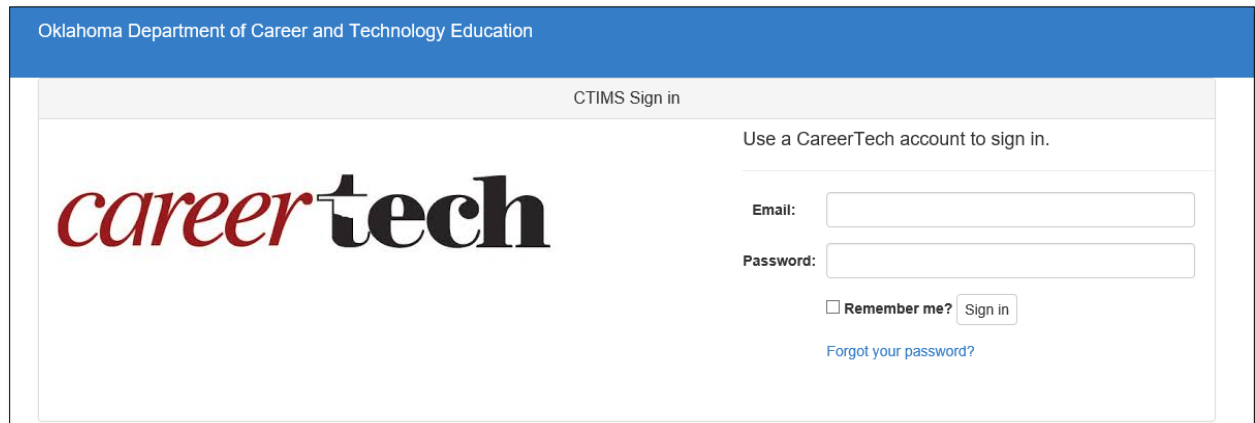


Stage 3 – State Initiative Supervisor - 3rd Approval. ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If approved, this completes the Worksheet Approval. If rejected, goes back to stage 1.

Stage 1-Local Coordinator

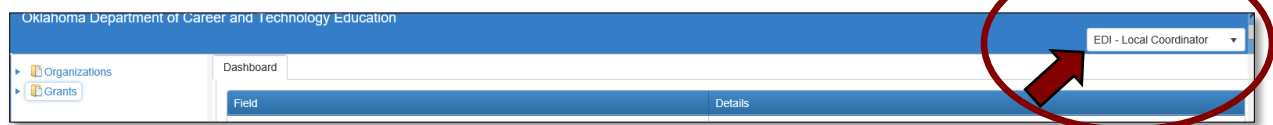
Starting a New Worksheet

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

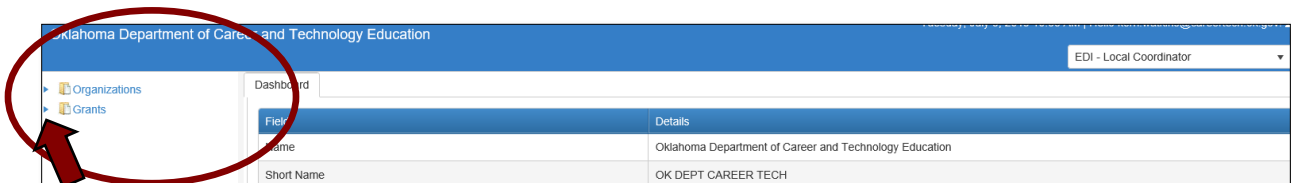


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

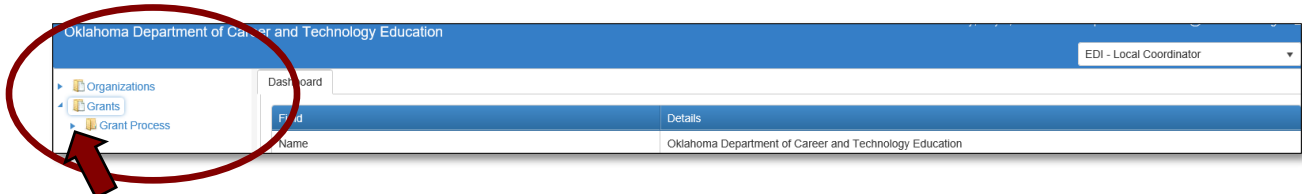
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



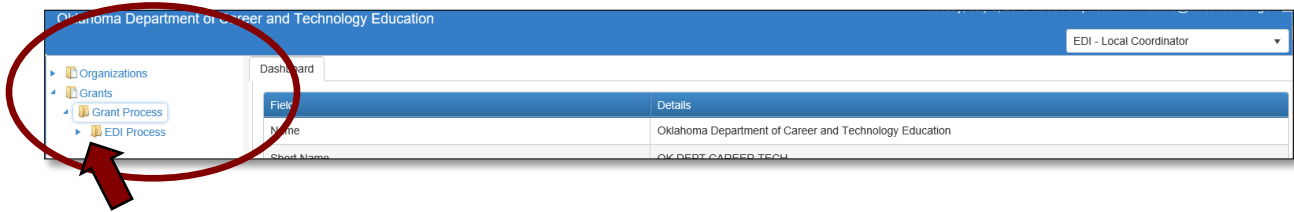
- Click the arrow ► next to **Grants** on left navigation.



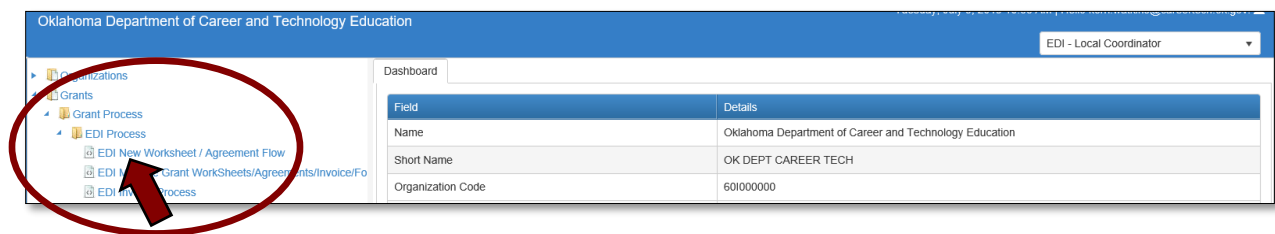
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



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

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

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

Dashboard EDI New Worksheet / Agreement Flow X EDI - Local Coordinator

EDI Grant Submit Worksheet - Step 1

12 Save & Next

Fiscal Calendar Year:*	1 2018-2019	Grant Fund Type:*	2 EDI
Organization Type:*	3 Tech Center Districts	Organization:*	4 Sample Technology Center
Organization District:*	5 Sample Technology Center	Program Initiative:*	6 Economic Development - Training for Ind...
Worksheet No:*	7 WS-1819-EDI-EDI-TIP-4		

Client Basic Information For work Sheet

Organization Type*	8 Business Masters	Client Type*	9 Business Masters (Company)
Organization*	10 BANK	Business Code*	11

View Location(s) View Contact(s)

Year Established		FEI Number	
Primary NAICS Code	Commercial Banking (522110)	Secondary NAICS Code	Agriculture, Forestry, Fishing and Hu...
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

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

EDI Grant Submit Worksheet - Step 2

Provider Organization Details

Refresh Worksheet Summary Save & Next

Fiscal Calendar Year: 2018-2019 Grant Fund Type: EDI

Organization Type: Tech Center Districts Organization: SAMPLE Technology Center

Organization District: SAMPLE Technology Center Program Initiative: Economic Development - Firefighter (Type 83) -...

Worksheet No.: WS-1819-EDI-EDI-FIREFTR-

+ Basic Client Information

+ Funding Request Details

Refresh Worksheet Summary Save & Next

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

FORM EXAMPLES:

TIP Worksheet:

Dashboard EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 2

Refresh Worksheet Summary Save & Next

+ Provider Organization Details

+ Basic Client Information

+ Attachments

- Funding Request Details

New TIP Worksheet

Client's Mailing Address*

CEO's Name

CEO's Phone

CEO's Email Address

Contact's Name*

Contact's Title*

Contact's Phone Number*

Contact's Email Address*

Client's Product

Years in Business*

Years in Oklahoma*

Firefighter Training Worksheet:

The screenshot shows the 'New FFT Worksheet' form. The left sidebar contains a navigation menu with 'Grant Process' and 'EDI Process' categories. The main content area is titled 'EDI Grant Submit Worksheet - Step 2' and includes a 'Refresh' button, a 'Worksheet Summary' button, and a 'Save & Next' button. The form is organized into sections: 'Provider Organization Details', 'Basic Client Information', 'Attachments', and 'Funding Request Details'. The 'Funding Request Details' section is expanded, showing the 'New FFT Worksheet' form with the following fields: 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* (with a calendar icon), Current Employees*, and Number Of Trainees*.

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

New Safety Worksheet:

The screenshot shows the 'New Safety Worksheet' form. The left sidebar contains a navigation menu with 'Grant Process' and 'EDI Process' categories. The main content area is titled 'EDI Grant Submit Worksheet - Step 2' and includes a 'Refresh' button, a 'Worksheet Summary' button, and a 'Save & Next' button. The form is organized into sections: 'Provider Organization Details', 'Basic Client Information', 'Attachments', and 'Funding Request Details'. The 'Funding Request Details' section is expanded, showing the 'New Safety Worksheet' form with the following fields: Contact's Name*, Contact's Title*, Contact's Phone Number*, Contact's Email Address*, Contract Start Date* (with a calendar icon), Current Employees, Number Of Trainees, and two sections for training requests: 'Why is training being requested?' with 'Maintain' and 'Upgrade' checkboxes, and 'What type of training is being requested?'.

Economic Development – Incubator Worksheet:

The screenshot shows the 'EDI Grant Submit Worksheet - Step 2' form. The left sidebar contains a navigation menu with options: 'Grant Process', 'EDI Process', 'EDI New Worksheet / Agreement Flow' (highlighted), 'EDI Manage Grant WorkS', and 'EDI Invoice Process'. The main content area has a blue header bar with the title 'EDI Grant Submit Worksheet - Step 2' and buttons for 'Refresh', 'Worksheet Summary', and 'Save & Next'. Below the header, there are expandable sections: '+ Provider Organization Details', '+ Basic Client Information', '+ Attachments', and '- Funding Request Details'. The 'Funding Request Details' section is expanded, showing a 'New Incubator Worksheet' form with fields for 'Contact's Name*', 'Contact's Title*', 'Contact's Phone Number*', 'Contact's Email Address*', 'Contract Start Date*' (with a calendar icon), 'Current Employees*', and 'Number Of Trainees*'. Below these fields are two checkboxes: 'Maintain' and 'Upgrade', followed by a text area labeled 'What type of training is being requested?'.

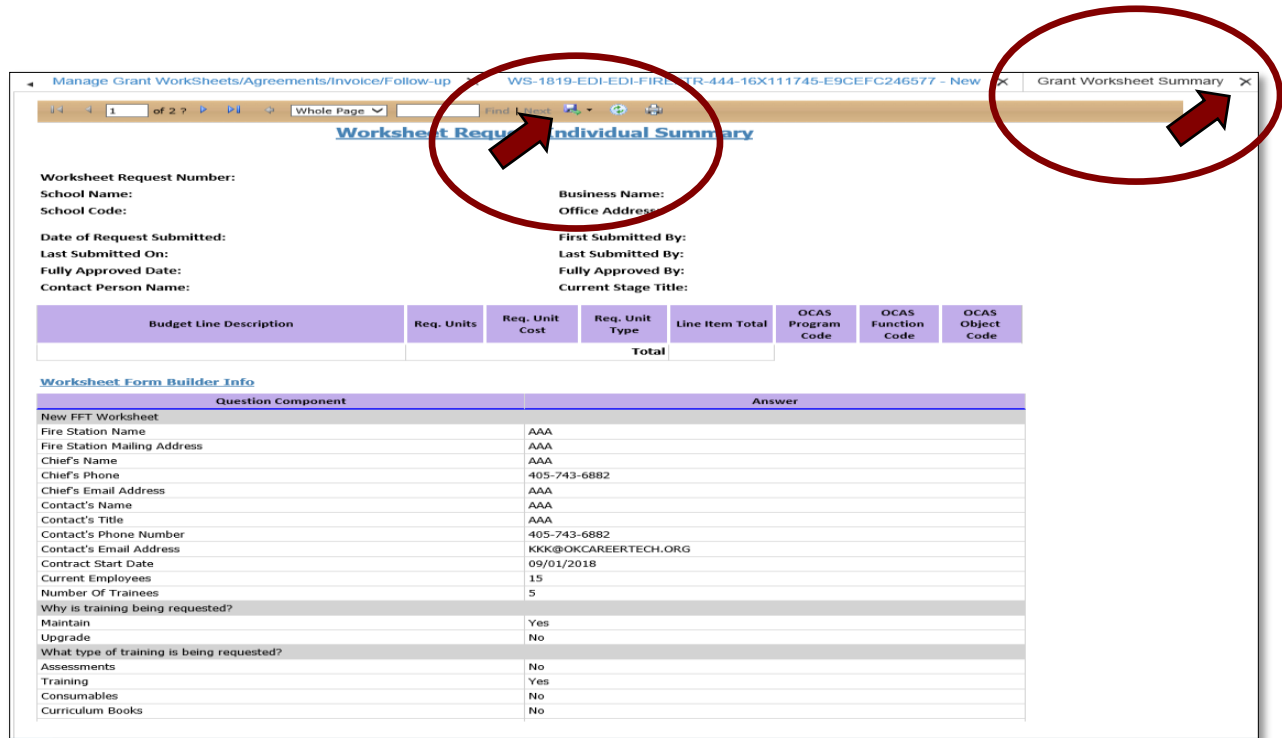
IMPORTANT: You must finish the **EDI Grant Submit Worksheet – Step 2 Page** and click **Save and Next** for any of the information to be saved.

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

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

This screenshot is similar to the one above, showing the 'EDI Grant Submit Worksheet - Step 2' form. However, the 'Funding Request Details' section is collapsed. At the bottom right of the form, there is a red circle highlighting the 'Worksheet Summary' button, with a red arrow pointing to it. The other buttons in this area are 'Refresh' and 'Save & Next'.

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



Manage Grant WorkSheets/Agreements/Invoice/Follow-up WS-1819-EDI-EDI-FIRETR-444-16X111745-E9CEFC246577 - New Grant Worksheet Summary

Worksheet Request Individual Summary

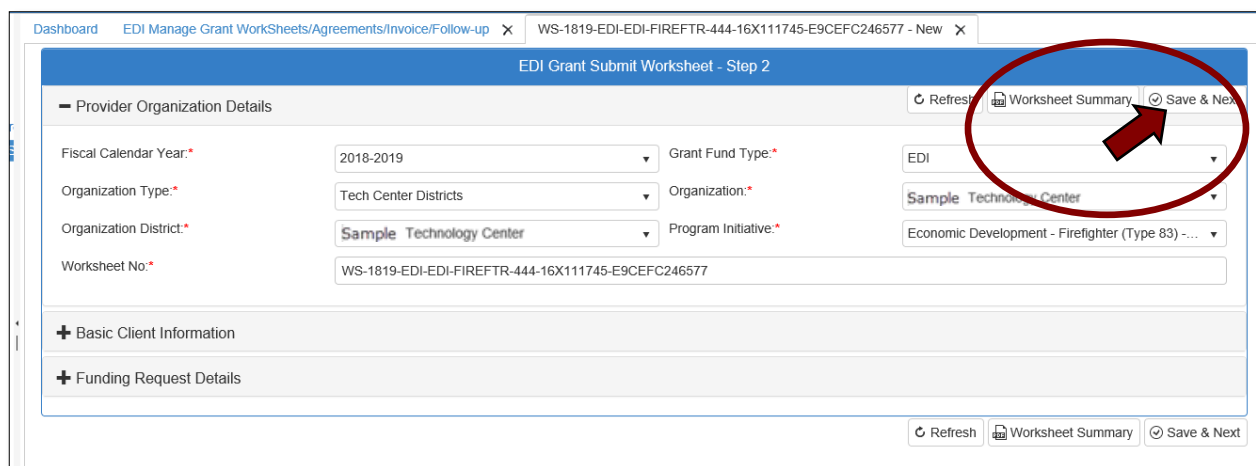
Worksheet Request Number:
School Name:
School Code:
Business Name:
Office Address:
Date of Request Submitted:
Last Submitted On:
Fully Approved Date:
Contact Person Name:
First Submitted By:
Last Submitted By:
Fully Approved By:
Current Stage Title:

Budget Line Description	Req. Units	Req. Unit Cost	Req. Unit Type	Line Item Total	OCAS Program Code	OCAS Function Code	OCAS Object Code
Total							

Worksheet Form Builder Info

Question Component	Answer
New FFT Worksheet	
Fire Station Name	AAA
Fire Station Mailing Address	AAA
Chief's Name	AAA
Chief's Phone	405-743-6882
Chief's Email Address	AAA
Contact's Name	AAA
Contact's Title	AAA
Contact's Phone Number	405-743-6882
Contact's Email Address	KKK@OKCAREERTECH.ORG
Contract Start Date	09/01/2018
Current Employees	15
Number Of Trainees	5
Why is training being requested?	
Maintain	Yes
Upgrade	No
What type of training is being requested?	
Assessments	No
Training	Yes
Consumables	No
Curriculum Books	No

2.5 - Select Save and Next to continue.



Dashboard EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up WS-1819-EDI-EDI-FIRETR-444-16X111745-E9CEFC246577 - New EDI Grant Submit Worksheet - Step 2

Provider Organization Details

Fiscal Calendar Year: 2018-2019 Grant Fund Type: EDI
Organization Type: Tech Center Districts Organization: Sample Technology Center
Organization District: Sample Technology Center Program Initiative: Economic Development - Firefighter (Type 83) ...
Worksheet No.: WS-1819-EDI-EDI-FIRETR-444-16X111745-E9CEFC246577

Basic Client Information

Funding Request Details

Refresh Worksheet Summary **Save & Next**

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

EDI Grant Submit Worksheet – Step 3

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

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

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	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated -	Remaining to Invoice
\$3,874.00	\$0.00	Total	\$0.00	\$0.00	Agmt. Budgeted)	\$0.00
		\$0.00			\$3,874.00	

+ Add Budget Line x Remove Budget Line x Cancel Budget Line Changes

Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched Funds	Status
1	2 0.00	3 \$0.00	4	\$0.00	\$0.00	5 0.00	Active

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

+ Project Details

- Budget Line Items

Grant Allocation:

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$3,874.00	\$0.00	Total \$0.00	\$0.00	\$0.00	\$3,874.00	\$0.00

Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched Funds	Status
Training Materials	5.00	\$15.00	Cost Per Each	\$75.00	\$75.00	20.00	Active
	0.00	\$0.00		\$0.00	\$0.00	0.00	Active
				\$75.00	\$75.00		

Note

[Empty text area for note]

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

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

EDJ Grant Submit Worksheet - Step 3

+ Provider Organization Details
+ Basic Client Information
+ Project Details
+ Budget Line Items
- Attachments

Browse: [Browse...]

Attachment Note: [Text area]

Status	File Name	Attachment Note*	Uploaded Date	Action
--------	-----------	------------------	---------------	--------

+ Acknowledgements

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

EDI Grant Submit Worksheet

+ Provider Organization Details Refresh

+ Basic Client Information

+ Project Details

+ Budget Line Items

- Attachments

Browse:

Attachment Note:

Status	File Name	Attachment Note
<input type="checkbox"/> Active	Testing Attachment Excel File.xlsx	

acknowledgements

Testing Attachment Excel File.xlsx

Note:

Input note here...

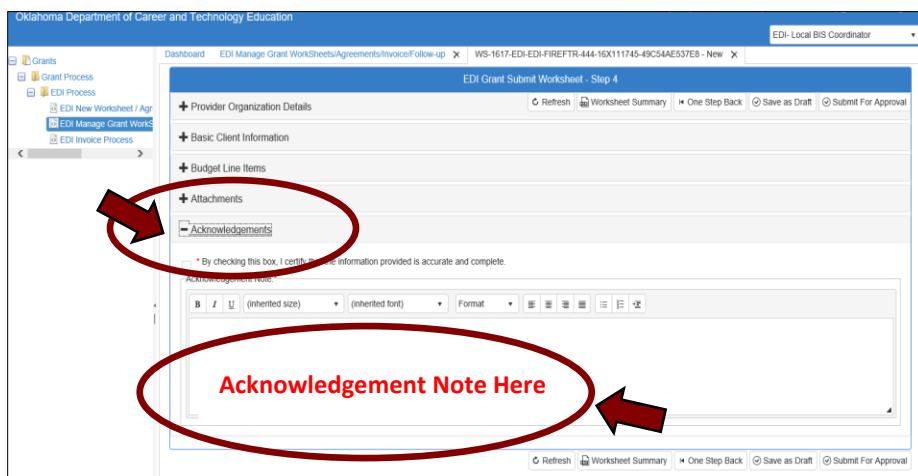
Cancel Ok

To save as Draft

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

EDI Grant Submit Worksheet – Step 4

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



Oklahoma Department of Career and Technology Education

Dashboard | EDI Manage Grant Worksheets/Agreements/Invoices/Follow-up | WS-1617-ED-EDI-FIREFTR-444-16X11745-49C54AE537E8 - New

EDI-Local BIS Coordinator

EDI Grant Submit Worksheet - Step 4

Provider Organization Details

Basic Client Information

Budget Line Items

Attachments

Acknowledgements

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

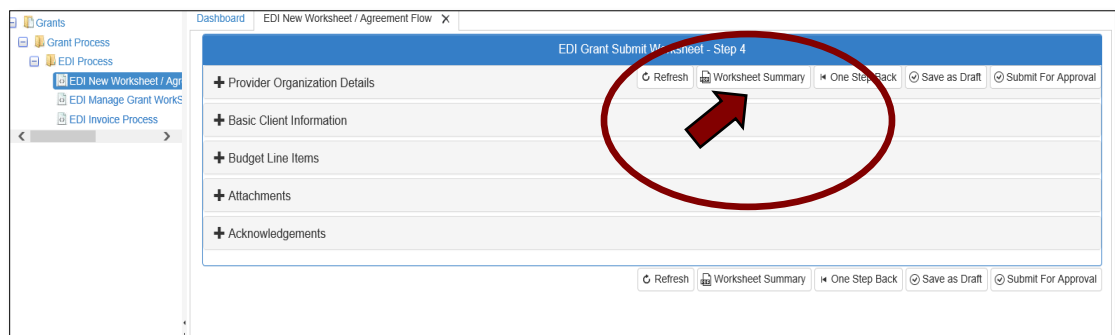
Acknowledgement Note

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

Acknowledgement Note Here

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

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



Dashboard | EDI New Worksheet / Agreement Flow

EDI Grant Submit Worksheet - Step 4

Provider Organization Details


Basic Client Information

Budget Line Items

Attachments

Acknowledgements

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

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

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

The screenshot shows the 'EDI Grant Submit Worksheet - Step 4' interface. The top navigation bar includes 'Dashboard', 'EDI Manage Grant Worksheets/Agreements/Invoices/Follow-up', and a user dropdown menu labeled 'EDI - Local BIS Coordinator'. The main content area has sections for 'Provider Organization Details', 'Basic Client Information', 'Budget Line Items', and 'Attachments'. Below these is an 'Acknowledgements' section with a checkbox and a text area. The bottom of the interface has a toolbar with 'Refresh', 'Worksheet Summary', 'One Step Back', 'Save as Draft', and 'Submit For Approval'. The 'Submit For Approval' button is circled in red with an arrow pointing to it.

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

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

Stage 2 - EDI State Regional Coordinator

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

Signing in & Opening the Worksheet

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

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

The screenshot shows the 'Oklahoma Department of Career and Technology Education' dashboard. The top navigation bar includes 'Dashboard' and a user dropdown menu labeled 'EDI - State Regional Coordinator'. The main content area has a table with columns 'Field' and 'Details'. The table contains the following information:

Field	Details
Name	Oklahoma Department of Career and Technology Education
Short Name	OK DEPT CAREER TECH
Organization Code	60000000
Organization Type	ODCTE District

The user dropdown menu in the top right corner is circled in red with an arrow pointing to it.

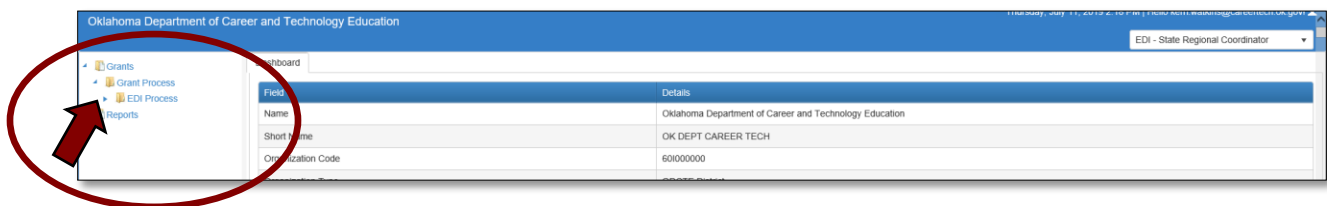
- Click the arrow |▶ next to **Grants** on left navigation.



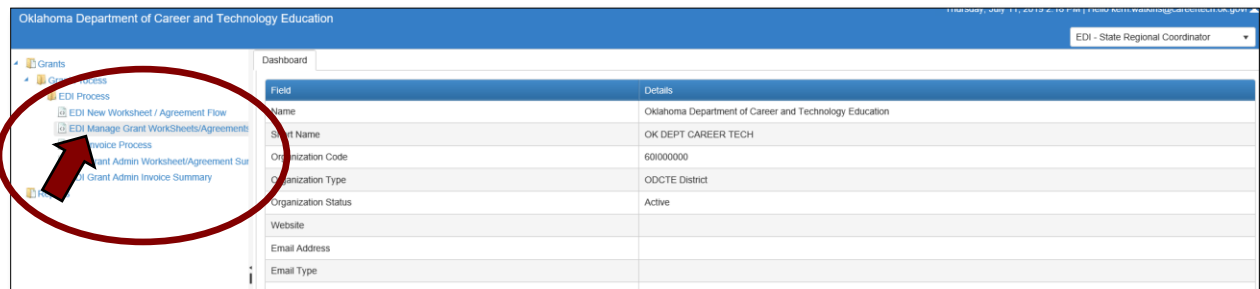
- Click the arrow |▶ next to **Grants Process**



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



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



Or,

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

Oklahoma Department of Career and Technology Education

EDI - State Regional Coordinator

Dashboard | EDI Grant Admin Worksheet/Agreement Summary

EDI Grant Admin Worksheet/Agreement Summary

Fiscal Year: 2019-2020

Program Initiative: ☐ All *

Organization Type: ☐ All *

Organization:

Approval Function Type: ☐ All

Filter on Status: ☐ All

☐ Save changes ☐ Cancel changes ☐ Export to Excel

Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
---------------	-------------	----------------------------------	---------------------------	-----------	-----------

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

NOTE: The red asterisks* represents a required field.

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

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

The screenshot shows the 'EDI Grant Fund Worksheets List' interface. It features a header bar with 'Dashboard' and 'EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up'. Below the header, there are several filter sections: 'Fiscal Calendar Year' (1), 'Grant Fund Type' (2), 'Organization Type' (3), 'Organization' (4), 'Organization District' (5), and 'Program Initiative' (6). There are also 'Approval Function Type' (7) and 'Filter on Status' (8) dropdowns. A 'Search' button (9) is located to the right of the status filter. Below the filters are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom, there is a table with columns: 'Act', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', 'Worksheet', and 'Agreement'.

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

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

EDI Grant Fund Worksheet List – Step 1

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

This screenshot shows the same interface as the first one, but with specific values entered in the filters: 'Fiscal Calendar Year' is 2016-2017, 'Grant Fund Type' is EDI, 'Organization Type' is Tech Center Districts, 'Organization' is Sample Technology Center, and 'Program Initiative' is Economic Development - Firefighter (Type 83). The 'Worksheet' column in the table is highlighted with a red circle, and a red arrow points to the worksheet number 'WS-1617-EDI-EDI-FIREFTR-444-16X1117...'.

EDI Grant Submit Worksheet - Step 2

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

EDI Grant Submit Worksheet - Step 2

Refresh Worksheet Summary Next Step

+ Provider Organization Details

+ Basic Client Information

+ Funding Request Details

New FFT Worksheet

Fire Station Name* Valley View Volunteer Fire

Fire Station Mailing Address* 6/04 NE Cache Rd

Chief's Name* Lin Newton

Chief's Phone* 580-351-7597

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

Dashboard EDI Manage Grant Worksheets/Agreements/InvoiceFollow-up WS-1617-EDI-EDIFREFTR-444-16X111745-88953194C6A2 - 1st Stage

EDI Grant Submit Worksheet - Step 2

Refresh Worksheet Summary Next Step


+ Provider Organization Details

+ Basic Client Information

+ Attachments

+ Funding Request Details

Refresh Worksheet Summary Change Request Next Step

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

EDI Grant Submit Worksheet - Step 3

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

Add Budget Line Remove Budget Line Cancel Budget Line Changes

Budget Line (OCAS CODE)	Program - Function - Object	Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched
		Firefighter Workbooks	10.00	\$15.00	Cost Per Each	\$150.00	\$0.00	
		Tech Supplies	10.00	\$250.00	Cost Per Each	\$2,500.00	\$0.00	
						\$2,650.00	\$0.00	

Note

+ Attachments

+ Acknowledgements

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

Approval Process - EDI Grant Worksheet Approval

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

The screenshot shows a web-based approval interface. It features two large text input areas at the top, each with a 'Format' dropdown and a rich text editor toolbar. The first is labeled 'Approval/Rejection Note' and the second 'Private Note'. Below these is a 'Browse' section containing a 'View to Public' checkbox (which is checked) and a 'Select files...' button. An 'Attachment Note' text area is located below the browse section. At the bottom of the interface is a table with the following columns: 'Approval Stage', 'File Name', 'Uploaded On', 'Note', and 'Attachment'. The table is currently empty. A red circle highlights the 'Approve' button at the bottom right of the interface, which is next to a 'Reject' button.

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

Stage 3 - EDI State Supervisor

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

EDI Change Request Process

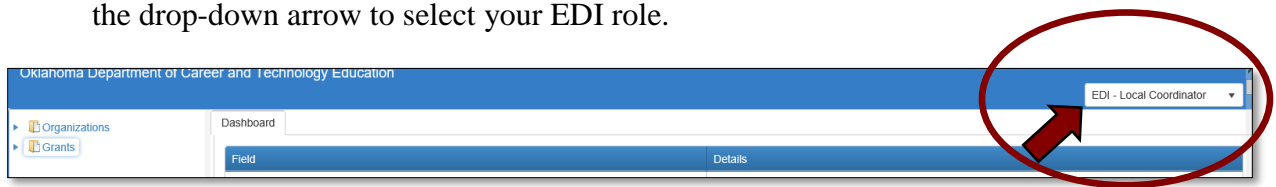
Logging in and Accessing the Worksheet

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

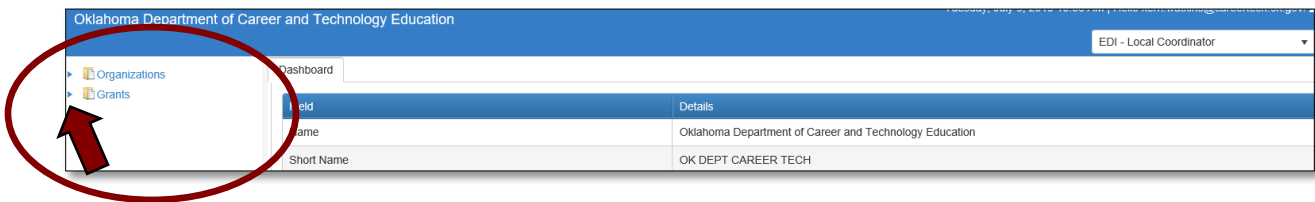
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

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

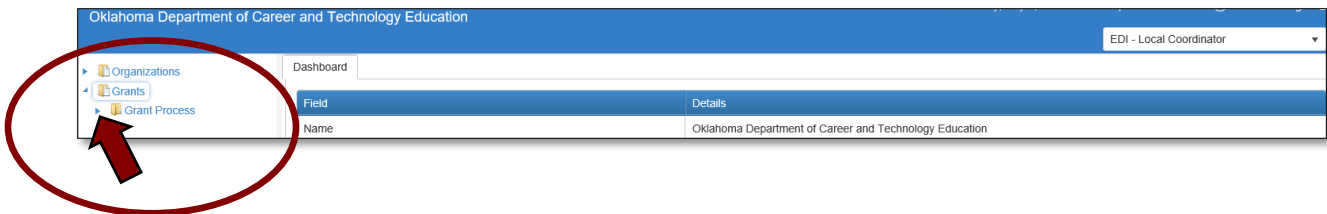
- Verify that you are signed in with the appropriate role in the top right-hand corner. Use the drop-down arrow to select your EDI role.



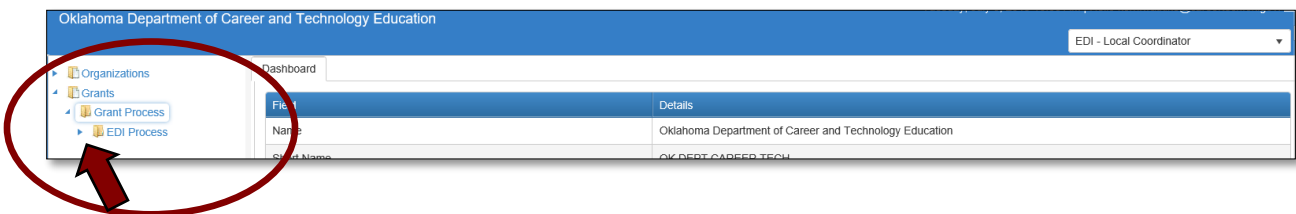
- Click the arrow ► next to **Grants** on left navigation.



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



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



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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

The screenshot shows a web application interface for managing grant worksheets. At the top, there is a breadcrumb trail: "Dashboard > EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up". Below this is a title bar "EDI Grant Fund Worksheets List". The form contains several fields with red asterisks indicating they are required. Numbered callouts (1-9) point to specific fields: 1 points to "Fiscal Calendar Year:" (set to 2018-2019), 2 points to "Grant Fund Type:" (set to EDI), 3 points to "Organization Type:" (set to Tech Center Districts), 4 points to "Organization:" (with a prompt to enter the first three characters), 5 points to "Organization District:", 6 points to "Program Initiative:" (set to --Select--), 7 points to "Approval Function Type:" (set to All), 8 points to "Filter on Status:" (set to All), and 9 points to the "Search" button. Below the form are buttons for "Save changes", "Cancel changes", and "Export to Excel". At the bottom, there is a table header with columns: "Act", "Provider Name", "Client Name", "Worksheet Approval Current Stage", "Worksheet Submission Date", "Worksheet", and "Agreement".

Initiating and Completing the Change Request

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

EDI Grant Fund Worksheets List

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

Organization Type: Tech Center Districts Organization: Sample Technology Center

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

Approval Function Type: All Filter on Status: All

Save changes Cancel changes Export to Excel

Act...	Provider Name	Worksheet Approval Curre...	Worksheet...	Worksheet	Agreement	Agreement
+	Sample Technology Center	EDI Local BIS Director - 2n...	05/16/201...	WS-1617-EDI-EDI-FIREFTR-444-16X1117...		New-Draft

1.2 - 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

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$2,007.20	\$550.00	\$0.00	\$0.00	\$2,007.20	\$0.00

Add Budget Line Remove Budget Line Cancel Budget Line Changes

Budget Line(OCAS CODE) Program - Function - Object	Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched
	Training	3.00	\$100.00	Cost Per Class	\$300.00	\$0.00	
	Books	10.00	\$10.00	Cost Per Each	\$100.00	\$0.00	
	supplies	150.00	\$1.00	Cost Per Class	\$150.00	\$0.00	

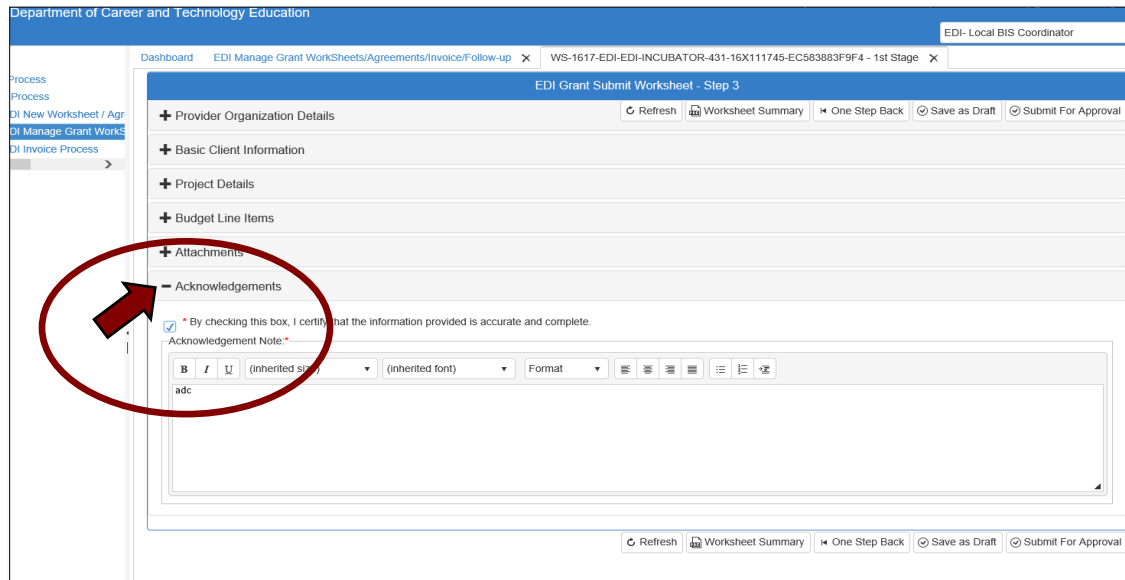
1.3 - The Change Request process cancels the worksheet/application approval process. Click **OK** to continue.

Change Request

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

Cancel OK

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



Department of Career and Technology Education

EDI- Local BIS Coordinator

Dashboard EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up X WS-1617-EDI-EDI-INCUBATOR-431-16X111745-EC583883F9F4 - 1st Stage X

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 *

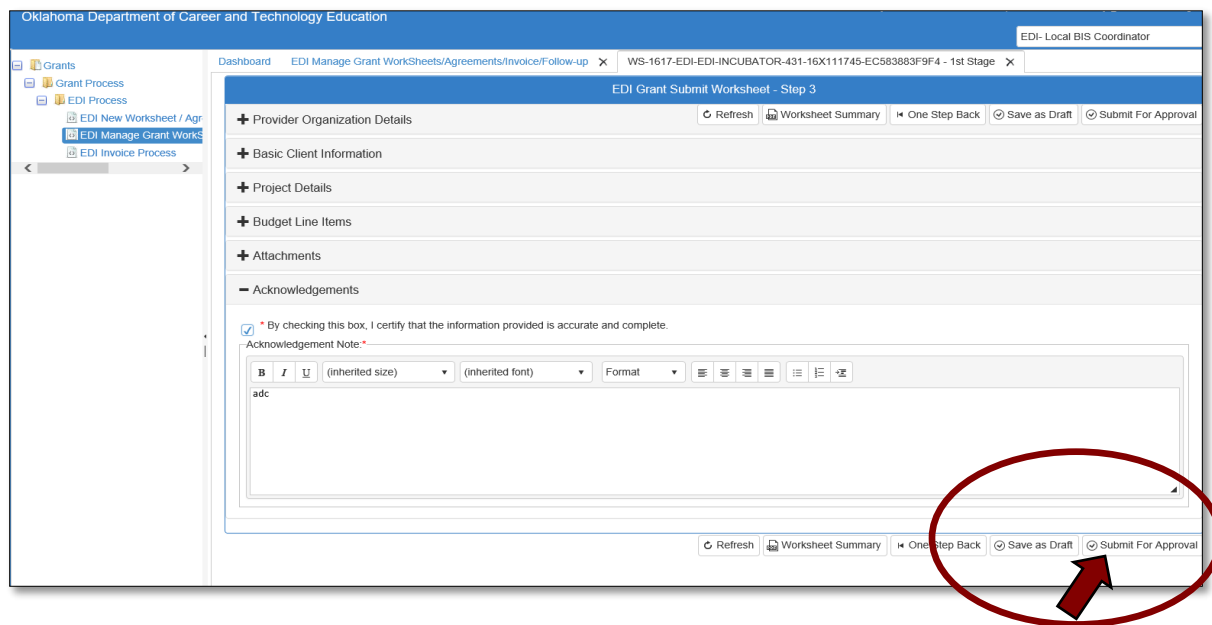
B I U (inherited size) (inherited font) Format

adc

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

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

1.5 - Select **Submit for Approval**.



Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Dashboard EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up X WS-1617-EDI-EDI-INCUBATOR-431-16X111745-EC583883F9F4 - 1st Stage X

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.

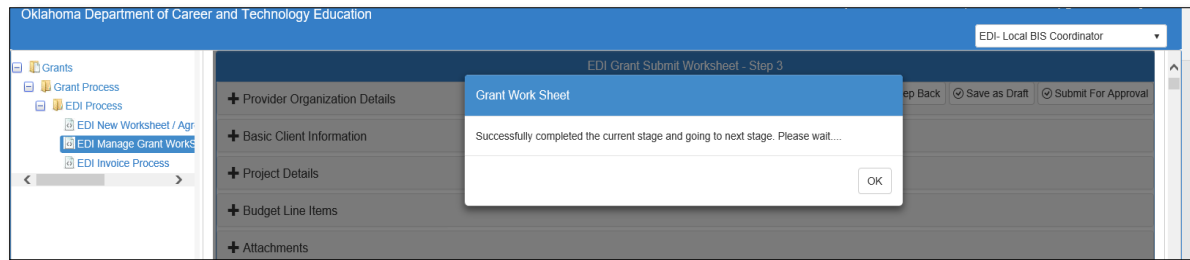
Acknowledgement Note *

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

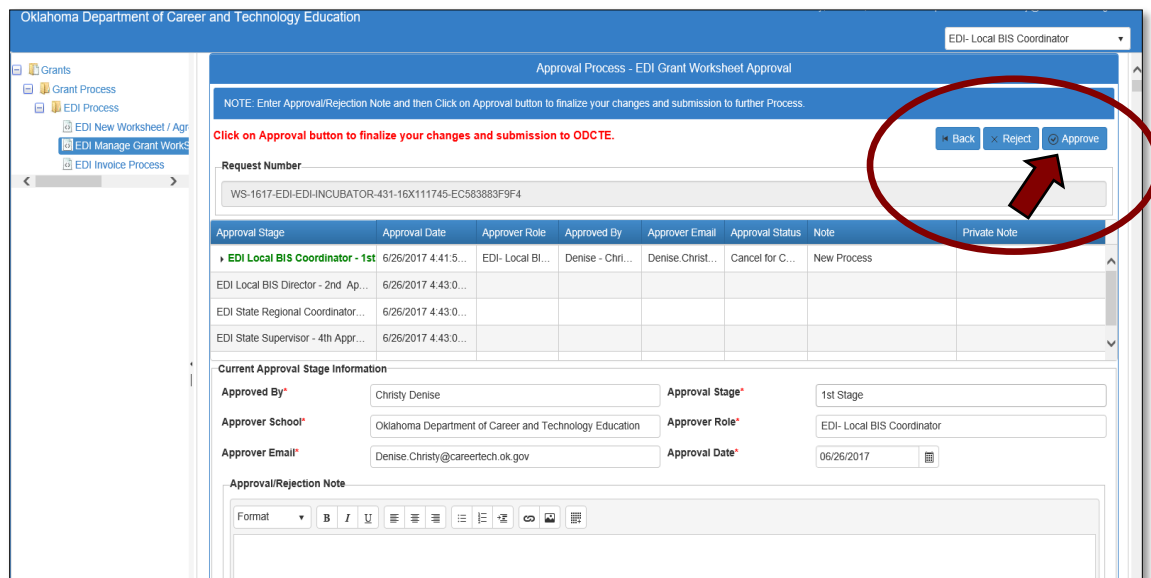
adc

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

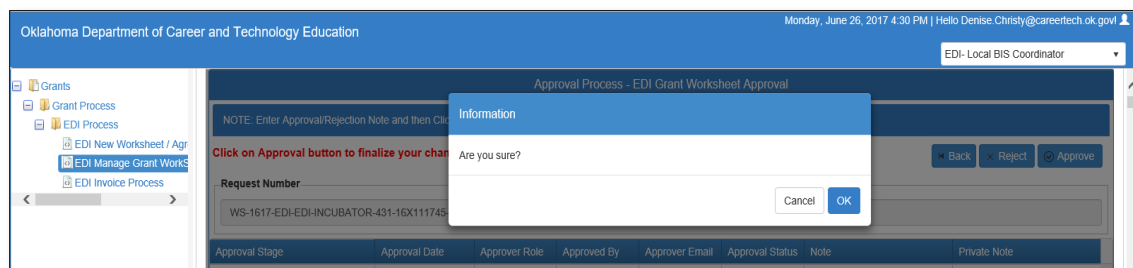
1.6 - Click OK.



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



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



The worksheet will go back through the regular approval process.

Agreement Process

Agreement Approval Process

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

Roles: Agreement Process

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



Stage 2 – Local BIS Director



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



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



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



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

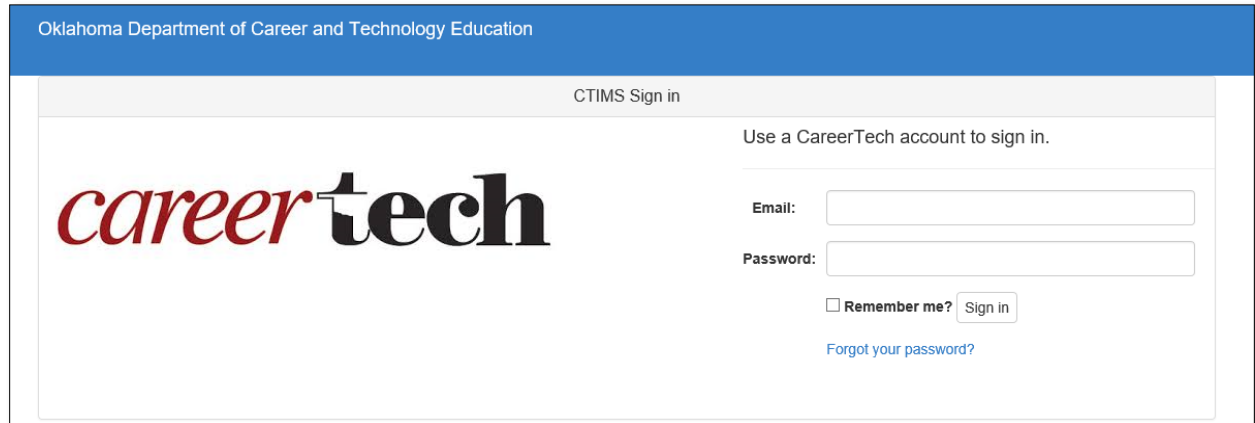


Stage 7 - Local Finance Coordinator – Enter OCAS codes for each line item. Agreement Approval becomes fully approved. (The tech center is responsible for selecting OCAS codes. See <https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx> for codes.)

Stage 1- Local Coordinator

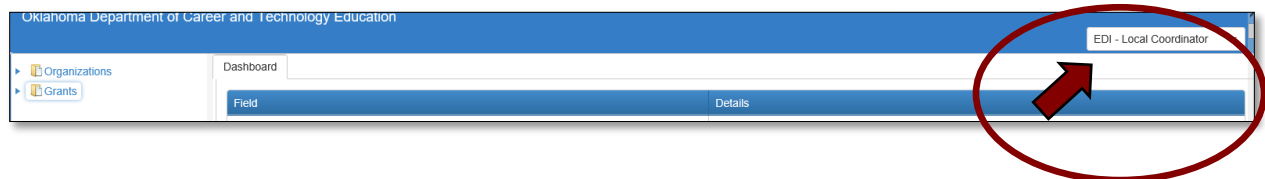
Accessing the Agreement List

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

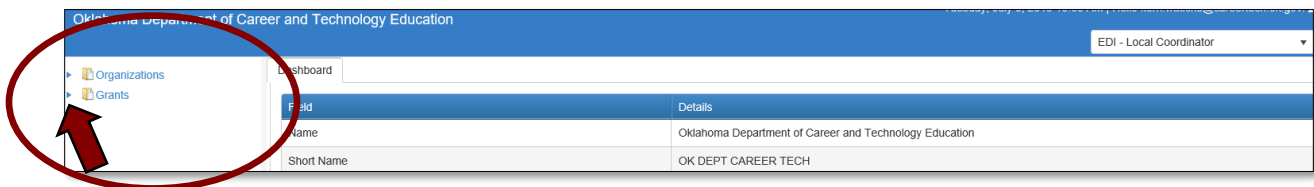


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

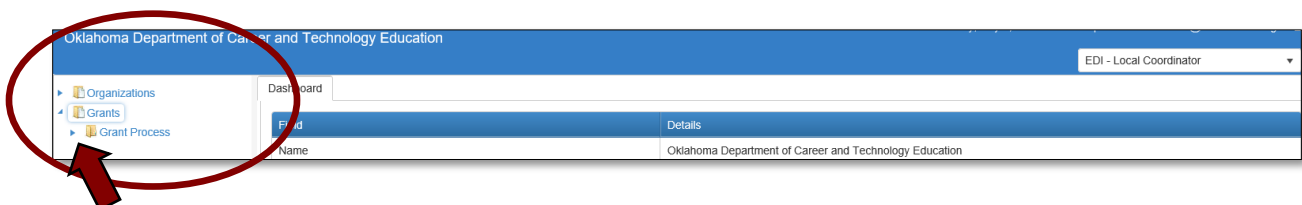
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



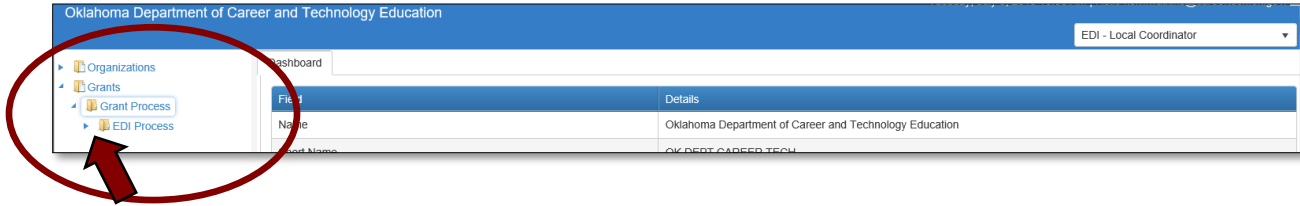
- Click the arrow ► next to **Grants** on left navigation.



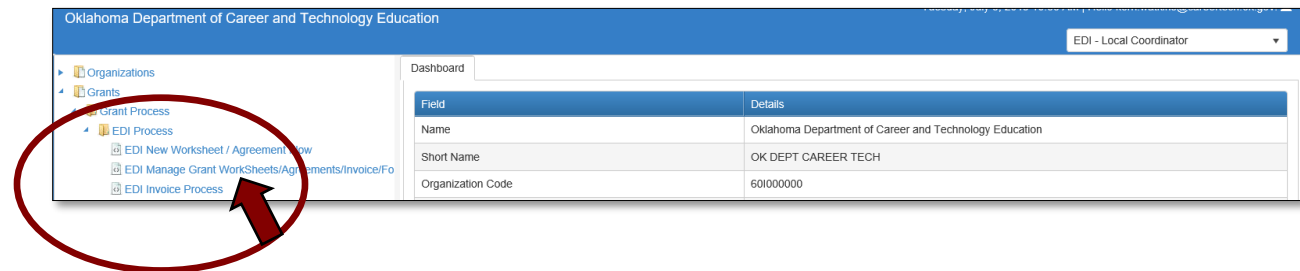
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



Opening the Agreement – Step 1

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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

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

EDI Grant Fund Worksheets List

Fiscal Calendar Year: **1** 2018-2019 Grant Fund Type: **2** EDI
 Organization Type: **3** Tech Center Districts Organization: **4** Enter the first three characters of any word that is in
 Organization District: **5** --Select-- Program Initiative: **6** --Select--
 Approval Function Type: **7** All
 Filter on Status: **8** All **9** Search

☒ Save changes ☐ Cancel changes

Act	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement

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

Oklahoma Department of Career and Technology Education

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

EDI Grant Fund Worksheets List

Fiscal Calendar Year: 2016-2017 Grant Fund Type: EDI
 Organization Type: Sample Technology Center Organization: Sample Technology Center
 Organization District: Sample Technology Center Program Initiative: Economic Development - Firefighter (Type 83)
 Approval Function Type: All
 Filter on Status: All Search

☒ Save changes ☐ Cancel changes

Act	Provider Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
<input checked="" type="checkbox"/>	Sample Technology Center	Local Superintendent - Fully Approved Stage	05/16/201...	WS-1617-E	EDI-FIREFTR-444-16X117... New

Reviewing the Agreement– Step 2

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

The screenshot shows the 'EDI Grant Agreement' screen in the Oklahoma Department of Career and Technology Education system. The 'Budget Line Items' section is expanded, and a red circle with an arrow points to the plus sign next to it. The 'Grant Allocation' table shows a sub award allocation of \$3,986.00. The 'Budget Line(OCAS CODE)' table lists two items: 'Firefighter Workbooks' and 'Tech Supplies'.

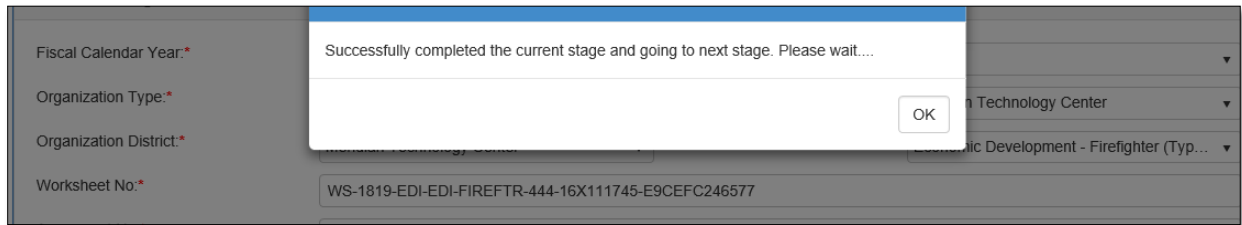
Budget Line(OCAS CODE)	Program – Function – Object	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds
		Firefighter Workbooks	10	\$15.00	Cost Per Each	\$150.00	\$150.00	
		Tech Supplies	10	\$250.00	Cost Per Each	\$2,500.00	\$2,500.00	

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

The screenshot shows the 'EDI Grant Agreement' screen with the 'Provider Organization Details' section expanded. The 'Funding Agreement' and 'BIS PEF Report' tabs are visible. The 'Provider Organization Details' section contains fields for Fiscal Calendar Year, Organization Type, Organization District, Worksheet No., Agreement No., Grant Fund Type, and Organization. The 'BA Summary Report' and 'SOU History Report' sections are also visible.

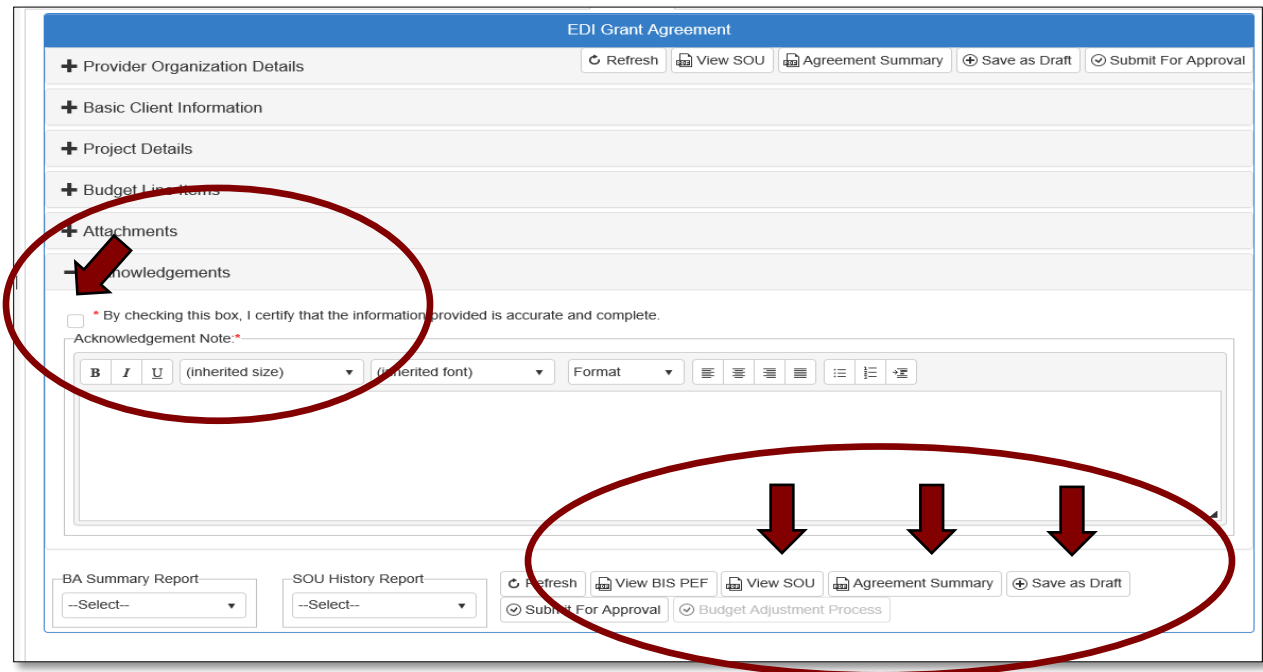
BA Summary Report	SOU History Report	Refresh	View BIS PEF	View SOU	Agreement Summary	Save as Draft
--Select--	--Select--					

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



Agreement Acknowledgments and Approval– Step 3

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



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

The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgements' section is expanded, showing a checkbox for certification and a text area for the 'Acknowledgement Note'. Below the text area, there are two dropdown menus for 'BA Summary Report' and 'SOU History Report'. At the bottom right, the 'Submit For Approval' button is circled in red with a red arrow pointing to it. Other buttons like 'Refresh', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Budget Adjustment Process' are also visible.

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

Stage 2-Local BIS Director

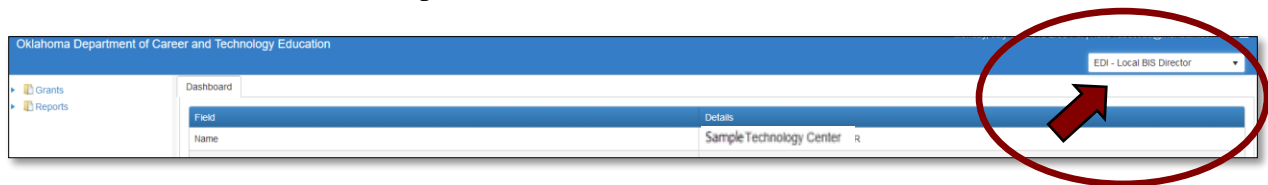
Accessing the Agreement List

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

The screenshot shows the 'CTIMS Sign in' page. On the left is the 'career tech' logo. On the right, it says 'Use a CareerTech account to sign in.' Below this are input fields for 'Email:' and 'Password:'. There is a 'Remember me?' checkbox and a 'Sign in' button. A link for 'Forgot your password?' is also present.

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

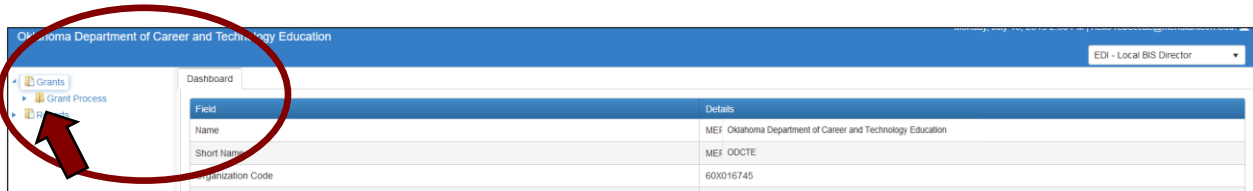
- Verify that you are signed in with the role of an **EDI Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select this role.



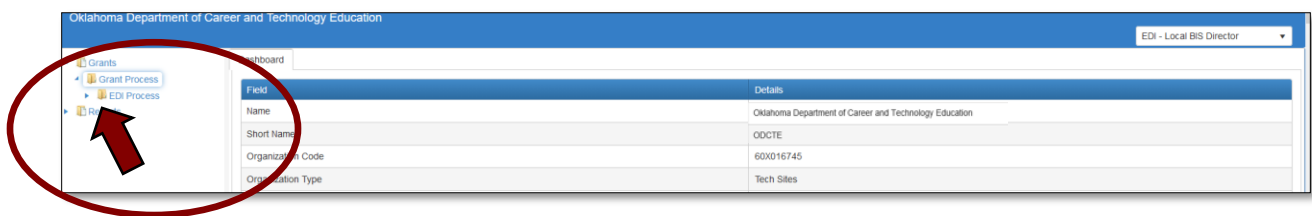
- Click the arrow ► next to **Grants** on left navigation.



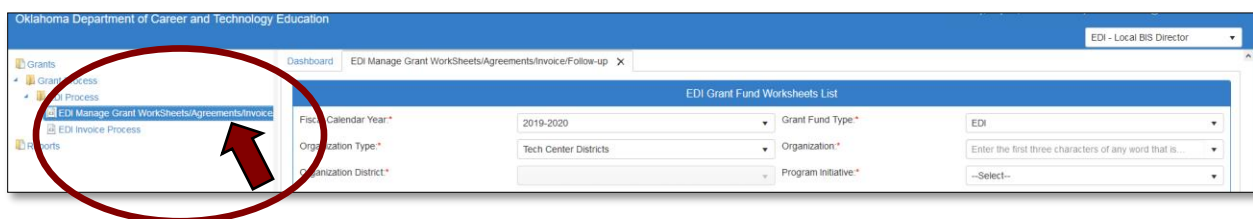
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



Opening the Agreement – Step 1

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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a numbered callout:

- 1**: Fiscal Calendar Year* (2018-2019)
- 2**: Grant Fund Type* (EDI)
- 3**: Organization Type* (Tech Center Districts)
- 4**: Organization* (Enter the first three characters of any word that is in)
- 5**: Organization District* (dropdown menu)
- 6**: Program Initiative* (dropdown menu)
- 7**: Approval Function Type* (All)
- 8**: Filter on Status* (All)
- 9**: Search button

Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement.

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

Reviewing the Agreement– Step 2

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

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

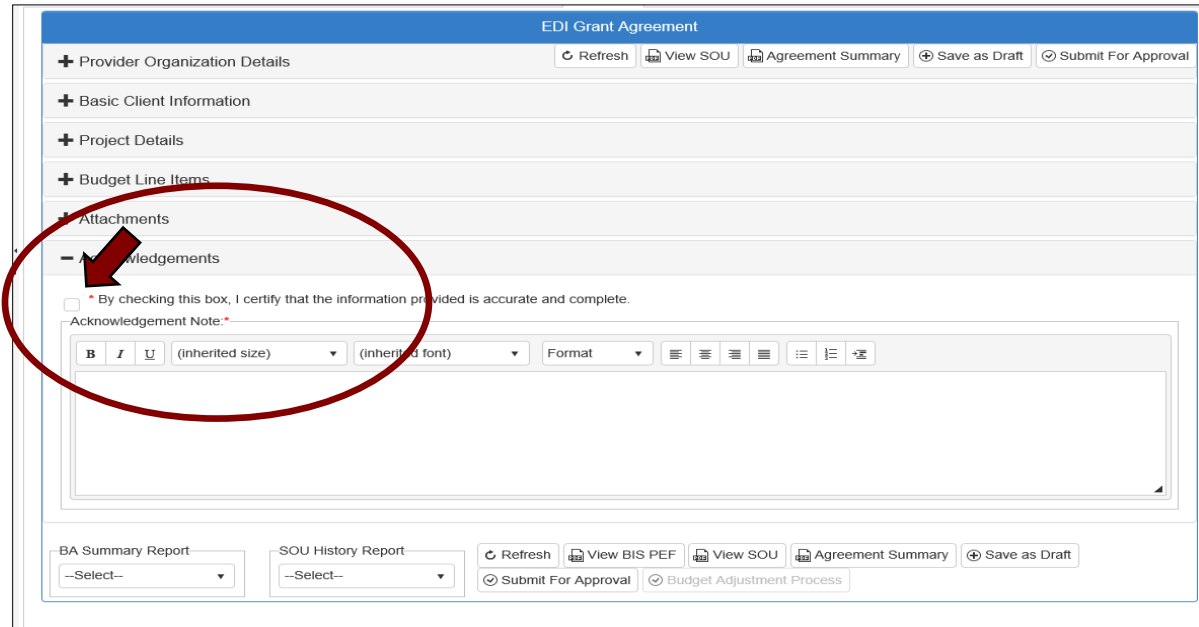
The screenshot shows the 'EDI Grant Agreement' screen. At the top, there are tabs for 'Dashboard', 'EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up', 'New', 'Funding Agreement', and 'BIS PEF Report'. The main section is titled 'EDI Grant Agreement' and contains a 'Provider Organization Details' section with fields for Fiscal Calendar Year (2018-2019), Organization Type (Tech Center Districts), Organization District (Sample Technology Center), Worksheet No. (WS-1819-EDI-EDI-FIREFTR-444-16X111745-E9CEFC246577), and Agreement No. (WSAG-1819-EDI-EDI-FIREFTR-444-16X111745-46538BAB6A30). Below this are sections for Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. At the bottom, there is a navigation bar with buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Submit For Approval'. A red oval highlights this navigation bar, and three red arrows point to the 'View SOU', 'View BIS PEF', and 'Agreement Summary' buttons.

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

The screenshot shows the same 'EDI Grant Agreement' screen as before, but with a modal dialog box open in the center. The dialog box contains the text 'Successfully completed the current stage and going to next stage. Please wait....' and an 'OK' button. A red arrow points to the 'OK' button. The background of the screen is dimmed.

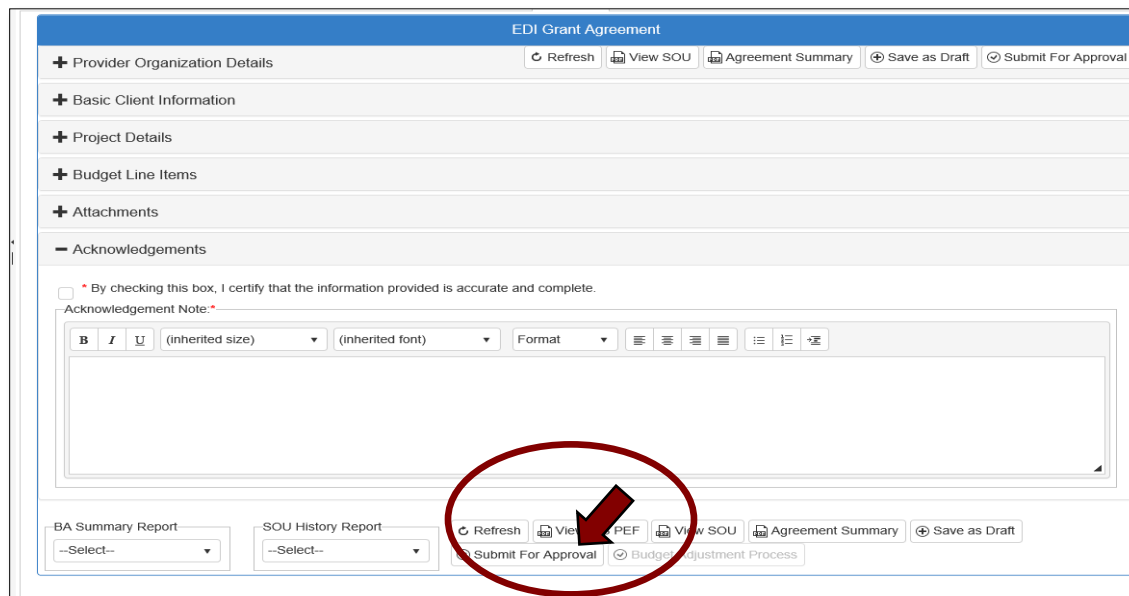
Agreement Acknowledgements and Approval– Step 3

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



The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgements' tab is expanded, and a red circle with an arrow points to the checkbox labeled 'By checking this box, I certify that the information provided is accurate and complete.' Below this is a text area for the 'Acknowledgement Note' with a rich text editor toolbar. At the bottom, there are dropdowns for 'BA Summary Report' and 'SOU History Report', and buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'.

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



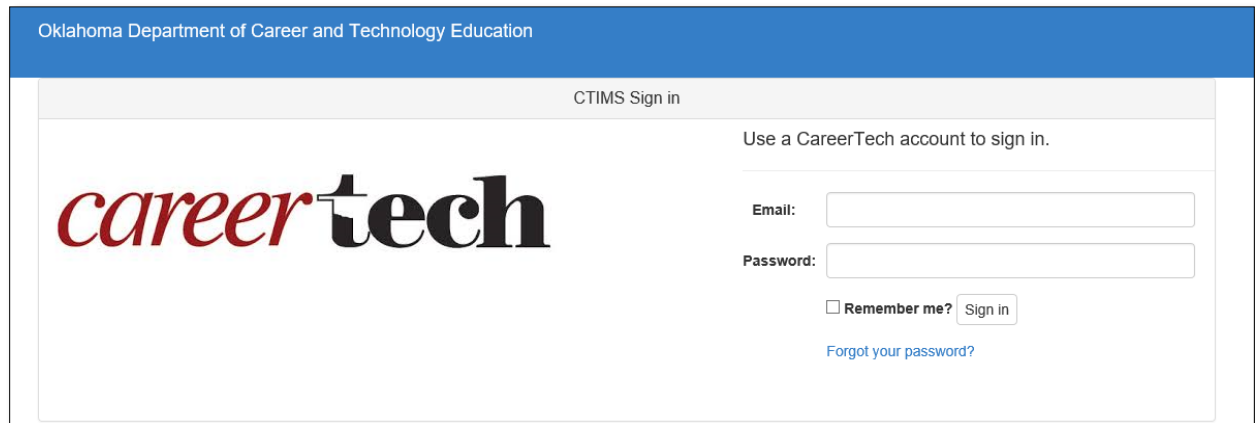
This screenshot is similar to the previous one, but the 'Submit For Approval' button at the bottom is circled in red with an arrow pointing to it. The 'Acknowledgement Note' text area is still empty.

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

Stage 3-State Regional Coordinator

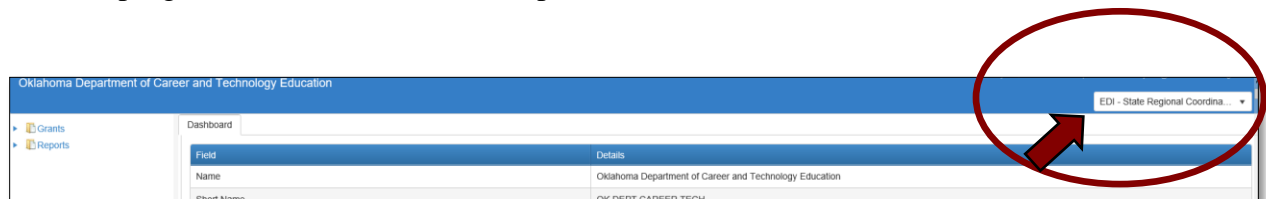
Accessing the Agreement

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

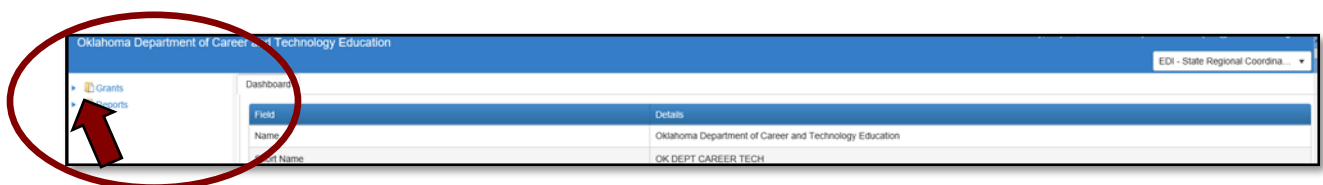


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

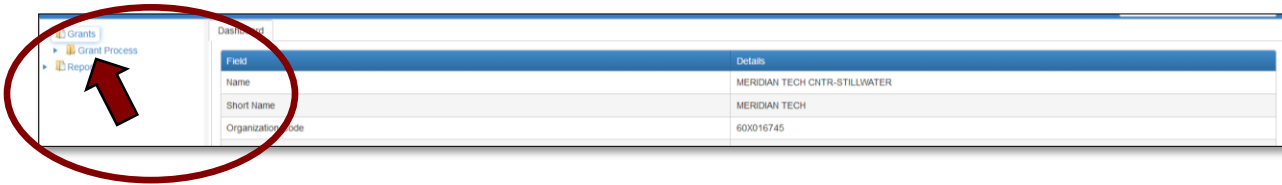
- Verify that you are signed in with the role of an **EDI State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



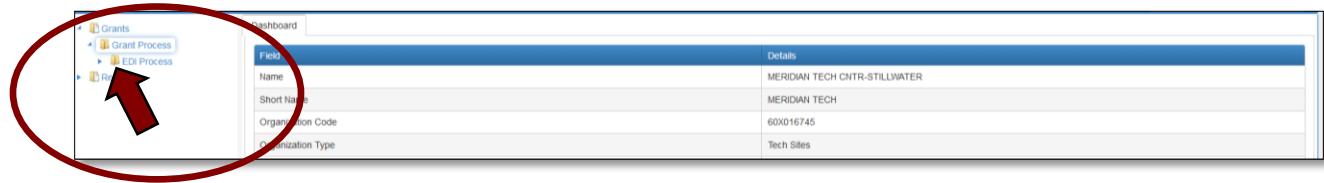
- Click the arrow | ► next to **Grants** on left navigation.



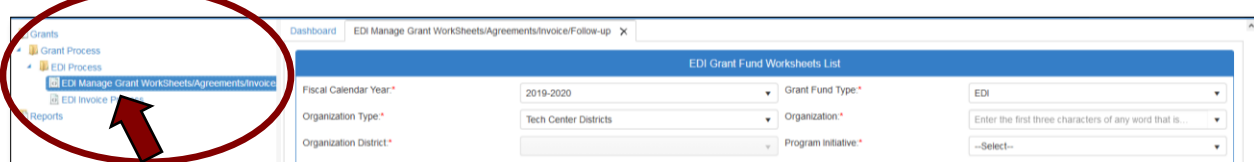
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



Opening the Agreement – Step 1

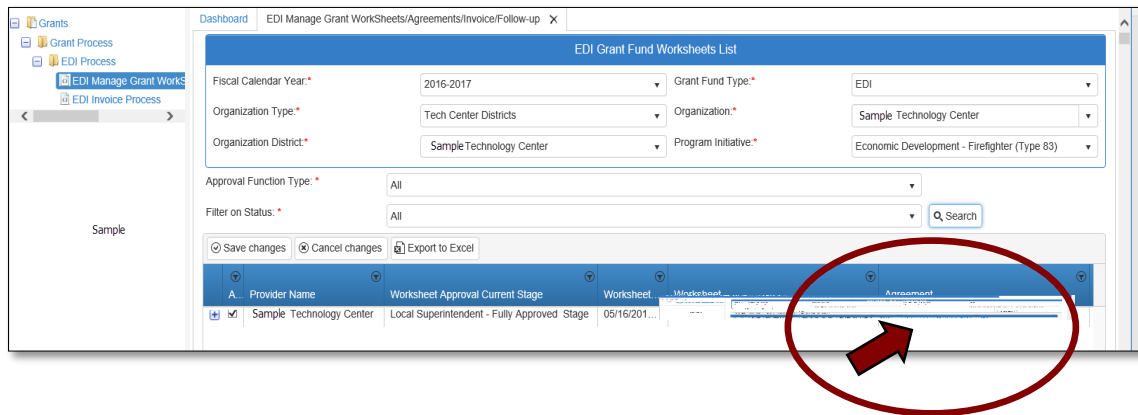
1.1 - Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of the Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

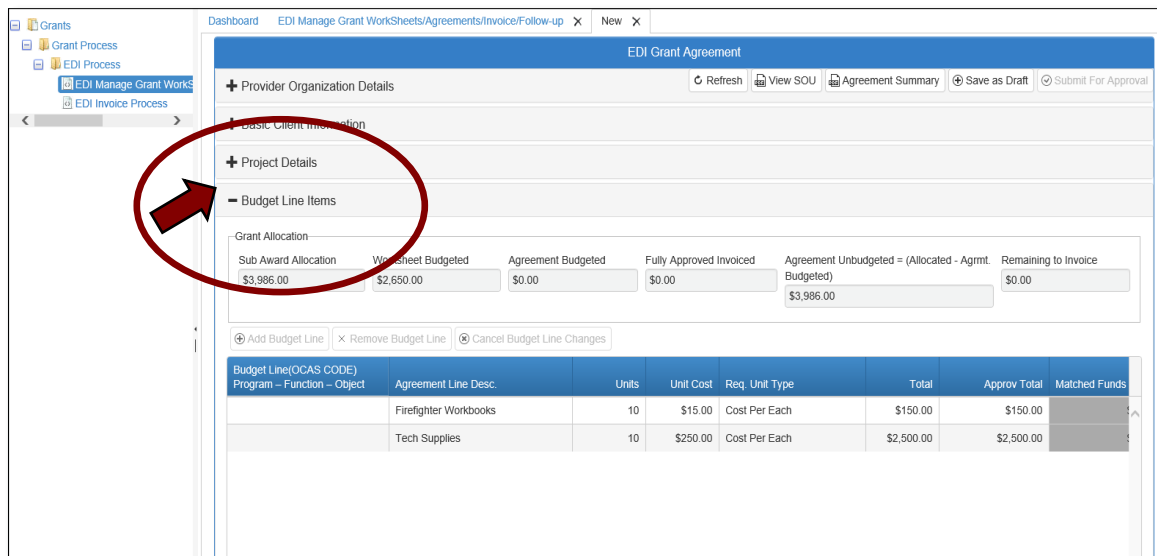
The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a numbered callout (1-9) indicating where to click or type. The form is titled 'EDI Grant Fund Worksheets List' and has a blue header. Below the header, there are two rows of dropdown menus. The first row contains 'Fiscal Calendar Year*' (callout 1) and 'Grant Fund Type*' (callout 2). The second row contains 'Organization Type*' (callout 3), 'Organization*' (callout 4), and 'Program Initiative*' (callout 6). Below these, there are two more dropdown menus: 'Organization District*' (callout 5) and 'Approval Function Type*' (callout 7). At the bottom, there are two more dropdown menus: 'Filter on Status*' (callout 8) and a 'Search' button (callout 9). Below the form, there are three buttons: 'Save changes', 'Cancel changes', and 'Export to Excel'. At the very bottom, there is a table with columns: 'Act', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', 'Worksheet', and 'Agreement'.

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



Reviewing the Agreement– Step 2

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



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

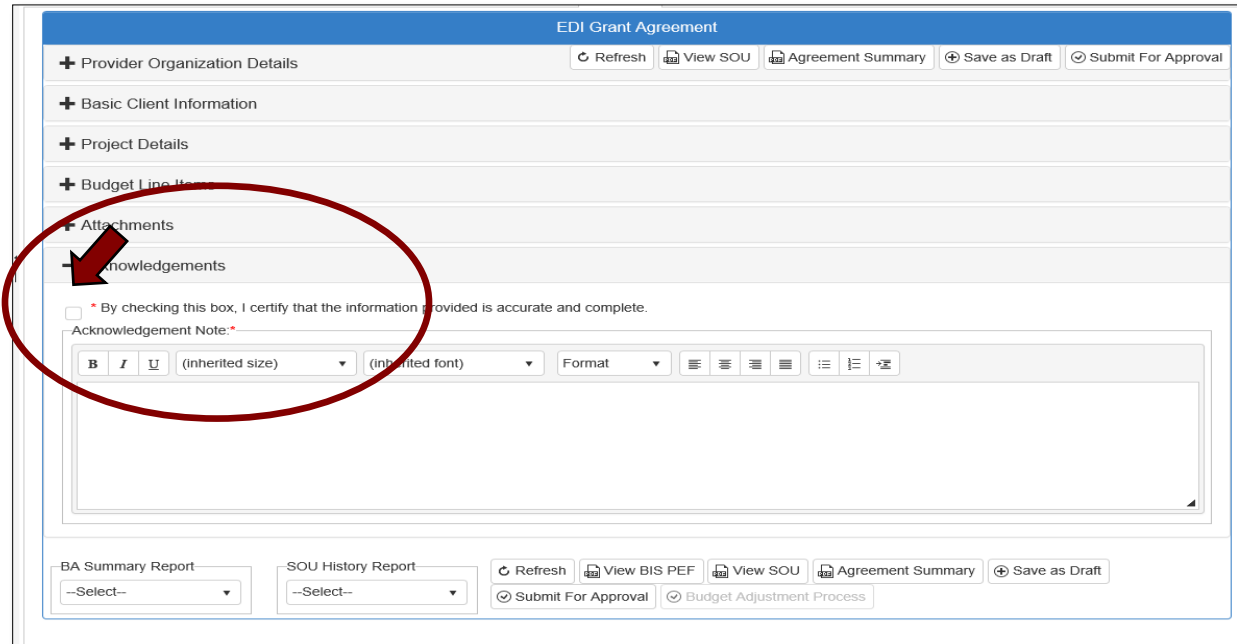
The screenshot shows the 'EDI Grant Agreement' screen. At the top, there are tabs: 'Dashboard', 'EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up', 'New', 'Funding Agreement', and 'BIS PEF Report'. The main content area is titled 'EDI Grant Agreement' and includes a sub-header with buttons: 'Refresh', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Submit For Approval'. Below this, there are several sections: 'Provider Organization Details' (with fields for Fiscal Calendar Year, Organization Type, Organization District, Worksheet No., and Agreement No.), 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. At the bottom, there are two dropdown menus for 'BA Summary Report' and 'SOU History Report', and a row of buttons: 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'. A red oval highlights this bottom row of buttons, with three red arrows pointing down to each of the 'View SOU', 'Agreement Summary', and 'Save as Draft' buttons.

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

The screenshot shows the same 'EDI Grant Agreement' screen as before, but with a success message dialog box overlaid. The dialog box contains the text: 'Successfully completed the current stage and going to next stage. Please wait....' and an 'OK' button. A red arrow points to the 'OK' button. The background of the screen is dimmed, showing the same fields and buttons as in the previous screenshot.

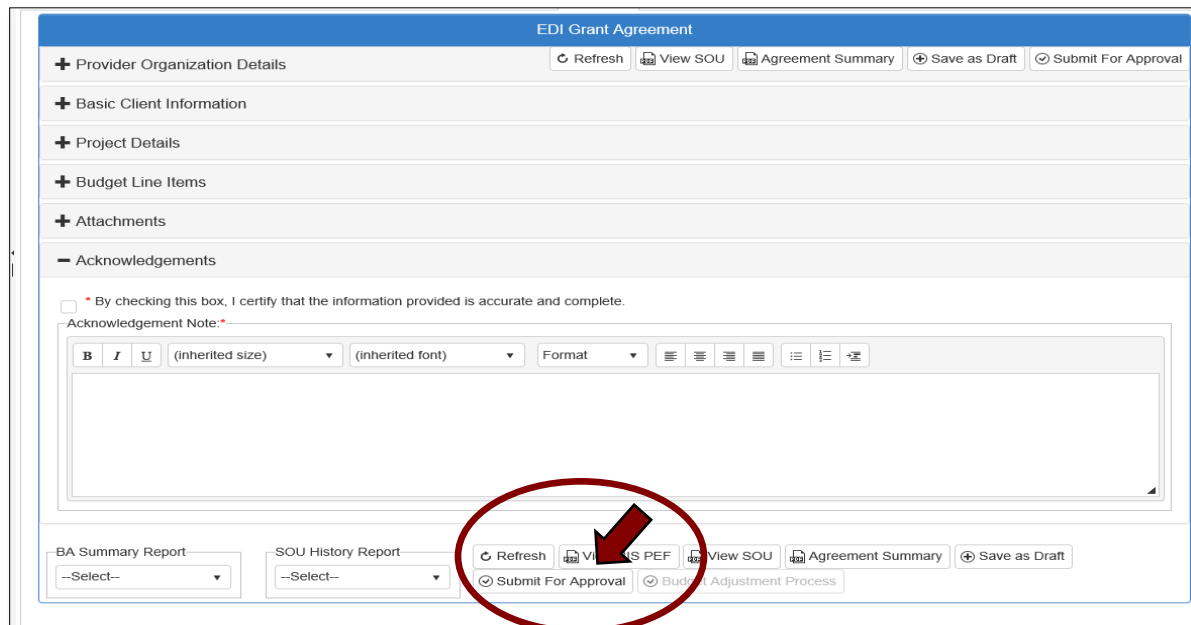
Agreement Acknowledgements and Approval– Step 3

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



The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgements' tab is expanded, indicated by a minus sign. A red circle highlights the checkbox labeled '* By checking this box, I certify that the information provided is accurate and complete.' and the text area for the 'Acknowledgement Note:'. The text area has a rich text editor toolbar with options for bold, italic, underline, font size, font color, and text alignment. Below the text area, there are dropdown menus for 'BA Summary Report' and 'SOU History Report', and buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Submit For Approval'.

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



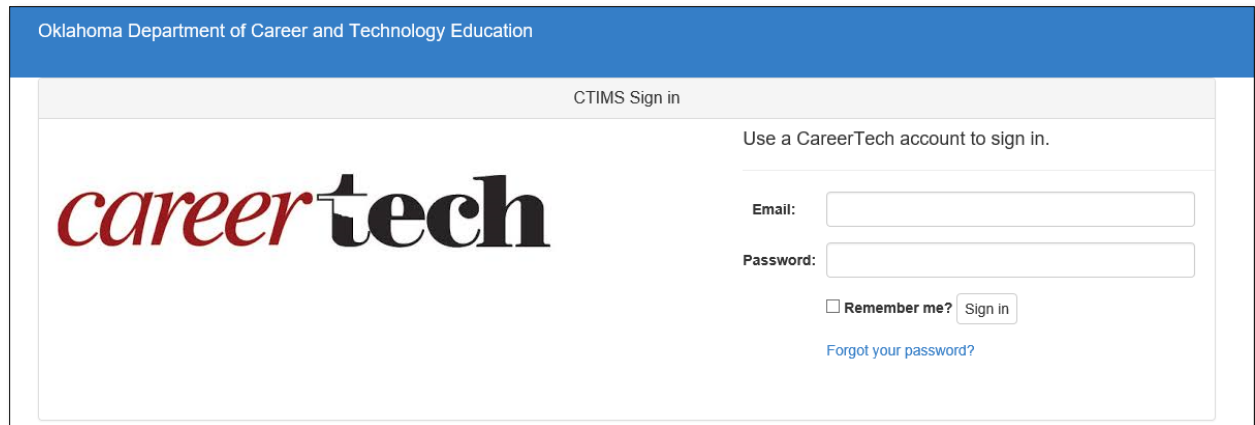
The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgements' tab is expanded, indicated by a minus sign. The 'Acknowledgement Note' text area is visible. A red circle highlights the 'Submit For Approval' button at the bottom of the form. The button is located next to the 'BA Summary Report' and 'SOU History Report' dropdown menus, and other buttons like 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Budget Adjustment Process'.

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

Stage 4-State Initiative Supervisor

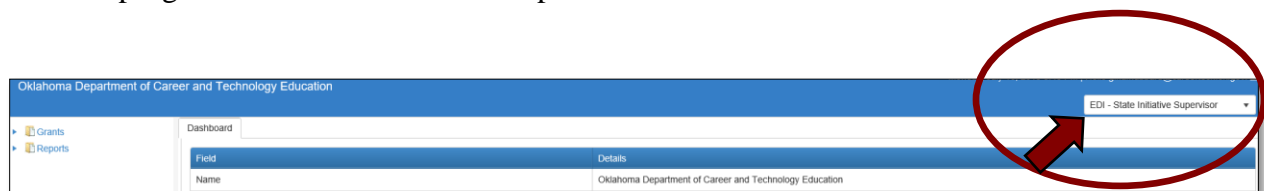
Accessing the Agreement

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

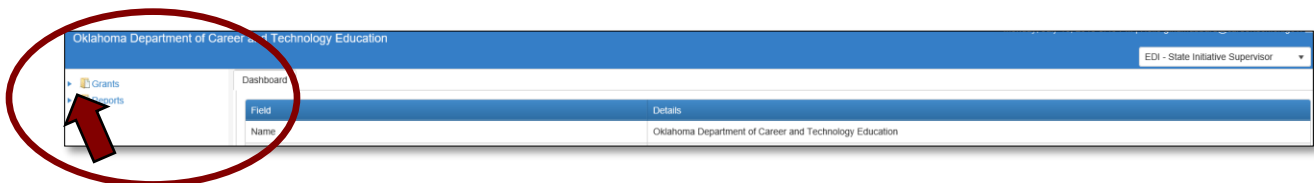


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

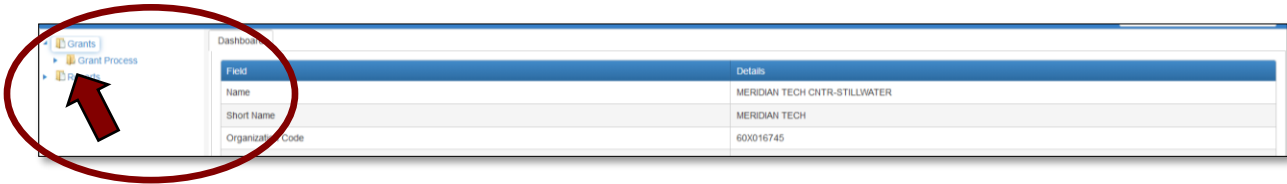
- Verify that you are signed in with the role of an **EDI State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



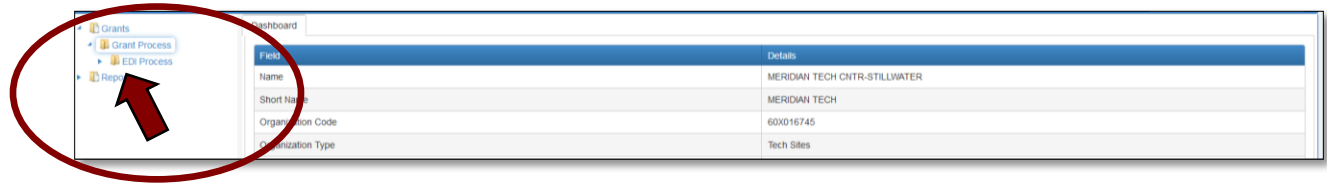
- Click the arrow ► next to **Grants** on left navigation.



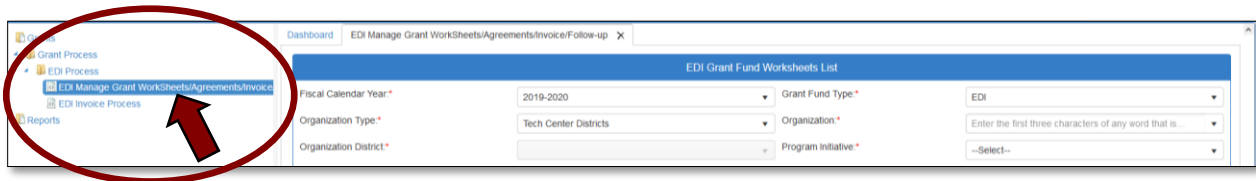
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



Opening the Agreement – Step 1

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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of the Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a numbered callout (1-9) indicating where to click or type. The form is titled 'EDI Grant Fund Worksheets List' and has a blue header. Below the header, there are two rows of dropdown menus. The first row contains 'Fiscal Calendar Year*' (callout 1) and 'Grant Fund Type*' (callout 2). The second row contains 'Organization Type*' (callout 3), 'Organization*' (callout 4), and 'Program Initiative*' (callout 6). Below these, there are two more dropdown menus: 'Organization District*' (callout 5) and 'Approval Function Type*' (callout 7). At the bottom, there are two more dropdown menus: 'Filter on Status*' (callout 8) and a 'Search' button (callout 9). Below the form, there are three buttons: 'Save changes', 'Cancel changes', and 'Export to Excel'. At the very bottom, there is a table with columns: 'Act', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', 'Worksheet', and 'Agreement'.

Act	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
-----	---------------	-------------	----------------------------------	---------------------------	-----------	-----------

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

Sample

Save changes Cancel changes Export to Excel

Provider Name	Worksheet Approval Current Stage	Worksheet	Agreement
Sample Technology Center	Local Superintendent - Fully Approved Stage	05/16/201...	[Link]

Reviewing the Agreement– Step 2

2.1 - Expand the **Budget Line Items** section by clicking on the + (plus). 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	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agmt. Budgeted)	Remaining to Invoice
\$3,986.00	\$2,650.00	\$0.00	\$0.00	\$3,986.00	\$0.00

Add Budget Line Remove Budget Line Cancel Budget Line Changes

Budget Line(OGAS CODE)	Program - Function - Object	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds
		Firefighter Workbooks	10	\$15.00	Cost Per Each	\$150.00	\$150.00	
		Tech Supplies	10	\$250.00	Cost Per Each	\$2,500.00	\$2,500.00	

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

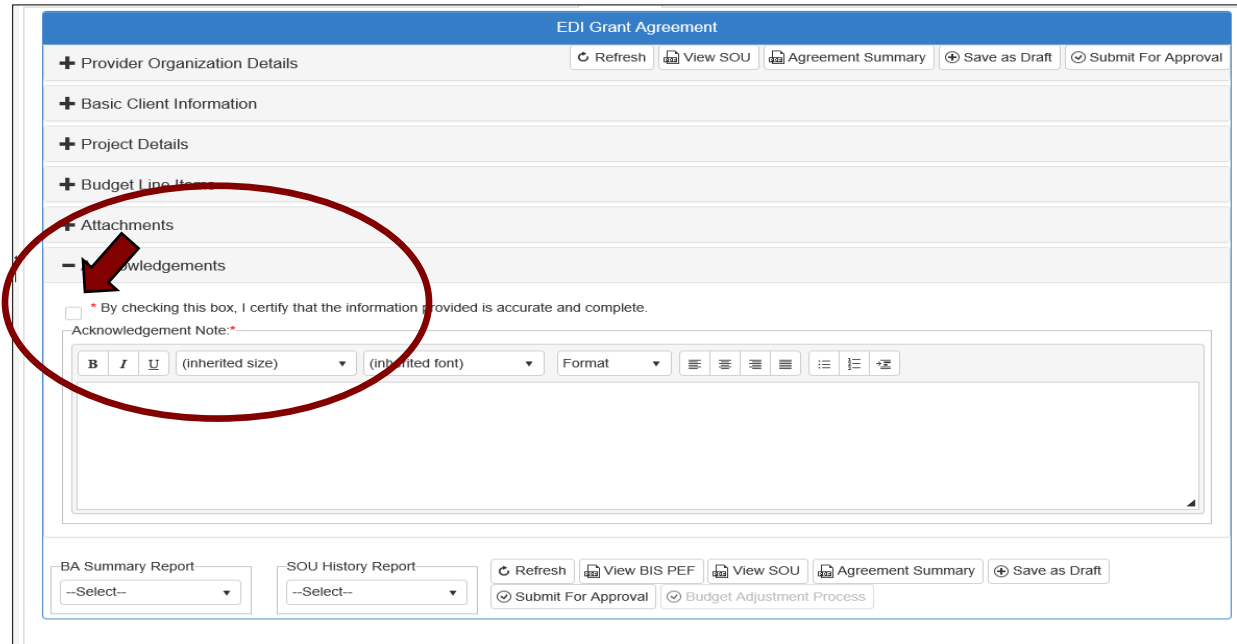
The screenshot shows the 'EDI Grant Agreement' interface. At the top, there are tabs for 'Dashboard', 'EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up', 'New', 'Funding Agreement', and 'BIS PEF Report'. The main section is titled 'EDI Grant Agreement' and includes a sub-header 'Provider Organization Details'. Below this, there are several input fields for 'Fiscal Calendar Year', 'Organization Type', 'Organization District', 'Worksheet No.', and 'Agreement No.'. To the right of these fields are dropdown menus for 'Grant Fund Type', 'Organization', and 'Program Initiative'. At the bottom of the screen, there is a navigation bar with buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'. A red oval highlights this navigation bar, and three red arrows point to the 'View BIS PEF', 'View SOU', and 'Agreement Summary' buttons.

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

The screenshot shows the same 'EDI Grant Agreement' interface as before, but with a modal dialog box open in the center. The dialog box contains the text 'Successfully completed the current stage and going to next stage. Please wait....' and an 'OK' button. A red arrow points to the 'OK' button. The background of the screen is dimmed, and the navigation bar at the bottom is still visible.

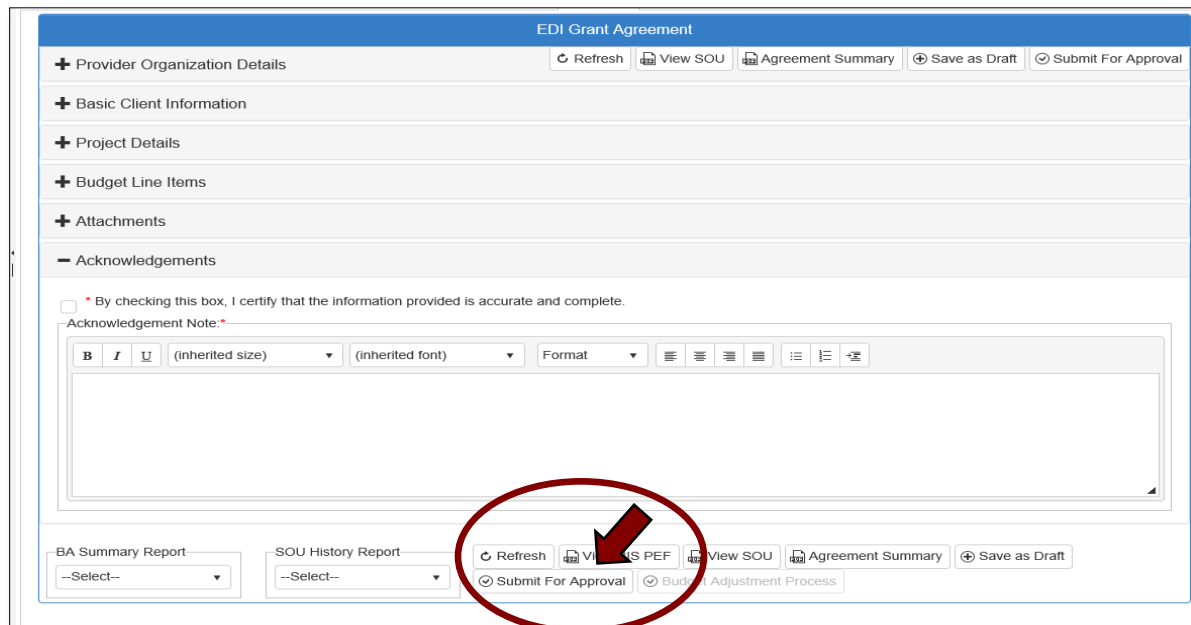
Agreement Acknowledgements and Approval– Step 3

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



The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgements' section is expanded, indicated by a minus sign. A red circle highlights the checkbox labeled '* By checking this box, I certify that the information provided is accurate and complete.' and the 'Acknowledgement Note' text area below it. The text area has a rich text editor toolbar with options for bold, italic, underline, font size, font color, and text alignment. At the bottom of the form, there are dropdown menus for 'BA Summary Report' and 'SOU History Report', and buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', and 'Submit For Approval'.

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



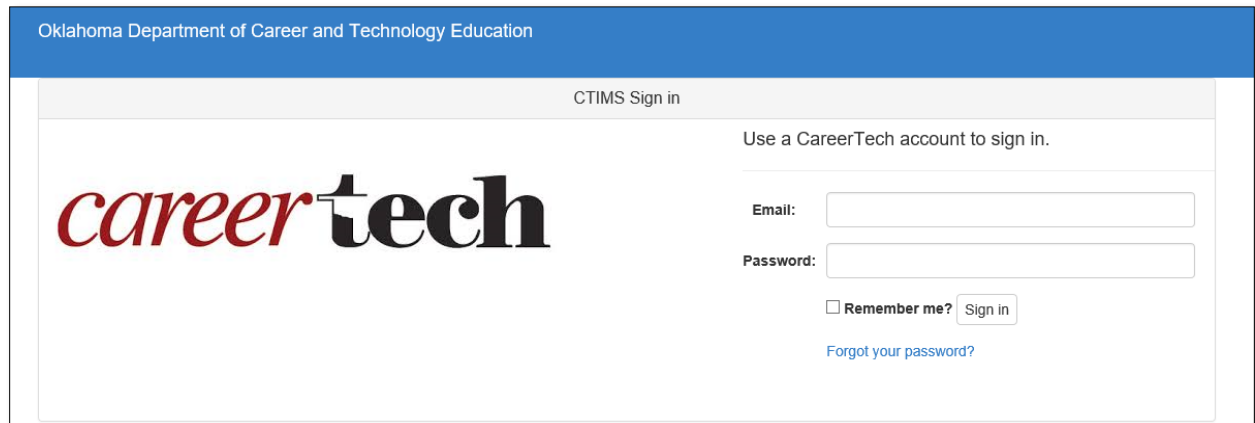
This screenshot shows the same 'EDI Grant Agreement' form. The 'Acknowledgements' section is still expanded. A red circle highlights the 'Submit For Approval' button at the bottom right of the form. The 'Acknowledgement Note' text area is now empty, and the 'BA Summary Report' and 'SOU History Report' dropdown menus are still set to '--Select--'.

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

Stage 5-Local Superintendent/CEO (or Designee)

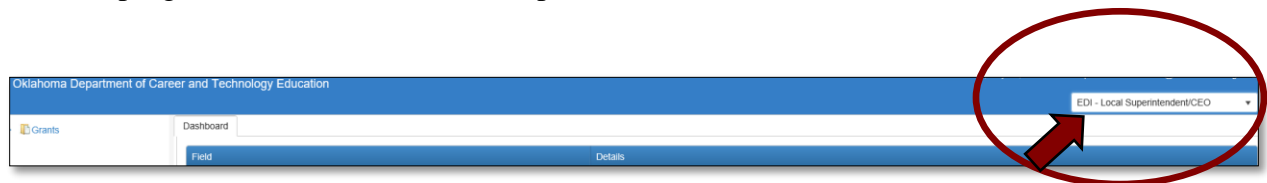
Accessing the Agreement

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

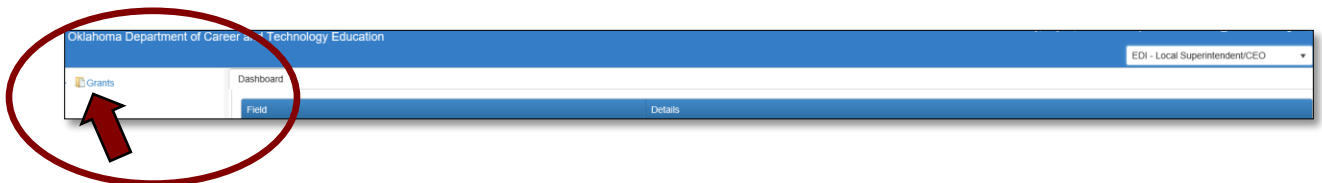


IMPORTANT: Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

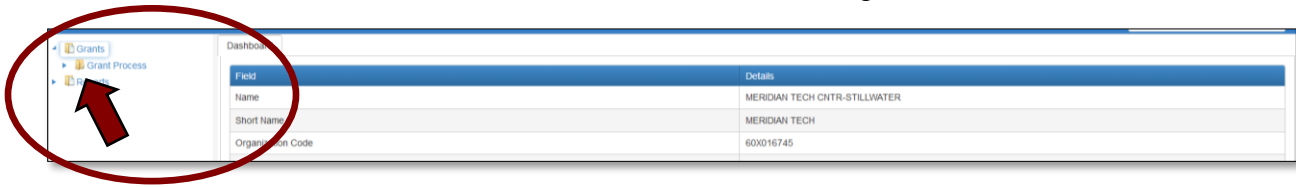
- Verify that you are signed in with the role of an **EDI Local Superintendent/CEO** in the top right-hand corner. Use the drop-down arrow to select this role.



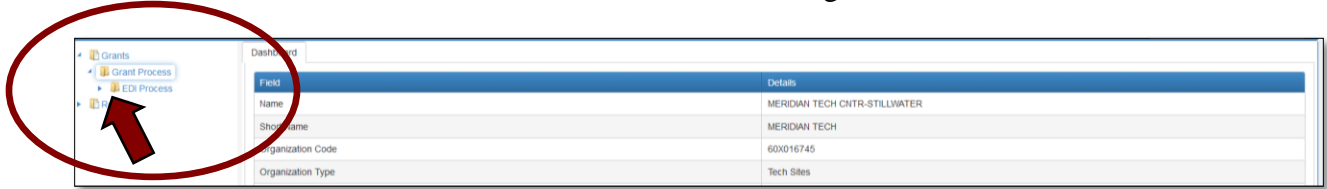
- Click the arrow |▶ next to **Grants** on left navigation.



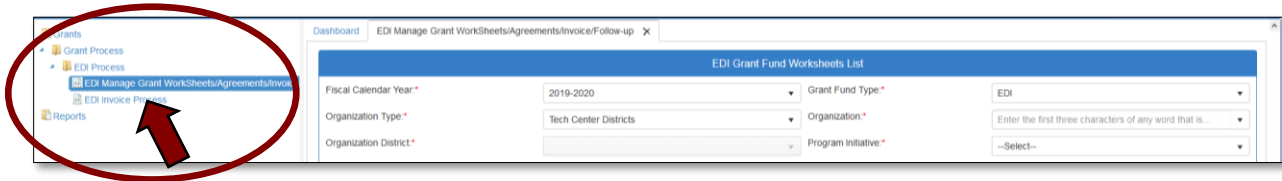
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



Opening the Agreement – Step 1

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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of the Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

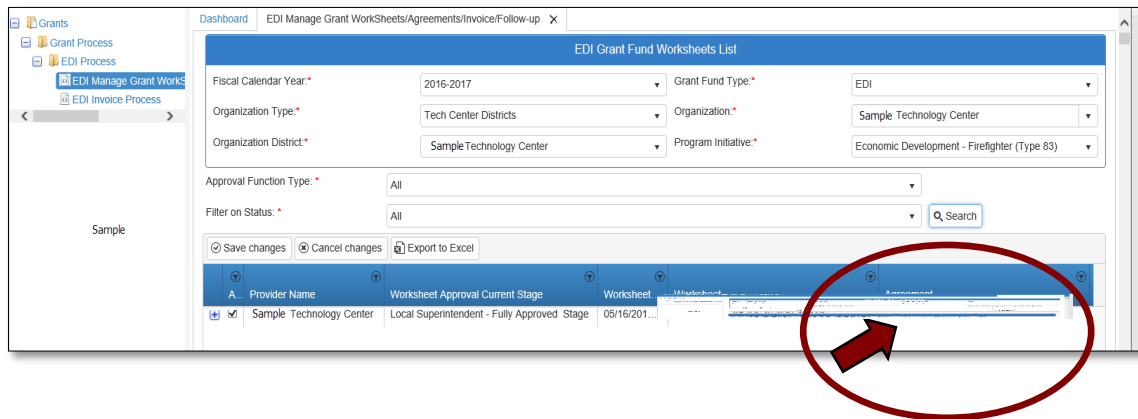
NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a numbered callout:

- 1**: Fiscal Calendar Year* (2018-2019)
- 2**: Grant Fund Type* (EDI)
- 3**: Organization Type* (Tech Center Districts)
- 4**: Organization* (Enter the first three characters of any word that is in)
- 5**: Organization District* (empty)
- 6**: Program Initiative* (--Select--)
- 7**: Approval Function Type* (All)
- 8**: Filter on Status* (All)
- 9**: Search button

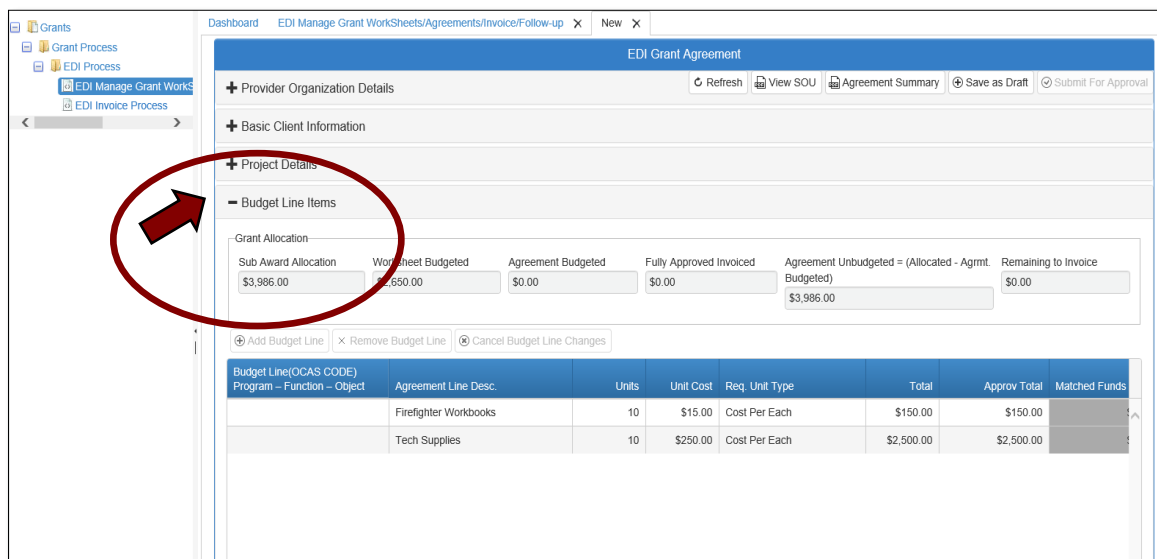
Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement.

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



Reviewing the Agreement– Step 2

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



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

The screenshot shows the 'EDI Grant Agreement' interface. At the top, there are tabs for 'Dashboard', 'EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up', 'New', 'Funding Agreement', and 'BIS PEF Report'. The main section is titled 'EDI Grant Agreement' and includes a sub-header 'Provider Organization Details'. Below this, there are several input fields for 'Fiscal Calendar Year', 'Organization Type', 'Organization District', 'Worksheet No.', and 'Agreement No.'. To the right of these fields are dropdown menus for 'Grant Fund Type', 'Organization', and 'Program Initiative'. At the bottom of the screen, there is a navigation bar with buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'. A red oval highlights this navigation bar, and three red arrows point to the 'View BIS PEF', 'View SOU', and 'Agreement Summary' buttons.

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

The screenshot shows the same 'EDI Grant Agreement' interface as before, but with a modal dialog box open in the center. The dialog box contains the text 'Successfully completed the current stage and going to next stage. Please wait...' and an 'OK' button. A red arrow points to the 'OK' button. The background of the screen is dimmed, and the navigation bar at the bottom is still visible.

Agreement Acknowledgements and Approval– Step 3

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

The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgements' tab is expanded, and a red circle with an arrow points to the checkbox labeled 'By checking this box, I certify that the information provided is accurate and complete.' Below this is a text area for the 'Acknowledgement Note' with a rich text editor toolbar. At the bottom, there are buttons for 'BA Summary Report', 'SOU History Report', 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'.

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

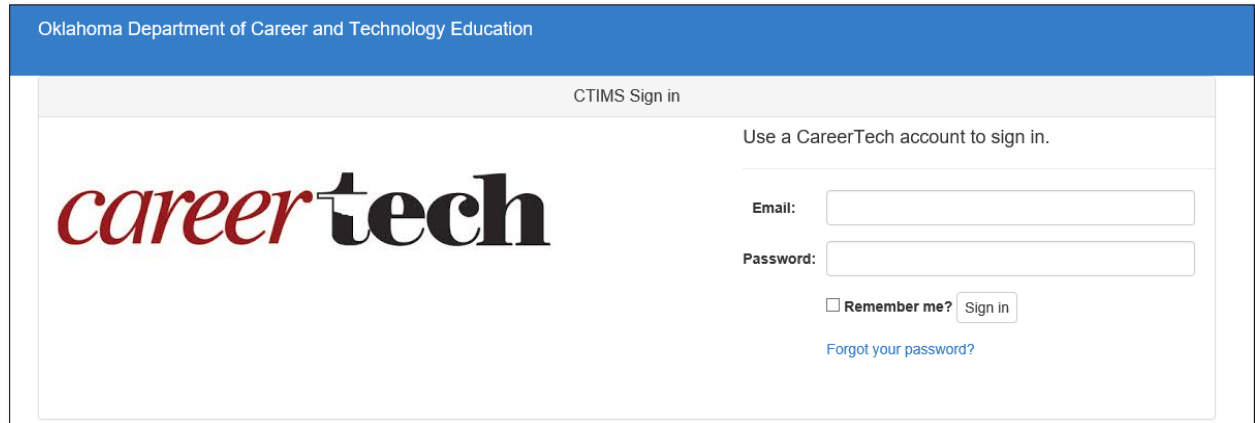
This screenshot is similar to the previous one, but the 'Submit For Approval' button at the bottom is circled in red with an arrow pointing to it. The 'Acknowledgement Note' text area is empty, and the checkbox for verifying information accuracy is still present.

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

Stage 6-State Requisition Coordinator

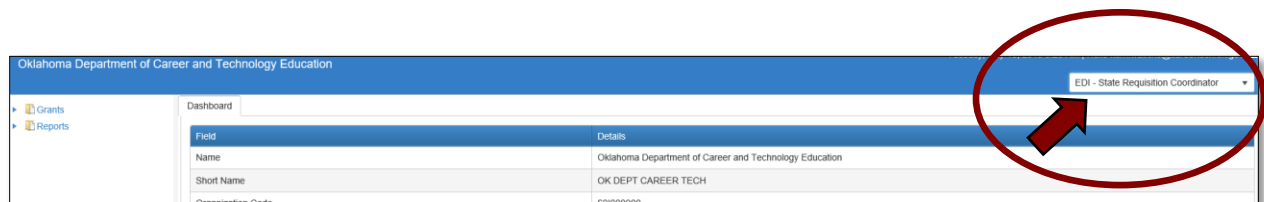
Accessing the Agreement

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



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

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



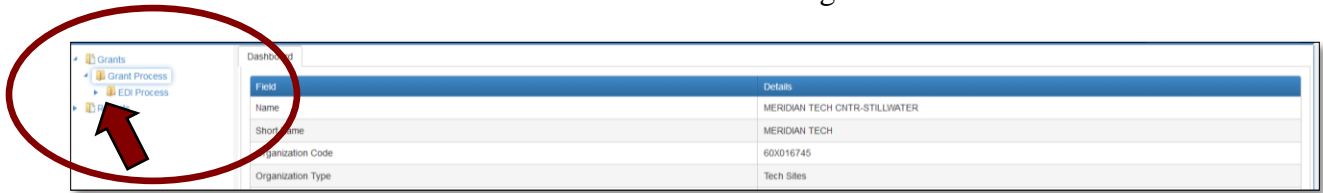
- Click the arrow next to **Grants** on left navigation.



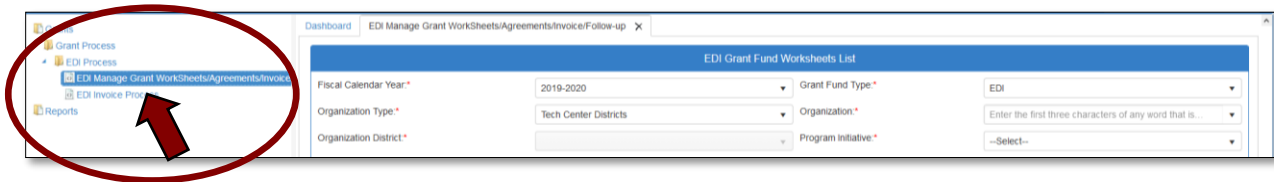
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



Opening the Agreement – Step 1

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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of the Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a numbered callout:

- 1**: Fiscal Calendar Year* (2018-2019)
- 2**: Grant Fund Type* (EDI)
- 3**: Organization Type* (Tech Center Districts)
- 4**: Organization* (Enter the first three characters of any word that is in)
- 5**: Organization District* (dropdown menu)
- 6**: Program Initiative* (dropdown menu)
- 7**: Approval Function Type* (All)
- 8**: Filter on Status* (All)
- 9**: Search button

Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table header with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement.

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

Reviewing the Agreement– Step 2


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

Budget Line (OCAS CODE)	Program - Function - Object	Agreement Line Desc	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds
		Firefighter Workbooks	10	\$15.00	Cost Per Each	\$150.00	\$150.00	
		Tech Supplies	10	\$250.00	Cost Per Each	\$2,500.00	\$2,500.00	

2.2 – Submit the requisition to finance.

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

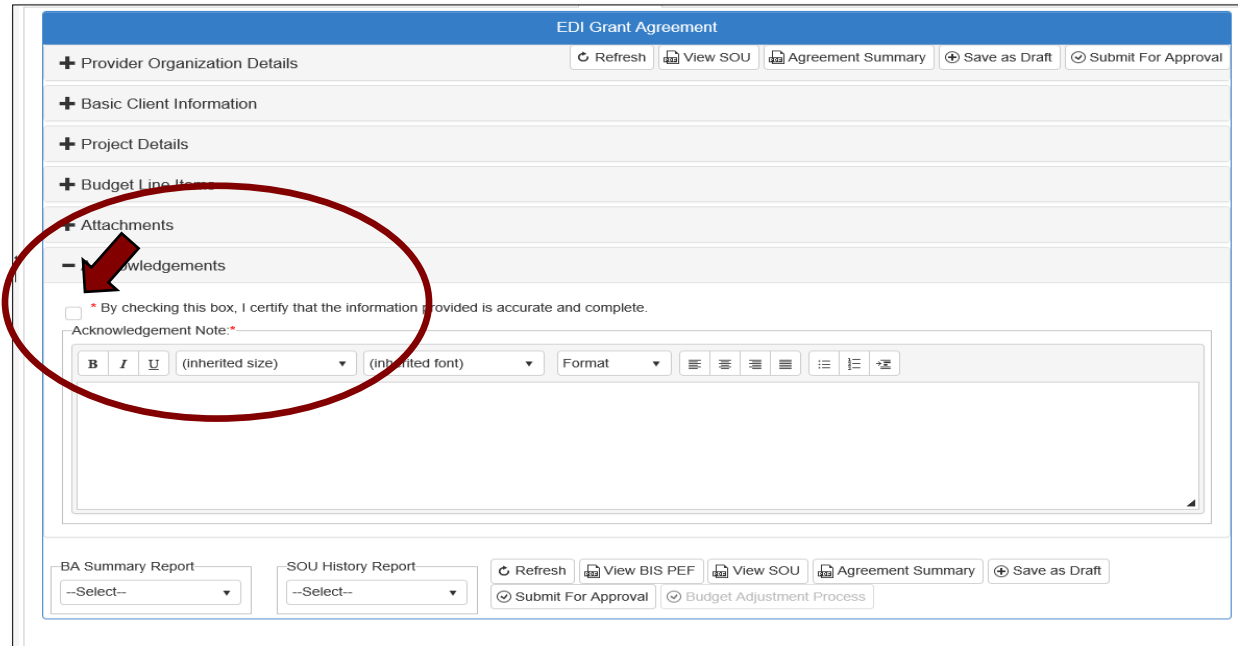
The screenshot shows the 'EDI Grant Agreement' form. The 'Project Details' section is expanded, indicated by a red arrow pointing to the minus sign icon. The 'Purchase Order Number' field is highlighted with a red circle and a red arrow pointing to it. The form includes sections for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. The Purchase Order Number is 8009013969 and the Purchase Order Date is 6/2/2018.

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

The screenshot shows the 'EDI Grant Agreement' form with the 'View SOU' button highlighted by a red circle and a red arrow pointing to it. The form includes sections for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. The 'View SOU' button is located in the bottom right corner of the form. The form also includes a 'BA Summary Report' dropdown menu and a 'SOU History Report' dropdown menu.

Agreement Acknowledgements and Approval– Step 3

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



The screenshot displays the 'EDI Grant Agreement' form. The 'Acknowledgements' section is expanded, showing a checkbox labeled '* By checking this box, I certify that the information provided is accurate and complete.' This checkbox is circled in red, and a red arrow points to it. Below the checkbox is a text area for the 'Acknowledgement Note:'. The form also includes various tabs like 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', and 'Attachments'. At the bottom, there are buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'.

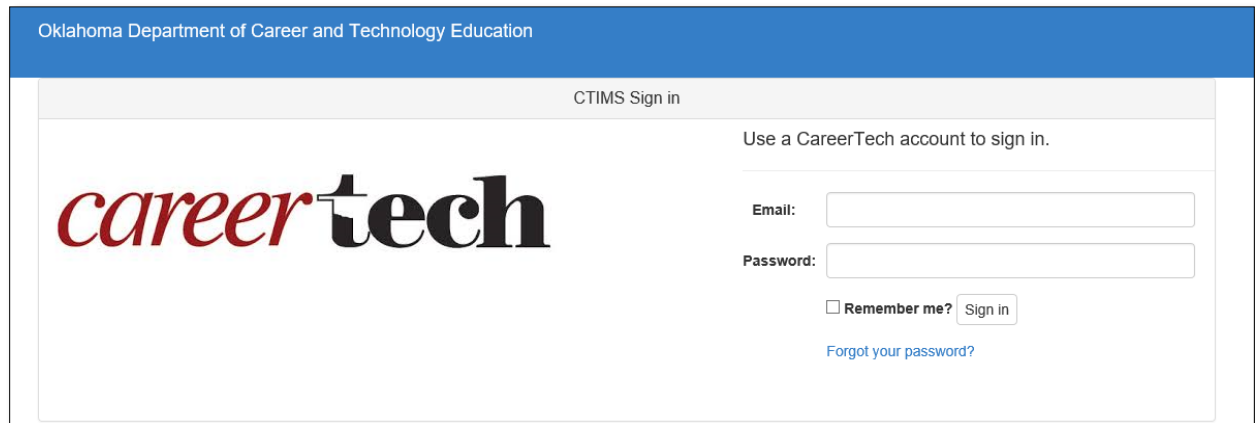
3.2 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required. Then, click on the **Submit for Approval** button.

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

Stage 7-Local Finance Coordinator

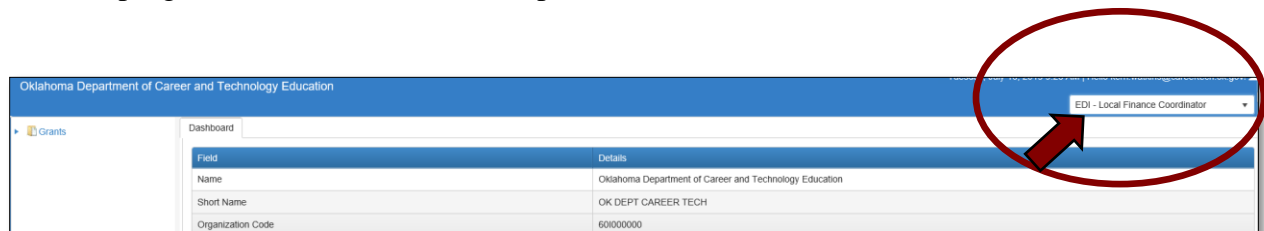
Accessing Agreement List

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



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

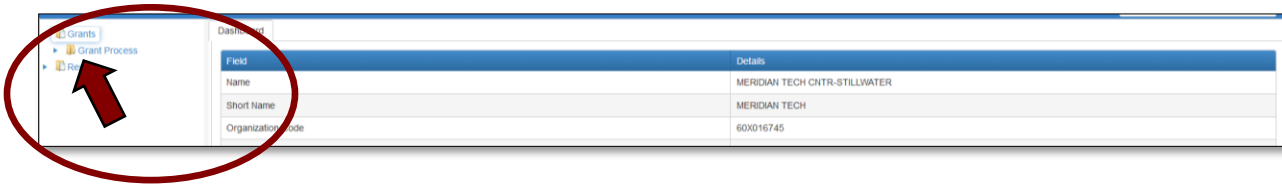
- Verify that you are signed in with the role of an **EDI Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



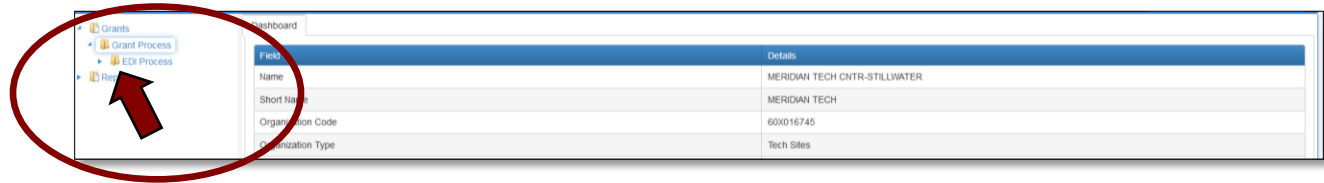
- Click the arrow | ► next to **Grants** on left navigation.



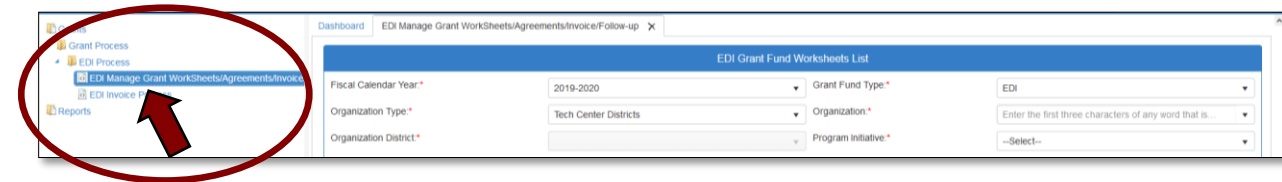
- Click the arrow ► next to **Grant Process** on left navigation.



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



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



Opening Agreement – Step 1

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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select the **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of the Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a red circle and a number indicating a step in the process:

- 1**: Fiscal Calendar Year* (2018-2019)
- 2**: Grant Fund Type* (EDI)
- 3**: Organization Type* (Tech Center Districts)
- 4**: Organization* (Enter the first three characters of any word that is in)
- 5**: Organization District* (empty)
- 6**: Program Initiative* (--Select--)
- 7**: Approval Function Type* (All)
- 8**: Filter on Status* (All)
- 9**: Search button

Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement.

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

Reviewing the Agreement

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

Budget Line(OCAS CODE)	Agreement Line Desc	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds
Program - Function - Object	Firefighter Workbooks	10	\$15.00	Cost Per Each	\$150.00	\$150.00	
	Tech Supplies	10	\$250.00	Cost Per Each	\$2,500.00	\$2,500.00	

Entering OCAS Codes— Step 3

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

The screenshot displays the 'EDI Grant Agreement' form. The 'Budget Line Items' section is highlighted with a red circle and an arrow. The 'Save as Draft' button is also highlighted with a red circle and an arrow. The 'Budget Line(OCAS CODE)' column header is highlighted with a red circle and an arrow. The table below shows the budget line items with their respective OCAS codes, descriptions, units, unit costs, and totals.

Budget Line(OCAS CODE) Object - Program - Function	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Match
610-590-1500	Calling the Mayday 9/30/17 (16s,1...	1	\$1,278.91	Cost Per Class	\$1,278.91	\$1,278.91	
610-590-1500	Responding to the Mayday 10/1/17...	1	\$1,460.91	Cost Per Class	\$1,460.91	\$1,460.91	
610-590-1500	Advanced Fire Behavior 3/10/18 (2...	1	\$2,986.67	Cost Per Class	\$2,986.67	\$2,986.67	
610-590-1500	Ropes 1A May 5,&6,2018 (24s,1c,...	1	\$3,534.00	Cost Per Class	\$3,534.00	\$3,534.00	

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

Agreement Acknowledgements and Approval– Step 4

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

The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgements' tab is expanded, and a red circle with an arrow points to the checkbox labeled 'By checking this box, I certify that the information provided is accurate and complete.' Below this is a text area for the 'Acknowledgement Note' with a rich text editor toolbar. At the bottom, there are dropdowns for 'BA Summary Report' and 'SOU History Report', and buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'.

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

This screenshot shows the same 'EDI Grant Agreement' form. The 'Acknowledgements' section is still expanded. A red circle with an arrow points to the 'Submit For Approval' button at the bottom right of the form.

The agreement is now fully approved.

Budget Adjustment Process

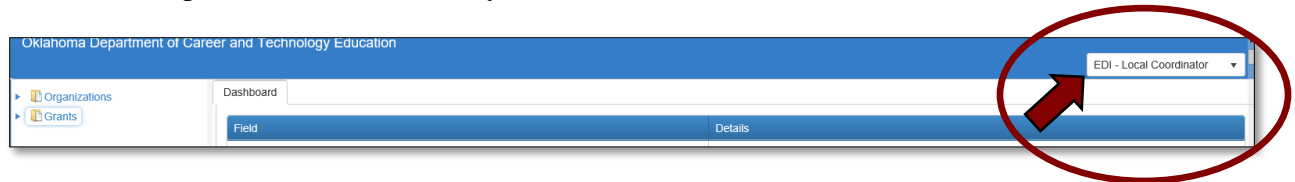
After an Agreement is submitted for approval, you must go through the **Budget Adjustment Process** to make any changes.

Accessing the Agreement List

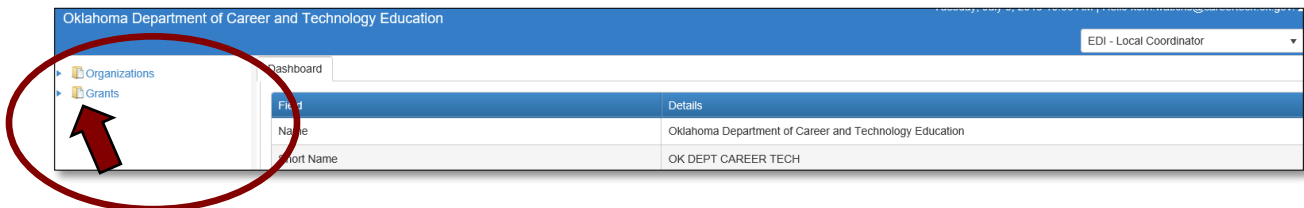
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

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

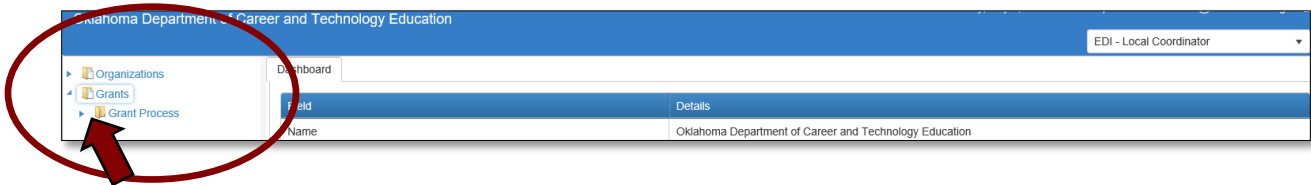
- Verify that you are signed in with the appropriate role in the top right-hand corner. Use the drop-down arrow to select your EDI role.



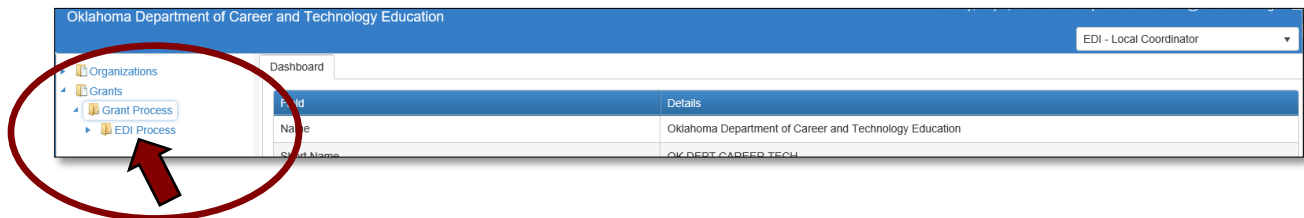
- Click the arrow | ► next to **Grants** on left navigation.



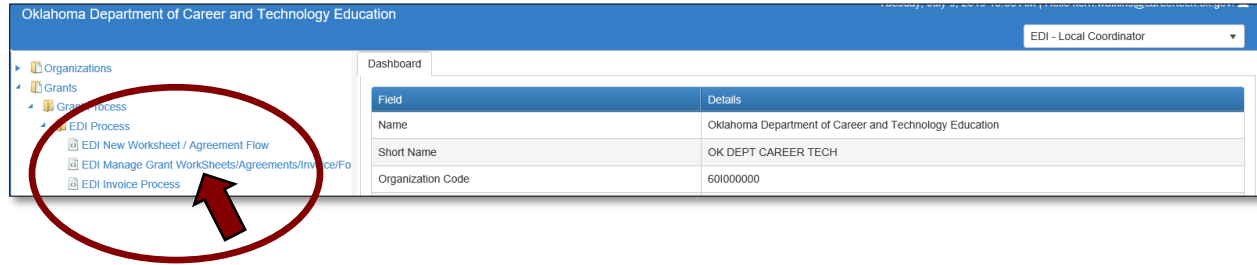
- Click the arrow | ► next to **Grant Process** on left navigation.



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



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



Opening Agreement – Step 1

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

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' interface. It includes a header bar with 'Dashboard' and 'EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up'. Below the header is a form with several dropdown menus and buttons. Numbered callouts are placed over the following elements:

- 1: Fiscal Calendar Year dropdown (set to 2018-2019)
- 2: Grant Fund Type dropdown (set to EDI)
- 3: Organization Type dropdown (set to Tech Center Districts)
- 4: Organization dropdown (placeholder: Enter the first three characters of any word that is ir)
- 5: Organization District dropdown
- 6: Program Initiative dropdown (set to --Select--)
- 7: Approval Function Type dropdown (set to All)
- 8: Filter on Status dropdown (set to All)
- 9: Search button

Below the form are three buttons: 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table with columns: 'Act', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', 'Worksheet', and 'Agreement'.

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

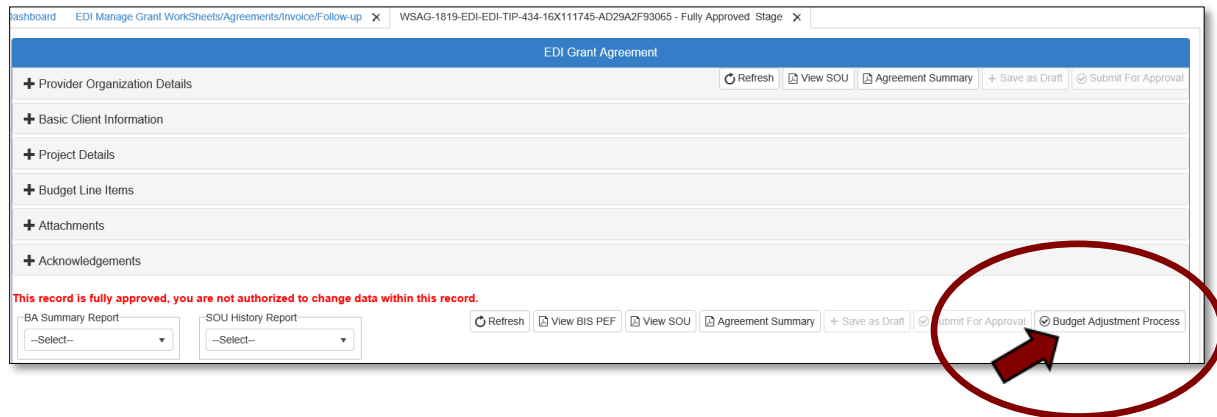
This screenshot shows the same interface after a search has been performed. The search results are displayed in the table below the form. A red circle and a red arrow point to the 'Agreement' column, which now contains a link to the selected agreement.

Act	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
<input checked="" type="checkbox"/>	Sample Technology Center	Local Superintendent - Fully Approved	Stage	05/16/201...	...	[Link to Agreement]

Initiating the Budget Adjustment – Step 2

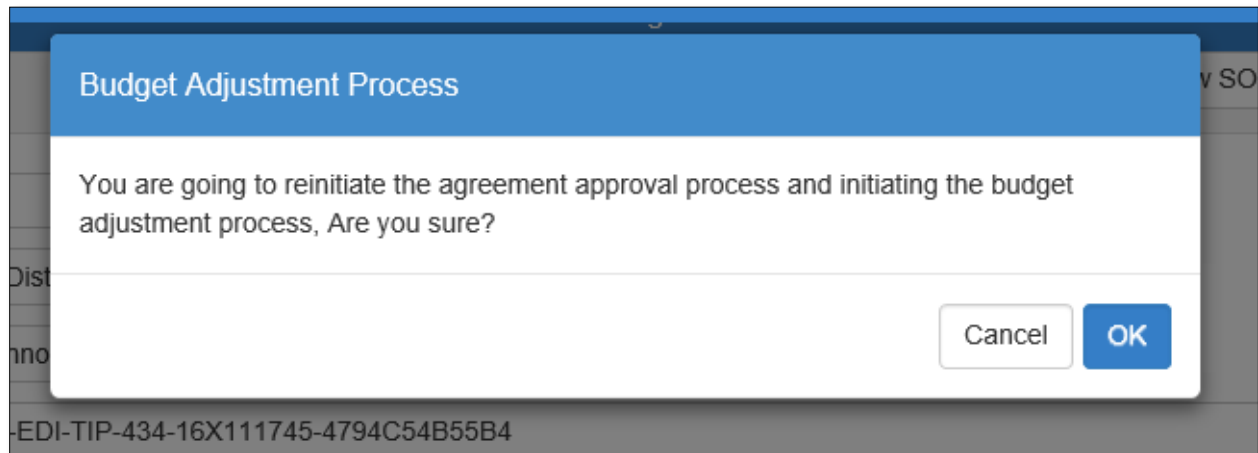
2.1 - At the bottom right corner of the EDI Grant Agreement screen, click Budget Adjustment Process.

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



The screenshot shows the 'EDI Grant Agreement' screen. At the bottom right, the 'Budget Adjustment Process' button is circled in red with a red arrow pointing to it. The screen includes a header with the title 'EDI Grant Agreement' and a sub-header with the ID 'WSAG-1819-EDI-EDI-TIP-434-16X111745-AD29A2F93065 - Fully Approved Stage'. Below the header, there are several sections: 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. At the bottom, there are two dropdown menus for 'BA Summary Report' and 'SOU History Report', and a row of buttons including 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'.

2.2 - 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 text inside the dialog box reads: 'You are going to reinitiate the agreement approval process and initiating the budget adjustment process, Are you sure?'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'OK'. The dialog box is overlaid on a background that shows the 'EDI-TIP-434-16X111745-4794C54B55B4' ID.

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

The screenshot shows the 'Budget Line Items' section expanded. At the top, there's a 'Grant Allocation' summary with fields for Sub Award Allocation, Worksheet Budgeted, Worksheet Requested Total, Agreement Budgeted, Fully Approved Invoiced, and Agreement Unbudgeted. Below this is a table of budget line items. The first item is 'Skills Academy (155, 360H, 2C) Traini' with 1 unit and a unit cost of \$1.00. A red circle highlights the 'Units' column for this item, and a red arrow points to it.

Budget Line(OCAS CODE) Function - Object - Program	Agreement Line Desc	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
1500-600-590	Skills Academy (155, 360H, 2C) Traini	1	\$1.00	Cost Per Class	\$1.00	\$1.00	\$0.00	Active

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

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

The screenshot shows the 'Budget Line Items' section with the 'Note' field expanded below the table. The table now shows 2 units for the 'Skills Academy' item, with a total of \$2.00. The 'Note' field is empty and has a maximum length of 1000 characters. Below the note field are sections for 'Attachments' and 'Acknowledgements'. At the bottom, there are buttons for 'Refresh', 'View BIS PEF', 'BA Detail Report', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', and 'Budget Adjustment Process'.

Budget Line(OCAS CODE) Function - Object - Program	Agreement Line Desc	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
1500-600-590	Skills Academy (155, 360H, 2C) Tr...	2	\$1.00	Cost Per Class	\$2.00	\$1.00	\$0.00	Active

Note
Maximum 1000 characters length

Attachments
Acknowledgements

IA Summary Report
SOU History Report

Refresh View BIS PEF BA Detail Report View SOU Agreement Summary Save as Draft Submit For Approval Budget Adjustment Process

Acknowledgements and Approval– Step 3

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

The screenshot displays a software interface for 'Acknowledgements'. The main section is titled 'Budget Adjustment Justification Note' and contains a text area for input. A red circle highlights a plus sign in the top left corner of this section, indicating it can be expanded. Below the text area, there is a checkbox with the text 'By checking this box, I certify that the information provided is accurate and complete.' and a text area for the 'Acknowledgement Note'. At the bottom right of the interface, there is a 'Submit For Approval' button, which is also circled in red. Red arrows point to the plus sign, the checkbox, and the 'Submit For Approval' button.

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

The agreement will go back through the regular approval process.

Invoice Process

Invoice Submission & Approval Process

NOTE: For more information on funding and reimbursement, please refer to the Reimbursement Checklist on page 19 of the BIS Guidelines FY20.

<https://www.okcareertech.org/about/state-agency/divisions/imd/ctims>

Roles: Invoice Process

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

Stage 1 - Local Coordinator – Initiates the invoice process



Stage 2 - Local BIS Director



Stage 3 - Local Finance Coordinator



Stage 4 - State Regional Coordinator



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



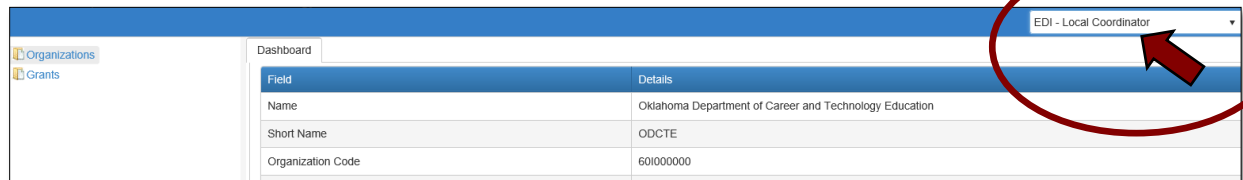
Stage 6 -ODCTE EDI Finance Reviewer - This is final approval to pay the claim.

Stage 1- Local Coordinator

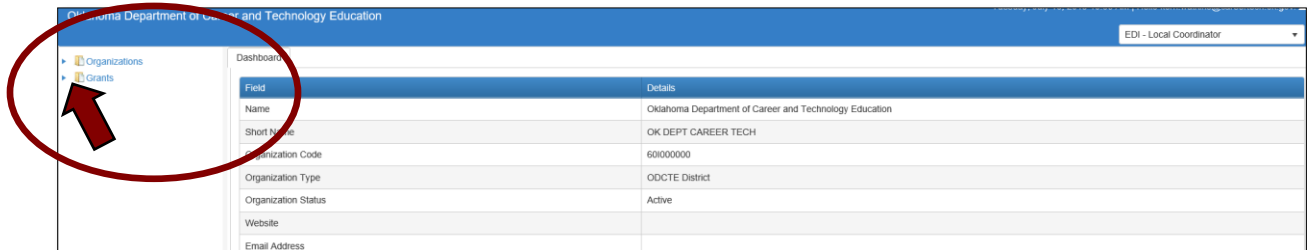
Accessing the Invoice

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

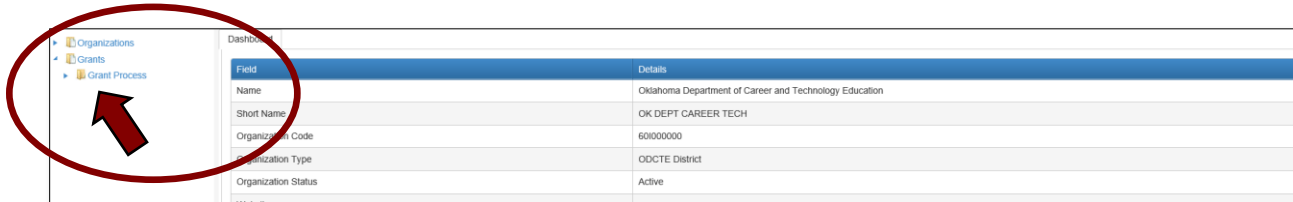
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. If not, use the drop-down arrow to select the correct role.



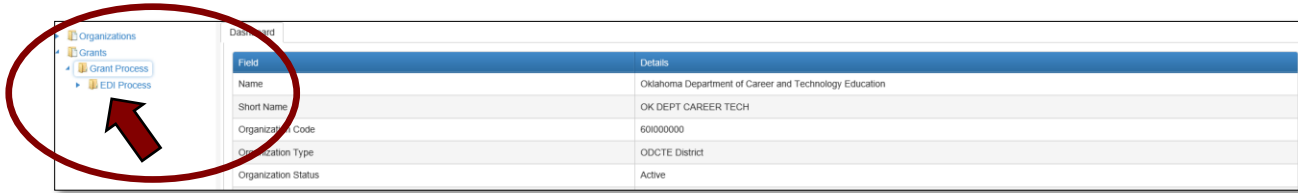
- Click the arrow | ► next to **Grants** on left navigation.



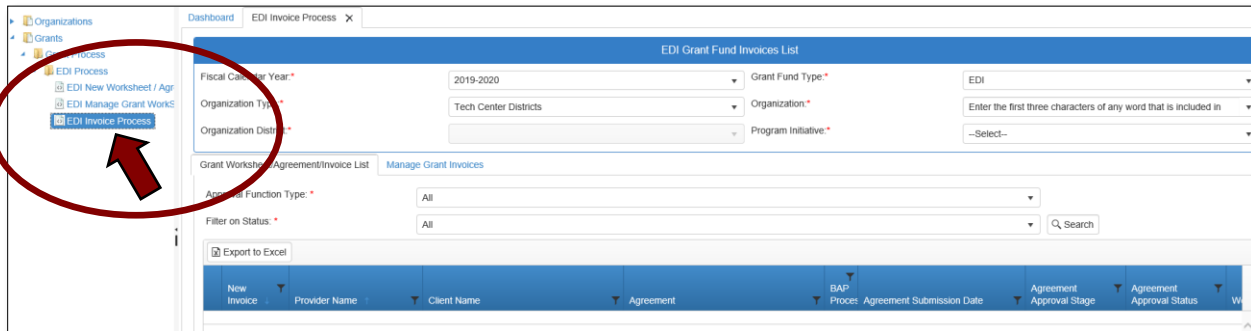
- Click the arrow | ► next to **Grant Process**.



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



- Select the **EDI Invoice Process**.



Opening/Creating the Invoice

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

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

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

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

EDI - State Regional Coordinator

EDI Grant Fund Worksheets List

Fiscal Calendar Year: **1** 2018-2019 Grant Fund Type: **2** EDI
 Organization Type: **3** Tech Center Districts Organization: **4** Enter the first three characters of any word that is in
 Organization District: **5** Program Initiative: **6** --Select--
 Approval Function Type: **7** All
 Filter on Status: **8** All **9** Search

☒ Save changes ☐ Cancel changes

Act	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
-----	---------------	-------------	----------------------------------	---------------------------	-----------	-----------

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

Oklahoma Department of Career and Technology Education

Dashboard | EDI Invoice Process X

EDI - Local BIS Coordinator

EDI Grant Fund Invoices List

Fiscal Calendar Year: 2016-2017 Grant Fund Type: EDI
 Organization Type: Tech Center Districts Organization: Sample Technology Center
 Organization District: Sample Technology Center Program Initiative: Economic Development - Firefighter (Type 83)
 Grant Worksheet/Agreement/Invoice List [Manage Grant Invoices](#)
 Approval Function Type: All
 Filter on Status: All Search

New Invoice	Provider Name	Agreement	BAP	Agreement Submission Date	Agreement Approval Stage	Agreement Approval Status
+ New Invoice	Sample Technology Center	WSAG-1617-EDI-EDI-FIREFTR-444-16X1...	No	06/23/2017 10:36:24	EDI State Requir...	Fully Approved

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

Grant Worksheet/Agreement/Invoice List [Manage Grant Invoices](#)

Approval Function Type: All
 Filter on Status: All Search

New Invoice	Provider Name	Client Name	Agreement	BAP	Agreement Submission Date	Agreement Approval Stage	Agreement Approval Status
-------------	---------------	-------------	-----------	-----	---------------------------	--------------------------	---------------------------

EDI Grant Submit Invoice - Step 1

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

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Dashboard EDI Invoice Process X New Invoice X

EDI Grant Submit Invoice - Step 1

Provider Organization Details

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

Organization Type: Tech Center Districts Organization: Sample Technology Center

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

Worksheet No: WS-1617-EDI-EDI-FIREFTR-444-16X111745-88953194C6A2

Agreement No: WSAG-1617-EDI-EDI-FIREFTR-444-16X111745-741DF268EAA0

Invoice No: INV-1617-EDI-EDI-FIREFTR-444-16X111745-A1331C725E9B

Basic Client Information

Project Details

Refresh Save & Next

EDI Grant Submit Invoice - Step 2

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

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Dashboard EDI Invoice Process X New Invoice X

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh 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 Item	Budget Line	Program - Function	OCAS Description	Units	Unit Cost	Req. Unit Type
<input checked="" type="checkbox"/> Firefighter Workbooks	511-1000-640	511 - ABE Implementation Function-1000 - ...		10.00	\$15.00	Cost Per Each
<input checked="" type="checkbox"/> Tech Supplies	511-1000-600	511 - ABE Implementation Function-1000 - ...		10.00	\$250.00	Cost Per Each

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

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants

Grant Process

EDI Process

EDI New Worksheet / Agr

EDI Manage Grant WorkS

EDI Invoice Process

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Unit Cost	Req. Unit Type	Matched F...	Total	Approv Total	Avl. to Inv...	Current LI...	Total Invo...	Worksheet Budget Line De
10.00	\$15.00	Cost Per Each	\$0.00	\$150.00	\$150.00	\$150.00	\$0.00	Firefighter Workbooks
10.00	\$250.00	Cost Per Each	\$0.00	\$2,500.00	\$2,500.00	\$2,500.00	\$0.00	Tech Supplies

0.00 2,650.00 2,650.00 2,650.00 0.00 0.00

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

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Browse:

Attachment Note:

Upload & Save file

Active/inactive file(s) Download all files

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

Acknowledgements

Invoice Summary One Step Back Save as Draft Submit For Approval

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

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants

- Grant Process
- EDI Process
- EDI New Worksheet / Agr
- EDI Manage Grant WorkS
- EDI Invoice Process

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:

adc

Refresh View SOU Invoice Summary One Step Back Save as Draft Submit For Approval

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

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

EDI Grant Submit Invoice - Step 2

Provider Organization Details

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:


adc

Grant Invoice

Successfully completed the current stage and going to next stage. Please wait...

OK

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

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

Budget Line Description	Units	Unit Cost	Unit Type Code	Request Item Total
Tech Supplies	10.00	\$250.00	Each	\$2,500.00
Firefighter Workbooks	10.00	\$15.00	Each	\$150.00
Total Invoiced				\$2,650.00

Approval Stage	Approval Note	Approval Date	Approval Role	Approved By	Full Name	Approval Status	Approval Private Note
EDI Local BIS Coordinator - 1st Stage	New Process	6/26/2017 3:13 PM	EDI - Local BIS Coordinator	Denise.Christy@careertech.ok.gov	Denise Christy	Approved	
EDI Local BIS Director - 2nd Approval Stage			EDI - Local BIS Director				

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

Making Changes to an Invoice

Changes to Invoices before Submitting for Approval

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

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

Changes to Invoices after Submitting for Approval

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

Grant Allocation

Invoice Line Items

Budget Line (OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Matched Funds	Total	Approv
1500-610-590	1500-General Supplies-610-General Suppl...	20.00	\$40.00	Cost Per Hour	\$0.00	\$800.00	\$800.00
1500-610-590	1500-General Supplies-610-General Suppl...	12.00	\$40.00	Cost Per Hour	\$0.00	\$480.00	\$480.00
1500-610-590	1500-General Supplies-610-General Suppl...	10.00	\$40.00	Cost Per Hour	\$0.00	\$400.00	\$400.00
1500-610-590	1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590	1500-General Supplies-610-General Suppl...	10.00	\$40.00	Cost Per Hour	\$0.00	\$400.00	\$400.00
1500-610-590	1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590	1500-General Supplies-610-General Suppl...	10.00	\$40.00	Cost Per Hour	\$0.00	\$400.00	\$400.00
1500-610-590	1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590	1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590	1500-General Supplies-610-General Suppl...	24.00	\$11.53	Cost Per Each	\$0.00	\$276.72	\$276.72
1500-610-590	1500-General Supplies-610-General Suppl...	40.00	\$40.00	Cost Per Hour	\$0.00	\$1,600.00	\$1,600.00
					\$0.00	\$15,236.72	\$15,236.72

Attachments

Acknowledgements


Refresh View BIS 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.

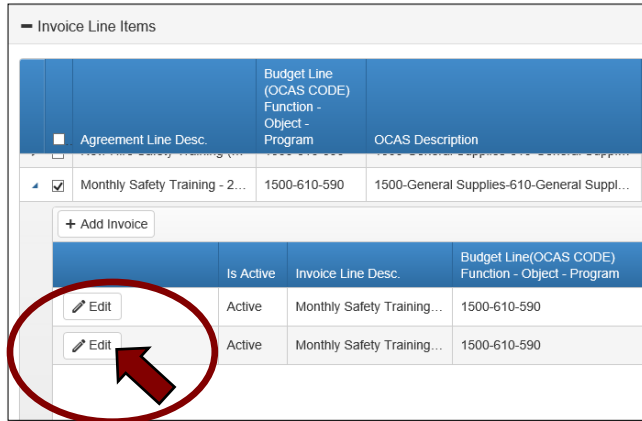
Change Request

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

Cancel OK

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

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



Agreement Line Desc.	Budget Line (OCAS CODE) Function - Object - Program	OCAS Description
Monthly Safety Training - 2...	1500-610-590	1500-General Supplies-610-General Suppl...

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program
Active	Monthly Safety Training...	1500-610-590
Active	Monthly Safety Training...	1500-610-590

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

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

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

Stage 2- Local BIS Director

Accessing the Invoice

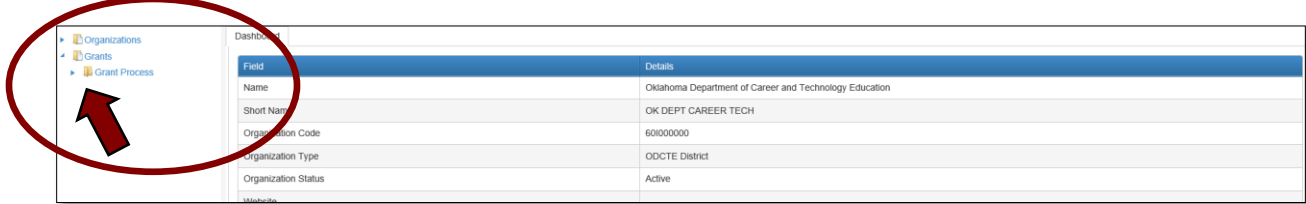
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. If not, use the drop-down arrow to select the correct role.



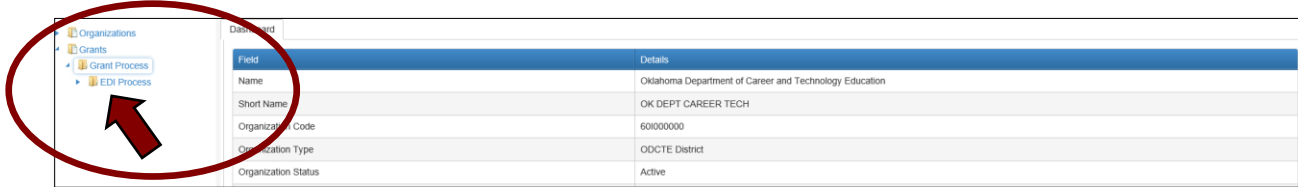
- Click the arrow ► next to **Grants** on left navigation.



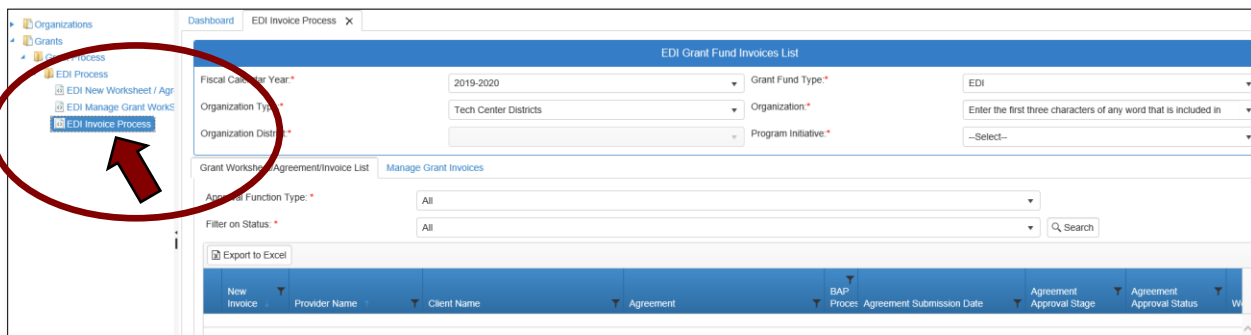
- Click the arrow ► next to **Grant Process**.



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



- Select the **EDI Invoice Process**.



Opening the Invoice

- Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.
 1. Verify **Fiscal Calendar Year***.
 2. Verify **Grant Fund Type** is set to **EDI***.
 3. Select your correct **Organization Type** from the drop-down menu. Should default to Tech Center Districts.
 4. Select your **Organization** by typing in the first three characters of the name.
 5. Verify the **Organization District***.
 6. Select a **Program Initiative***.
 7. **Approval Function Type** will remain as All.
 8. **Filter on Status** will remain as All.
 9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a red circle and a number indicating a step in the process:

- 1: Fiscal Calendar Year* (set to 2018-2019)
- 2: Grant Fund Type* (set to EDI)
- 3: Organization Type* (set to Tech Center Districts)
- 4: Organization* (text input field)
- 5: Organization District*
- 6: Program Initiative*
- 7: Approval Function Type* (set to All)
- 8: Filter on Status* (set to All)
- 9: Search button

Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table header with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement.

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

The screenshot shows the 'Manage Grant Invoices' tab selected. A red circle and a red arrow point to the 'Manage Grant Invoices' link in the top navigation bar. Below the navigation bar are dropdown menus for 'Approval Function Type*' (set to All) and 'Filter on Status*' (set to All), along with a 'Search' button. At the bottom is a table header with columns: New Invoice, Provider Name, Client Name, Agreement, BAP Process, Agreement Submission Date, Agreement Approval Stage, and Agreement Approval Status.

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

Dashboard | EDI Invoice Process

EDI Grant Fund Invoices List

Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI
 Organization Type: Tech Center Districts | Organization: Sample Technology Center
 Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Type...

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

☒ Save changes |
 ☐ Cancel changes |
 |

	BAP Status	Procet	Payme Days	Organization	Client Name	Program Initiative	Invoice	Invoice Last 4 Digit Reque No	Invoice Submitted On	Last App
<input type="checkbox"/>	Yes	Yes	0	Sample Technology Center	Sample Company Test Incorporated	Economic Development	INV-1819-EDI-EDI-TIP-434-16X111745-25...	15...	04/29/2019 15:11:31	EDI Loca
<input type="checkbox"/>	Yes	Yes	0	Sample Technology Center	Sample Company Test Incorporated	Economic Development	INV-1819-EDI-EDI-TIP-434-16X1...	16...	04/29/2019 00:00:00	
<input type="checkbox"/>	Yes	Yes	0	Sample Technology Center	Sample Company Test Incorporated	Economic Development	INV-1819-EDI-EDI-TIP-434-16X11174...	65...	04/29/2019 00:00:00	

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

EDI Grant Submit Invoice Step-1

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

Dashboard | EDI Invoice Process | INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6

EDI Grant Submit Invoice - Step 1

Provider Organization Details

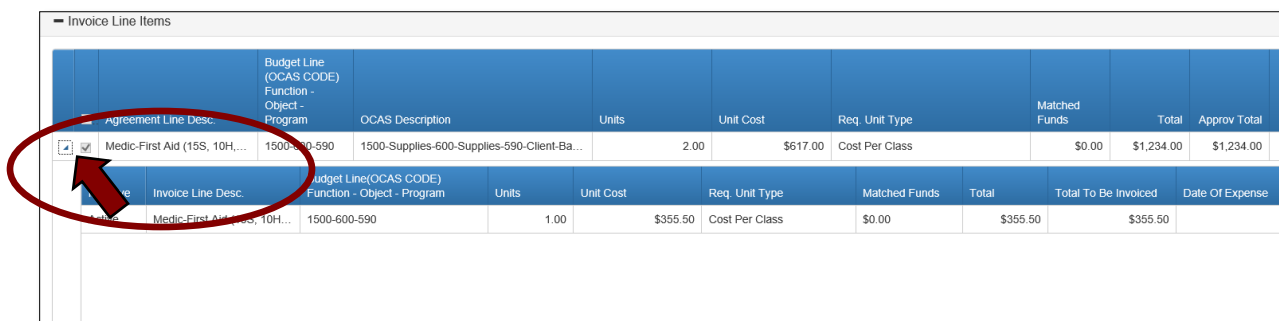
Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI
 Organization Type: Tech Center Districts | Organization: Sample Technology Center
 Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Typ...
 Worksheet No: WS-1819-EDI-EDI-TIP-434-16X111745-F819ECF759A3
 Agreement No: WSAG-1819-EDI-EDI-TIP-434-16X111745-DD198D78C5DA
 Invoice No: INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6

+ Basic Client Information
 + Project Details

|

EDI Grant Submit Invoice Step-2

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



Invoice Line Items										
Agreement Line Desc.	Budget Line (OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Matched Funds	Total	Approv Total		
Medic-First Aid (15S, 10H,...	1500-600-590	1500-Supplies-600-Supplies-590-Client-Ba...	2.00	\$617.00	Cost Per Class	\$0.00	\$1,234.00	\$1,234.00		
Medic-First Aid (15S, 10H,...	1500-600-590		1.00	\$355.50	Cost Per Class	\$0.00	\$355.50	\$355.50		

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

Stage 3-Local Finance Coordinator

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

Stage 4-State Regional Coordinator

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

Stage 5-State Requisition Coordinator

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

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

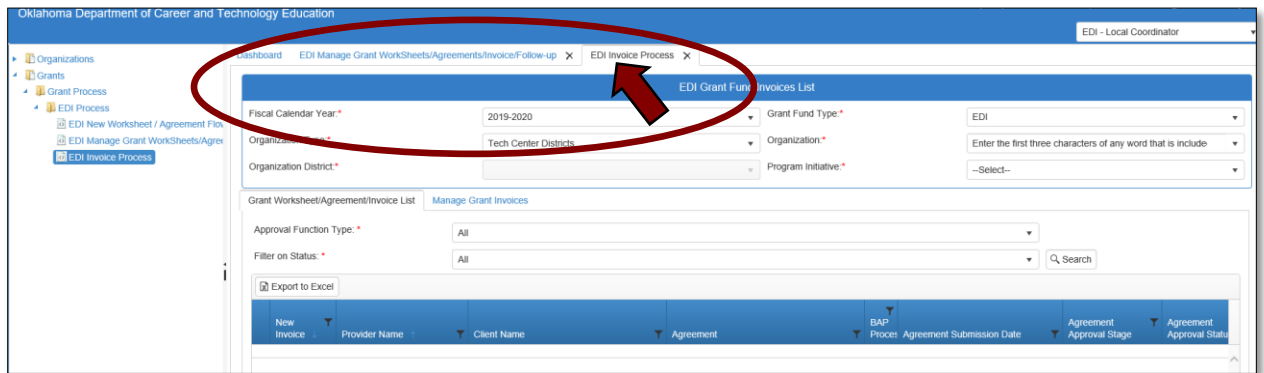
Stage 6-ODCTE EDI Finance Reviewer



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

TIPS and Tricks

CTIMS Helpful Hints

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



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

Where's my Worksheet, Agreement or Invoice?

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

Worksheets/Agreements

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

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

Invoices

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

Where are the Funds?

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