Agreement Process

Roles for the Agreement Process:

FLA Local Finance Coordinator



FLA State Initiative Supervisor

After the **Worksheet** is approved through the ODCTE Contract Reviewer level, the <u>Grant</u> <u>recipient</u> 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.

OKLAHOMA CTIMS		Friday, October 3	21, 2022 9:24 AM Helio Debbis Handburgsarcenedi ok got 💄 👻
P Grants	Dashboard		
	Announcements	User Profile	
	Calendar Year 2022-2023	Name	Oklahoma Department of Career and Technology Education
	CESI Dua by October 21, 2022 & Follow Lip Dua by Neyamber 20, 2022	Short Name	ODCTE
	CLSI Due by October 51, 2022 & Politow-Op Due by November 50, 2022	Organization Code	601000000

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

Grants	Dashboard
U	Announcements
	Calendar Year 2022-2023
	CESI Due by October 31, 2022 & Follow-Up Due by

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

₽ Grants	Dashboard
Grant Process	Announcements
	Calendar Year 2022-2023
	CESI Due by October 31, 2022 & Follow-Up Due by

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

🕇 👔 Grants	Dashboard
Grant Process	Announcements
	Calendar Year 2022-2023
	CESI Due by October 31, 2022 & Follow-Up Due by November 30,
	K-12 Schools Due Dates
	K-12 Salary & Scheduling: September 30

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

OKLAHOMA CareerTech	
<u>ዋ</u>	Dashboard
Grants	
 Grant Process 	Announcements
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FLA Manage Grant WorkShee	Calendar Year 2022-2023
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	K-12 Schools Due Dates

Step 7: Complete these items in the **FLA Grant Fund Worksheets List**. <u>*The tagged*</u> <u>*numbers on the screen shot correspond to the instruction steps below*</u>. 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.

					Tuesday, C	clober 18, 202 1 22 PM Helio Debbie Hamb	e@careerlech.ck.govf 🛓 I Finance Coordinator
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Grant Process				FLA Grant Fund Worksheel	is List		
FLA Process FLA Wanage Grant WorkShee		1. Fiscal Calendar V	ear.* 2022-2023		2. Grant Fund Type	RA .	
RLA Invoice Process		3. Organization T	pe* College District		4. Organization	State College District	,
		5. Organization Dist	nd:* State College District		6. Program Indiative	-Select-	,
	7.	Approval Function Type * A				* 9.	
		8. Filter on Status * A				Q Search	
	✓ Save changes	Cancel changes 😨 Ex	of to Eicel				
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Step 8: After clicking the Search button, the **Agreement** column will display **New**. To start a new Agreement, click on the blue word "**New**".

VIS Information Management System						FLA-Local Finance Coordinator
hboard FLA Manage Grant WorkSheet	ets/Agreements/Invoice/Fo	illow-up 🗙				
			FLA Grant Fund	Norksheets List		
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Irganization District:*	Your Orga	nization District (Auto Fills)		, Program Initiative:*	Your Program Initiative	•
proval Function Type: *	All				•	
er on Status: *	All				• Q S	earch
Save changes	Export to Excel					
Y Act Provider Name Y	lient Name	Worksheet Approval	Worksheet ¥ Submission Date V	/orksheet	Agreement	Agreement Approval
Vour School Name You	our School Name	This stage is approving for	11/01/201 V	/S-1920-FLA-FLA-CPTCTW-429-22X(11	New	New-Draft

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

ion Details			🖒 Refresh 🗋 Agreement Sum	mary + Save as [Draft 🛛 😔 Submit For Appr
ation					
1					
n Worksheet Budgeted	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Al	located - Agrmt.	Remaining to Invoice
\$38,879.00	\$38,879.00	\$24,260.07	\$0.00 \$14,618.93		\$14,618.93
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Budget Line Detail Information					
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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.

career tech FLA-Local Finance Coordinator CTIMS ... **FLA Grant Agreemen** · Crants C Retresh 🖸 Agreement Su 4 IL Grant Process Provider Organization Details + EFLA Process FLA Mar Basic Client Information **Project Details** Budget Line Items Grant Allocation Sub Award Allocation Workshauf Br Fully Approved Invoiced Agreement Unbudgeted = (Allocated ing to low mt. Budge \$17,457.00 \$17,457.00 \$17,457.00 \$5,854.76 \$11,602.24 \$0.00 Budget Line(s) Budget Line Detail Infor + Add Budget Line X Remove Budget Line 🚫 Cancel Budget Line Changes Unit Cost Res Unit T 2330-100-339 Administrator Salary 1 \$500.00 Cost Per Each \$500.00 2330-200-339 Administrator Benefits 1 \$124.78 Cost Per Each \$124.78

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 Grant Agreement
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understand that approval of budget adjustments is at the discretion of the	ODCTE - Carl Periors Administration and approval is not guaranteed. I certify that any submitted budget adjustments will be a
inderstand that approval of to operativity of the discretion of the alignment with our submitted Application.	DOCTE - Call Pendis Administration and approval is not guaranteed. I certify that any submitted bulget adjustments will be a

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**.