

Agreement Process

Roles for the Agreement Process:

FLA Local Finance Coordinator



FLA State Initiative Coordinator



FLA State Initiative Supervisor

After the **Worksheet** is approved through the ODCTE Contract Reviewer level, the Grant recipient will receive an email from the ODCTE Perkins Administration (FLA) office with the CTIMS approval notification. At this point they may begin the Agreement process. Only the **Agreement** can be changed once the Worksheet is fully approved by ODCTE staff.

Starting the Agreement Process: FLA Local Finance Coordinator

The **Agreement** is the working copy of the **Budget**. It contains the OCAS codes and details of planned expenditures.

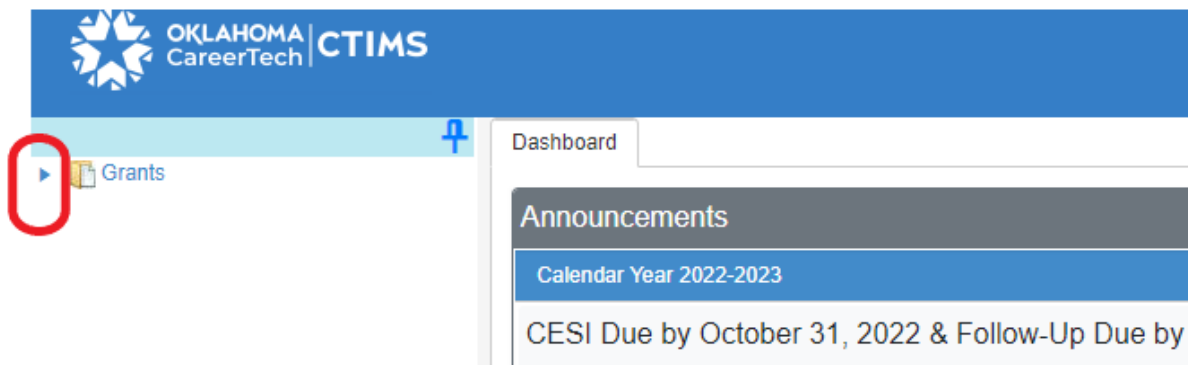
Step 1: Using **Microsoft Edge, Mozilla Firefox or Google Chrome**, sign in to CTIMS using your email and CTIMS password at <https://ctims.okcareertech.org/CTBDSWeb/>

Note: CTIMS is currently not compatible with other browsers.

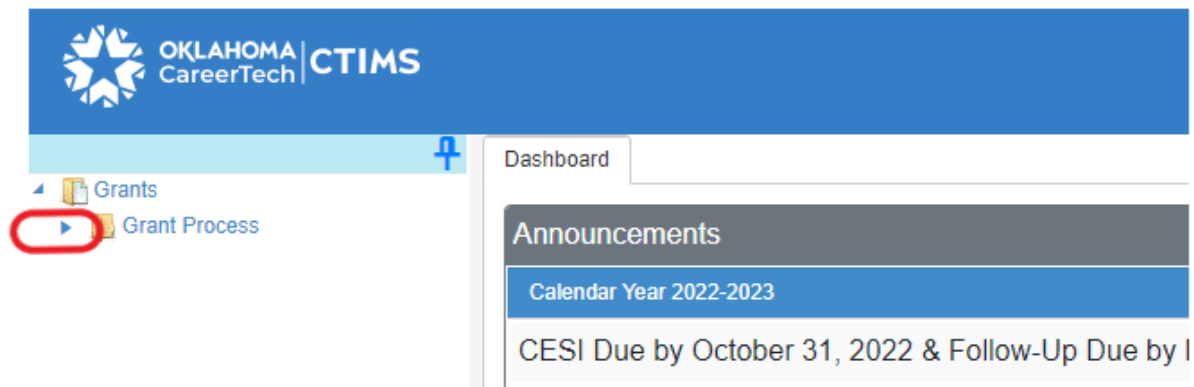
Step 2: Verify that you are signed on with the role of a **FLA-Local Finance Coordinator** in the top right corner or use the dropdown arrow to select the correct role.



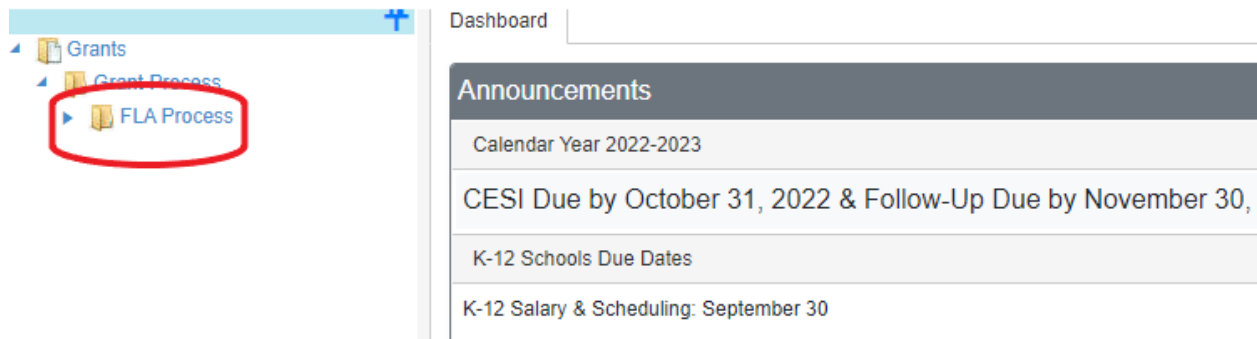
Step 3: Click the ► (small blue triangle) icon next to **Grants** on the left side navigation area.



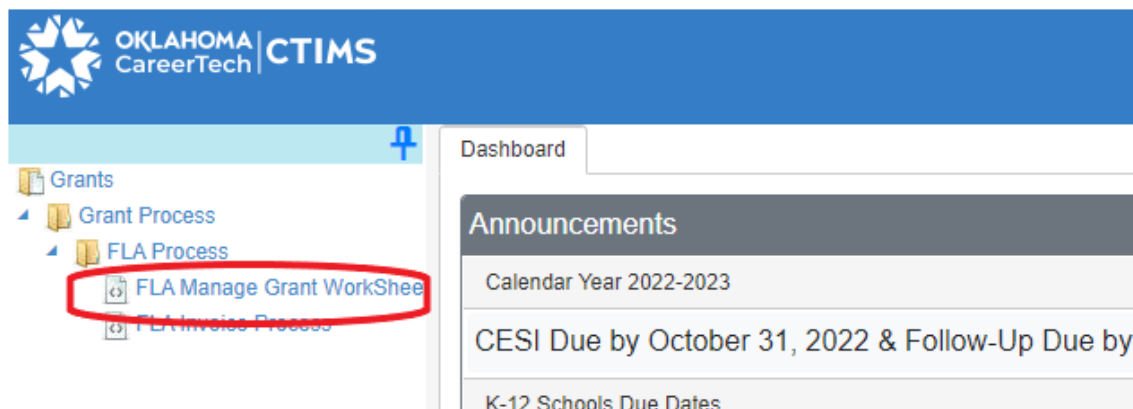
Step 4: Click the ► (small blue triangle) icon next to **Grant Process**.



Step 5: Click the ▶ (small blue triangle) icon next to **FLA Process**.



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



Step 7: Complete these items in the **FLA Grant Fund Worksheets List**. *The tagged numbers on the screen shot correspond to the instruction steps below.* Many of these fields will automatically display based on your organization login credentials.

Note: The red asterisks* represents a required field.

1. Verify **Fiscal Calendar Year** to make sure correct year is showing*.
2. Verify **Grant Fund Type** is set to FLA*.
3. Select your correct **Organization Type** from the dropdown menu.
4. Select your **Organization** by typing in the first three characters of the name then selecting your school from the dropdown menu.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your *Organization* name.
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.

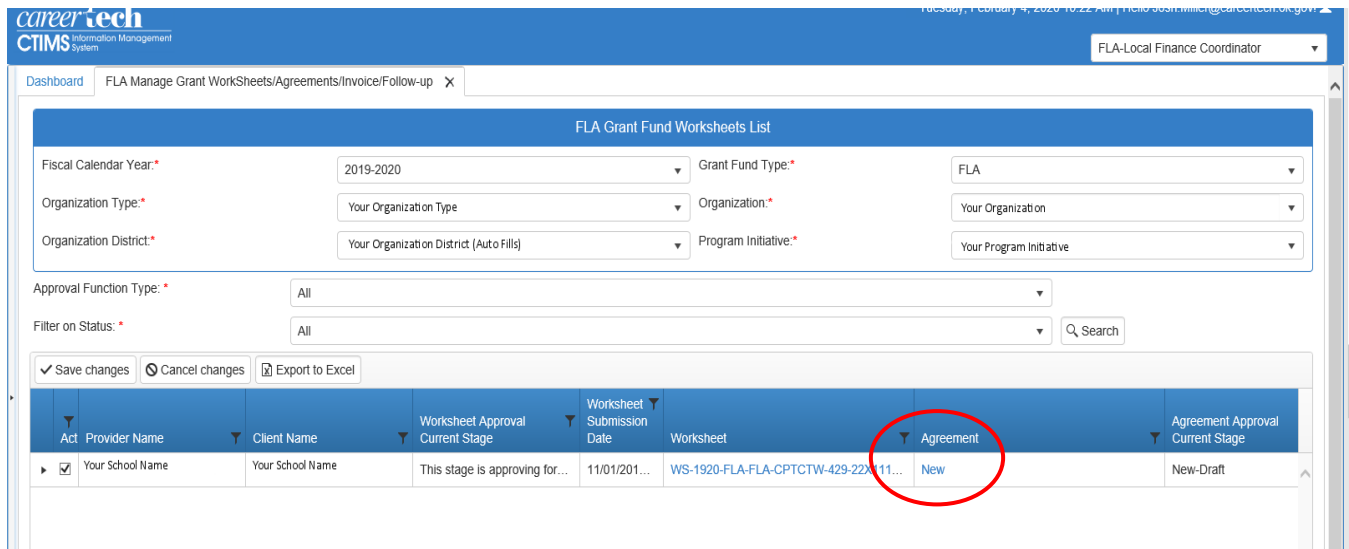
The screenshot shows the 'FLA Grant Fund Worksheets List' interface. The form contains the following fields:

- 1. Fiscal Calendar Year*: 2022-2023
- 2. Grant Fund Type*: FLA
- 3. Organization Type*: College District
- 4. Organization*: State College District
- 5. Organization District*: State College District
- 6. Program Initiative*: -Select-
- 7. Approval Function Type*: All
- 8. Filter on Status*: All

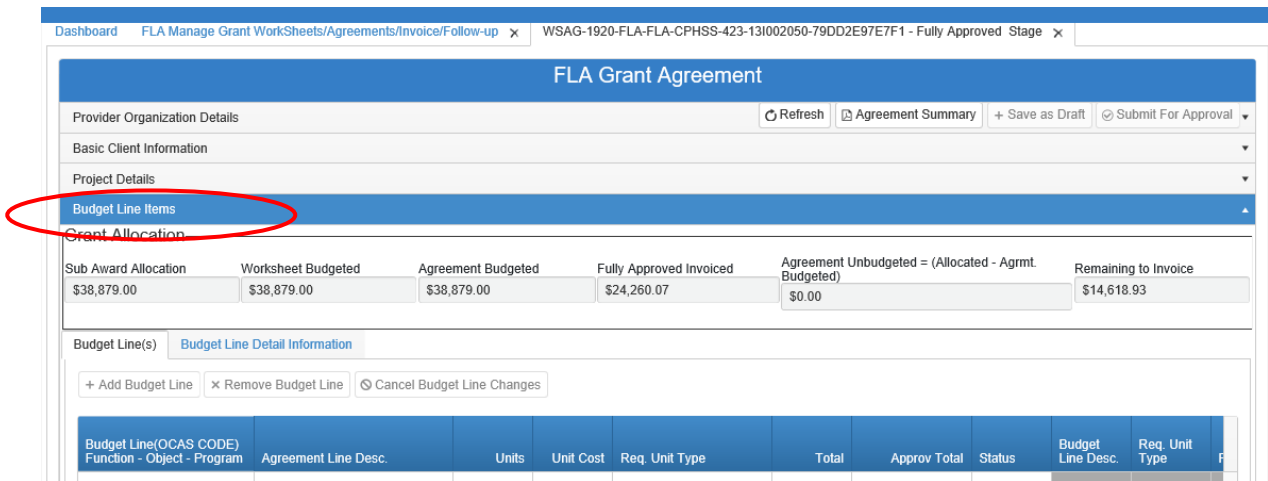
Buttons: Save changes, Cancel changes, Export to Excel

Table Headers: Act, Provider Name, Client Name, Stage, Worksheet Approval Content, Worksheet Submission Date, Worksheet, Agreement

Step 8: After clicking the Search button, the **Agreement** column will display **New**. To start a new Agreement, click on the blue word "New".

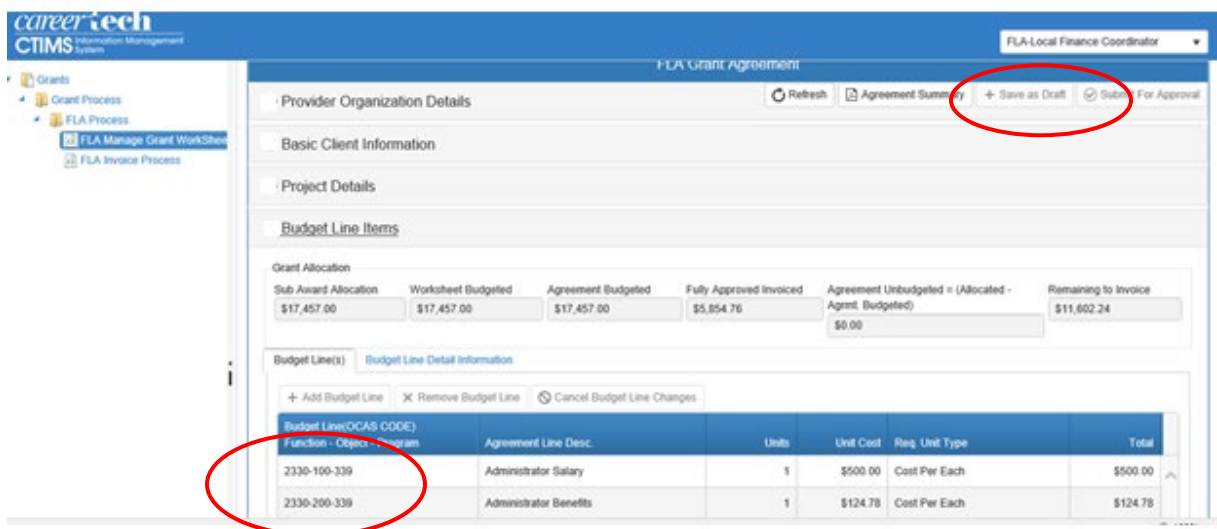


Step 9: On the **FLA Grant Agreement** page, the **Budget Line Items** section should be open.



Step 10: The first step is to complete the **Budget Line OCAS Codes**. For each of the budget line items, enter the OCAS coding in the order of **Function-Object-Program Code** (e.g. 1000-100-330). As you begin typing the OCAS code, a dropdown list of OCAS codes should display for you to select from. After entering an OCAS code, **Tab** to the **Agreement Line Description Column** then use your cursor to click on the next **OCAS Code** area. (This helps ensure the OCAS Codes you have entered are saved.) After entering OCAS codes for all your line items, click on the **Save as Draft** button.

Note: All object codes should be entered at the 100 level: (100, 200, 300, 400, etc.).



Step 11: Acknowledgements. Scroll down the page and click on the word **“Acknowledgements”** section heading. Click on the two *** certify/verification boxes** and put in an **Acknowledgment Note** (required). Click on **Submit for Approval**. The Agreement will now go to the **FLA State Initiative Coordinator** and **FLA State Initiative Supervisor** for approval.



**FLA State Initiative Coordinator, and FLA State Initiative Supervisor:
Agreement Approval**

The **FLA State Initiative Coordinator** and the **FLA State Initiative Supervisor** continue the Agreement review and approval/rejection process by following Steps 1-11 above (the same steps as the FLA Local Finance Coordinator).

After the Agreement is approved by the FLA State Initiative Supervisor, the **FLA Local Finance Coordinator** can begin submitting **Invoices/Reimbursement Claims**.