CareerTech
Information Management System
(CTIMS)

EDI
Complete User Guidebook

IMD (Information Management Division)
career tech

March 2022
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**IMPORTANT:** For questions about specific EDI requirements or what content you need to input or attach with your worksheet, contact your ODCTE Regional Coordinator.

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**CTIMS Support**

If you have questions about submitting information in CTIMS, please contact CTIMS Support at CTIMSSupport@careertech.ok.gov, or contact:

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# Approval Process Overview

## Worksheet Approval Stage (Stage 1)

<table>
<thead>
<tr>
<th>EDI Role</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Coordinator</td>
<td>Initiate the Worksheet Approval process. Budget is added here along with company information. Upload the Excel spreadsheet, as well as supporting documents (i.e. 3rd party vendor proposal).</td>
</tr>
<tr>
<td>State Regional Coordinator</td>
<td>Approve the budget and line items and confirm company information is entered completely.</td>
</tr>
<tr>
<td>State Initiative Supervisor</td>
<td>Approve the budget and line items. The Worksheet becomes fully approved.</td>
</tr>
</tbody>
</table>

## Agreement Approval Stage (Stage 2)

<table>
<thead>
<tr>
<th>EDI Role</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Coordinator</td>
<td>Initiate the Agreement approval process. (No changes should need to be made.)</td>
</tr>
<tr>
<td>Local BIS Director</td>
<td>Approve the Agreement</td>
</tr>
<tr>
<td>State Regional Coordinator</td>
<td>Approve the Agreement. The approval will generate a signature on the SOU.</td>
</tr>
<tr>
<td>State Initiative Supervisor</td>
<td>Approve the Agreement. The approval will generate a signature on the SOU.</td>
</tr>
<tr>
<td>Local Superintendent/CEO (or designee)</td>
<td>Approve the Agreement. The approval will generate a signature on the SOU.</td>
</tr>
<tr>
<td>State Requisition Coordinator</td>
<td>Generate the SOU, submit the requisition to finance, enter the PO number into the Agreement.</td>
</tr>
<tr>
<td>Local Finance Coordinator</td>
<td>Enter OCAS codes and add new codes as needed. The Agreement becomes fully approved.</td>
</tr>
</tbody>
</table>
### Budget Adjustment Approval Stage (if Agreement changes are necessary)

<table>
<thead>
<tr>
<th>EDI Role</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Coordinator</td>
<td>Initiate the Budget Adjustment process. Budget is adjusted and/or new line items added here.</td>
</tr>
<tr>
<td>Local BIS Director</td>
<td>Approve the Budget Adjustment.</td>
</tr>
<tr>
<td>State Regional Coordinator</td>
<td>Approve the Budget Adjustment.</td>
</tr>
<tr>
<td>State Initiative Supervisor</td>
<td>Approve the Budget Adjustment.</td>
</tr>
<tr>
<td>Local Superintendent/CEO</td>
<td>Approve the Budget Adjustment.</td>
</tr>
<tr>
<td>State Requisition Coordinator</td>
<td>Verify the PO amount is still accurate. (if $ increased, then request finance increase the PO amount)</td>
</tr>
<tr>
<td>Local Finance Coordinator</td>
<td>Verify OCAS codes and add new codes as needed. The Budget Adjustment becomes fully approved.</td>
</tr>
</tbody>
</table>

### Invoice Approval Stage (Stage 3)

<table>
<thead>
<tr>
<th>EDI Role</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Coordinator</td>
<td>After training is complete, the EDI Local Coordinator initiates the invoice process.</td>
</tr>
<tr>
<td>Local BIS Director</td>
<td>Review and approve invoice line items and attachments.</td>
</tr>
<tr>
<td>Local Finance Coordinator</td>
<td>Review and approve invoice line items and attachments.</td>
</tr>
<tr>
<td>State Regional Coordinator</td>
<td>Review and approve invoice line items and attachments.</td>
</tr>
<tr>
<td>State Requisition Coordinator</td>
<td>Verify the invoices, print the documentation, and deliver to the finance department.</td>
</tr>
<tr>
<td>ODCTE EDI Finance Reviewer</td>
<td>Review and approve the invoice and documentation. The invoice becomes fully approved. Pay the claim.</td>
</tr>
</tbody>
</table>
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 CTIMS Helpful Hints section of this document.

**IMPORTANT:**

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

**CTIMS Customer Support Contact**

Rebecca Thacker  
Phone: 405-743-5134  
CTIMSSupport@careertech.ok.gov
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 the CTIMS tab.
On the IMD website, select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance

- Click here to login to CTIMS:

  - Microsoft Edge, Mozilla Firefox, or Google Chrome are currently the only browsers compatible with CTIMS.

  - [Setting up your CTIMS Account](#)

  - For help with CTIMS, contact the Information Management Division via email: [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)

  - Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00
Worksheet Process
Worksheet Process Flow

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 with the company information. The mandatory Excel spreadsheet is uploaded.

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, the worksheet goes to the EDI State Supervisor stage. If rejected, it goes back to stage 1.

Stage 3 – State Initiative Supervisor - 3rd Approval. ODCTE state staff review and approve or reject the worksheet. If approved, this completes the Worksheet approval. If rejected, goes back to 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 into CTIMS using Internet Explorer version 11 or higher or Microsoft Edge. 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 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**.
EDI Grant Submit Worksheet – Step 1

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](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. If the organization is not available on the drop-down menu, you will need to reactivate or request a new business code. To reactivate or request a new business code, refer to the Business Code section of this document found [here](#).

12. After verifying that all information is correct, Click **Save & Next** button.
NOTE: A red asterisk (*) on the form indicates a required field.

IMPORTANT: You must select an organization under the Basic Information for Work Sheet section before the Save & Next button will be available. The information in the form below the Client Basic Information for Work Sheet section is not a fillable form. You do not need to complete any of this information.
EDI Grant Submit Worksheet – Step 2

2.1 - Verify the client information on the EDI Grant Submit Worksheet – Step 2 Page. Expand the Provider Organization Details section by clicking on the + (plus) sign if it is not already visible.

2.2 - Verify the Basic Client Information. Expand the Basic Client Information section by clicking on the + (plus) sign.

2.3 – Expand the Funding Request Details section by clicking on the + (plus) sign.
2.4 – Scroll down to access and complete all the sections. You must put something in every box with a red asterisk (*). This form is different for each initiative. After you complete the form, click the **Worksheet Summary** button to print a pdf of your worksheet.

![Worksheet Image]

2.5 – Click the **Save & Next** button at the top or bottom of the form.

![Form Image]

**NOTE:** You can click the **Worksheet Summary** button at the top or bottom of the form to view the Worksheet details before going to the next step.

**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.
FORM EXAMPLES:

TIP & TIG Worksheet:

Firefighter Training Worksheet:
New Safety Worksheet:

Economic Development – Incubator Worksheet:
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 if it is not automatically expanded. 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 item. Just click in the blank box under the column 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 the drop-down menu.
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 all columns).
3.2 - Type a **Note** in the space below the line item budget area if needed.

3.3 - Add supporting or required attachments. Expand the **Attachments** section by clicking the (+) sign. 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.

3.4 - You can add a note for the attachment after it has been uploaded by clicking the field for **Attachment Note**.

**To save as Draft**
You can **Save as Draft** at this point and it will save all information you have input on the **Funding Request Details** form and the **Budget Line Items** section 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 - Acknowledgements

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

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 at the top or bottom of the form. Be sure to Save as Draft before viewing the Worksheet Summary.
• To print the **Worksheet Summary**, click the save icon and choose Excel or PDF from the drop-down menu to download a document that you can save or print. To return to the EDI Grant Submit Worksheet – Step 3 form to submit for approval, click the on the Grant Worksheet Summary tab at the top of your screen.

4.2 – On the **EDI Grant Submit Worksheet – Step 3** form, click the **Submit for Approval** button at the top or bottom of the form.

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

**If Change Request is needed:** After you submit the worksheet/application, if there are any changes needed due to change in training need or it has been rejected, you will have to use the **Change Request** process. The Local Coordinator can initiate the change request process at any time before it is fully approved by the ODCTE staff. You can find complete instructions on here.

**IMPORTANT:** If you do need to do a **Change Request**, do not select the EDI New Worksheet/Agreement Flow option on the left navigation. This will start a completely new worksheet.
State Regional Coordinator

After the Local Coordinator has created and submitted the worksheet, the State Regional Coordinator will receive an email to review the worksheet and budget to approve or reject.

Signing in & Opening the Worksheet

**IMPORTANT:** Please log into CTIMS using Internet Explorer version 11 or higher or Microsoft Edge. 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.

- 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 Worksheets/Agreements/Invoice/Follow-up 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 for all schools. Click Search to display all in the display screen.
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. This should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the technology center 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.

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

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).
EDI Grant Submit Worksheet

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.

![Diagram showing Worksheet - Stage 2 - State Regional Coordinator](image)

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

![Diagram showing Worksheet - Stage 2 - State Regional Coordinator](image)

**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.

![Diagram showing Worksheet - Stage 2 - State Regional Coordinator](image)
EDI Grant Submit Worksheet – Budget Line Items

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

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.

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.
EDI State Initiative Supervisor
See instructions for Regional Coordinator here
Change Request Process
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. The Local Coordinator, State Regional Coordinator, and State Supervisor can initiate the change request at any time during the Worksheet process. However, once the Worksheet is fully approved, a change request is no longer an option.

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

![CTIMS Sign-in Screen]

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

- Verify that you are signed in with the role of an EDI Local Coordinator, State Regional Coordinator, or State Supervisor. In the top right corner. Use the drop-down arrow to select your role.

![CTIMS Role Selection Screen]
• 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

**IMPORTANT**: Do not select the EDI New Worksheet/Agreement Flow option on the left navigation. This will start a completely new worksheet.
1. Verify Fiscal Calendar Year* to make sure the 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 the 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 the worksheet/application that needs changed.

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

1.2 - To make changes to your Worksheet/Application or Budget, select Change Request.
1.3 - The Change Request process will cancel the worksheet/application approval process. Click OK to continue.

1.4 – On the EDI Grant Submit Worksheet-Step 2 screen, click Save & Next.

1.5 - Expand the Project Details section by clicking on the + (plus) sign if changes to the Operating Unit or Purchase Order Number need to be revised.
1.6 - Expand the **Budget Line Items** section by clicking on the + (plus) sign to revise the budget.

- Change the budget line description by clicking in the field under the **Budget Line Desc.** column.
- Change the **Req. Units, Req. Unit Cost,** and/or the **Req. Unit Type** columns to adjust the budget line items. This will change the Total columns.
- To make a budget line item inactive, click inside the field under the **Status** column to check the box.
1.7 - After making the changes to the **Project Details** and **Budget Line Items** sections, go to the **Acknowledgement** section and check the certification box and add an acknowledgment note. The **Acknowledgment Note** is a required field. You can add your initials if you do not have a note to add.

**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 summiting to the next approval stage, so you can return and finish at a later time.

1.8 - Select **Submit for Approval** if the changes to the Worksheet are complete.
1.9 - Click OK.

1.10 - Select Approve to send changes to next approval stage.

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

The worksheet will go back through the regular approval process.
Agreement Process

career tech
Agreement Process Flow

The Agreement is the working copy of the Budget Line Items that contain 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.)

The Agreement can be started when the Local Coordinator receives the email that the Worksheet has been fully approved.

Roles: Agreement Process

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

Stage 2 – Local BIS Director – Approves the Agreement.

Stage 3 – State Regional Coordinator – Approves the Agreement. The approval will generate a signature on the SOU.

Stage 4 – State Initiative Supervisor - Approves the Agreement. The approval will generate a signature on the SOU.

Stage 5 – Local Superintendent/CEO (or designee) – Approves the Agreement. The approval will generate a signature on the SOU.

Stage 6 - State Requisition Coordinator – Generates the SOU, submits the requisition to finance, enters the PO number into the Agreement.

Stage 7 - Local Finance Coordinator – Enters the OCAS codes and adds new codes as needed. The Agreement 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.)

IMPORTANT: The Local Coordinator can initiate the budget adjustment process at any time during the Agreement process as long as an invoice has not been started. The Local Coordinator must contact the Regional Coordinator prior to initiating the budget adjustment process.
Local Coordinator

Accessing the Agreement List

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log in to CTIMS using Internet Explorer version 11 or higher or Microsoft Edge. 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 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.

![Image of Grant Process](image1)

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

![Image of EDI Process](image2)

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

![Image of EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up](image3)

**IMPORTANT:** Do not select the **EDI New Worksheet/Agreement Flow** option on the left navigation. This will start a completely new worksheet.
Opening the Agreement

1.1 - Complete the **EDI Grant Fund Worksheets List** 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.
1.2 - After clicking the Search button, the Agreement column will display New. Select the new Agreement by clicking on the word New.

Agreement Acknowledgments and Approval

2.1 - Review the Agreement details, if necessary, by clicking the +(plus) sign to expand the Project Details or Budget Line Items sections.

2.2 - After reviewing the Agreement details, if necessary, click the +(plus) sign beside the Acknowledgements tab to expand this section. Check the box to verify that the information is accurate and complete.
2.3 - 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.

2.4 - Then, click on the **Save as Draft** button.

2.5 – Click **OK** to acknowledge that the Agreement has saved.
2.6 – Click **Submit for Approval** at the top or bottom of the screen. The Agreement will now go to the **EDI Local BIS Director** for approval.
Local BIS Director

Accessing the Agreement List

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using [Internet Explorer](https://www.microsoft.com/ie) version 11 or higher or [Microsoft Edge](https://microsoft.com/edge). 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

1.1 - Complete the EDI Grant Fund Worksheets List 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.
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 to review the budget.
2.2 – To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below. To close out each tab after review, click the ✗ on that tab.

2.3 – Once you’ve reviewed the Agreement, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.
Agreement Acknowledgements and Approval

**3.1 -** On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the Approval/Rejection Note section, and a note in the **Private Note** section (optional).

The agreement will now go to the **EDI State Regional Coordinator** for Approval.

**3.2 -** Click the **Approve** button at the top or bottom of the screen. Then, click **OK** on the **Are you sure?** message.
State Regional Coordinator
Accessing the Agreement List

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using Internet Explorer version 11 or higher or Microsoft Edge. 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.

![Diagram of Grant Process](image1)

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

![Diagram of EDI Process](image2)

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

![Diagram of EDI Manage Grant WorkSheets](image3)
Opening the Agreement

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.
1.1 - 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 to review the budget.
2.2 – To review the SOU and/or Agreement Summary click on the appropriate buttons indicated below. To close out each tab after review, click the × on that tab.

2.3 – Once you’ve reviewed the Agreement, on the EDI Grant Agreement screen, click the Approval Process button at the bottom of the form.
Agreement Acknowledgements and Approval

3.1 - On the Approval Process – EDI Grant Agreement Approval screen, add a note to the Approval/Rejection Note section, and a note in the Private Note section (optional).

3.2 - Click the Approve button at the top or bottom of the screen. Then, click OK on the Are you sure? message.

The Agreement will now go to the EDI State Initiative Supervisor for approval.
State Initiative Supervisor

See instructions for Regional Coordinator here.
Local Superintendent/CEO (or Designee)

Accessing the Agreement List

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

**IMPORTANT:** Please log into CTIMS using Internet Explorer version 11 or higher or Microsoft Edge. 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**.
Agreement – Stage 5 – Local Superintendent/CEO

Opening the Agreement

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.
1.1 - 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 to review the budget.
2.2 – To review the SOU and/or Agreement Summary click on the appropriate buttons indicated below. To close out each tab after review, click the ✗ on that tab.

2.3 – Once you’ve reviewed the Agreement, on the EDI Grant Agreement screen, click the Approval Process button at the bottom of the form.
Agreement Acknowledgements and Approval

3.1 - On the Approval Process – EDI Grant Agreement Approval screen, add a note to the Approval/Rejection Note section, and a note in the Private Note section (optional).

Add note here. If you do not have a note to add, type your initials. This field is required.

3.2 - Click the Approve button at the top or bottom of the screen. Then, click OK on the Are you sure? message.

The Agreement will now go to the Local Finance Coordinator for approval.
Local Finance Coordinator

Accessing the Agreement List

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using [Internet Explorer](https://www.microsoft.com/en-us/ie/ie11) version 11 or higher or [Microsoft Edge](https://microsoft.com/edge). 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 the Agreement

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.
1.1 - 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.

Reviewing the Agreement

2.1 - Expand the Budget Line Items section by clicking on the + (plus) sign, if necessary. Review the budget.
**Entering OCAS Codes**

**3.1** – Enter the OCAS coding for each of the line items by clicking in the field under the Budget Line (OCAS Code) column. Begin typing the code in Object-Program-Function Code (e.g. 610-590-1500) order. 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.

**NOTE:** The tech center is responsible for selecting OCAS codes. See [https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx](https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx) for codes.

**3.2** – After reviewing the budget information and entering the OCAS codes, click on the **Approval Process** button at the bottom of the screen.
Agreement Acknowledgements and Approval

4.1 - On the Approval Process – EDI Grant Agreement Approval screen, add a note to the Approval/Rejection Note section, and a note in the Private Note section (optional). You can add your initials if you do not have a note to add.

4.2 - Click the Approve button at the top or bottom of the screen. Then, click OK on the Are you sure? message.

The Agreement is now fully approved.
Budget Adjustment Process
Budget Adjustment Process

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

**IMPORTANT:** Initiating the Budget Adjustment will freeze any invoice in process. The Agreement will be sent back to your approval stage.

Accessing the Agreement List

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**NOTE:** Please log into CTIMS using **Internet Explorer version 11 or higher** or **Microsoft Edge**. 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.
Budget Adjustment Process

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

**IMPORTANT:** Do not select the EDI New Worksheet/Agreement Flow option on the left navigation. This will start a completely new worksheet.

**Opening the Agreement**

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.
1.1 - 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.

**Initiating the Budget Adjustment**

2.1 - At the bottom right corner of the **EDI Grant Agreement** screen, click **Budget Adjustment Process**.
2.2 - You will be asked to confirm that you are reinitiating the agreement approval process. Click **OK**.

2.3 - In the **Budget Line Items** section, make the necessary changes to the budget line item by clicking in the appropriate columns. For example, click in the Units column to change the number of units.

**IMPORTANT**: After changing the units and/or unit cost columns, remember **you must manually enter the amount in the Approv Total column to match the Total column**. This will release the funds.
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 summiting 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.

Acknowledgements and Approval

3.1 - Next, expand the Acknowledgements section by clicking on the +(plus) sign. Add your Budget Adjustment Justification Note and Acknowledgement Note (These fields are required. You can add your initials if you do not have a note to add.), then click the box to verify that the information provided is accurate and complete. Now, select Submit for Approval.
The agreement will go back through the Agreement approval process.

**Releasing Funds**

If a project has completed and not all funds are used, you can release the funds to be used for another project. For example, you can release funds for a fire fighter program to be used for another fire fighter program training project.

- In the Agreement, you will do a budget adjustment. Once the budget adjustment is fully approved, the funds will be released and you can begin a new Worksheet for the new training.
- If you have a line item that has not been used and need to release the funds to be used for another project, you will make that line item inactive.

For complete instructions to release funds, go to the Releasing Unused Funds section of the guidebook [here](#).
Invoice Process

career tech
Invoice Process Flow

- All enrollments must be uploaded to CTIMS before the invoice process can be initiated.
- Verify you have all supporting documents before submitting an invoice for approval. For more information on funding and reimbursement, please refer to the Invoicing Checklist on page 12 of the BIS Guidelines FY21.
  https://www.okcareertech.org/about/state-agency/divisions/imd/ctims

**IMPORTANT**: If you have started an invoice and realize you need to do a budget adjustment in the Agreement, you must make the current invoice inactive, then begin the budget adjustment process. For information on the budget adjustment process, see instructions [here](https://www.okcareertech.org/about/state-agency/divisions/imd/ctims).

**Contact the regional coordinator prior to initiating a budget adjustment**

Roles: Invoice Process

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

**Stage 1 - Local Coordinator** – After training is complete, the EDI Local Coordinator initiates the invoice process.

**Stage 2 - Local BIS Director** – Reviews and approves invoice line items and attachments.

**Stage 3 - Local Finance Coordinator** - Reviews and approves invoice line items and attachments.

**Stage 4 - State Regional Coordinator** - Reviews and approves invoice line items and attachments.

**Stage 5 - State Requisition Coordinator** - Verifies the invoice line items and documentation, prints the documentation, and delivers to the finance department.

**Stage 6 - ODCTE EDI Finance Reviewer** - Reviews and approves the invoice line items and documentation. The invoice becomes fully approved. Pays the claim.
Local Coordinator

Accessing the Invoice

After training is complete, the **EDI Local Coordinator** starts the **EDI Invoice Process**.

**IMPORTANT:** Before initiating an invoice, all Budget Adjustments must be fully approved.

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log in to CTIMS using **Internet Explorer** version 11 or higher or **Microsoft Edge**. 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 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.

• Select the EDI Invoice Process.
Creating a New 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. This 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 invoices that need your approval.

NOTE: A red asterisk (*) indicates a required field.
• After clicking the Search button, select New Invoice to start a new invoice.

**IMPORTANT:** If you have already created an invoice for the project, do not click on New Invoice. Follow the instructions for opening and existing invoice [here](#).

• On the EDI Grant Submit Invoice-Step 1 screen, click Save & Next.
• On the EDI Grant Submit Invoice-Step 2 screen, the Invoice Line Items section should automatically expand.

• 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. Multiple invoice line items can be checked to invoice on one invoice.

**NOTE:** To check all invoice line items at once, click the check box in the column header.

• If you will be invoicing for only part of a line item, click on the ▶ next to the line item to expand the details.
• To revise the budget line item, click the **Edit** button.

• Make the necessary changes to the **Units**, **Unit Cost**, and/or **Req. Unit Type** fields by clicking in the space and typing or use the arrows on each field. This will update the **Total to be Invoiced** column.

• Once the necessary adjustments have been made, click the **Update** button.
- Expand the Attachments section by clicking on the +(plus) sign next to Attachments.

**NOTE:** Refer to page 12 of the BIS Guidelines for invoicing requirements.

**IMPORTANT:** Invoice line items and attached supporting documents must match. All attachments must be uploaded in one pdf.
2.4 –

1. Click **Browse** to locate the files on your computer.
2. Select **Upload and Save File** to attach the file.
   - A message box will say you have successfully uploaded the file. Close this box.

2.5 - Go to the **Acknowledgements** tab by clicking on the **+(plus)** sign to expand this section. Check the required acknowledgment box. Type an acknowledgment note in the box. Any extenuating circumstances related to the line item or attachment should be added here with detail. If you don’t have a note to add, type your initials, as this field is required. Then, click the **Submit for Approval** button.
NOTE: If you are not finished with the invoice, you can select **Save as Draft** and return at a later time to make changes, then 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**.

2.6 - Go to the **Invoice Summary** tab to print or save a pdf report of the claim you have submitted.
2.7 - Click on the symbol to download a pdf of your invoice summary.

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

**Opening an Existing Invoice for Submission**

- Click the arrow next to **Grants** on left navigation.
• Click the arrow ▶ next to **Grant Process** on left navigation.

• Select the **EDI Invoice Process**.

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

EDI Grant Submit Invoice - Step 1

1.1 - Verify that the information is correct, then select Save & Next to continue to the next screen.
EDI Grant Submit Invoice - Step 2

2.1 - Under the Invoice Line Items section, 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. Multiple invoice line items can be checked to invoice on one invoice.

2.2 - Click the ▶ next to the line item to be invoiced, then click the Edit button.

- You will be able to change the Units, Unit Cost, Req. and Unit Type, by clicking in each field and tying, or use the arrows to make the changes.
• Then, click the **Update** button.

• Use your scroll wheel on your mouse to scroll to the Attachments section. Expand the Attachments section by clicking on the +(plus) sign next to **Attachments**.

**NOTE:** Refer to page 12 of the BIS Guidelines for invoicing requirements.

**IMPORTANT:** Invoice line items and attached supporting documents must match. All attachments must be uploaded in one pdf.
2.4 –

1. Click **Browse** to locate the files on your computer.
2. Select **Upload and Save File** to attach the file. A message box will say you have successfully uploaded the file. Close this box.

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2.5 - Go to the **Acknowledgements** tab by clicking on the **+(plus)** sign to expand this section. Check the required acknowledgment box. Type an acknowledgment note in the box. **Any extenuating circumstances related to the line items or attachments should be added here with detail.** If you don’t have a note to add, type your initials, as this field is required. Then, click the **Submit for Approval** button.

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NOTE: If you are not finished with the invoice, you can select **Save as Draft** and return at a later time to make changes, then 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**.

2.6 - Go to the **Invoice Summary** tab to print or save a pdf report of the claim you have submitted.
2.7 - Click on the symbol to download a pdf of your invoice summary.

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

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.

- 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.
• 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.

• 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 must contact the ODCTE Finance Reviewer to request they reject the invoice. Then, you can initiate the change request.

**Changes for Invoices that Have Not Been Submitted 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.

• In the **Budget Line** section, click the **Edit** button. Make the changes to the **Unit**, **Unit Cost**, and/or **Req. Unit Type** 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**, or **Submit for Approval**.
Local BIS Director

Accessing the Invoice

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using **Internet Explorer version 11 or higher** or **Microsoft Edge** 🍎. 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 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. This 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 invoices that need your approval.

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

- Click on the Manage Grant Invoices tab.
• Click on the **invoice number** in the invoice column to choose the invoice to review and approve.

**NOTE:** To view an 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**.
EDI Grant Submit Invoice Step-2

2.1 - Review and verify 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.

IMPORTANT: You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.

2.2 – Click Submit for Approval at the top or bottom of the screen. The invoice will now go to the next approval stage.
Local Finance Coordinator

Accessing the Invoice

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using [Internet Explorer version 11 or higher](https://www.microsoft.com/en-us/ie) or [Microsoft Edge](https://www.microsoft.com/en-us/edge). 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 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. This 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 invoices that need your approval.

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

- Click on the **Manage Grant Invoices** tab.
• Click on the invoice number in the **Invoice column** to choose the invoice to review and approve.

**NOTE:** To view an 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.
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]

**IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.

2.2 – Click Submit for Approval at the top or bottom of the screen. The invoice will now go to the next approval stage.
State Regional Coordinator

Accessing the Invoice

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using **Internet Explorer** version 11 or higher or **Microsoft Edge**, CTIMS is currently not compatible with other browsers.

- Verify that you are signed in with the role of **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.

• Click the arrow ▶ next to EDI Invoice Process on left navigation
**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. This 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 invoices that need your approval.

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

- Click on the **Manage Grant Invoices** tab.
• Click on the **invoice number** in the invoice column to choose the invoice to review and approve.

**NOTE:** To view an 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.**
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.

**IMPORTANT:** You must review the invoiced line items and attachments. *Invoice line items and attached supporting documents must match.*

2.2 – Click **Submit for Approval** at the top or bottom of the screen. The invoice will now go to the next approval stage.
State Requisition Coordinator
Accessing the Invoice

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using Internet Explorer version 11 or higher or Microsoft Edge. 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.

- Click the arrow ▶️ next to EDI Grant Admin Invoice Summary on left navigation.
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 the Program Initiative from the drop-down menu, or click the box for All.
4. Select your Organization Type selecting from the drop-down menu, or click the box for All.
5. Choose the Organization or click the box for All.
6. Approval Function Type will remain as All.
7. Filter on Status will remain as All.
8. Select the Search button to search for invoices that need your approval.
• Click on the **Manage Grant Invoices** tab.

![Image of Manage Grant Invoices tab](image)

• Click on the **invoice number** in the invoice column to choose the invoice to review and approve.

![Image of invoice number](image)

**NOTE:** To view an 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.

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.

2.2 – Verify the invoice information and print the documentation to deliver to the finance department.

- Click on the Invoice Summary button at the top or bottom of the screen.
- To print, click on the save icon above the summary. Export to a PDF to print.

- Download the attachments by expanding the Attachments section, then clicking the Download all files button.

**IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.

2.3 – Click Submit for Approval at the top or bottom of the screen. Deliver the documentation to Finance. The invoice will now go to the ODCTE Finance Reviewer.
Printing a PEF
Printing a PEF

- Verify that you are signed in with the role of **Tech Center BIS Submitter**. In the top right corner. Use the drop-down arrow to select this role.

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

- Click the arrow ▶ next to **Enrollment Reports** on left navigation.

- Click the arrow ▶ next to **BIS Tech Center Enrollment** on left navigation.
• Select **BIS Tech Center User** on the left navigation.

• On the **Report Generation** screen, in the **Organization** field, type the first three letters of your school name. Then, choose your campus from the drop-down.
• Choose the **School Calendar Year**.

• In the Report Name field, choose the Multiple BIS PEF report from the drop-down.
• Click the **View Report** button.

- A list of the PEFs will populate the field below. In the search field in the tan bar above the report, type in the contract number for the PEF you wish to print. Click **Find**.

- The contract number you are searching for will be highlighted in blue.

- Click the highlighted contract number to open the PEF. The PEF will display.

- To print the PEF, click on the save icon on the tan bar above the PEF and choose PDF from the drop-down to save to your computer and print.
The PEF will contain the information for the training: contract number, the name of the training, program type, beginning and end date, course hours, number of students enrolled, and the list of students with student details.

Example:

![Example PEF image]

**BIS CONTRACT INFORMATION**

**H0001**

<table>
<thead>
<tr>
<th>Sample Course Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROG TYPE: 75</td>
</tr>
<tr>
<td>MIS CODE: 3501</td>
</tr>
<tr>
<td>BEG DATE: 20190926</td>
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<td>END DATE: 20190926</td>
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<tr>
<td>STUDENTS IN COURSE FILE: 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>GENDER</th>
<th>AGE</th>
<th>RACE</th>
<th>CLOCK HRS</th>
<th>INDUSTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Student</td>
<td>Sample Student</td>
<td>F</td>
<td>38</td>
<td>09</td>
<td>2.00</td>
<td>Sample Organization</td>
</tr>
</tbody>
</table>
Business Codes
Requesting a New Business Code

- Sign in at [https://ctims.okcareertech.org/CTBDSWeb/](https://ctims.okcareertech.org/CTBDSWeb/) using your school email and CTIMS password.

**IMPORTANT:** Please log into CTIMS using Internet Explorer version 11 or higher or Microsoft Edge. 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 **Organizations** on left navigation.

- Click the arrow ➔ next to **Business Master** on left navigation.
• Select **Request New Business Code or View Business Master**.

**NOTE:** Search the Business Master before requesting a new business code to verify that the business does not already have a code in CTIMS. To search for an existing business record, in the field next to **Business Name**, type in the name of the business. Then click **Search**. If the business does not populate in the window below, proceed with requesting a new code.

• Click on the **New Business Request** button. You will be directed to a new screen.

• In the box beside **Business Name**, enter the name of the business. The business name must be unique. If the business is a chain, or the name already exists, you will need to add a unique identifier, such as a town name or store number to define it; for example, Shelter Insurance – Joe Smith Agency.

• Click **Save & Next**. You will be directed to a new screen.
Enter the following for the new business:

- The **Primary NAICS Code** is a drop down menu where you can select the appropriate NAICS code by clicking on the down arrow and scrolling to select a code. You can also type in the NAICS number or a title keyword in the drop down box (not the gray box on top of the drop down box).
- Enter the **FEI Number** and **DUNS Number**, if applicable.
- If the NAICS code begins with a **92**, you must select the **Business Type** (City Business, County Business, State Business, or Federal Business.)
- Complete the **Physical** and **Mailing** addresses. The Physical address is mandatory. Enter the mailing address if it is different than the physical address. When information is entered in the address fields, a red triangle will appear in the upper left corner of the box. This does not mean there is an error, only that data has been entered in the field.
- To clear the form and start over, click on the **Refresh** button.
- Click **Submit for Approval**. If you are missing any data elements, you will receive an error message when you try to submit. Correct the errors and resubmit.
You should now see a **Successfully Submitted** message popup. Click the **OK** button. Your request has now been successfully submitted for review. Click on the **X** on the Business Master tab to close this screen.

You will receive an email from CTIMS@careertech.ok.gov indicating that your request was successfully submitted. No additional action is required from you at this point.

The Information Management Division staff will review the request. You will receive another email indicating that the request was approved or rejected. See below for examples of these emails. If the request is approved the Business Code will be on the first line of the email.

If your Business Code request is rejected, you will get an email stating that your Approval Status is rejected. The reason for the rejection will be listed in the **Approval Process Note** in the rejection email. See instructions for the **Change Request** process to make corrections and resubmit your request.
Business Code Change Request

If changes need to be made after submitting a Business Code request, but before it is fully approved, or if your request is rejected, you will need to go through the change request process to make changes.

- Select the View Requests radio button. To see only the requests submitted by your site, clear the check mark beside All Sites. Type the first 3 letters of your school name in the School Name(s) box and select your school. Click on the Search button.
- Select the request you wish to change by clicking on the blue Business Master Name hyperlink.
• Click the **Change Request** button.

• You will get a popup indicating you are going to cancel the approval process and initiate the change request process. Click **OK**.
• Make the necessary changes to your request. Click **Submit for Approval**.

• Click **OK**.
Click on the **Approve** button if you are ready to finalize your changes.

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**Active Status of a Business Code**

A business code may exist in CTIMS, but it is no longer active.

- Click the arrow ➤ next to **Organizations** on left navigation.

- Click the arrow ➤ next to **Business Master** on left navigation.
• Select **Request New Business Code or View Business Master.**

• In the field for **Business Name**, type in the name of the business, then click the **Search** button.

• In the status column, check the status of the code; active or inactive.

**NOTE:** To activate an inactive code, contact CTIMS support at [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).
CTIMS Helpful Hints

career tech
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 button 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 button 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.
Releasing Unused Funds

If a project has completed and not all funds are used, you can release the funds to be used for another project.

**Releasing Funds to be used for the Same Program Type**

For example, you can release funds for a fire fighter program to be used for another fire fighter program training project.

- In the Agreement, you will do a budget adjustment. Once the budget adjustment is fully approved, the funds will be released and you can begin a new Worksheet for the new training. Click [here](#) for guidelines on the budget adjustment process.

If you have a line item that has not been used and need to release the funds to be used for another project, you will make that line item inactive:

- To make a budget line item inactive, click inside the field under the **Status** column to check the box.
- Check the box, then **Save as Draft**.
- Make sure the line is inactive, then click **Submit for Approval**.
• Go back into the Agreement and click Approval Process.

• Add the approval note in the Note field.

• Add private note (optional).
• Click Approve.
• On the pop-up screen, click **OK**.

![Image of pop-up screen with 'OK' button]

• Verify the submission by clicking **OK**.

![Image of confirmation screen with 'OK' button]

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