CareerTech Information Management System (CTIMS)

Temporary Assistance For Needy Families (TANF) Grants

Worksheet & Change Requests Guidebook

OKLAHOMA CareerTech

IMD Information Management Division

February 2026

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Help and Troubleshooting

If you do not have a CTIMS account set up or are experiencing issues with navigation or software, please contact CTIMSSupport@careertech.ok.gov. Send a message describing your problem. Please include your school's name and telephone number, and we will contact you. Someone is always monitoring that inbox and will respond to your email promptly.

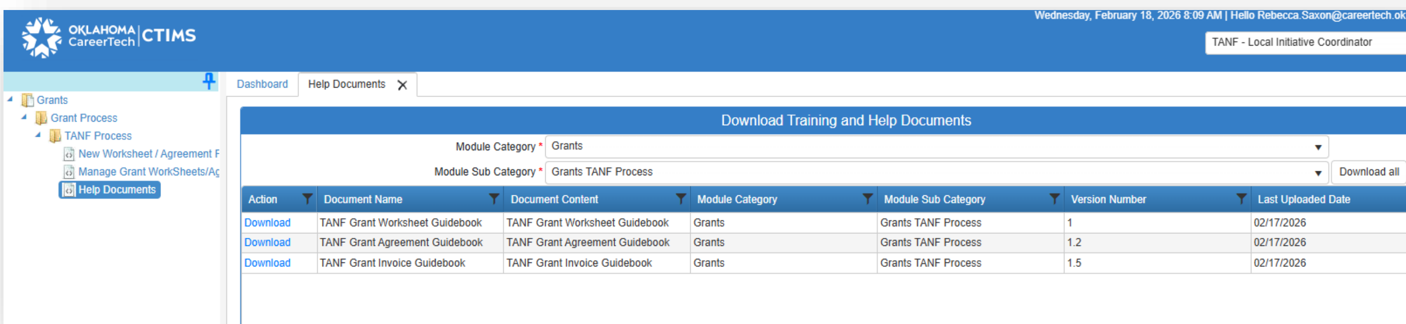
If you have forgotten your password, click the **'Forgot your password**?' link to reset it.

CTIMS Customer Support Contact

Office: (405) 743-5134
Email: CTIMSsupport@careertech.ok.gov

Help Documents

You can access and download the TANF grant guidebooks under the **TANF Process** tab.



TANF Contacts

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

CTIMS Support

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Approval Process Overview

Worksheet Approval Stage (Stage 1)	
TANF Role/Access	**Process**
TANF Local Initiative Coordinator	This starts the Worksheet Approval process. Creates, completes, saves, and submits a new worksheet.
TANF Local Finance Coordinator	1st Approval. Reviews and approves or rejects worksheets. If approved, it goes to the next stage. If rejected, it goes back to stage 1.
TANF Superintendent / President	2nd Approval. Reviews and approves or rejects the worksheet. If approved, it goes to the State approval stage. If rejected, it goes back to stage 1.
TANF State Initiative Supervisor	Final Approval. After the worksheet is approved through Stage 4, the Agreement Process begins with the TANF Local Finance Coordinator.

Agreement cannot be started until the Worksheet is fully approved

Agreement Approval Stage (Stage 2)	
TANF Role/Access	**Process**
TANF Local Finance Coordinator	This starts the Agreement Approval process. Creates, completes, saves, and submits new agreements.
TANF State Initiative Supervisor	Final Approval. After the Agreement is approved through Stage 2, the Invoice Process begins with the TANF Local Finance Coordinator.

Invoice cannot be started until the Agreement is fully approved

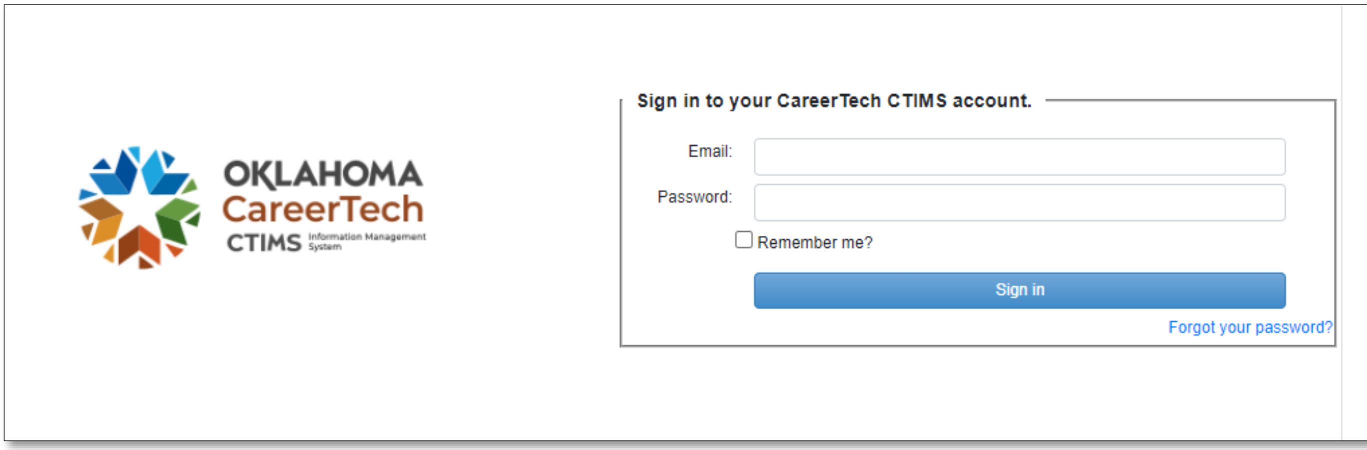
Invoice Approval Stage (Stage 3)	
TANF Role/Access	**Process**
TANF Local Finance Coordinator	This starts the Invoice Approval process. Creates, completes, saves, and submits new invoice.
TANF State Initiative Supervisor	1st Approval. Reviews and approves or rejects the invoice. If approved, it goes to the next stage. If rejected, it goes back to stage 1.
ODCTE Finance Reviewer	Final Approval. After the invoice is approved through Stage 3, the Invoice process is complete.

Budget Adjustment Approval Stage (if Agreement changes are necessary)	
TANF Role/Access	**Process**
TANF Local Finance Coordinator	This starts the Budget Adjustment process. Budget Adjusted and/or new line items added here.
TANF State Initiative Supervisor	Final Approval. After the invoice is approved through Stage 2, the Invoice process is complete.

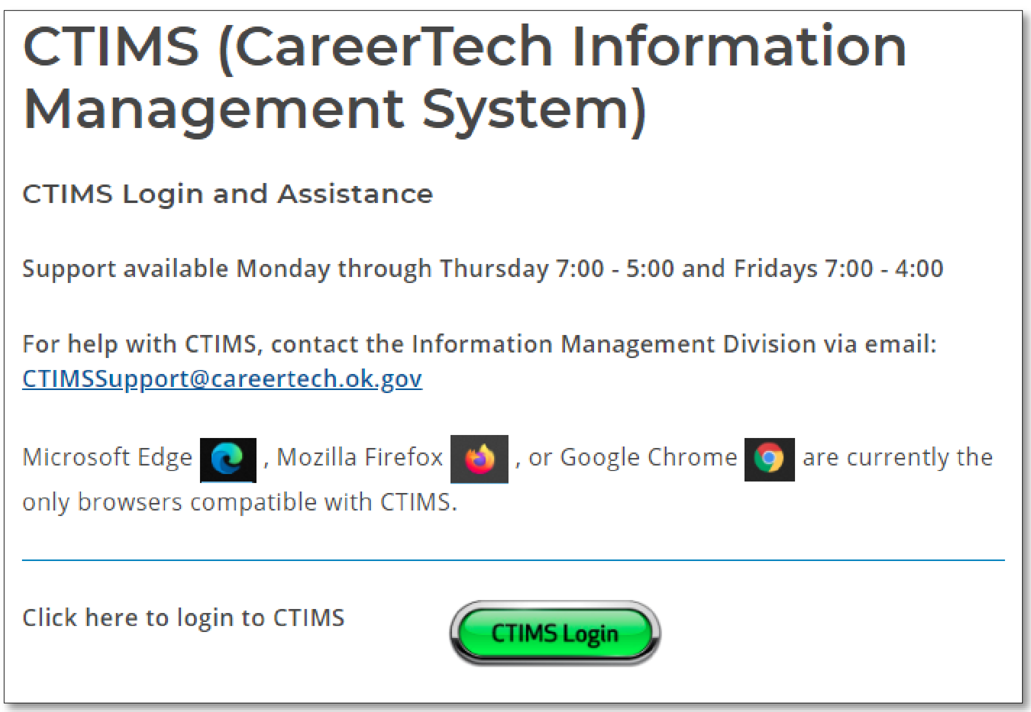
Objective: *This guidebook will take you through the steps to submit TANF Grants in CTIMS.*

Logging into CTIMS

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



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



Worksheet

Worksheet Approval Process

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

Stage 1 – TANF Local Initiative Coordinator: Creates, completes, saves, and submits a new worksheet.

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

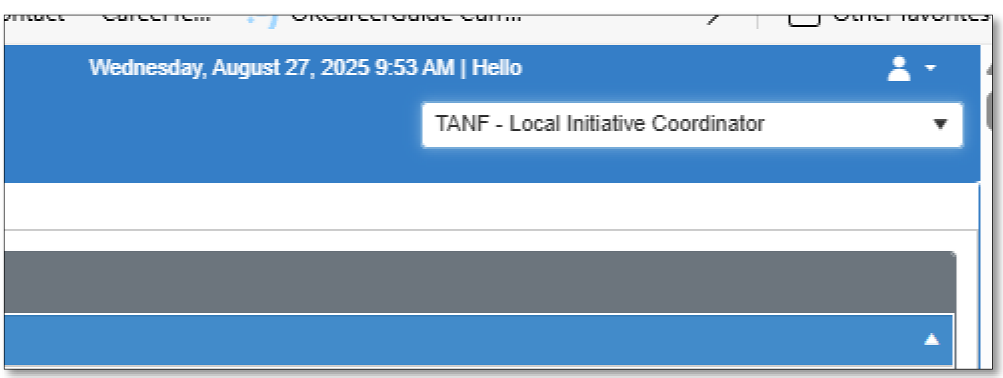
Stage 3 – TANF Superintendent/President: 2nd Approval. Reviews and approves or rejects the worksheet. If approved, it goes to the State approval stage. If rejected, it goes back to stage 1.

Stage 4 – TANF State Local Coordinator: 3rd Approval. Reviews and approves or rejects the worksheet. If approved, it goes to the State approval stage. If rejected, it goes back to stage 1.

Stage 5 – TANF State Initiative Supervisor: Final Approval. After the worksheet is approved through Stage 4, the Agreement Process begins with the TANF Local Finance Coordinator.

Stage 1 – Local Initiative Coordinator

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



If you do not see **TANF-Local Initiative Coordinator**, contact CTIMSSupport@careertech.ok.gov

- Click the arrows next to **Grants > Grant Process** > **TANF Process**.
- Click on the **New Worksheet / Agreement Flow** link.

Complete the **TANF Grant Submit Worksheet** form**. The tagged numbers in the screenshot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization's login credentials. **NOTE:** The red asterisks* represent a required field.

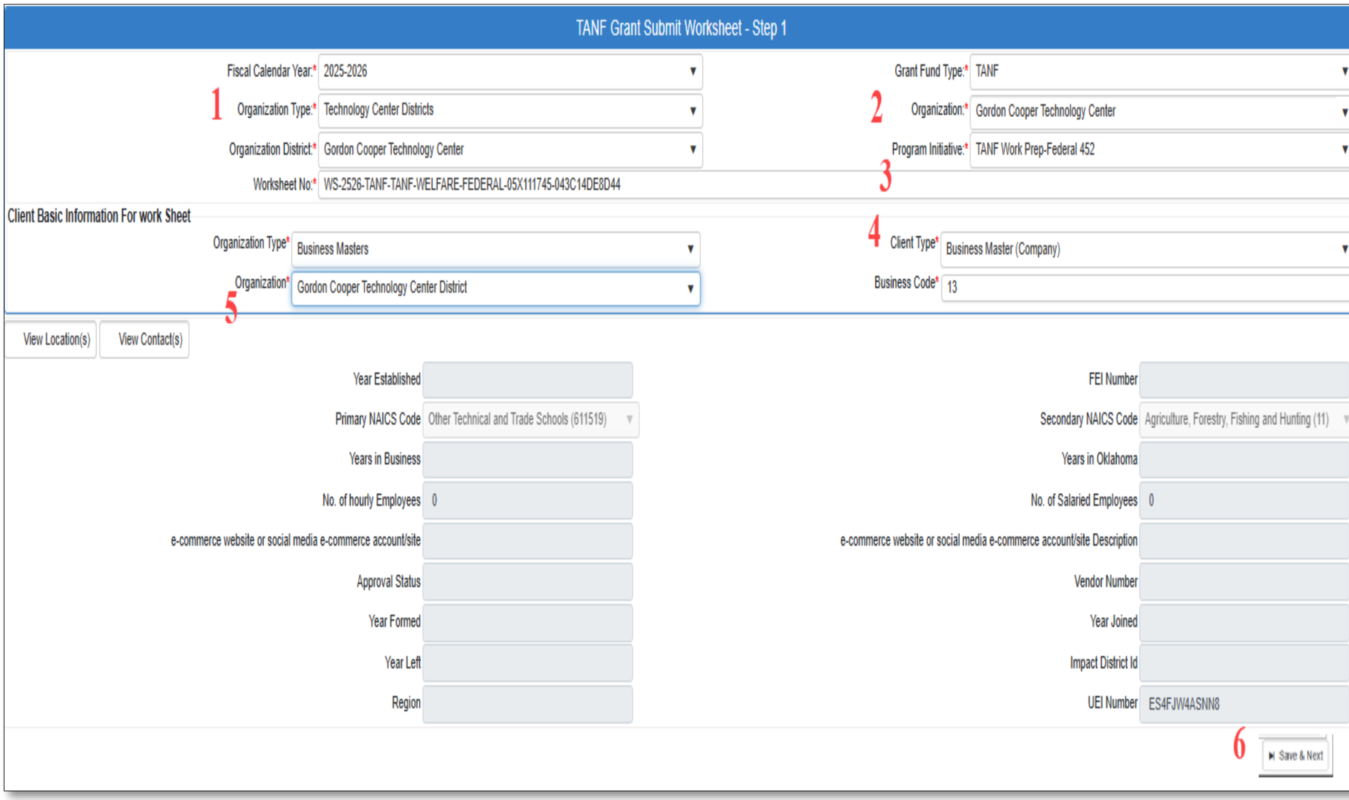
1. **Organization Type***: Colleges, Comprehensive Schools Districts, Other Organization, Tech Center Districts.
2. **Organization***: type the first three letters of your organization name.
3. **Program Initiative***: Choose from the drop-down menu.

    a. Worksheet No. will automatically display after the ***Program Initiative*** is selected.

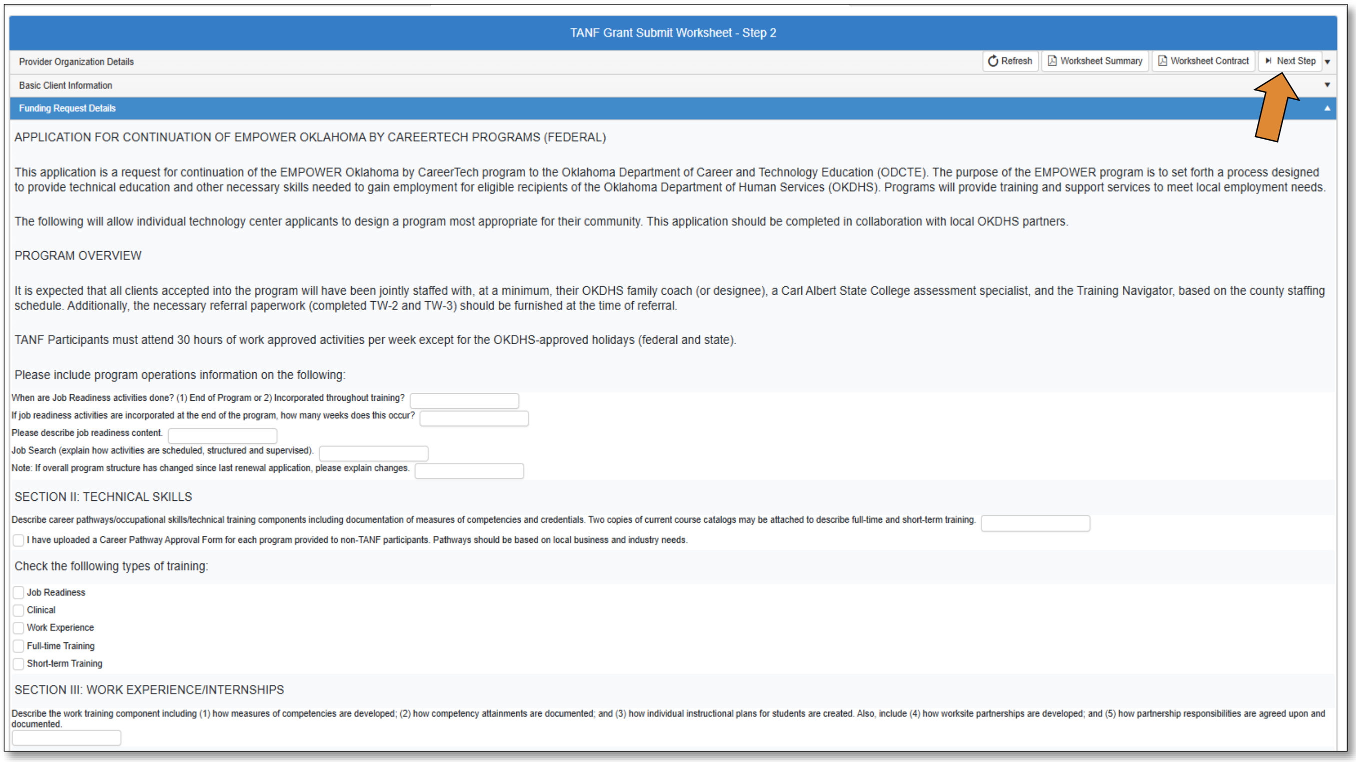
4. Verify that **Client Type*** is Business Masters (Company).
5. **Organization***: type the first three letters of your organization name. **This name should be the same as #2.* **Business Code***: is associated with the *Organization* and automatically displays after an organization is selected.

    After selecting the *Organization*, the bottom of the screen displays fields that are grayed out and cannot be changed. You can view the selected Organization's Business Master information that was previously entered in this area.

6. After verifying that all the information is correct, click the **Save & Next** button.



- Make sure the **Funding Request Details** form is open.
- Complete the form by clicking in the certifications boxes or entering the requested information. You <u>must</u> put something in every box that has a red asterisk (*).
- Verify your DUNS number and zip+4 for your physical address.
- There are some small, required check boxes you must check to certify the information.
- You will also need to provide your two-digit Congressional District code.
- Under the **Budget Narrative**, complete all sections identifying planned expenditures for each OCAS coding structure, identifying instructional and administrative costs.
- All job descriptions must be attached that are not coded 1000/100 (see Step 9).
  You can cut and paste from another document to fill in the boxes
- Hit **Save & Next**.



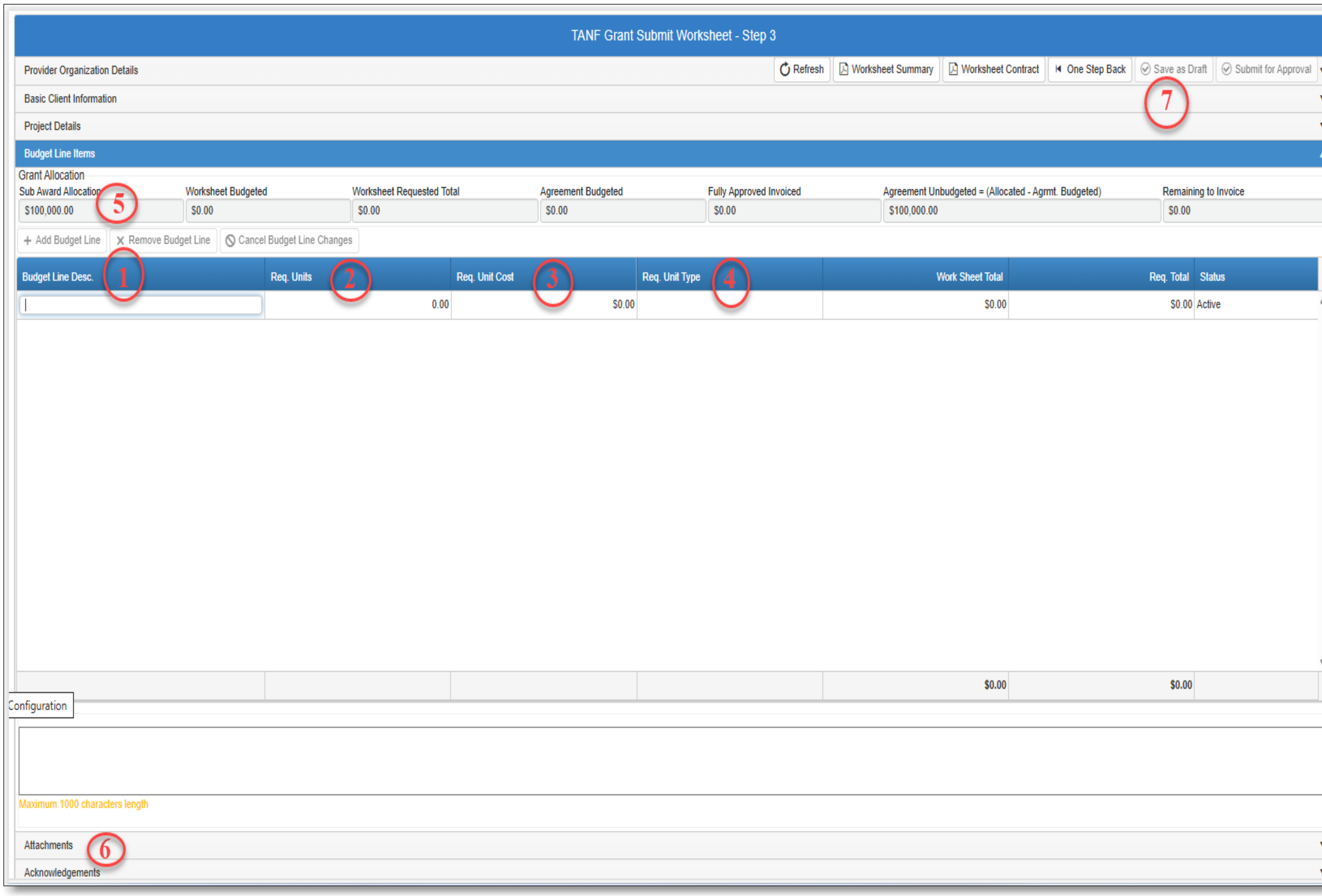
In the **Budget Line Items** screen, you can click the Add Budget Line, Remove Budget Line, or Cancel Budget Line Changes.

To add a Budget Line Item:

1. **Budget Line Desc** (Budget Line Description)
2. **Req. Units** (Required Units)
3. **Req. Unit Cost** (Required Unit Cost)
4. **Req. Unit Type** (Required Unit Type-Always select [***Cost Per Each***])
5. Click **+Add Budget Line** to add more budget lines and repeat steps 1-4.
6. Add supporting or required attachments by clicking on the **Attachments** tab.
7. 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 it 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 selecting the line and making the changes.

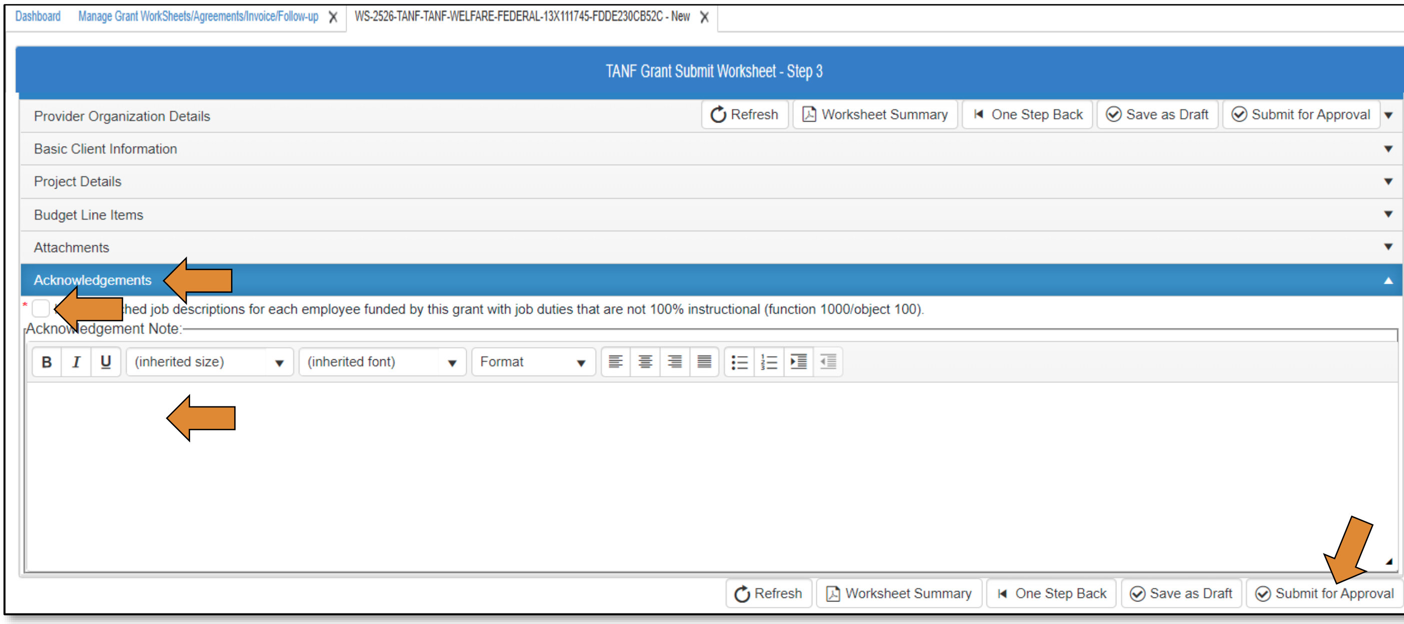
<u>Administrative Fee:</u>
Schools may charge an 8% administrative fee. It is meant to help offset finance, procurement, and human resource costs for the TANF grant.
There are two ways this can be claimed: 1) directly charging those costs to the grant not to exceed 8% of total program costs, or 2) claiming 8% of your total expenditures on each claim (recommended method). Option #2 does not require documentation. Both options require the provided coding to be used and submitted with each claim.

This is required to be put in the budget agreement. It may be coded as indirect cost 5400-900 or directly charged as 2330-100 / 200.
*There must be a budget line reflecting the indirect cost in the OCAS report.



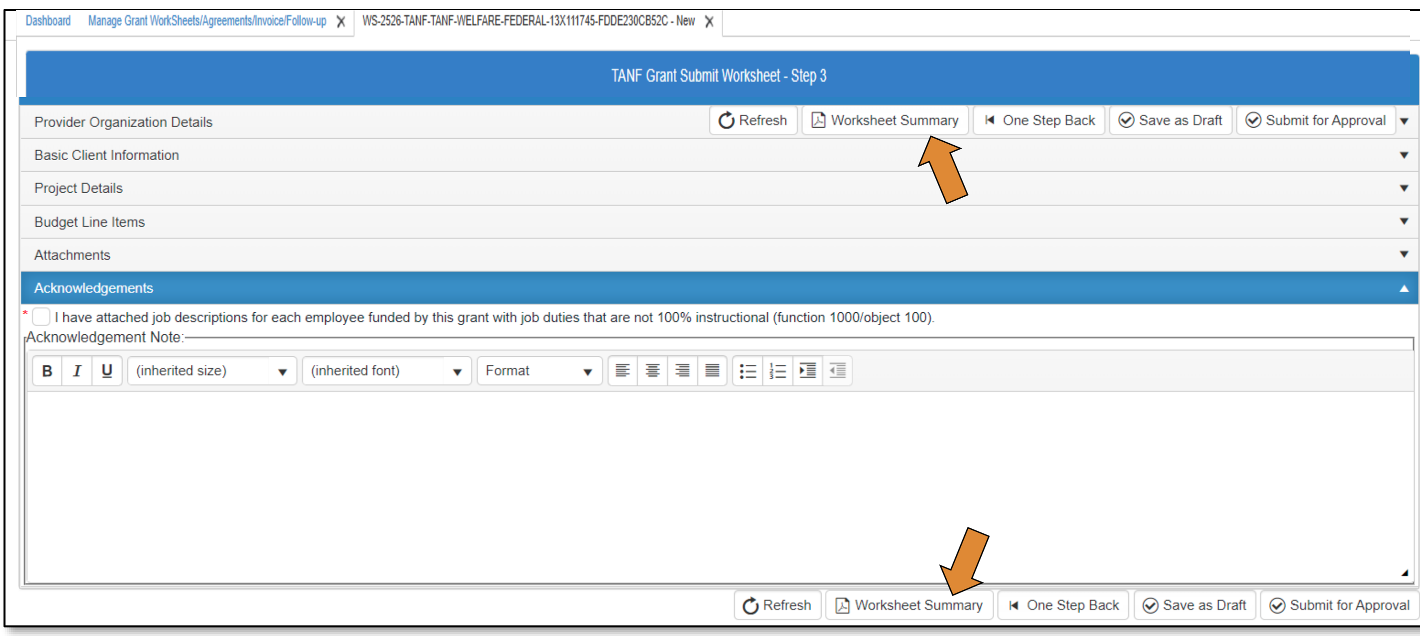
Acknowledgment

- Expand the Acknowledgments by clicking the word Acknowledgments.
- Check the box to confirm you have attached the documents needed.
- Add an **Acknowledgment Note***. *This field is required.*



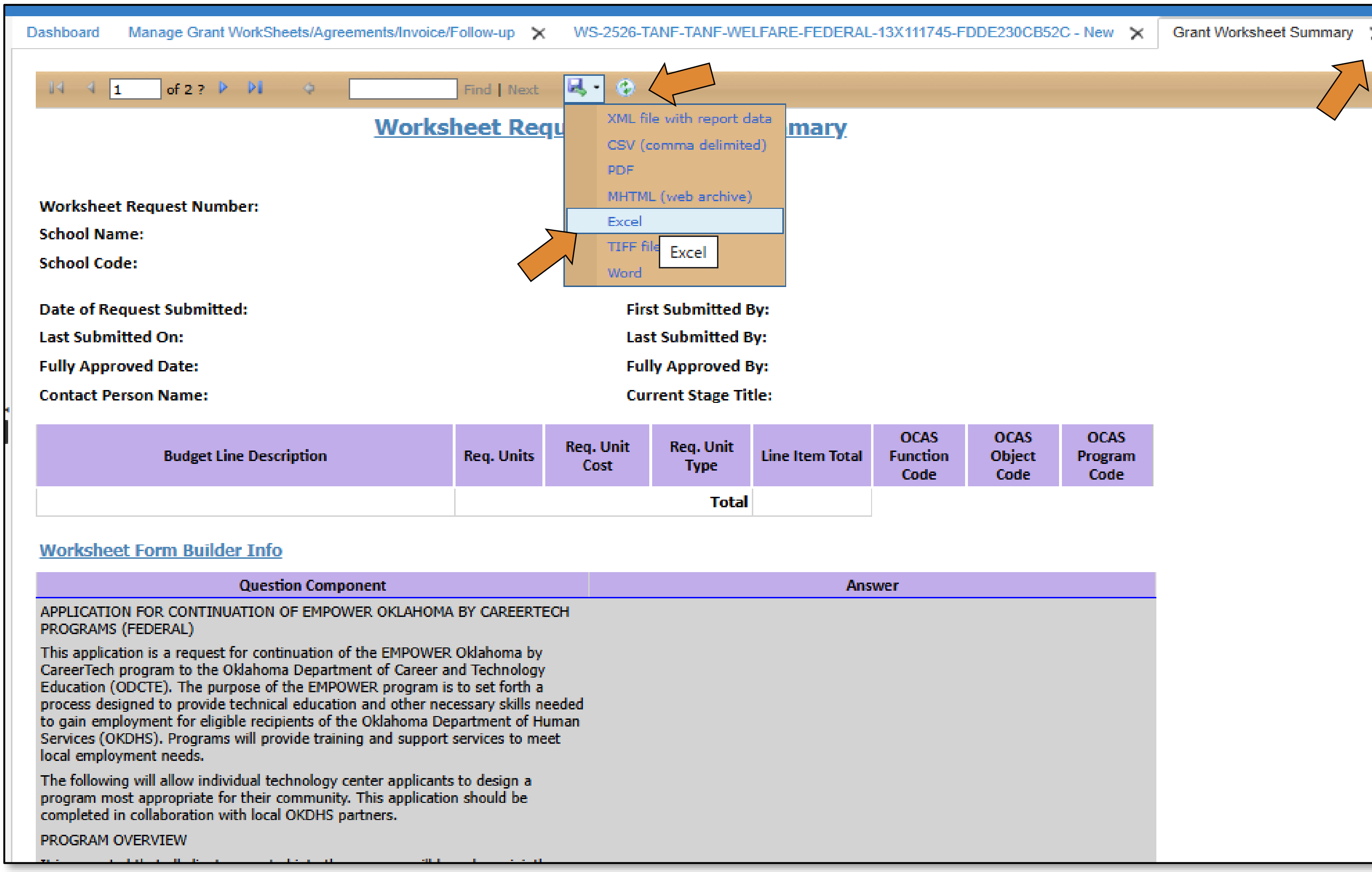
Worksheet Summary:

- You can view or print your worksheet summary page to review before submitting to ensure your worksheet/application is complete and accurate.



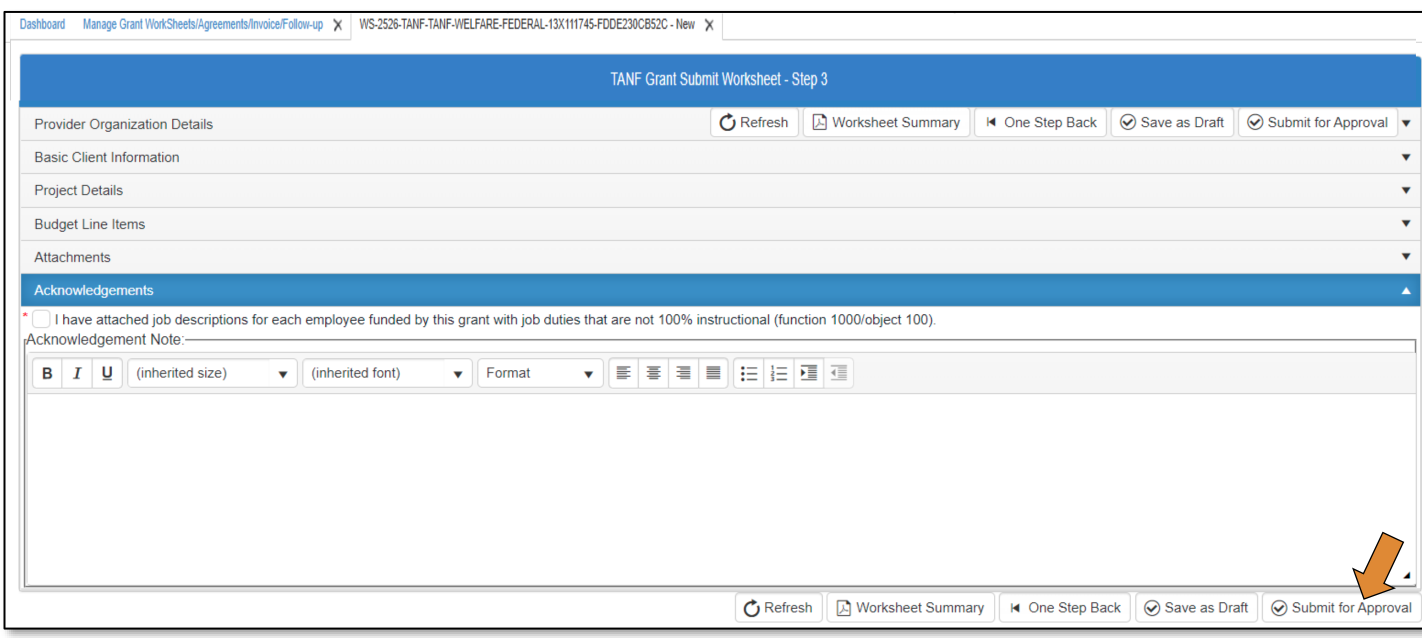
Print the Worksheet Summary:

- Click the save/download button to download a PDF that you can save or print.
- Click the X to close the **Grant Worksheet Summary** tab.



Submit the Worksheet:

- Click **Submit for Approval**.



At this point, your worksheet/application has been successfully submitted. You will receive an email stating your worksheet/application has been submitted successfully to the TANF Local Finance Coordinator.

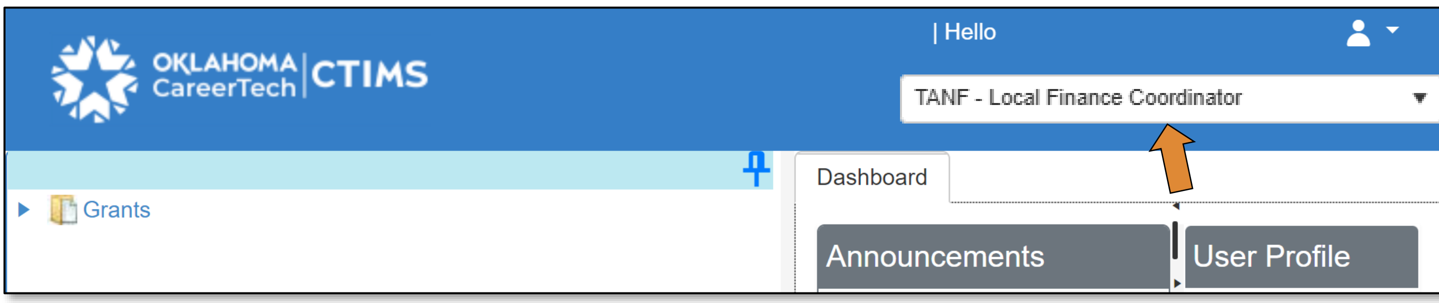
NOTE: After you submit the worksheet, if there are any changes, you will have to go through the **Change Request** process.

Stage 2 – Local Finance Coordinator

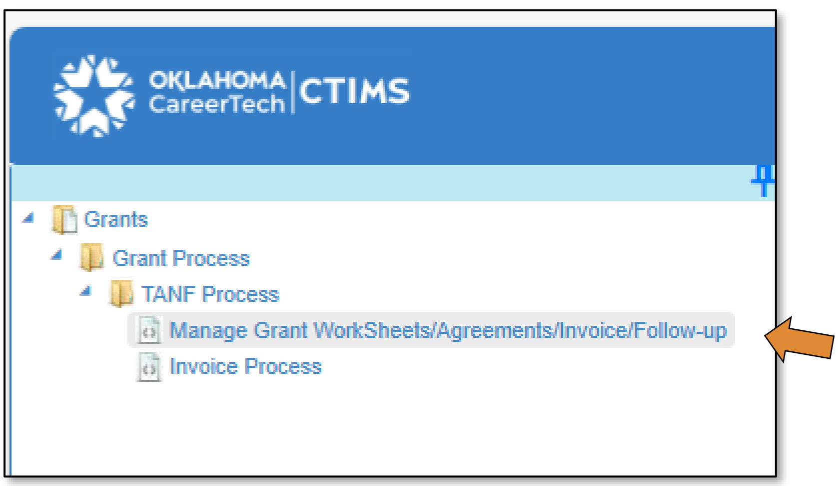
After the Local Initiative Coordinator has created and fully submitted the worksheet/application, the Local Finance Coordinator will receive an email from CTIMS letting them know they can sign in and review the worksheet/application to approve or reject. If the Local Finance Coordinator approves the worksheet/application, it will go to the TANF Local Superintendent/President to approve or reject using the same process.

Verify that you are signed in with the role of **TANF-Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **TANF-Local Finance Coordinator**, contact CTIMSSupport@careertech.ok.gov



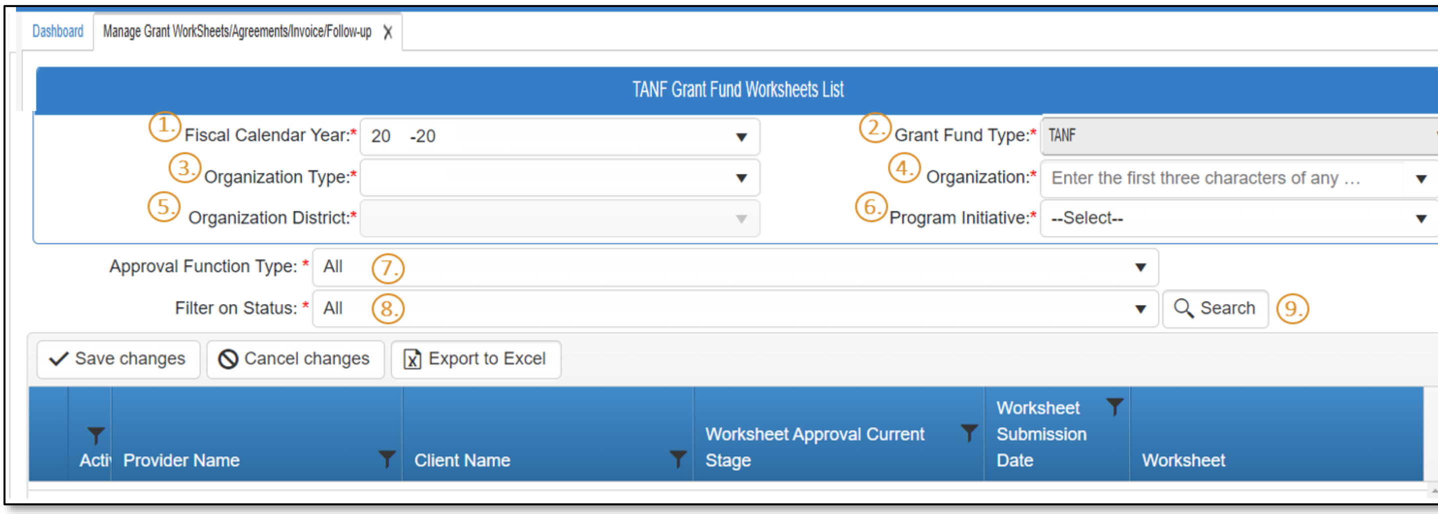
- Click the arrows next to **Grants > Grant Process** > **TANF Process**.
- Click on the **Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



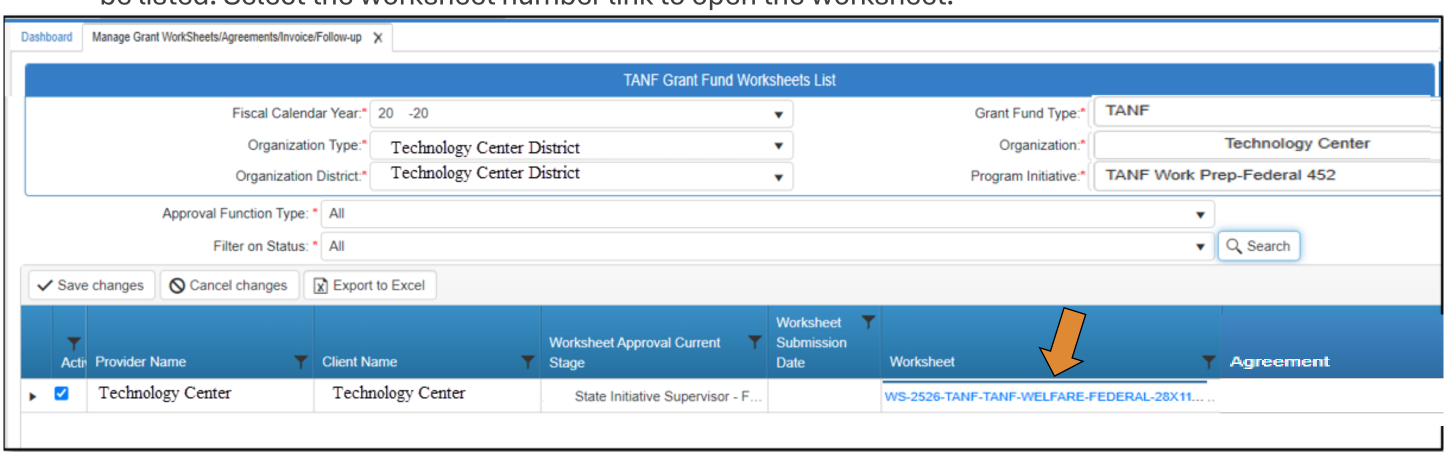
- Complete the **Manage Grant Worksheets/Agreements/Invoice/Follow-up** form. **The tagged numbers on the screenshot correspond to the instruction steps below.**

NOTE: The red asterisks* represent a required field.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type*** is set to TANF.
3. Select your correct **Organization Type*** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the organization.
5. Verify the **Organization District*** is the district for the Organization.
6. Select a **Program Initiative*** from the drop-down menu.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Click the **Search** button.

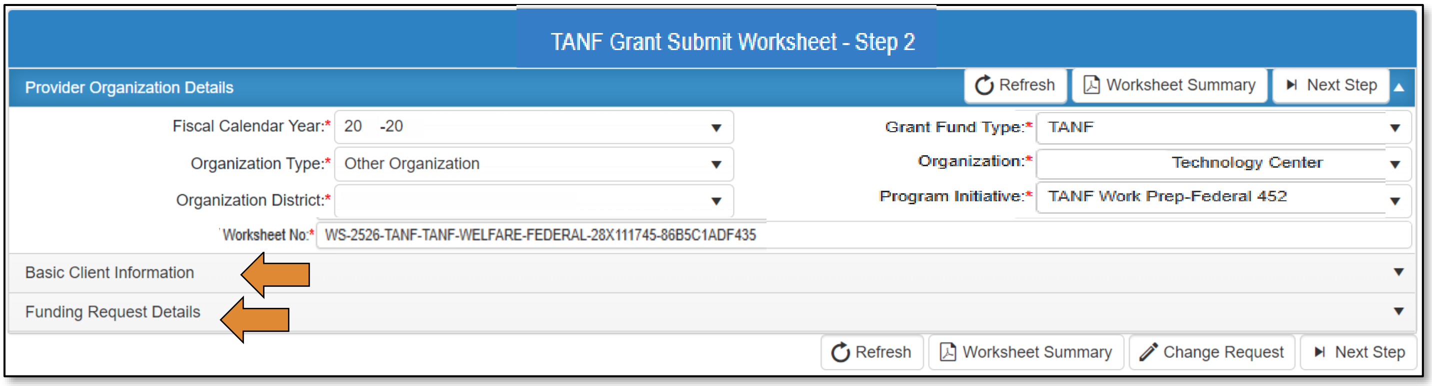


- After clicking the **Search** button, the worksheet/application that needs to be verified and approved will be listed. Select the worksheet number link to open the worksheet.



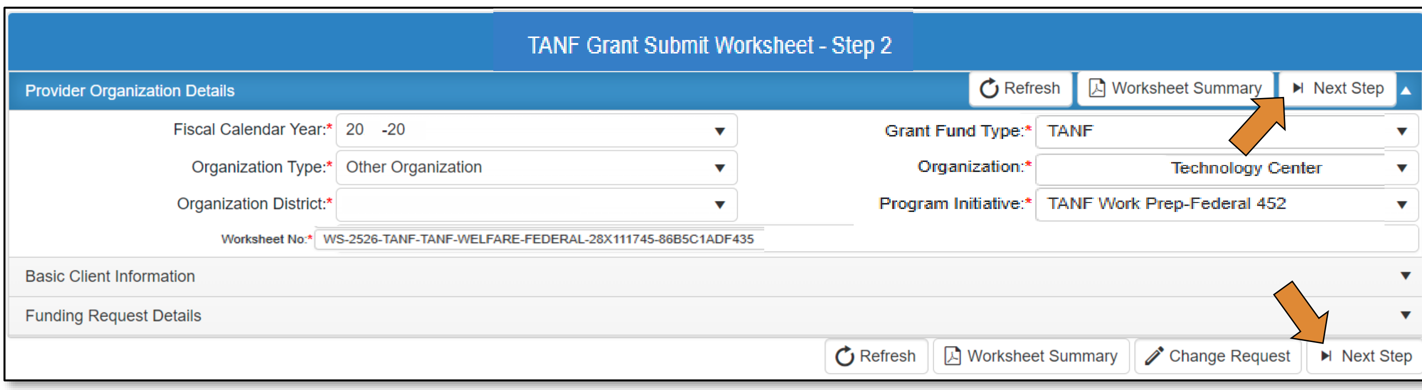
TANF Grant Submit Worksheet

- Open each section of the worksheet by clicking each row. Verify the contents of each section of the worksheet. *We recommend printing a PDF of the worksheet summary to assist with project and budget verification.*



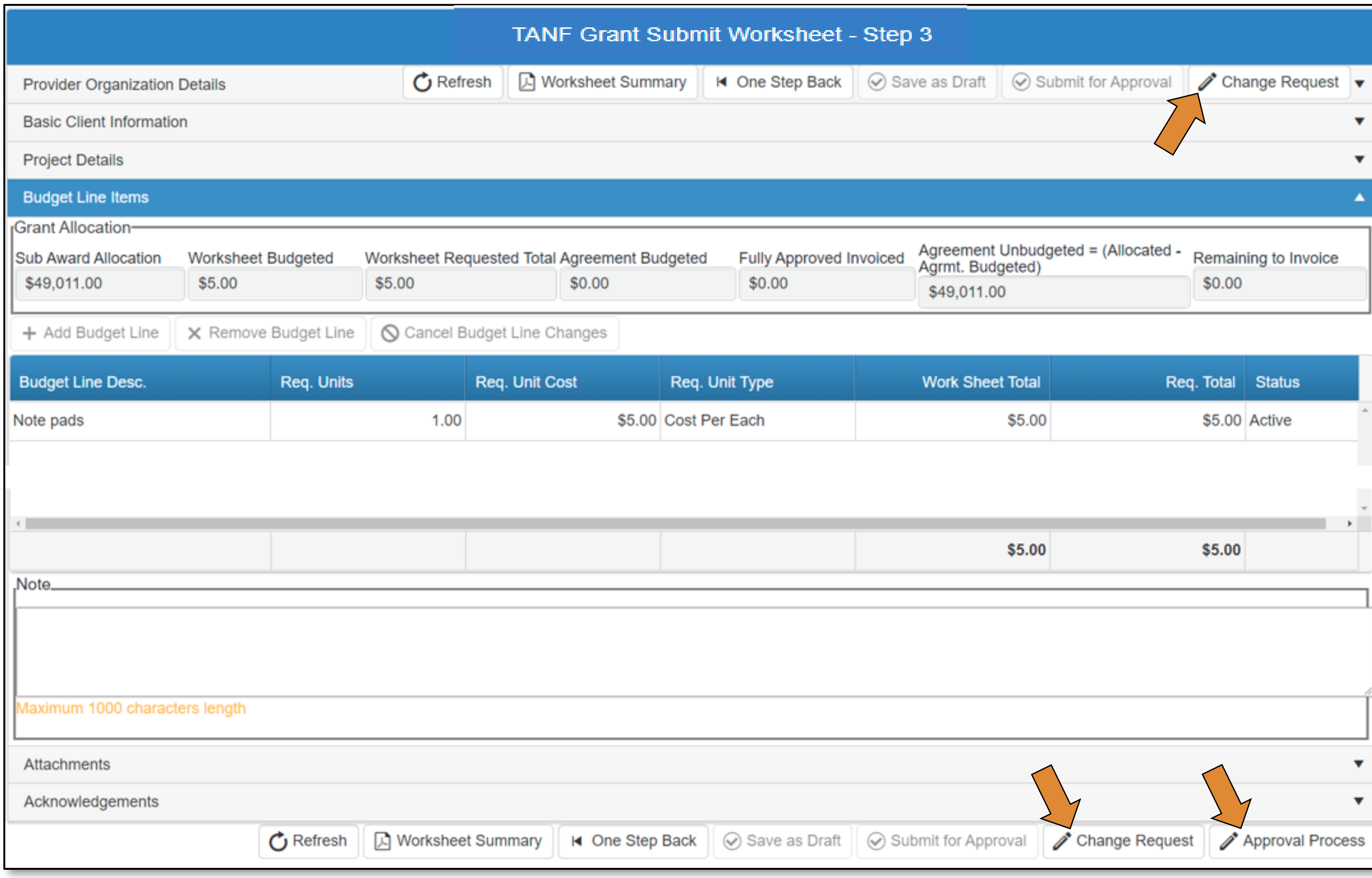
TANF Grant Submit Worksheet

- Click **Next Step**.



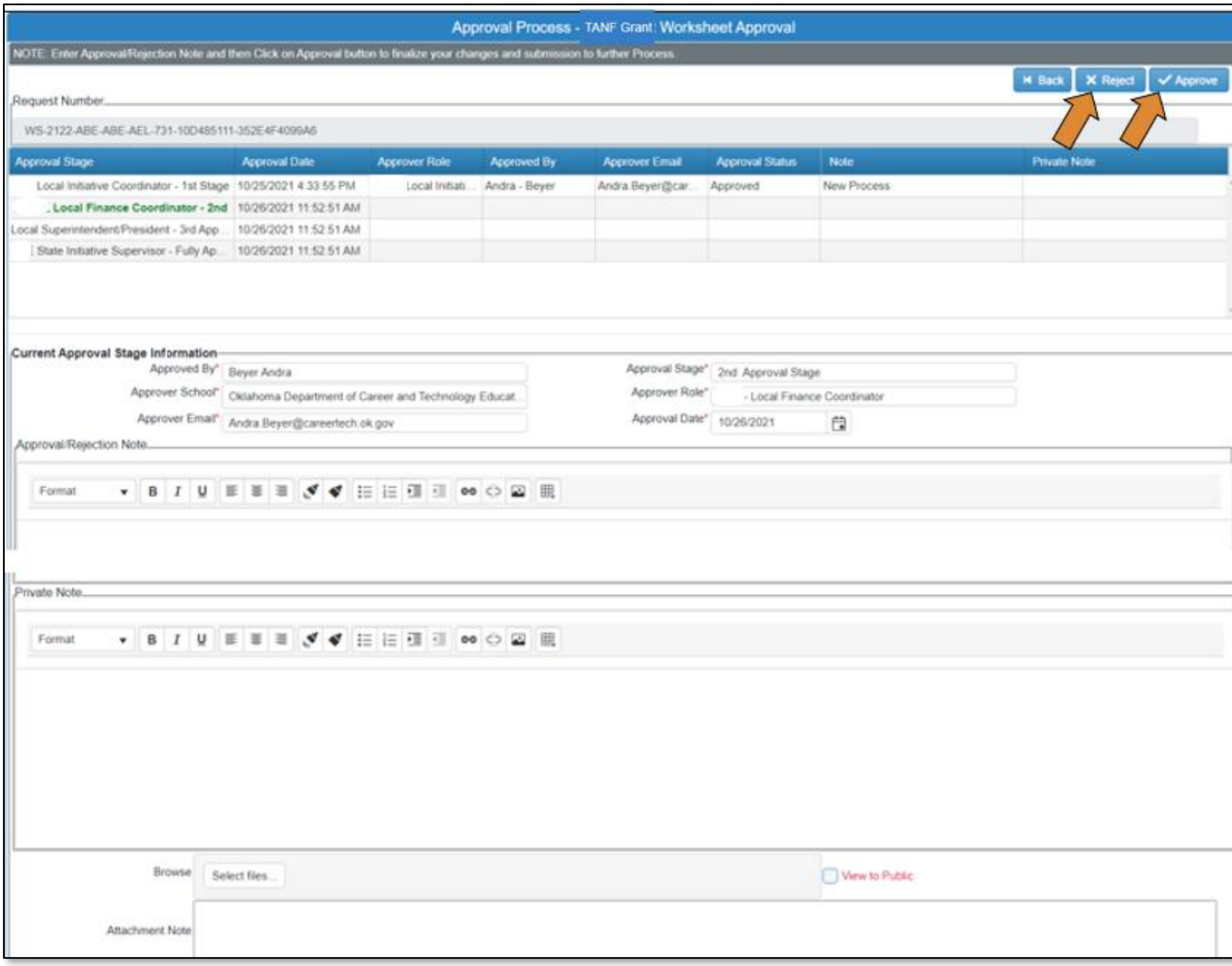
TANF Grant Submit Worksheet

- Verify the information in the budget is correct. If you need to make a change, select **Change Request**, and follow the instructions to make the changes.
- If the budget is correct, click **Approval Process.**



Approval Process - TANF Grant Worksheet Approval

- At this point, you can see that the worksheet/application is at the Local Finance Coordinator Stage (2nd Stage). Click the **Reject** button to reject the worksheet/application (A rejection note is required) or click the **Approve** button to approve the worksheet/application. After selecting the Reject or Approve button, the system will ask, "Are you sure?" Click **cancel** or **ok**. If ok, the application has been successfully approved or rejected. At this point, an email will be sent to you, informing you of the necessary corrections or confirming that it has been approved.



Stage 3 – TANF Superintendent/President

The steps are the same as those for the TANF Local Finance Coordinator above: After the TANF Local Finance Coordinator approves the worksheet/application, the TANF Superintendent/President will receive an email indicating that the worksheet/application is ready for review. They will follow the same steps outlined above, using the role of TANF Local Superintendent/President in Step 2 and proceeding through each step.

At this point, your worksheet/application is submitted. You will receive an email stating your worksheet/application has been submitted successfully to the TANF State Staff for review.

Stage 4 - TANF State Initiative Supervisor

The steps are the same as those for the TANF Local Finance Coordinator above: The review and approval or rejection process continues using the steps outlined above for the **TANF State Initiative Supervisor.** After the worksheet/application is approved by the TANF State Initiative Supervisor, the **Agreement Approval Process** begins.

Change Request (Worksheet)

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

IMPORTANT: Once a change request is initiated by a user, it must be completed by the same user. Change Requests are author-based, not role-based.

Change Request Approval Process

Stage 1 - TANF Local Initiative Coordinator – Creates, completes, saves, and submits new worksheet.

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

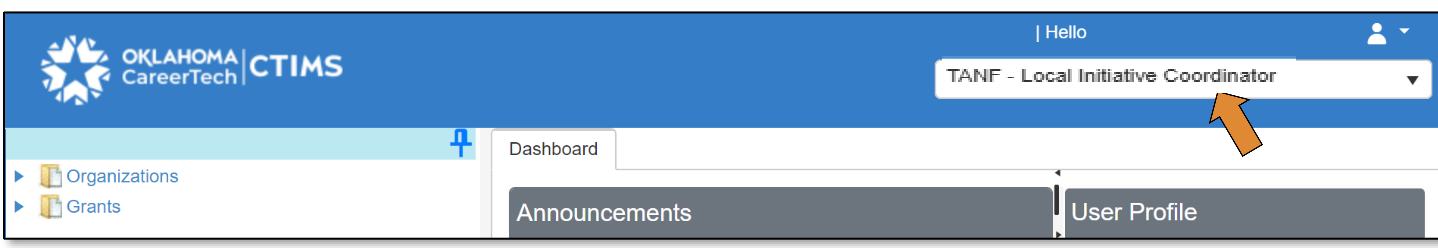
Stage 3 - TANF Superintendent/President – 2nd Approval. Reviews and approves or rejects the worksheet. If approved, goes to State approval stage. If rejected, it goes back to stage 1.

Stage 4 – TANF State Initiative Supervisor –. Final Approval. After the worksheet is approved through Stage 4, the Agreement Process begins with the TANF Local Finance Coordinator

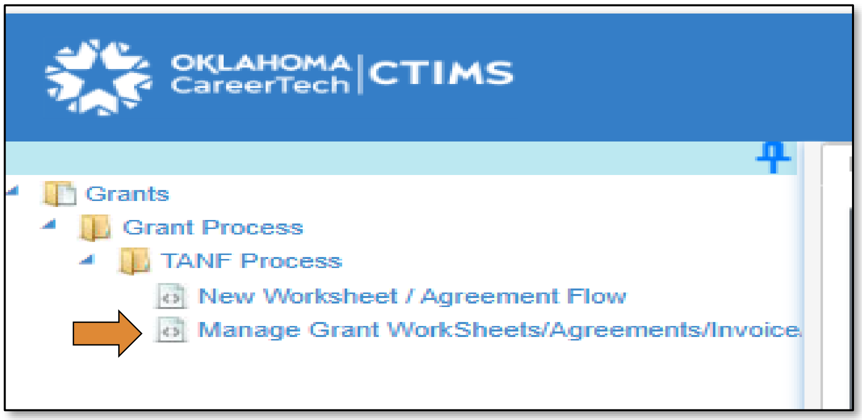
Stage 1: Local Initiative Coordinator

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

If you do not see **TANF-Local Initiative Coordinator**, contact CTIMSSupport@careertech.ok.gov



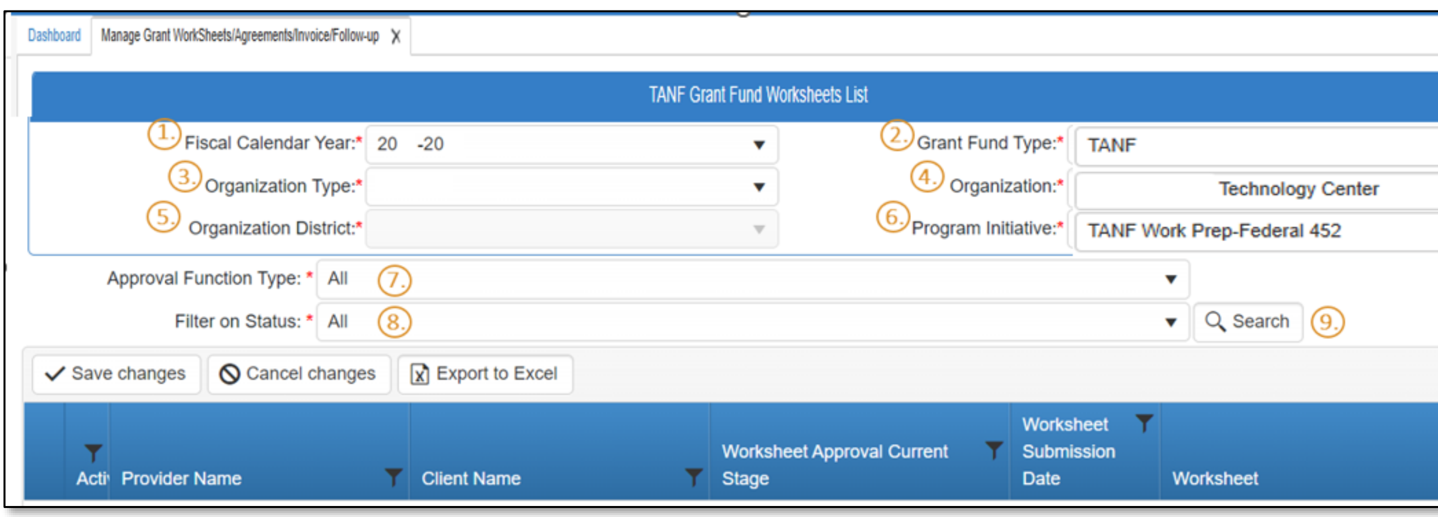
- Click the arrows next to **Grants > Grant Process** > **TANF Process**.
- Click on the **Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



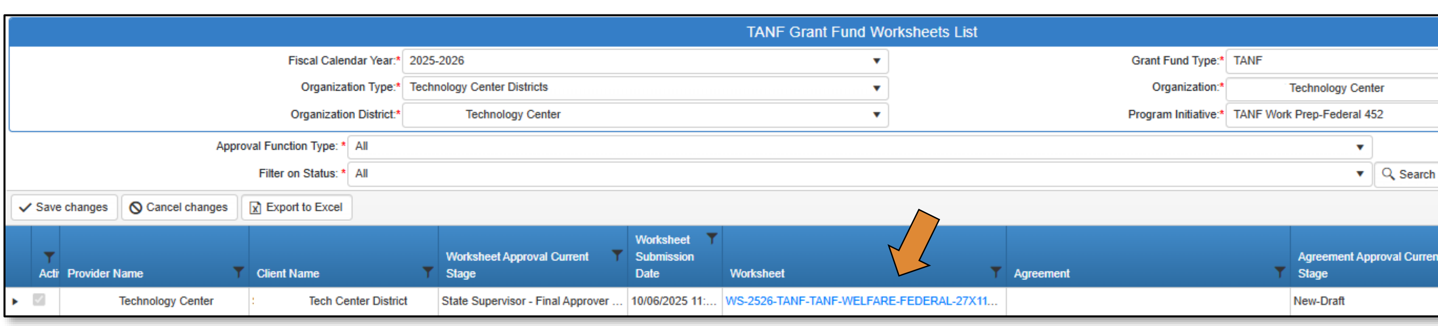
Complete the requested information on this screen. **The tagged numbers on the screenshot correspond to the instruction steps below.**

NOTE: The red asterisks* represent a required field.

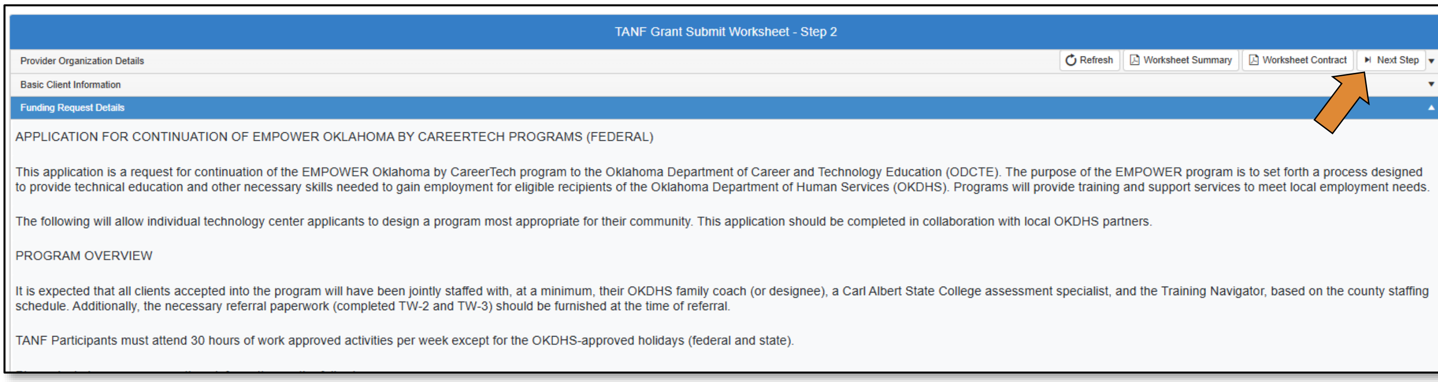
1. Verify **Fiscal Calendar Year*** to make sure the correct year is showing.
2. Verify **Grant Fund Type*** is set to TANF.
3. Select your correct **Organization Type*** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District***.
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.



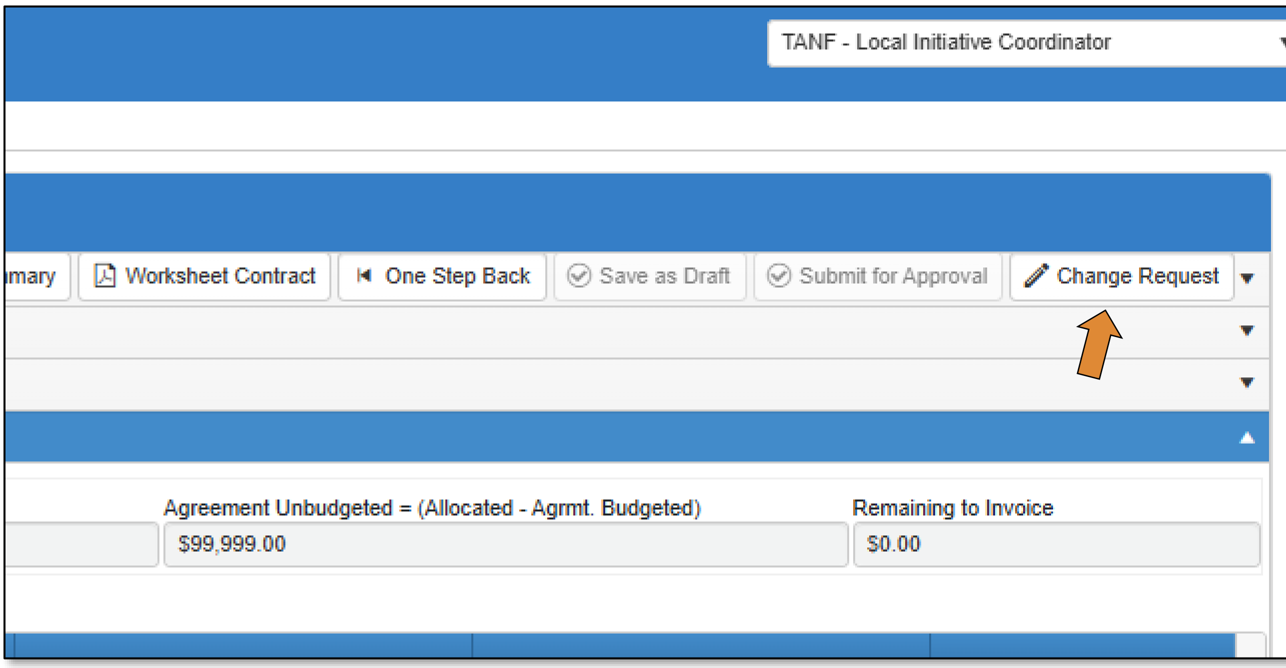
After clicking the **Search** button, the worksheets/applications that are in the approval process will be listed. Select the worksheet number to open it.



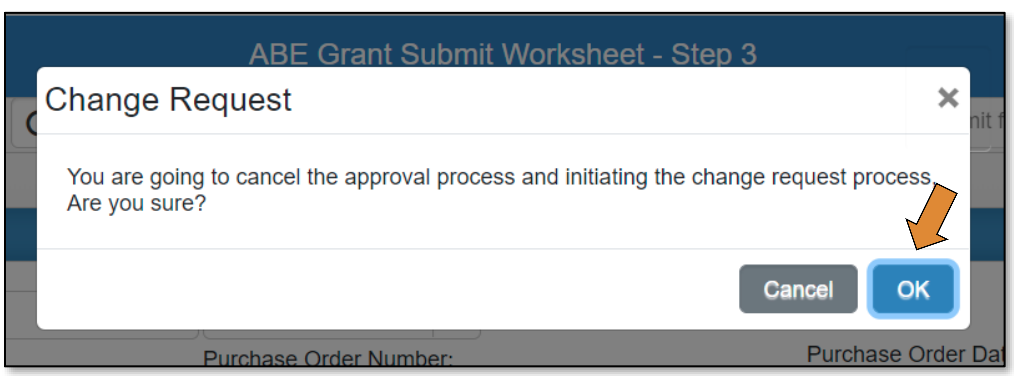
- Click **Next Step**.



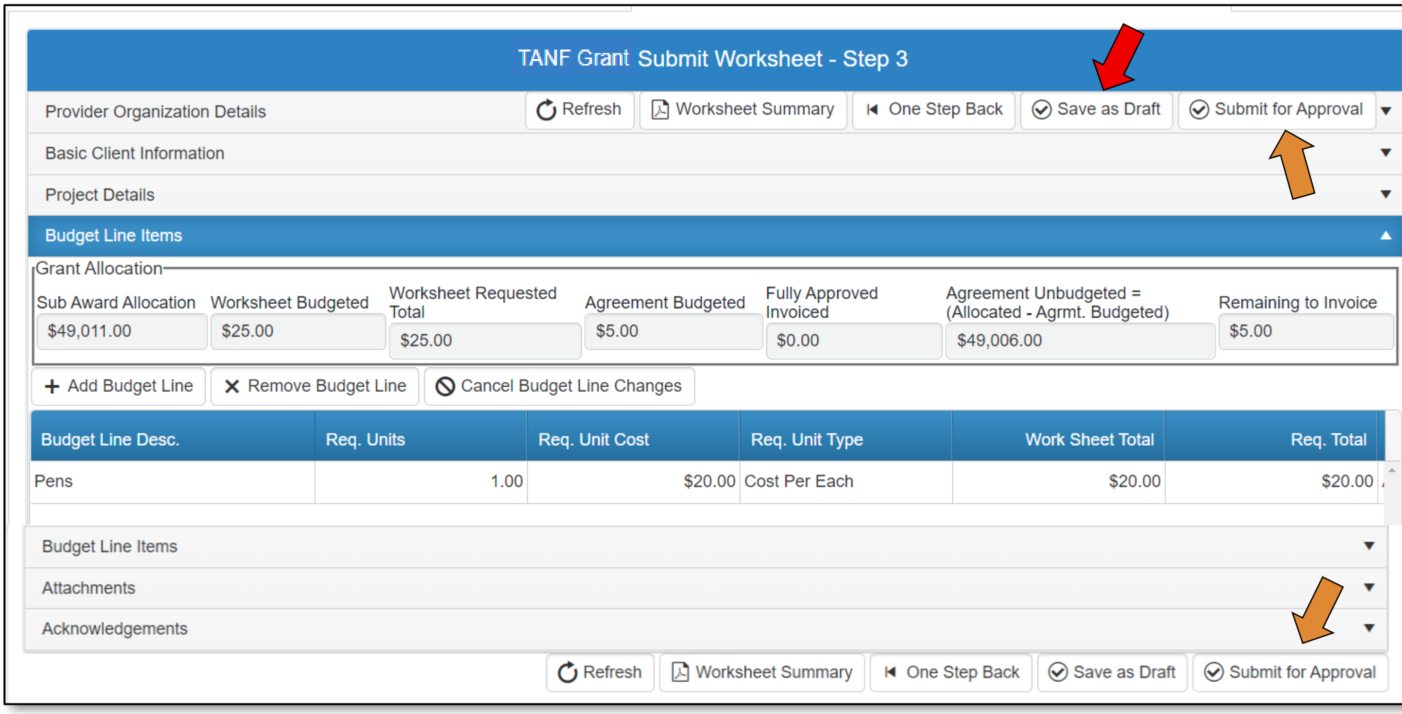
- To make changes to your Worksheet/Application or Budget, select **Change Request**.



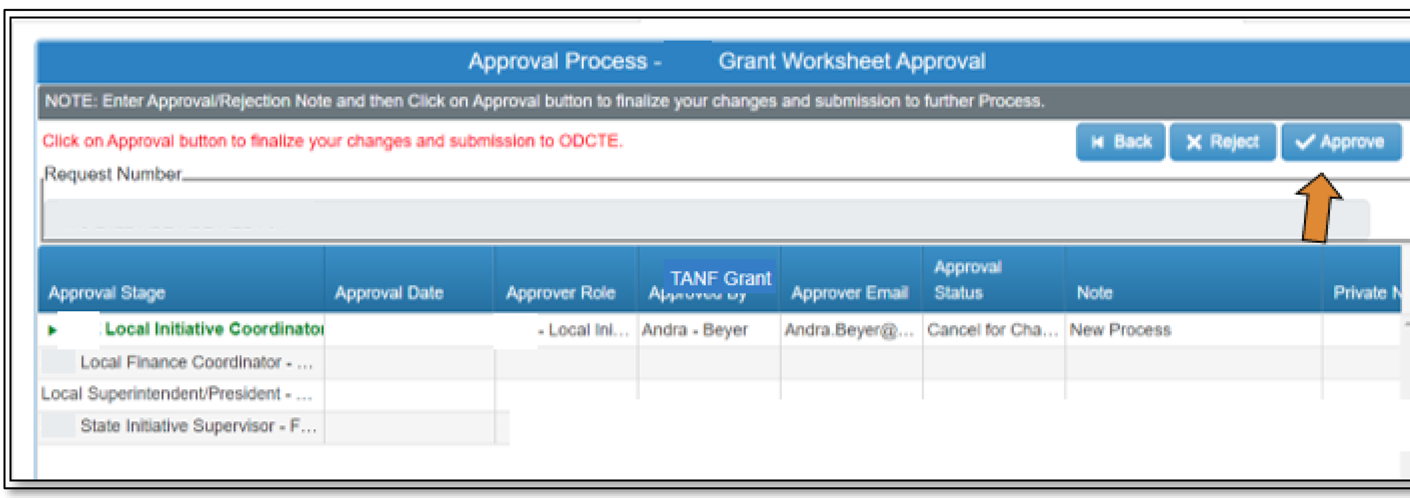
- The **Change Request** process cancels the worksheet/application approval process.
- Click **OK** to continue.



- You can now make changes to the worksheets or budget items.
- After making the changes, click the **Save as Draft button.**
- Once the worksheet is saved as a draft, you can resubmit it by hitting **Submit for Approval**.



- Select **Approve** to send changes to the next approval level.



*After the worksheet is approved and an agreement is started, you **cannot** make changes to the worksheet; only the agreement. *

IMPORTANT: Once a change request is initiated by a user, it must be completed by the same user. Change Requests are author-based, not role-based.

Stage 2-4: TANF Local Finance Coordinator- TANF Superintendent/President- TANF State Initiative Supervisor