Roles for the Worksheet (Application) Process

The following roles are required in CTIMS for the submission of a New **Worksheet** (Application):

**Stage 1 - FLA Local Initiative Coordinator** – Creates, completes, saves and submits new Worksheet for 1st Approval. Responsible for completing all required revisions during Worksheet approval process.

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

**Stage 3 – FLA Local Superintendent/CEO/President** – 3rd Approval. Reviews and approves or rejects Worksheet. If approved, goes to State approval stage. If rejected, goes back to stage 1.

**Stage 4 – FLA State Initiative Coordinator** – 4th Approval. ODCTE state staff reviews and approves or rejects Worksheet. If approved, goes to final approval stage. If rejected, goes back to stage 1.

**Stage 5 – FLA State Initiative Supervisor** – Final review and approval of Worksheet. If approved, goes to contract approval stage. If rejected, goes back to stage 1.

**Stage 6 – ODCTE Contract Reviewer** – Fully Approved Stage. This stage is only for approving the **Subaward Funding Agreement (Contract)** by the ODCTE.

After the Worksheet is approved through Stage 6, the Agreement Process begins with the FLA Local Finance Coordinator.
Starting a New Worksheet/Application: FLA Local Initiative Coordinator

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

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

**Step 2:** Verify that you are signed on with the role of a **FLA-Local Initiative Coordinator** in the top right corner. Use the dropdown arrow to select the Local Initiative Coordinator role if it is not already shown in the box.

**Step 3:** Click the (small blue triangle) icon next to **Grants** on the left side navigation area.
Step 4: Click the ▶️ (small blue triangle) icon next to Grant Process.

Step 5: Click the ▶️ (small blue triangle) icon next to FLA Process.
Step 6: Select FLA New Worksheet/Agreement Flow
**Step 7:** Complete the **FLA Grant Submit Worksheet – Step 1** form. The tagged numbers on the screen shot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

**Note:** The red asterisks* represents a required field.

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

1. From the dropdown menu, select an **Organization Type**, such as Comprehensive School District, Technology Center District, College District or College name*.
2. **Select an Organization** by typing in the first three letters of your school or organization name* then selecting the school name from the dropdown menu.
3. Select an **Organization District*** if it does not automatically appear after typing the first three letters of your **Organization** name or if you need to select a different **Organization District**.
4. Select a **Program Initiative*** from the dropdown menu. The **Worksheet No.*** automatically displays after selecting the **Program Initiative**.
5. Verify that **Client Type*** is Business Masters.
6. Select an **Organization** by typing in the first three letters of your organization name*. This name should be the same as in field #2. The **Business Code*** is associated with the Organization and automatically displays after an Organization is selected.
7. After verifying that all information is correct, Click **Save & Next** button.
Step 8: Click on the **Funding Request Details** tab. This begins **Step 2** of the Worksheet process where you will enter your responses to the application questions. You must scroll down to access and complete all the sections. If there are any required responses they will be indicated by a red asterisk (*).

Within the Funding Request Details area, there are links to resources that will help you complete the associated section(s). There are also links to required templates and forms for you to download, complete and then attach in a later step.

**To prevent losing your information, it is highly recommended that you type your answers into a blank Word document and then cut and paste from that document to fill in the answer boxes. If necessary you can ask your Perkins Coordinator for a blank template**

You must click **Save & Next** or **Save as Draft** for any of the information to be saved.
**Note: Returning to an Existing Worksheet**

If you need to exit CTIMS during the process of completing your application, you will need to select **FLA Manage Grant Worksheet/Agreement** on the left side navigation panel to access your Worksheet or budget when you come back. For additional information, see the **Opening a Saved Worksheet** section of this Guidebook.

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

**Step 9:** After completing the **Funding Request Details** form click on either of the **Save & Next** buttons to continue to the next page.
Step 10: FLA Grant Submit Worksheet – Step 3: After clicking the Save & Next button the CTIMS system will open the Budget Line Items section where you will enter your itemized budget information.
**Step 11:** On the Budget Line Items screen, you can click the **Add Budget Line, Remove Budget Line**, or **Cancel Budget Line Changes**. The tagged numbers on the screen shot correspond to the instruction steps below.

1. Type a **Budget Line Desc** (Budget Line Description).  
   Use the **Allowable/Non-Allowable Guide** for assistance.
2. Complete **Req. Units** (Required Units).
3. Complete **Req. Unit Cost** (Required Unit Cost).
4. Complete **Req. Unit Type** (Required Unit Type).
5. Verify **Work Sheet Total** populates correctly.
6. To add more budget lines, click **Add Budget Line** and repeat steps 1-4. **You must budget the full amount of your allocation.**
7. Type a **Note** in the space below the line item budget area if desired.
8. You can **Save as Draft** at this point to save all the information you have entered 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.
**Step 12:** Click on the **Attachments** section. In this section, you will use the **Browse** and **Upload & Save File** buttons to attach all the required documents such as the Comprehensive Local Needs Assessment, and the Program of Study – Course Sequence Worksheets to your local application.

1. Save all the required documentation in a folder on your local computer.
2. Click the **Browse** button, which will open your local computers file system. Navigate to the folder where you saved the files you want to upload to the CTIMS local application.
3. Select a single file to upload and click the **Open** button.

4. You should now see a **named document icon** in the space underneath of the browse button. If it shows the file you wish to upload, you may add an **Attachment Note** then select the **Upload & Save File** button.
5. If the Upload & Save file was successful, a Pop-Up Box as shown below will appear. Select X to close this box. Repeat steps 1 through 4 for each file you need to attach to the application.

Deleting or inactivating an attachment:

1. In the Attachments section, select the attached document that you wish to inactivate or delete by checking the box to the left of the Status column as seen below:
2. As soon as the box is checked, a pop up window as shown below will display. You will need to type the words “Inactivate” or “Delete” or a reason for inactivating or deleting the document then click the OK button.

3. After clicking the OK button, select either the Active/Inactive file(s) or the Delete file(s) button to select the action you wish to take. A pop-up window should appear indicating the record has been updated successfully. Click on OK.
4. After selecting **OK** you will see the status change from Active to **Inactive** or **Deleted**.

Do not **Submit For Approval** yet because you are required to complete the **Acknowledgements** section first.

**Step 13:** Click on the **Acknowledgements** section.

READ and check all (6) of the **Acknowledgement Boxes**, then add an **Acknowledgement Note** (required).
**Step 14:** Select the **Worksheet Summary** button to view or print your Worksheet Application before submitting to ensure it is complete and accurate.

**To Print Your Worksheet Summary (Application):**

Select the save/download button to download your Application as a PDF that you can save or print. You may need to click on the **Open** button on the bottom of your screen in order to open the PDF file. You can save and print/or from this screen.
Step 15: Once you have reviewed your completed Worksheet/Application, you can close the Worksheet Summary tab and select the Submit For Approval button. You may have a pop-up verification screen appear asking if you are sure? Click OK. You will receive an automatic email from the CTIMS system stating your Worksheet has been submitted successfully to your FLA Local Finance Coordinator. It is highly recommended that you also contact this individual and inform them that the Worksheet is available for their review and approval / rejection.

After you submit the Worksheet, if there are any changes, you will have to use the Change Request Process. (See Table of Contents for location in this document)
**FLA Local Finance Coordinator - Worksheet Approval**

After the FLA Local Initiative Coordinator has created and submitted the Worksheet, the FLA Local Finance Coordinator will receive a notification from CTIMS to sign in and review the Worksheet. If the FLA Local Finance Coordinator approves the Worksheet, it will go to the FLA Local Superintendent/CEO/President to approve or reject using this same process. If either person rejects the Worksheet, it will be sent back to the FLA Local Initiative Coordinator for correction.

**Step 1:** Using **Internet Explorer Version 11** or higher, sign in using your school email and CTIMS password at https://ctims.okcareertech.org/CTBDSWeb/

**Note:** CTIMS is currently not compatible with other browsers.

**Step 2:** Verify that you are signed on with the role of a FLA-Local Finance Coordinator in the top right corner. Use the dropdown arrow to select the FLA Local Finance Coordinator role if it is not already shown in the box.

**Step 3:** Click the **(small blue triangle) icon next to Grants** on the left side navigation area.
Step 4: Click the (small blue triangle) icon next to Grant Process.

Step 5: Click the (small blue triangle) icon next to FLA Process.
Step 6: Select FLA Manage Grant Worksheet/Agreement Flow
**Step 7:** Complete the **FLA Grant Funds Worksheets List**

The tagged numbers on the screen shot correspond to the instruction steps below.

*Note:* The red asterisks* represents a required field.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to FLA*.
3. Select your correct **Organization Type*** from the dropdown menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District***.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as All.
8. **Filter on Status** will remain as All.
9. Select the **Search** button.
**Step 8:** After clicking the Search button, the link for the Worksheet that needs approval will be listed under the Worksheet column. Click on the **Worksheet Number** to open the Worksheet. The Worksheet number always begins with “WS-“.

**Step 9: FLA Grant Submit Worksheet – Step 2**

After clicking on the Worksheet number to open the grant, the application information should be reviewed by scrolling through the different sections of the Worksheet: **Provider Organization Details, Basic Client Information, and Funding Request Details**. To proceed to the next section, select **Next Step**.
Step 10: FLA Grant Submit Worksheet - Step 2: Open each section of the Worksheet by clicking on the section heading. Verify the contents of each section of the Worksheet. We recommend you print a PDF of the Worksheet Summary to help with project and budget verification. (Refer to the “Printing your Worksheet Application” section of this Guidebook.)

If everything is correct, click on Approval Process.
**Step 11: Approval Process – FLA Grant Worksheet Approval.** At this point,

1. You can see that the Worksheet is at the **FLA Local Finance Coordinator** Stage (2nd Stage).
2. Type in an **Approval or Rejection Note**.
3. Select the **Reject** button to reject the Worksheet, or
4. Select the **Approve** button to approve the Worksheet.

After clicking the Reject or Approve button, the system will ask, “**Are you sure?**” Click **Cancel or OK**. If OK is selected, the application is successfully approved or rejected.

If the Worksheet is **rejected** it will be returned to the FLA Local Initiative Coordinator for additional revisions or additions.

If the Worksheet is **approved**, an email from the CTIMS system will be sent to you stating that your Worksheet has been submitted successfully to the **FLA Local Superintendent/President** for their review. It is highly recommended that you also contact this individual and inform them that the Worksheet is available for their review and approval/rejection.
**FLA Local Superintendent/President: Worksheet Approval**

After the FLA Local Finance Coordinator approves the Worksheet, the FLA Local Superintendent /President will receive an automatic CTIMS email that the Worksheet is ready for review.

To approve the Worksheet, the FLA Local Superintendent/President will follow the same steps as in the **FLA Local Finance Coordinator: Worksheet Approval** process listed in this Guidebook (shown above).

If the Worksheet is rejected it will be returned to the FLA Local Initiative Coordinator for additional revisions or additions. The Worksheet must then progress through review and approval by the FLA Local Finance Coordinator and the FLA Superintendent/President before it is fully submitted.

When the submission process is complete, you will receive an email from the CTIMS system stating your Worksheet has been submitted successfully to the FLA State Staff for review.
**FLA State Initiative Coordinator and FLA State Initiative Supervisor: Worksheet Approval**

To approve the Worksheet, first the **FLA State Initiative Coordinator**, then the **FLA State Initiative Supervisor** will follow the same steps as in the **FLA Local Finance Coordinator: Worksheet Approval** process listed in this Guidebook.

**ODCTE Contract Reviewer: Contract Approval**

After the Worksheet is approved by the FLA State Initiative Supervisor, the **Subaward Funding Agreement (Contract)** is reviewed and approved by the **ODCTE Contract Reviewer**. The Agreement approval process can then begin.
Opening a Saved Worksheet:

If at any time you need to return to the Worksheet, go to: Grants – Grant Process – FLA Process – FLA Manage Grant Worksheet in the left side navigation panel. **Do not select FLA New Worksheet again.**

Complete these sections in the FLA Grant Funds Worksheet List: Fiscal Calendar Year - Organization Type - Organization - Program Initiative - Search -
In the new section:

**Scroll to the left and click on the Worksheet link under the Worksheet column.** The Worksheet link is in blue and begins with “WS.”

Scroll through the **Funding Request Details** section to see Worksheet answers or select **Next Step** to open the rest of the Worksheet.

Selecting **Next Step** will allow you to see your **Budget Line Items**, the Attachment function or the **Acknowledgement** section. The **Save as Draft** and **Submit for Approval** buttons are also located here, along with the **Worksheet Summary** button which may be selected if you want to pdf/print your Worksheet/application.
If the Worksheet is rejected at any time during the Approval process, it is returned to the FLA Local Initiative Coordinator role for revisions &/or additions. The Worksheet must then be approved at all levels (FLA Local Finance Coordinator, FLA Local Superintendent/President, FLA State Initiative Coordinator, FLA State Supervisor and ODCTE Finance Reviewer) before it is completed.

Once a Worksheet has been fully approved by the ODCTE Contract Reviewer it is locked and no further changes may be made to it.

**Checking the Status of your Worksheet:**

At any time during the Approval process, you can check the status of your Worksheet. In this way you can determine who has approved the Worksheet, what level the Worksheet is currently at and whether the Worksheet has been rejected or is fully approved. The status of a Worksheet can be checked by any person with an assigned CTIMS role: FLA Local Initiative Coordinator, FLA Local Finance Coordinator or FLA Local Superintendent/President. After logging in, these selections on the left of the screen should be made:

**Grants –**  
**Grant Process –**  
**FLA Process –**  
**FLA Manage Grant Worksheet**

*Do not select FLA New Worksheet again.*

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Oklahoma Department of Career and Technology Education</td>
</tr>
<tr>
<td>Short Name</td>
<td>CK BEPT CAREER TECH</td>
</tr>
<tr>
<td>Organization Code</td>
<td>6NOXX000</td>
</tr>
<tr>
<td>Organization Type</td>
<td>ODCTE District</td>
</tr>
</tbody>
</table>
Complete the required items in the FLA Grant Funds Worksheet List:

**Fiscal Calendar Year** -
**Organization Type** -
**Organization** -
**Program Initiative** -
**Search** -

In the new section, click on the **small dark triangle** to the left of the “Active” checkbox. Scroll down through the **Approval Stage** and **Approval Status** columns to see the current status of your Worksheet/application.