

# CareerTech Information Management System (CTIMS)

EDI Complete User Guidebook



**OKLAHOMA**  
**CareerTech**

---

**IMD** Information Management Division

June 2023

## Table of Contents

EDI Contacts .....	6
CTIMS Support .....	7
Help and Troubleshooting.....	7
Approval Process Overview .....	8
Worksheet Process Flow .....	10
EDI – Local Coordinator (Worksheet Process) .....	11
Logging into CTIMS.....	11
EDI Grant Submit Worksheet – Step 1 .....	13
EDI Grant Submit Worksheet – Step 2 .....	14
EDI Grant Submit Worksheet – Step 3 .....	18
EDI – State Regional Coordinator (Worksheet Process) .....	21
Logging into CTIMS.....	21
EDI Grant Submit Worksheet – Step 2 .....	25
EDI Grant Submit Worksheet – Step 3 .....	27
Worksheet Acknowledgements and Approval .....	27
EDI – State Initiative Supervisor (Worksheet Process) .....	28
EDI – Local Coordinator, EDI – State Regional Coordinator, or EDI – State Supervisor (Change Request Process) .....	28
Logging into CTIMS.....	28
Change Request Process .....	29
Agreement Process Flow.....	34
EDI – Local Coordinator (Agreement Process) .....	35
Logging into CTIMS.....	35
Starting New Agreement .....	36
Agreement Details .....	37
Agreement Acknowledgments and Approval .....	39
EDI – Local BIS Director (Agreement Process) .....	40
Logging into CTIMS.....	40
Accessing the Agreement List .....	41
Reviewing the Agreement.....	43
Agreement Acknowledgements and Approval .....	44

EDI – State Regional Coordinator (Agreement Process).....	45
Logging into CTIMS.....	45
Accessing the Agreement List .....	46
Reviewing the Agreement.....	48
Agreement Acknowledgements and Approval .....	49
EDI - State Initiative Supervisor (Agreement Process).....	50
EDI-Local Superintendent/CEO (Agreement Process) .....	50
Logging into CTIMS.....	50
Accessing the Agreement List .....	51
Reviewing the Agreement.....	53
Agreement Acknowledgements and Approval .....	54
EDI – Local Finance Coordinator (Agreement Process) .....	55
Logging into CTIMS.....	55
Accessing the Agreement List .....	56
Reviewing the Agreement.....	58
Entering OCAS Codes .....	59
Agreement Acknowledgements and Approval .....	60
Budget Adjustment Process.....	61
EDI – Local Coordinator (Budget Adjustment Process).....	61
Logging into CTIMS.....	61
Accessing the Agreement List .....	62
Initiating the Budget Adjustment.....	64
Acknowledgements and Approval .....	65
Releasing Funds.....	65
Invoice Process.....	66
EDI – Local Coordinator (Invoice Process) .....	67
Logging into CTIMS.....	67
Accessing the Invoice .....	68
Creating a New Invoice .....	69
EDI – Local BIS Director (Invoice Process).....	74
Accessing Invoice .....	74

EDI Grant Submit Invoice – Step 1 .....	76
EDI Grant Submit Invoice – Step 2 .....	76
Agreement Acknowledgements and Approval .....	78
Invoice Change Request.....	80
EDI – Local Coordinator (Invoice Change Request).....	80
Accessing Invoice .....	81
EDI Grant Submit Invoice – Step 1 .....	82
Agreement Acknowledgements and Approval .....	85
EDI – Local BIS Director (Invoice Process).....	87
Logging into CTIMS.....	87
Accessing Invoice .....	88
EDI Grant Submit Invoice – Step 1 .....	90
EDI Grant Submit Invoice – Step 2 .....	90
Agreement Acknowledgements and Approval .....	92
EDI – Local Finance Coordinator (Invoice Process).....	94
Logging into CTIMS.....	94
Accessing the Invoice .....	96
EDI Grant Submit Invoice – Step 1 .....	97
EDI Grant Submit Invoice Step-2.....	97
EDI – State Regional Coordinator (Invoice Process) .....	100
Logging into CTIMS.....	100
Accessing the Invoice .....	102
EDI Grant Submit Invoice – Step 1 .....	103
EDI Grant Submit Invoice – Step 2 .....	103
EDI – State Requisition Coordinator (Invoice Process) .....	106
Logging into CTIMS.....	106
Accessing the Invoice .....	108
EDI Grant Submit Invoice – Step 1 .....	109
EDI Grant Submit Invoice – Step 2 .....	110
ODCTE – EDI Finance Reviewer (Invoice Process).....	113
Logging into CTIMS.....	113

---

Accessing the Invoice .....	115
EDI Grant Submit Invoice – Step 1 .....	116
EDI Grant Submit Invoice – Step 2 .....	117
ODCTE – EDI Finance Reviewer (Invoice Process).....	120
Logging into CTIMS.....	120
Accessing the Invoice .....	122
EDI Grant Submit Invoice – Step 1 .....	123
EDI Grant Submit Invoice – Step 2 .....	124
Printing a PEF .....	128
View or Request Business Code .....	131
Logging into CTIMS.....	131
View Requests.....	141
CTIMS Helpful Hints .....	142
Where’s my Worksheet, Agreement, or Invoice in the approval process? .....	143
Where are the Funds?.....	143
Releasing Unused Funds .....	144

## EDI Contacts

**Whitney Blaylock**

Approval Role: State Regional Coordinator

Cell: (918) 839-2592

Email: [Whitney.Blaylock@careertech.ok.gov](mailto:Whitney.Blaylock@careertech.ok.gov)**Gina Hubbard**

Approval Role: State Initiative Supervisor

Cell: (405) 743-5167

Email: [Gina.Hubbard@careertech.ok.gov](mailto:Gina.Hubbard@careertech.ok.gov)**Andrea Bradley**

Approval Role: State Requisition Coordinator

Cell: (405) 743-5572

Email: [Andrea.Bradley@careertech.ok.gov](mailto:Andrea.Bradley@careertech.ok.gov)**Lori Laufer**

Approval Role: State Regional Coordinator

Cell: (405) 385-3176

Email: [Lori.Laufer@careertech.ok.gov](mailto:Lori.Laufer@careertech.ok.gov)**Lori Broyles**

Approval Role: State Regional Coordinator

Cell: (405) 361-5268

Email: [Lori.Broyles@careertech.ok.gov](mailto:Lori.Broyles@careertech.ok.gov)**Max McKnight**

Approval Role: State Initiative Supervisor

Cell: (405) 714-7246

Email: [Max.Mcknight@careertech.ok.gov](mailto:Max.Mcknight@careertech.ok.gov)**Brian Campbell**

Approval Role: State Regional Coordinator

Cell: (405) 743-5548

Email: [Brian.Campbell@careertech.ok.gov](mailto:Brian.Campbell@careertech.ok.gov)**Cara Pattison**

Approval Role: State Regional Coordinator

Cell: (405) 664-3679

Email: [Cara.Pattison@careertech.ok.gov](mailto:Cara.Pattison@careertech.ok.gov)**Patrick Clanin**

Approval Role: State Regional Coordinator

Cell: (405) 747-6114

Email: [Patrick.Clanin@careertech.ok.gov](mailto:Patrick.Clanin@careertech.ok.gov)**Karen Talbott**

Approval Role: State Regional Coordinator

Cell: (580) 336-8676

Email: [Karen.Talbott@careertech.ok.gov](mailto:Karen.Talbott@careertech.ok.gov)

**Note:** For questions about specific EDI requirements or content you need to input or attached with your worksheet, contact your **ODCTE Regional Coordinator**.

## CTIMS Support

If you have questions about submitting information in CTIMS, please contact CTIMS Support at [CTIMSupport@careertech.ok.gov](mailto:CTIMSupport@careertech.ok.gov), or contact:

**Mika Hickman**

Administrative Assistant

Office: (405) 743-5124

Email: [Mika.Hickman@careertech.ok.gov](mailto:Mika.Hickman@careertech.ok.gov)**Elizabeth Richardson**

Technical Support Specialist

Office: (405) 743-5134

Email: [Elizabeth.Richardson@careertech.ok.gov](mailto:Elizabeth.Richardson@careertech.ok.gov)**Dennis Griffith**

Performance Data / Analysis Coordinator

Office: (405) 743-6882

Email: [Dennis.Griffith@careertech.ok.gov](mailto:Dennis.Griffith@careertech.ok.gov)**Brandy Elliott**

Data Quality Coordinator

Office: (405) 743-5403

Email: [Brandy.Elliott@careertech.ok.gov](mailto:Brandy.Elliott@careertech.ok.gov)**Carol Hall**

Manager, Information Management Division

Office: (405) 743-5125

Email: [Carol.Hall@careertech.ok.gov](mailto:Carol.Hall@careertech.ok.gov)

## Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact [CTIMSupport@careertech.ok.gov](mailto:CTIMSupport@careertech.ok.gov). Send a message describing your problem. Include your school name and your telephone number and we will contact you. Someone is always monitoring that inbox and will return your email swiftly.

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.

**CTIMS Customer Support Contact***Elizabeth Richardson*

Office: (405) 743-5134

Email: [CTIMSupport@careertech.ok.gov](mailto:CTIMSupport@careertech.ok.gov)

## Approval Process Overview

### Worksheet Approval Stage (Stage 1)

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

### Agreement Approval Stage (Stage 2)

EDI Role	Process
Local Coordinator	Initiate the Agreement approval process. (No changes should need to be made.)
Local BIS Director	Approve the Agreement
State Regional Coordinator	Approve the Agreement. The approval will generate a signature on the SOU.
State Initiative Supervisor	Approve the Agreement. The approval will generate a signature on the SOU.
Local Superintendent/CEO (or designee)	Approve the Agreement. The approval will generate a signature on the SOU.
State Requisition Coordinator	Generate the SOU, submit the requisition to finance, enter the PO number into the Agreement.
Local Finance Coordinator	Enter OCAS codes and add new codes as needed. The Agreement becomes fully approved.



**Budget Adjustment Approval Stage (if Agreement changes are necessary)**

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

**Invoice Approval Stage (Stage 3)**

<b>EDI Role</b>	<b>Process</b>
Local Coordinator	After training is complete, the EDI Local Coordinator initiates the invoice process.
Local BIS Director	Review and approve invoice line items and attachments.
Local Finance Coordinator	Review and approve invoice line items and attachments.
State Regional Coordinator	Review and approve invoice line items and attachments.
State Requisition Coordinator	Verify the invoices, print the documentation, and deliver to the finance department.
ODCTE EDI Finance Reviewer	Review and approve the invoice and documentation. The invoice becomes fully approved. Pay the claim.

## 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** – 2<sup>nd</sup> 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.

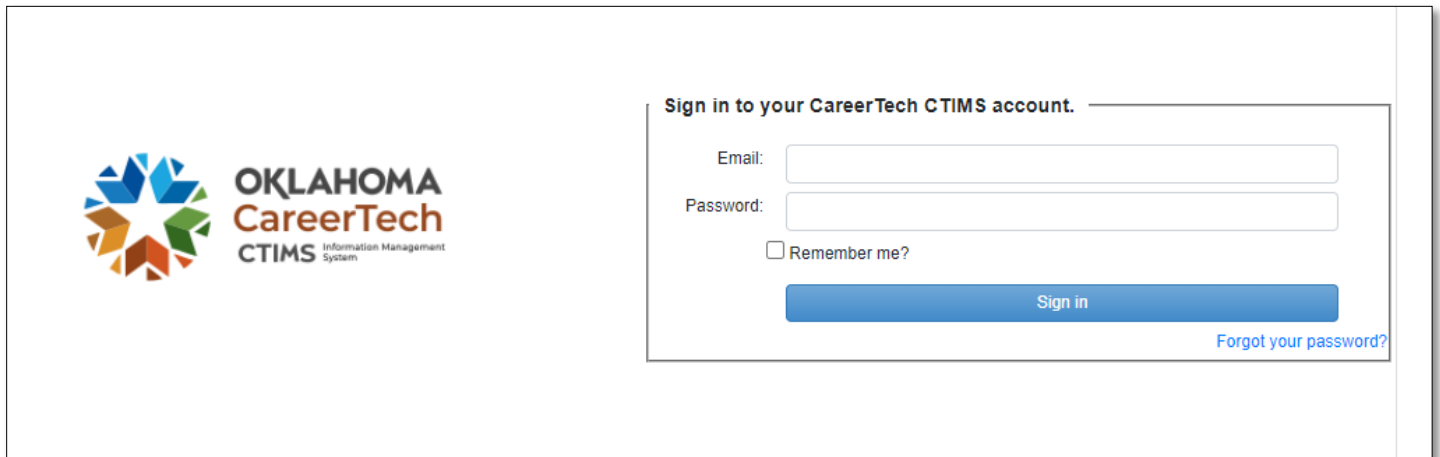


**Stage 3 – State Initiative Supervisor** - 3<sup>rd</sup> Approval. ODCTE state staff review and approve or reject the worksheet. If approved, this completes the Worksheet approval. If rejected, goes back to stage 1.

## EDI – Local Coordinator (Worksheet Process)

### Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green **CTIMS Login** button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

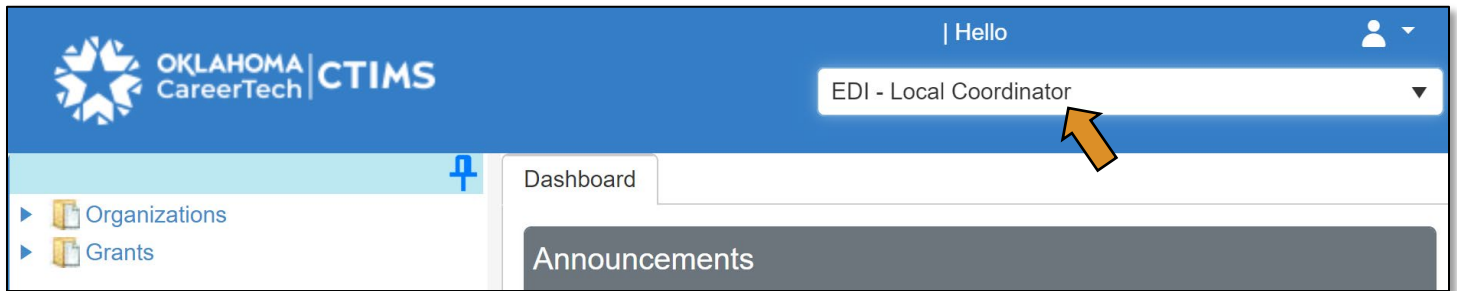
Microsoft Edge  , Mozilla Firefox  , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

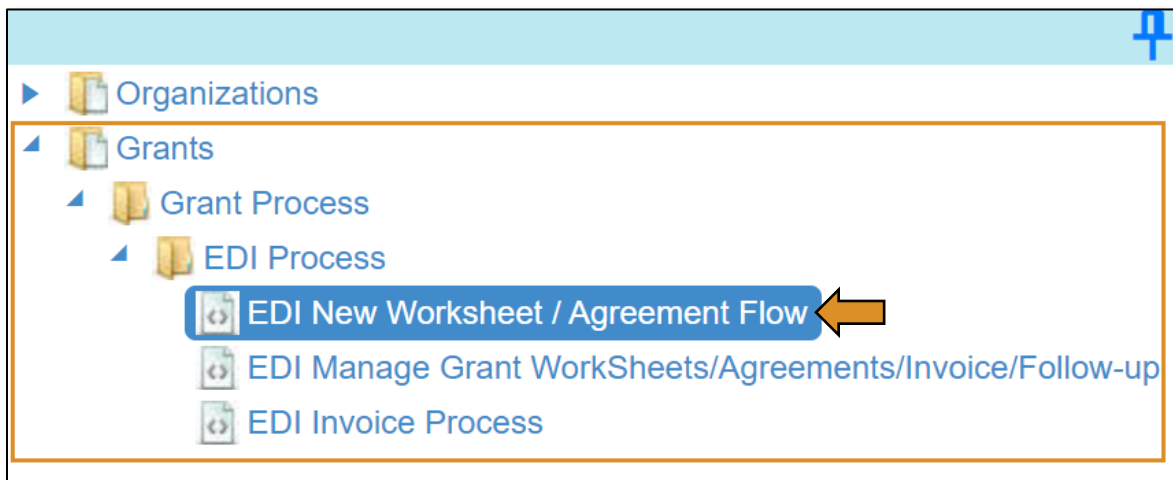


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator**, contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI New Worksheet / Agreement Flow** link.



## 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 populate 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 default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **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. **Organization\*** - start typing 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**.
11. **Business Code\*** - will automatically display after an **Organization\*** is selected.
12. After verifying that all information is correct, Click **Save & Next** button.

**NOTE:** A red asterisk (\*) on the form indicates a required field.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 1 12. Save & Next

1. Fiscal Calendar Year\* 2022-2023 2. Grant Fund Type\* EDI

3. Organization Type\* Technology Center Districts 4. Organization\* Technology Center

5. Organization District\* Technology Center 6. Program Initiative\* Economic Development - Firefighter (Type 83) -444

7. Worksheet No.\* WS-2223-EDI-EDI-FIREFTR-444-15X111745-CEB3BD6BCB29

**Client Basic Information For work Sheet**

8. Organization Type\* Business Masters 9. Client Type\* Business Master (Company)

10. Organization\* FIRE DEPT 11. Business Code\* 1172

View Location(s) View Contact(s)

Year Established \_\_\_\_\_ FEI Number \_\_\_\_\_

Primary NAICS Code Fire Protection (922160) Secondary NAICS Code Agriculture, Forestry, Fishing and Hunting (11)

Years in Business \_\_\_\_\_ Years in Oklahoma \_\_\_\_\_

No. of hourly Employees 0 No. of Salaried Employees 0

Highest Level of Employment \_\_\_\_\_ Client Products \_\_\_\_\_

Approval Status \_\_\_\_\_ Vendor Number \_\_\_\_\_

Year Formed \_\_\_\_\_ Year Joined \_\_\_\_\_

Year Left \_\_\_\_\_ Impact District Id \_\_\_\_\_

Region \_\_\_\_\_ DUNS Number \_\_\_\_\_

12. Save & Next

## EDI Grant Submit Worksheet – Step 2

- Verify the client information on the *EDI Grant Submit Worksheet – Step 2* page.
- Expand the **Provider Organization Details** section by clicking on the words if it is not already visible.

Dashboard | EDI New Worksheet / Agreement Flow X

### EDI Grant Submit Worksheet - Step 2

Provider Organization Details

Fiscal Calendar Year:\* 2022-2023  Grant Fund Type:\* EDI

Organization Type:\* Technology Center Districts  Organization:\* Technology Center

Organization District:\* Technology Center  Program Initiative:\* Economic Development - Firefighter (Type ...

Worksheet No.\* WS-2223-EDI-EDI-FIREFTR-444-15X111745-CEB3BD6BCB29

Basic Client Information

Funding Request Details

- Verify the *Basic Client Information*.
- Expand the **Basic Client Information** section by clicking on the words.

Dashboard | EDI New Worksheet / Agreement Flow X

### EDI Grant Submit Worksheet - Step 2

Provider Organization Details

Basic Client Information

Organization Type\* Business Masters  Client Type\* Business Master (Company)

Organization\* FIRE DEPT  Business Code\* 1172  DUNS

Funding Request Details

- Expand the **Funding Request Details** section by clicking on the words.

Dashboard | EDI New Worksheet / Agreement Flow X

### EDI Grant Submit Worksheet - Step 2

Provider Organization Details

Basic Client Information

Funding Request Details

New FFT Worksheet

This form is different for each initiative.

- Scroll down to complete all the sections. You must put something in every box with a red asterisk (\*).
- Click the **Save & Next** button at the top or bottom of the form.

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

**IMPORTANT:** You must finish the **EDI Grant Submit Worksheet – Step 2** page and click **Save & Next**.

EDI Grant Submit Worksheet - Step 2

Provider Organization Details
Refresh
Worksheet Summary
Save & Next

Basic Client Information

Funding Request Details

**New FFT Worksheet**

Fire Station Name \*

Fire Station Mailing Address \*

Chief's Name \*

Chief's Phone \*

Chief's Email Address \*

Contact's Name \*

Contact's Title \*

Contact's Phone Number \*

Contact's Email Address \*

Contract Start Date \*

Current Employees \*  (Numeric value)

Number Of Trainees \*  (Numeric value)

Why is training being requested?

Maintain  
 Upgrade

What type of training is being requested?

Assessments  
 Training  
 Consumables  
 Curriculum Books  
 Curriculum Development  
 Video Development  
 Travel  
 Equipment  
 Software  

Miscellaneous

Refresh
Worksheet Summary
Save & Next

## Program Initiative Example Forms

### TIP & TIG Worksheet:

EDI Grant Submit Worksheet - Step 2	
Provider Organization Details	<input type="button" value="Refresh"/> <input type="button" value="Worksheet Summary"/> <input type="button" value="Save &amp; Next"/>
Basic Client Information	▼
Funding Request Details	▲
<h4>New TIP Worksheet</h4>	
Client Name *	<input type="text"/>
FEI Number *	<input type="text"/>
NAICS Code *	<input type="text"/>
Client's Mailing Address *	<input type="text"/>
CEO's Name	<input type="text"/>
CEO's Phone	<input type="text"/>
CEO's Email Address	<input type="text"/>
Contact's Name *	<input type="text"/>
Contact's Title *	<input type="text"/>
Contact's Phone Number *	<input type="text"/>
Contact's Email Address *	<input type="text"/>
Client's Product	<input type="text"/>
Years in Business *	<input type="text"/> (Numeric value)
Years in Oklahoma *	<input type="text"/> (Numeric value)
Number of Hourly Employees *	<input type="text"/> (Numeric value)
Number of Salaried Employees *	<input type="text"/> (Numeric value)
What has been the highest level of employment? *	<input type="text"/>

### Firefighter Training Worksheet:

EDI Grant Submit Worksheet - Step 2	
Provider Organization Details	<input type="button" value="Refresh"/> <input type="button" value="Worksheet Summary"/> <input type="button" value="Save &amp; Next"/>
Basic Client Information	▼
Funding Request Details	▲
<h4>New FFT Worksheet</h4>	
Fire Station Name *	<input type="text"/>
Fire Station Mailing Address *	<input type="text"/>
Chief's Name *	<input type="text"/>
Chief's Phone *	<input type="text"/>
Chief's Email Address *	<input type="text"/>
Contact's Name *	<input type="text"/>
Contact's Title *	<input type="text"/>
Contact's Phone Number *	<input type="text"/>
Contact's Email Address *	<input type="text"/>
Contract Start Date *	<input type="text"/> <input type="button" value="Calendar"/>
Current Employees *	<input type="text"/> (Numeric value)
Number Of Trainees *	<input type="text"/> (Numeric value)



**New Safety Worksheet:**

EDI Grant Submit Worksheet - Step 2

Provider Organization Details
Refresh Worksheet Summary Save & Next

Basic Client Information

Funding Request Details

**New Safety Worksheet**

Contact's Name\*

Contact's Title\*

Contact's Phone Number\*

Contact's Email Address\*

Contract Start Date\*

Current Employees\*  (Numeric value)

Number Of Trainees\*  (Numeric value)

Why is training being requested?

Maintain  
 Upgrade

What type of training is being requested?

Assessments  
 Training  
 Consumables  
 Curriculum Books  
 Curriculum Development  
 Video Development  
 Travel  
 Equipment  
 Software  
 Miscellaneous

Refresh Worksheet Summary Save & Next

**Economic Development – Incubator Worksheet:**

EDI Grant Submit Worksheet - Step 2

+ Provider Organization Details
Refresh Worksheet Summary Save & Next

+ Basic Client Information

+ Attachments

- Funding Request Details

**New Incubator Worksheet**

Contact's Name\*

Contact's Title\*

Contact's Phone Number\*

Contact's Email Address\*

Contract Start Date\*

Current Employees\*

Number Of Trainees\*

Why is training being requested?

Maintain  
 Upgrade

What type of training is being requested?

### EDI Grant Submit Worksheet – Step 3

- On the *EDI Grant Submit Worksheet – Step 3* page, click on the words **Budget Line Items** to expand the 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.
  - Complete **Budget Line Desc** with the description of the item.
  - Complete **Req. Units** (Required Units-Zero (0) is not acceptable in this field).
  - Complete **Req. Unit Cost** (Required Unit Cost-Zero (0) is not acceptable in this field).
  - Complete **Req Unit Type** (Required Unit Type)-Select **Req Unit Type** from the drop-down menu.
  - If your school will match any of the funds, enter that amount under **Matched Funds**.
  - 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).

**EDI Grant Submit Worksheet - Step 3**

Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval

Basic Client Information

Project Details

**Budget Line Items**

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$26,035.00	\$26,035.00	\$23,604.90	\$0.00	\$3,431.00	\$23,604.90

+ Add Budget Line Remove Budget Line Cancel Budget Line Changes

Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched Funds
	0.00	\$0.00		\$0.00	\$0.00	

- Add supporting or required attachments. Expand the **Attachments** section by clicking the words.
- Click **Select files...** and find your document.
- Select **Upload & Save file**.

**Attachments**

Browse: Select files Upload & Save file

Attachment Note:

Active/Inactive file(s) Delete file(s) Download all files

Status	File Name	Attachment Note	Uploaded Date	Action
--------	-----------	-----------------	---------------	--------

Acknowledgements

Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval

**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.

- **Save as Draft**  
Click **Save as Draft**, 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 later. 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.
- Expand the **Acknowledgements** section by clicking on the word acknowledgements.
- Check the Acknowledgement box.
- Add an **Acknowledgement Note\***.
- Click **Submit for Approval** if everything is ready to be submitted.

EDI Grant Submit Worksheet - Step 3

Provider Organization Details      ▼

Basic Client Information ▼

Project Details ▼

Budget Line Items ▼

Attachments ▼

**Acknowledgements** ▲

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

**B** *I* U (Inherited size) (Inherited font) Format

All is correct. AB

**NOTE:** To make your worksheet is complete and accurate, you can view or print your worksheet summary page before submitting for approval. **\*\*Be sure to Save as Draft** before viewing the Worksheet Summary.

- Click on the **Worksheet Summary** button at the top or bottom of the form.

EDI Grant Submit Worksheet - Step 3

Provider Organization Details      ▼

Basic Client Information ▼

Project Details ▼

Budget Line Items ▼

Attachments ▼

**Acknowledgements** ▲

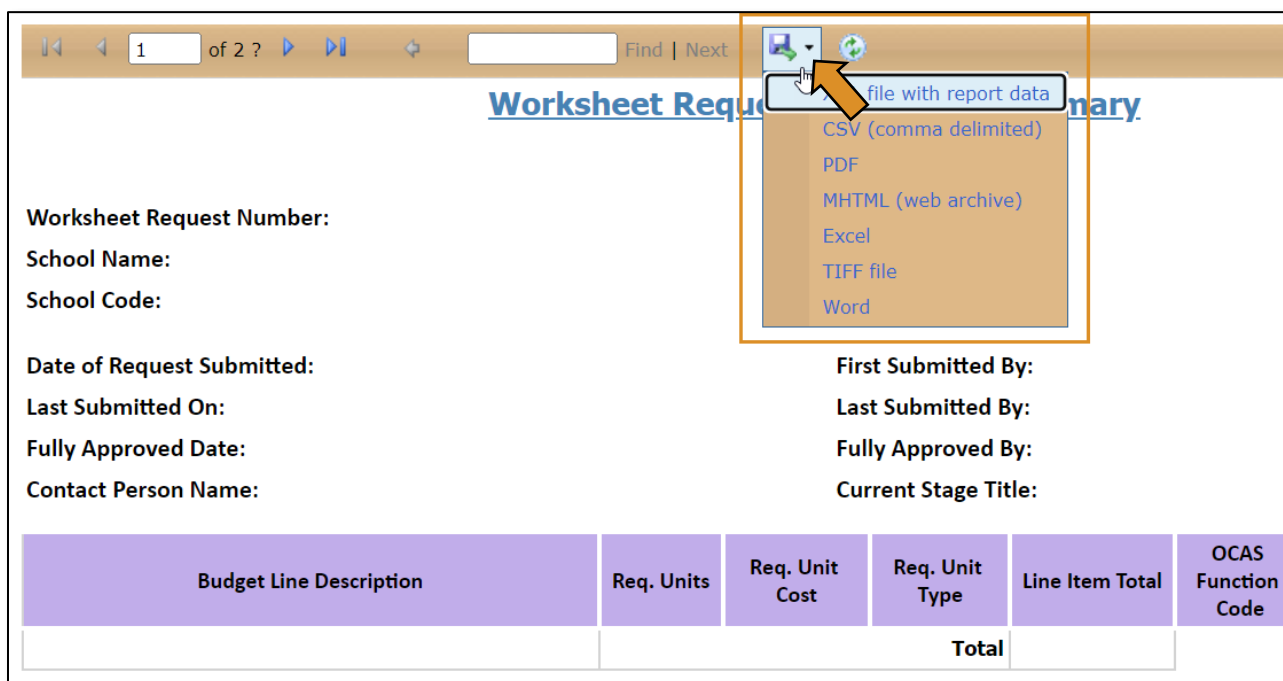
By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

**B** *I* U (Inherited size) (Inherited font) Format

All is correct. AB

- To export, save and/or print the **Worksheet Summary**, click the blue disc button, and choose *Excel* or *PDF* from the drop-down menu.



The screenshot shows the 'Worksheet Request Individual Summary' form. At the top, there is a navigation bar with a search box and a 'Find | Next' button. Below this, the form title 'Worksheet Request Individual Summary' is displayed. The form contains several input fields for user information and request details, including 'Worksheet Request Number', 'School Name', 'School Code', 'Date of Request Submitted', 'Last Submitted On', 'Fully Approved Date', 'Contact Person Name', 'First Submitted By', 'Last Submitted By', 'Fully Approved By', and 'Current Stage Title'. At the bottom, there is a table with columns: 'Budget Line Description', 'Req. Units', 'Req. Unit Cost', 'Req. Unit Type', 'Line Item Total', and 'OCAS Function Code'. A 'Total' row is present at the bottom of the table. A blue disc icon in the top right corner is highlighted with a red box, and a red arrow points to it. A dropdown menu is open, showing options: 'file with report data', 'CSV (comma delimited)', 'PDF', 'MHTML (web archive)', 'Excel', 'TIFF file', and 'Word'.

- To return to the *EDI Grant Submit Worksheet – Step 3* form to submit for approval, click the *X* on the *Grant Worksheet Summary* tab at the top of your screen to close this tab. You should now be on the *EDI Grant Submit Worksheet – Step 3* screen.



The screenshot shows a browser window with multiple tabs. The active tab is 'Grant Worksheet Summary', which is highlighted with a red box and a red arrow pointing to the close button (X). The browser address bar shows the URL: 'Dashboard EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X WS- -EDI-EDI-FIREFTR-444-15X111745-CEB3BD6BCB29 - New X Grant Worksheet Summary X'. Below the browser window, the 'Worksheet Request Individual Summary' form is visible, showing the same navigation bar and form fields as in the previous screenshot.

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

The *worksheet* will now go to the **EDI – State Regional Coordinator** for approval.

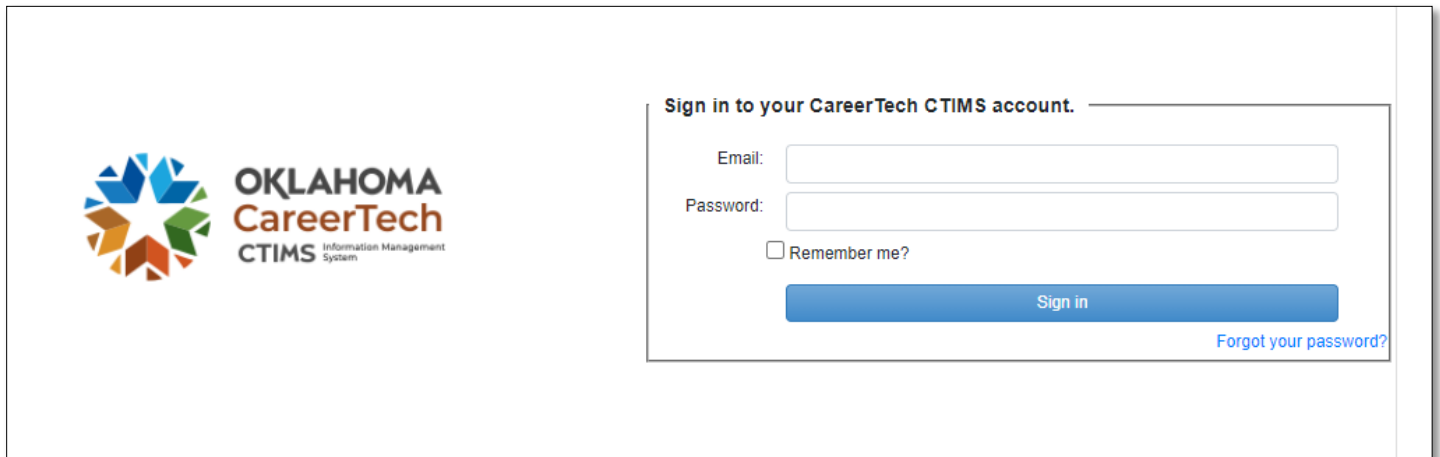
**Change Request:** After you submit the worksheet/application, if there are any changes that need to be made, due to change in training need or it has been rejected, you will have to use the Change Request process. The *EDI – Local Coordinator* can initiate the change request process at any time before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

**IMPORTANT:** If you need to do a **Change Request**, do not select the **EDI New Worksheet/Agreement Flow** option on the left navigation.

## EDI – State Regional Coordinator (Worksheet Process)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

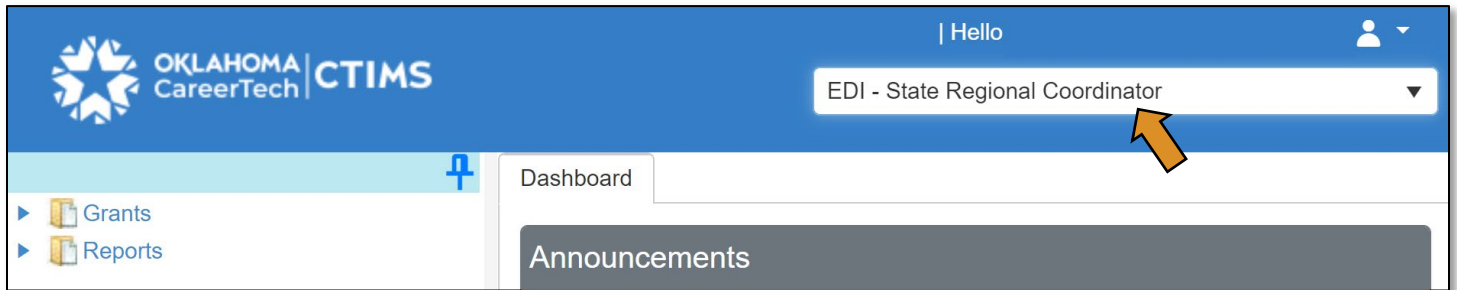
Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

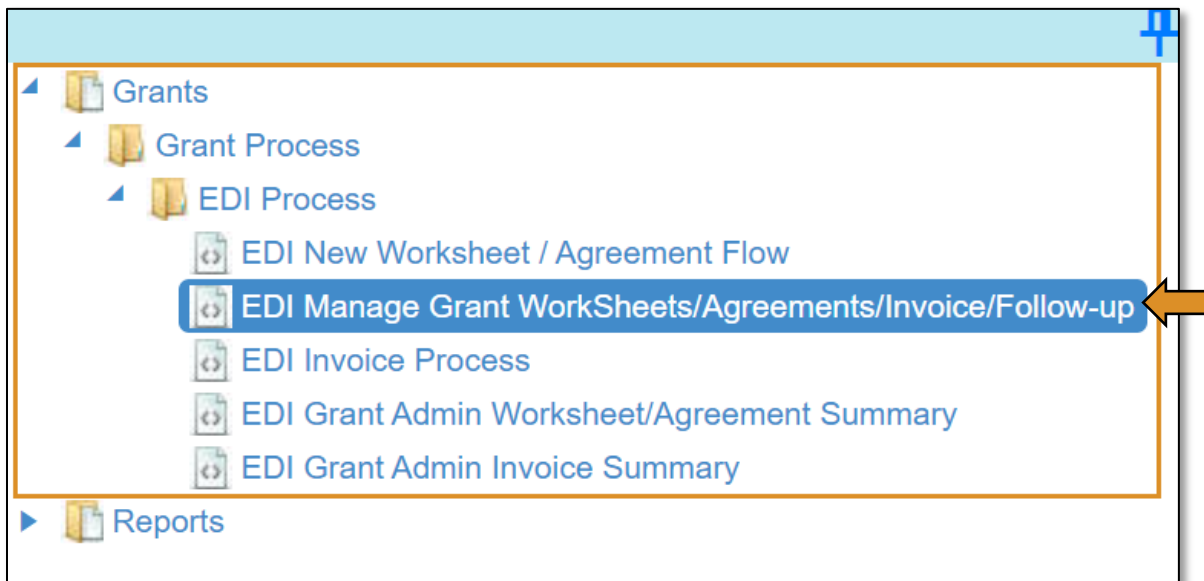


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

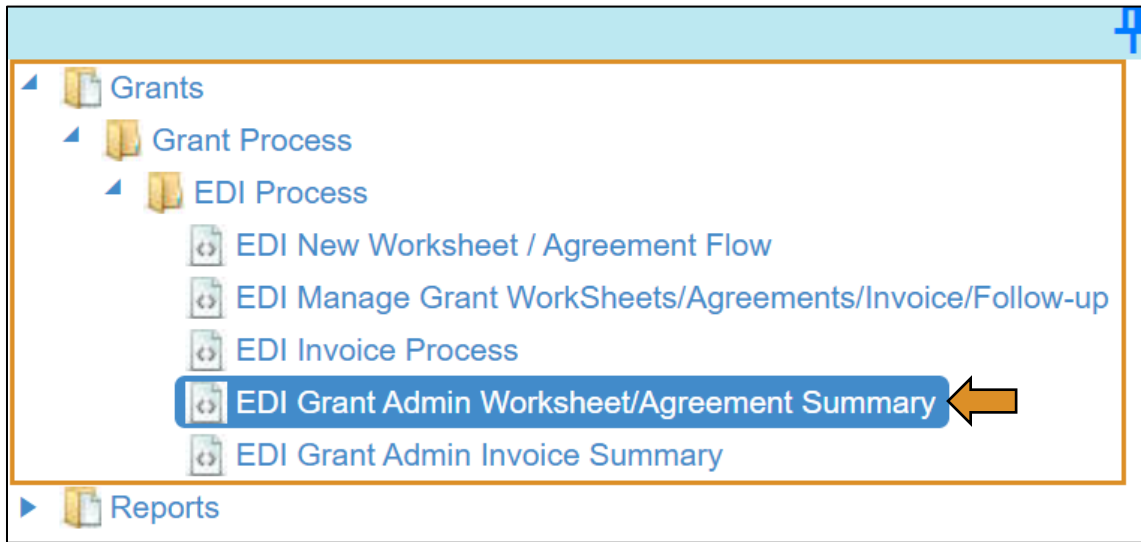
If you do not see **EDI – State Regional Coordinator**, contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link 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 requests in the display screen.

The screenshot displays the 'EDI Grant Admin Worksheet/Agreement Summary' application interface. At the top, there are filter fields: 'Fiscal Calendar Year:\*' (dropdown), 'Program Initiative:\*' (dropdown with 'All\*' selected), 'Organization:\*' (dropdown with 'S..' and 'All' selected), 'Grant Fund Type:\*' (dropdown with 'EDI' selected), and 'Organization Type:\*' (dropdown with 'All\*' selected). Below these are 'Approval Function Type:\*' (dropdown with 'All' selected) and 'Filter on Status:\*' (dropdown with 'All' selected). A 'Search' button is located to the right of the status filter. Below the filters are three buttons: 'Save changes' (checked), 'Cancel changes', and 'Export to Excel' (checked). At the bottom, there is a table with the following columns: 'Action', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', and 'Worksheet'. The first row of data shows: 'Country Technology Center', 'TECH CENT...', 'EDI', and 'WS- -EDI-EDI-SAFETY'.

Action	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet
▶	Country Technology Center	TECH CENT...	EDI		WS- -EDI-EDI-SAFETY

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. Many of these fields will automatically populate based on your organization login credentials.

**NOTE:** The red asterisks\* represents a required field.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

The **EDI Grant Fund Worksheets List** will open and the worksheets/applications that needs to be approved will be listed.

- Click the black arrow, on the row of the grant you need to approve, to open the worksheet summary of the Approval Stages for the worksheet. The **Worksheet Approval Current Stage** column will show the current role that needs to take action on the worksheet.

Dashboard | EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X

### EDI Grant Fund Worksheets List

1. Fiscal Calendar Year:\*

3. Organization Type:\*

5. Organization District:\*

7. Approval Function Type:\*

8. Filter on Status:\*

2. Grant Fund Type:\*

4. Organization:\*

6. Program Initiative:\*

9.

Save changes
  Cancel changes

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet
▶	Technology Center	CENTRAL PL...	EDI - Regional Coordinator		WS- -EDI-EDI-TIP-434-05X111745-

Worksheet Summary Agreement Summary

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email
EDI Local Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov



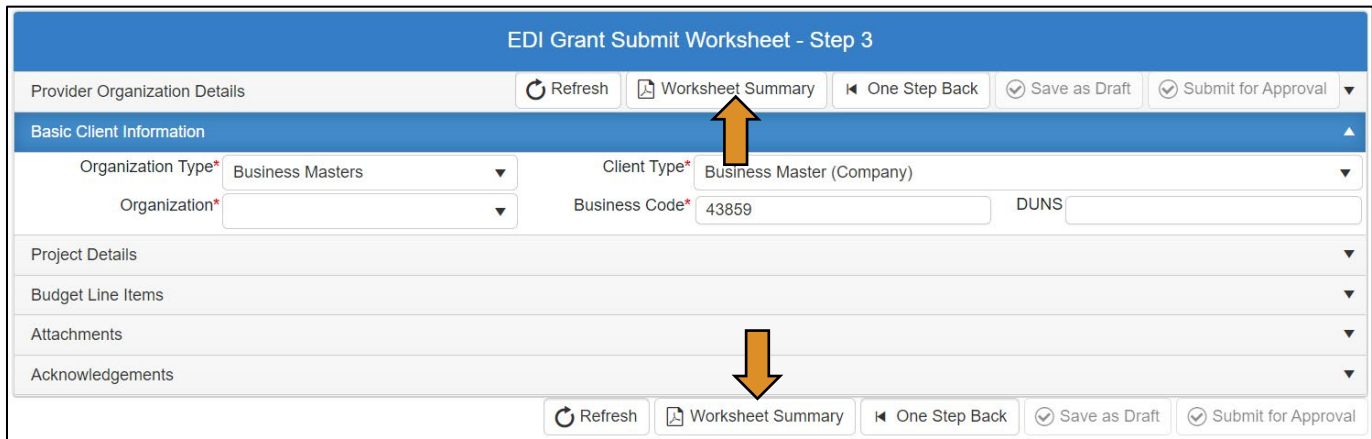
- Click the worksheet blue link under the **Worksheet** column to open the worksheet (or on the EDI Grant Admin Worksheet/Agreement Summary Screen if you are selecting from the list of all your schools).

EDI Grant Submit Worksheet – Step 2

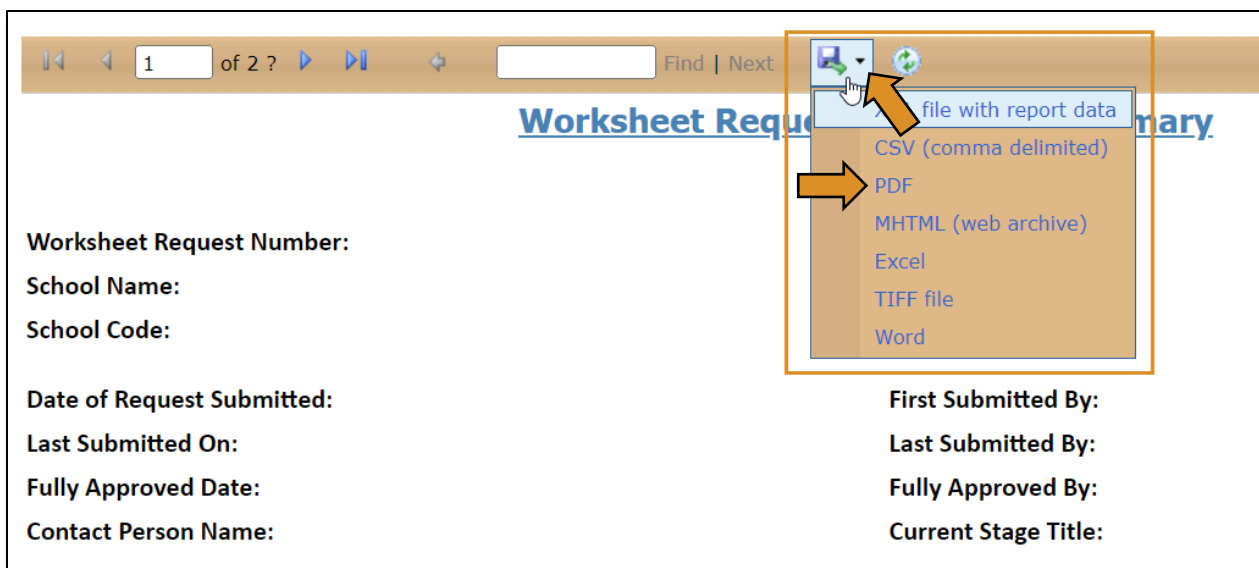
- Click on the words **Basic Client Information** and **Funding Request Details** to expand these sections if you want to review the information.

**NOTE:** We recommend you print a pdf of the **Worksheet Summary** before going to the next step to help with project and budget verification.

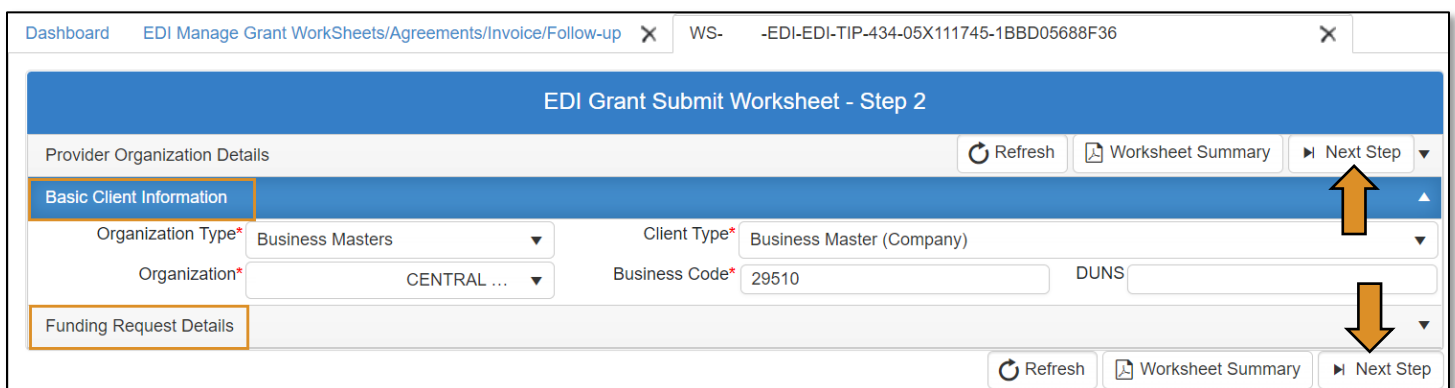
- Click on the **Worksheet Summary** button on the top right of the screen.



- Click the blue disc to export to a pdf.



- Click **Next Step** to proceed.



### EDI Grant Submit Worksheet – Step 3

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

### Worksheet Acknowledgements and Approval

You are able to put an **Approval Note** or **Rejection Note** in at this step. *The private note is for agency use only.* When you have verified the worksheet and budget, click the **Approve** button (at the top or bottom) to send the worksheet to the next approval stage.

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	6/14/2023 2:00:28 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Cancel for Chang...	New Process	
EDI Local Coordinator - 1st Stage	6/14/2023 2:02:03 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI State Regional Coordinator - 2nd	6/15/2023 7:45:34 AM						
EDI State Supervisor - Fully Approved	6/15/2023 7:45:34 AM						

At this point, your *worksheet/application* is successfully submitted. The worksheet will now go to the **EDI – State Initiative Supervisor** for approval.

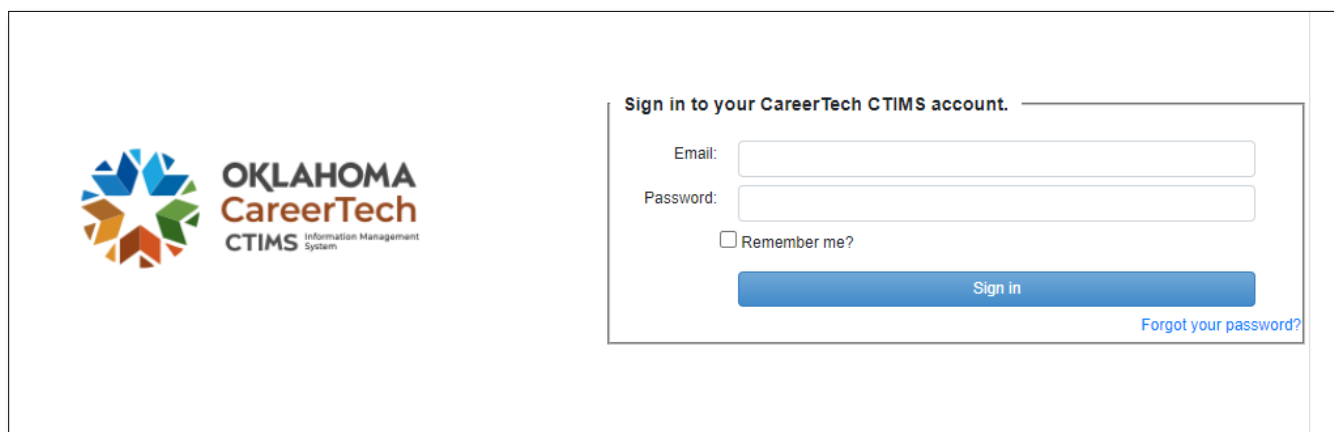
## EDI – State Initiative Supervisor (Worksheet Process)

See approval instructions [here](#).

## EDI – Local Coordinator, EDI – State Regional Coordinator, or EDI – State Supervisor (Change Request Process)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

Click here to login to CTIMS

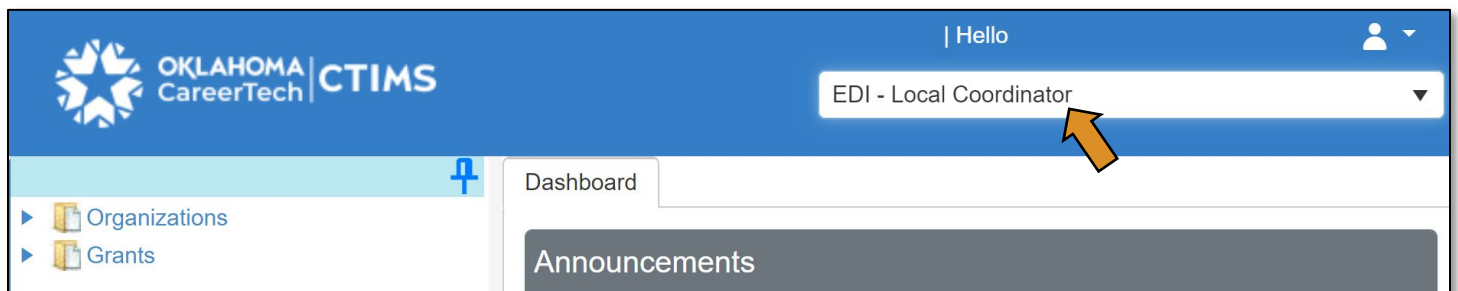


## Change Request Process

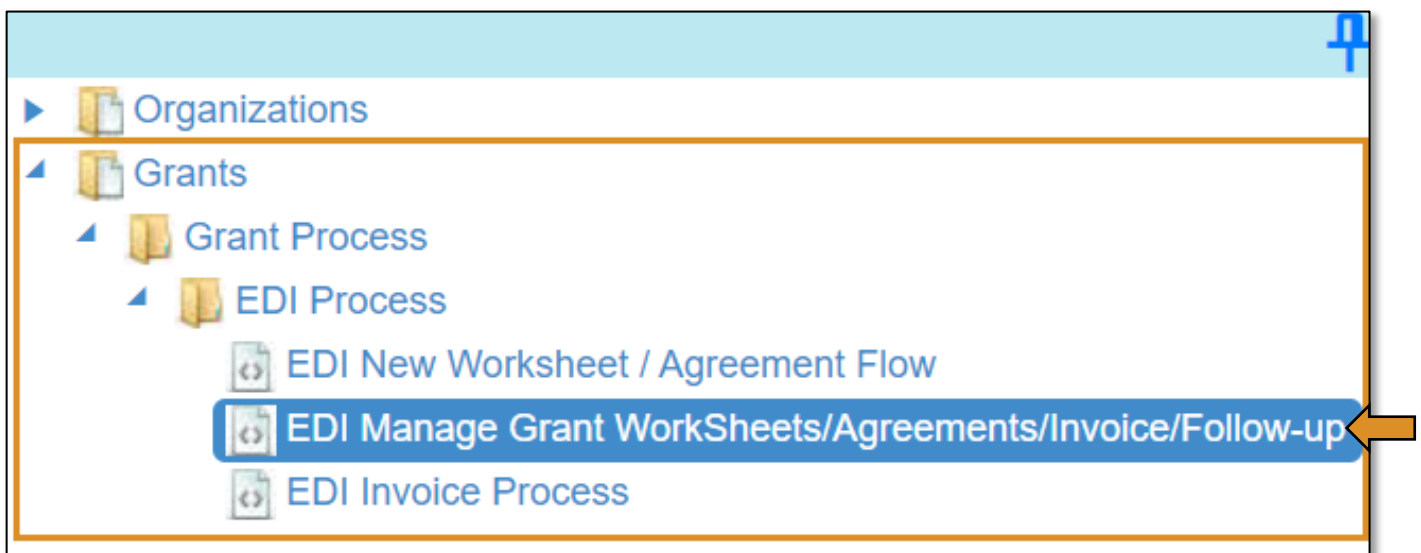
After a **Worksheet** is submitted for approval, you must go through the **Change Request Process** to make any changes. The **EDI – Local Coordinator**, **ODCTE – State Regional Coordinator**, and **ODCTE – State Supervisor** can initiate the change request at any time during the **Worksheet** process. Once the **Worksheet** is fully approved, a change request is no longer an option.

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 **EDI – Local Coordinator**, **EDI – State Regional Coordinator**, or **EDI – State Supervisor** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator**, **EDI – State Regional Coordinator**, or **EDI – State Supervisor** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)



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



The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

**NOTE:** The red asterisks\* represents a required field.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It contains several dropdown menus and a search button. The fields are numbered as follows:

- 1. Fiscal Calendar Year\* (dropdown)
- 2. Grant Fund Type\* (dropdown, value: EDI)
- 3. Organization Type\* (dropdown, value: Technology Center Districts)
- 4. Organization\* (dropdown, value: Technology Center)
- 5. Organization District\* (dropdown, value: Technology Center)
- 6. Program Initiative\* (dropdown, value: Economic Development - Training for Indust...)
- 7. Approval Function Type\* (dropdown, value: All)
- 8. Filter on Status\* (dropdown, value: All)
- 9. Search button

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

The screenshot shows the search results table for 'EDI Grant Fund Worksheets List'. The table has the following columns: Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement. Two rows are visible, with arrows pointing to the 'Worksheet' column values.

Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
ENID FIRE DEPT	New-Draft		WS- -EDI-EDI-FIREFTR-444-15X111745-CEB3	
GARFIELD COUNTY PUBLIC SA...	EDI State Regional Coordinator - ...		WS- -EDI-EDI-FIREFTR-444-15X111745-E970B	

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

The screenshot shows the 'EDI Grant Submit Worksheet - Step 3' interface. At the top, there is a navigation bar with buttons for 'Refresh', 'Worksheet Summary', 'One Step Back', 'Save as Draft', 'Submit for Approval', and 'Change Request'. The 'Change Request' button is highlighted with an orange arrow pointing up. Below the navigation bar, there are several sections: 'Provider Organization Details' (with fields for Fiscal Calendar Year, Organization Type, Organization District, and Worksheet No.), 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. At the bottom, there is another navigation bar with the same buttons as the top. The 'Change Request' button in the bottom navigation bar is highlighted with an orange arrow pointing down.

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

The screenshot shows a 'Change Request' dialog box. The dialog box has a title bar that says 'EDI Grant Submit Worksheet - Step 3' and a close button (X). The main text of the dialog box reads: 'You are going to cancel the approval process and initiating the change request process, Are you sure?'. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'OK'. The 'OK' button is highlighted with an orange arrow pointing to it.

- If changes to the *Operating Unit* or *Purchase Order Number* need to be revised, expand the *Project Details* section by clicking on the words "Project Details".

The screenshot shows the 'EDI Grant Submit Worksheet - Step 3' interface with the 'Project Details' section expanded. The 'Project Details' section is highlighted with an orange arrow pointing to it. The expanded section contains fields for 'Contact Name' (with a dropdown menu), 'Project Start Date' (with a date picker set to 7/1/2022), 'Operating Unit', 'Purchase Order Number', and 'Purchase Order Date' (with a date picker set to 6/14/2023). Below the 'Project Details' section, there are sections for 'Budget Line Items', 'Attachments', and 'Acknowledgements'. At the bottom, there is a navigation bar with buttons for 'Refresh', 'Worksheet Summary', 'One Step Back', 'Save as Draft', and 'Submit for Approval'.

- To revise the budget, expand the *Budget Line Items* section by clicking on the words “Budget Line Items”.
  - 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.

Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched Funds	Status
EMR/EMT/AEMT/Paramedic refreshe	50.00	\$35.00	Cost Per Hour	\$1,750.00	\$1,750.00	0.00	<input type="checkbox"/>
EMR/EMT/AEMT/Paramedic refre...	10.00	\$30.00	Cost Per Hour	\$300.00	\$300.00	0.00	Active

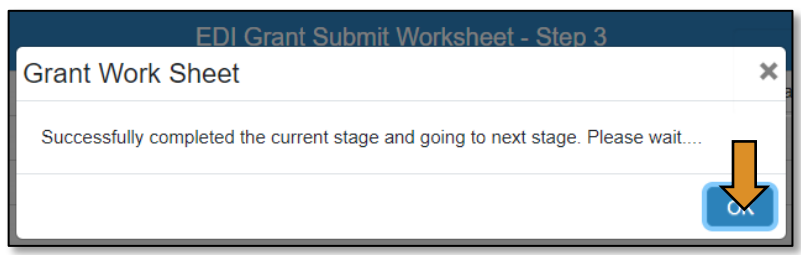
- After making the changes, go to the *Acknowledgement* section.
- Check the certification box and add an acknowledgment note. Add an explanation of any changes made to the agreement in the budget adjustment justification note box.
  - The **Acknowledgment Note\*** is a required field.

**NOTE:** Once the changes have been made, you can Save as Draft by clicking **Save as Draft**. This will save the changes to the worksheet without submitting to the next approval stage, so you can return and finish later.

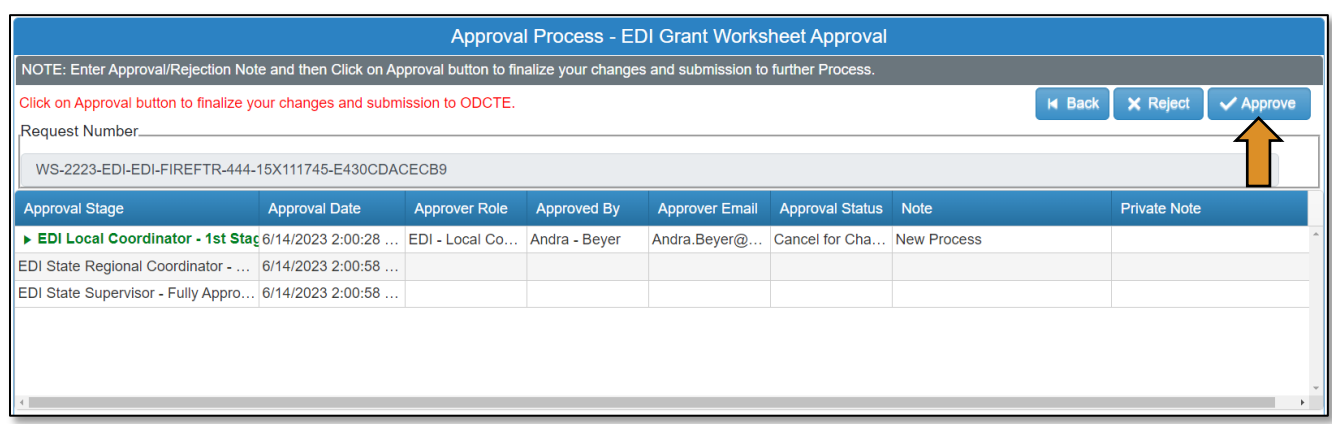
- Select **Submit for Approval** if the changes to the Worksheet are complete.

- Click **OK**.





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



- Click **OK** at the "Are you sure?" message.



The *worksheet* will now go back through the regular approval process.

## 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 **EDI – 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.



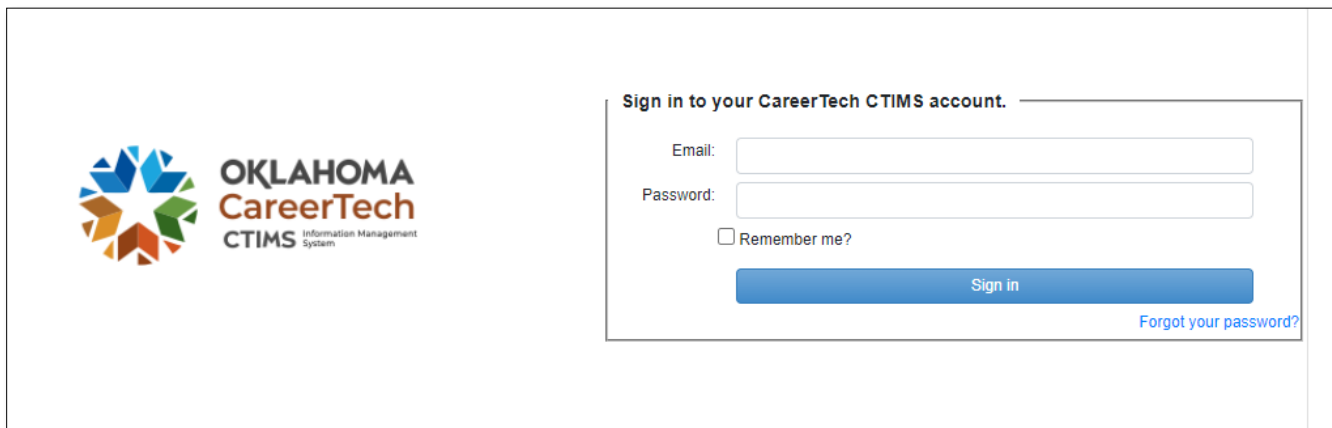
**Stage 7 - Local Finance Coordinator** – Enters the OCAS codes and adds new codes as needed. The Agreement becomes fully approved. (The tech center is responsible for selecting OCAS codes. See the [OCAS Codes for WED](#) for the codes.)

**IMPORTANT:** The local coordinator can initiate the budget adjustment process at anytime during the Agreement process IF an invoice has not been started. The local coordinator must contact the regional coordinator prior to initiating the budget adjustment process.

## [EDI – Local Coordinator \(Agreement Process\)](#)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

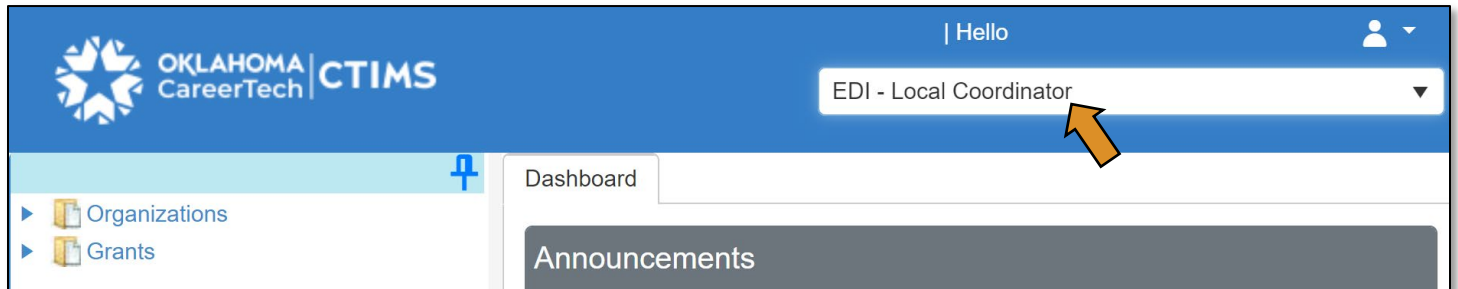
[Click here to login to CTIMS](#)



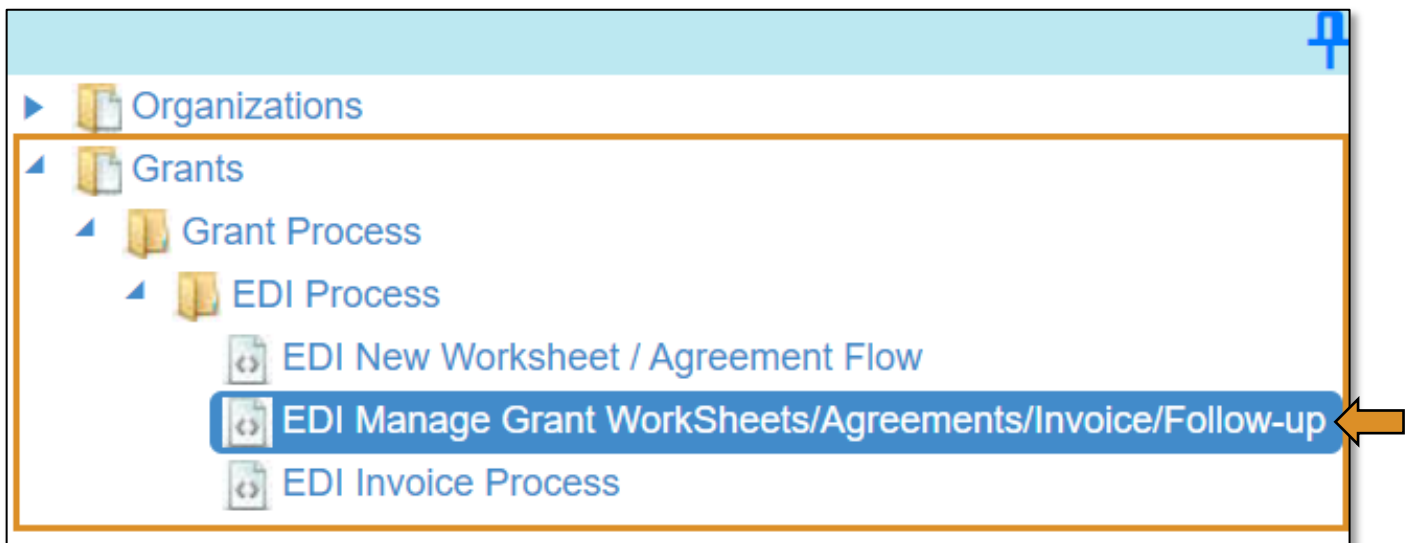
## Starting New Agreement

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 **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)



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



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 populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form with the following fields and values:

- 1. Fiscal Calendar Year\*: 2022-2023
- 2. Grant Fund Type\*: EDI
- 3. Organization Type\*: Technology Center Districts
- 4. Organization\*: Enter the first three characters of any ...
- 5. Organization District\*: (empty)
- 6. Program Initiative\*: --Select--
- Approval Function Type\*: All (tagged 7.)
- Filter on Status\*: All (tagged 8.)
- Search button (tagged 9.)

### Agreement Details

After clicking the **Search** button, the *Agreement* column will display *New*. Select the new Agreement by clicking on the word **New**.

The screenshot shows the 'EDI Grant Fund Worksheets List' table with the following search criteria and results:

Search Criteria:

- Fiscal Calendar Year\*: 2022-2023
- Grant Fund Type\*: EDI
- Organization Type\*: Technology Center Districts
- Organization\*: Technology Center
- Organization District\*: Technology Center
- Program Initiative\*: Economic Development - Firefighter (Type 83) -444
- Approval Function Type\*: All
- Filter on Status\*: All

Buttons:  Save changes,  Cancel changes,  Export to Excel

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
<input checked="" type="checkbox"/>	Technology Center	GARFIELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS-2223-EDI-EDI-FIREFTR-444-15X111745-C62D...	New

An orange arrow points to the 'New' text in the Agreement column of the first row.

Review the Agreement details, if necessary, by clicking the words to expand the *Project Details* or *Budget Line Items* sections. After reviewing the Agreement details, if necessary, click the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete. 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. Click on the **Save as Draft** button.

EDI Grant Agreement

Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

B I U (inherited size) (inherited font) Format

Approved. AB

BA Summary Report --Select-- SOU History Report --Select-- Refresh View WED PEF View SOU Agreement Summary + Save as Draft Submit for Approval Budget Adjustment Process

- Click **OK** to acknowledge that the Agreement has saved.

EDI Grant Agreement

Grant Agreement Process

Successfully completed the current stage and going to next stage. Please wait...

OK

## Agreement Acknowledgments and Approval

- Click **Submit for Approval** at the top or bottom of the screen.

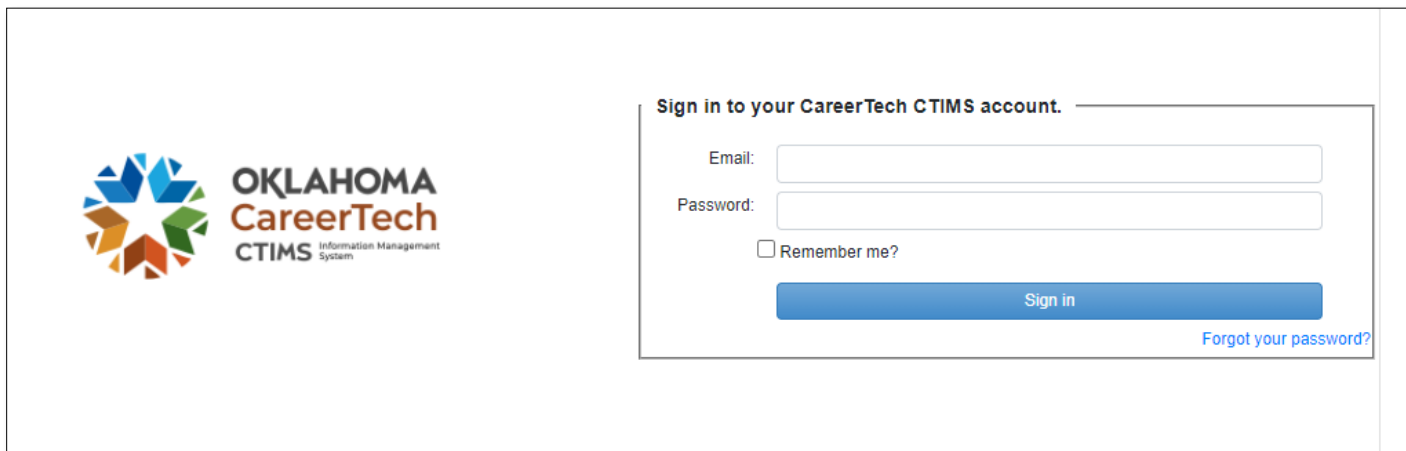
The screenshot displays the 'EDI Grant Agreement' interface. At the top, a blue header bar contains the title 'EDI Grant Agreement'. Below this, a navigation bar includes buttons for 'Refresh', 'View SOU', 'Agreement Summary', '+ Save as Draft', and 'Submit for Approval'. An orange arrow points to the 'Submit for Approval' button in this top bar. The main content area is divided into several sections: 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', and 'Attachments'. The 'Acknowledgements' section is highlighted in blue and contains a checked checkbox with the text 'By checking this box, I certify that the information provided is accurate and complete.' Below this is a text area for 'Acknowledgement Note:' with a rich text editor toolbar. The text 'Approved. AB' is entered in the text area. An orange arrow points to the 'Submit for Approval' button in the bottom navigation bar. The bottom navigation bar also includes buttons for 'Refresh', 'View WED PEF', 'View SOU', 'Agreement Summary', '+ Save as Draft', 'Submit for Approval', and 'Budget Adjustment Process'. On the left side of the bottom bar, there are dropdown menus for 'BA Summary Report' and 'SOU History Report'.

The *agreement* will now go to the EDI – Local BIS Director for approval.

## [EDI – Local BIS Director \(Agreement Process\)](#)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

Click here to login to CTIMS





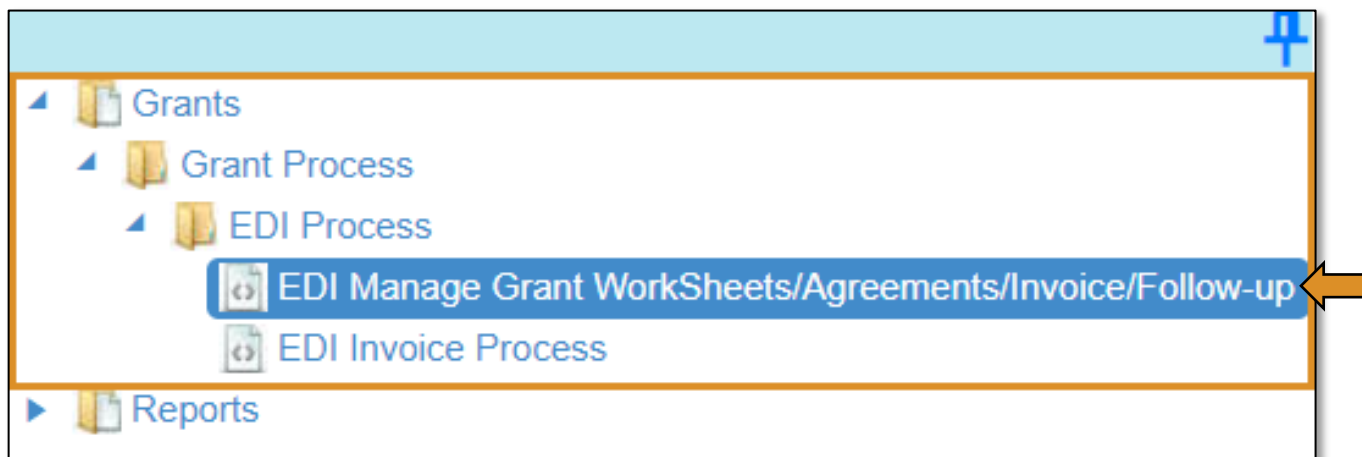
### Accessing the Agreement List

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 **EDI – Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local BIS Director** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)



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



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 populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

Dashboard | EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X

### EDI Grant Fund Worksheets List

1. Fiscal Calendar Year:\* 2022-2023

2. Grant Fund Type:\* EDI

3. Organization Type:\* Technology Center Districts

4. Organization:\* Enter the first three characters of any ...

5. Organization District:\*

6. Program Initiative:\* --Select--

Approval Function Type: \* All 7.

Filter on Status: \* All 8. 9. Search

- The **Agreement** column will display an agreement number.
- Click the agreement number link to open the agreement.

### EDI Grant Fund Worksheets List

Fiscal Calendar Year:\* 2022-2023

Grant Fund Type:\* EDI

Organization Type:\* Technology Center Districts

Organization:\* Technology Center

Organization District:\* Technology Center

Program Initiative:\* Economic Development - Firefighter (Type 83) -444

Approval Function Type: \* All

Filter on Status: \* All Search

Save changes
  Cancel changes

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

## Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.

**EDI Grant Agreement**

Provider Organization Details
Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s) Budget Line Detail Information

+ Add Budget Line X Remove Budget Line Cancel Budget Line Changes

Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.

**EDI Grant Agreement**

Provider Organization Details
Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

\*  By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
ab

BA Summary Report: --Select-- SOU History Report: --Select--

Refresh View WED PEF View SOU Agreement Summary + Save as Draft Submit for Approval

Budget Adjustment Process  Approval Process

- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.

**EDI Grant Agreement**

Provider Organization Details
Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

\*  By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
Approved. AB

BA Summary Report: --Select-- SOU History Report: --Select--

Refresh View WED PEF View SOU Agreement Summary + Save as Draft Submit for Approval  Budget Adjustment Process  Approval Process

## Agreement Acknowledgements and Approval

- Add a note to the **Approval/Rejection Note** section.
- Click the **Approve** button at the top or bottom of the screen.
- Click **OK** on the **Are you sure?** message.

**Approval Process - EDI Grant Agreement Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number  
WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	6/15/2023 8:32:51 AM	EDI - Local Coordina...	Andra - Beyer	Andra.Beyer@caree...	Approved	New Process	
▶ EDI BIS Director - 2nd Approval Stage	6/15/2023 8:40:39 AM						
EDI State Regional Coordinator - 3rd Approv...	6/15/2023 8:40:39 AM						
EDI State Supervisor - 4th Approval Stage	6/15/2023 8:40:39 AM						
EDI Local Superintendent (or designee) - 5th ...	6/15/2023 8:40:39 AM						
EDI State Requisition Coordinator - 6th Appro...	6/15/2023 8:40:39 AM						
EDI Local Finance Coordinator - Fully Approv...	6/15/2023 8:40:39 AM						

**Current Approval Stage Information**

Approved By\* 
 Approval Stage\*

Approver School\* 
 Approver Role\*

Approver Email\* 
 Approval Date\*

**Approval/Rejection Note**

Format

**Private Note**

Format

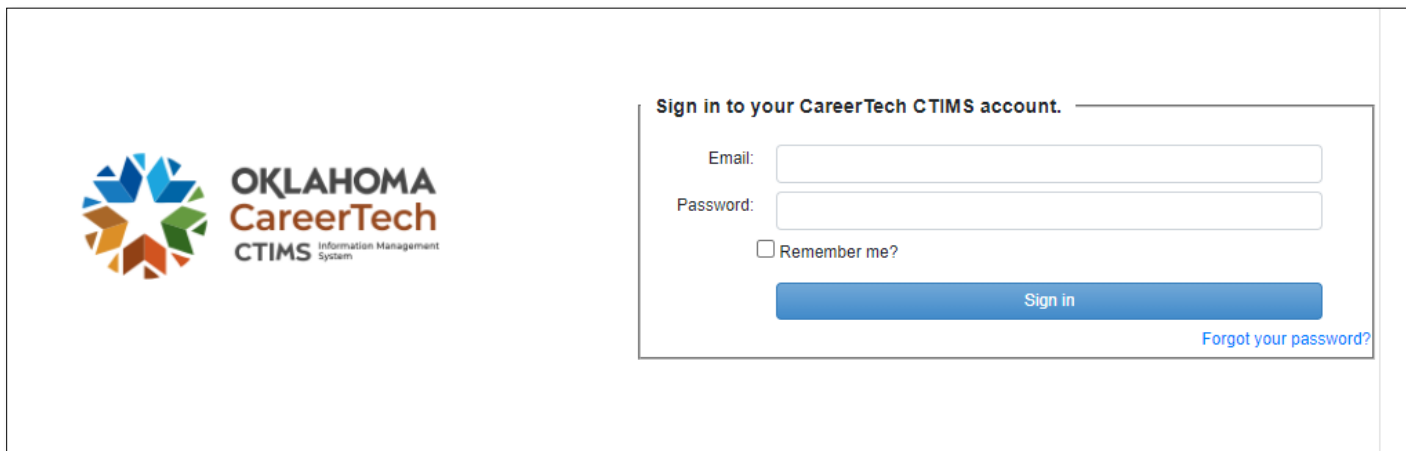
File Name	Uploaded On	Note	Attachment

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

## [EDI – State Regional Coordinator \(Agreement Process\)](#)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov/ctims) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

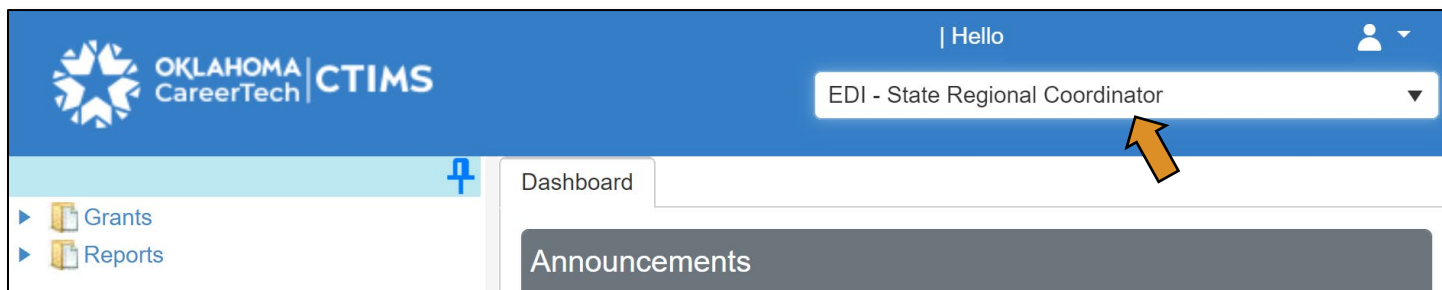
Click here to login to CTIMS



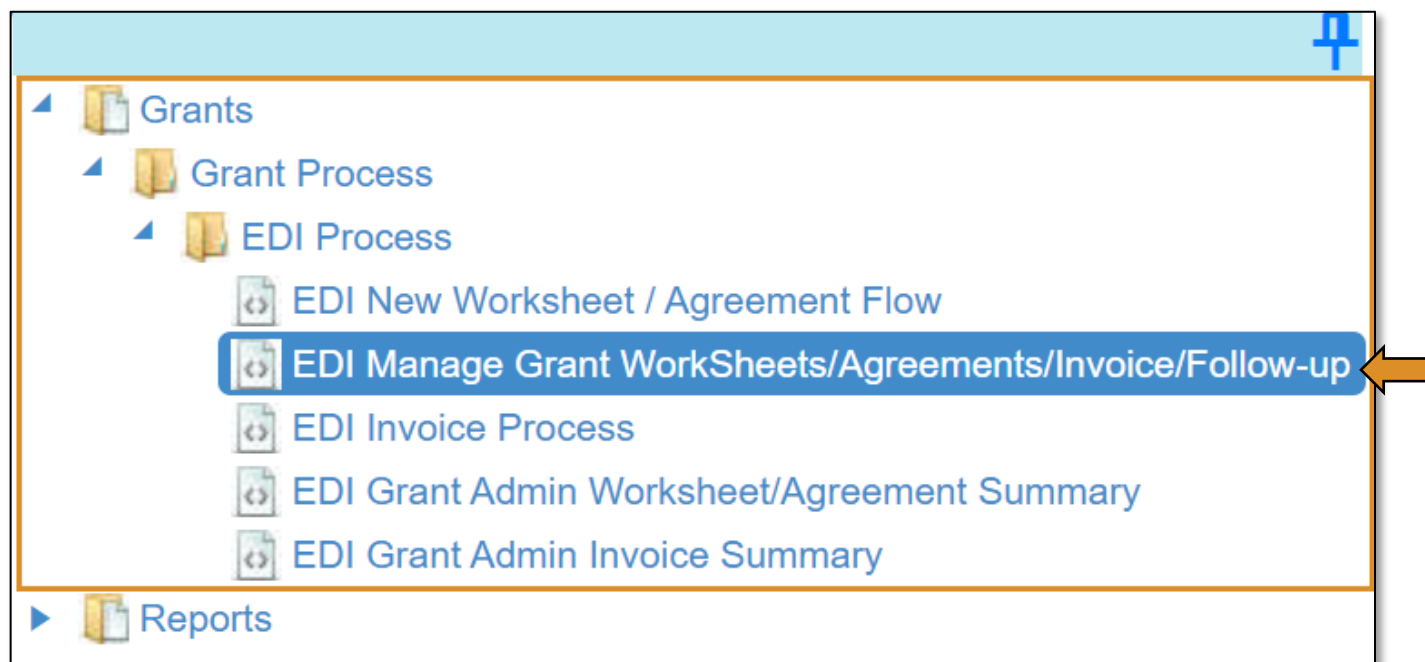
## Accessing the Agreement List

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 **EDI – State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – State Regional Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)



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



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 populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

Dashboard | EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X

### EDI Grant Fund Worksheets List

1. Fiscal Calendar Year\*: 2022-2023

2. Grant Fund Type\*: EDI

3. Organization Type\*: Technology Center Districts

4. Organization\*: Enter the first three characters of any ...

5. Organization District\*:

6. Program Initiative\*: --Select--

Approval Function Type\*: All 7.

Filter on Status\*: All 8.

9. Search

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

### EDI Grant Fund Worksheets List

Fiscal Calendar Year\*: 2022-2023

Grant Fund Type\*: EDI

Organization Type\*: Technology Center Districts

Organization\*: Technology Center

Organization District\*: Technology Center

Program Initiative\*: Economic Development - Firefighter (Type 83) -444

Approval Function Type\*: All

Filter on Status\*: All

Save changes | Cancel changes | Export to Excel

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

## Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.

EDI Grant Agreement

Provider Organization Details

Basic Client Information

Project Details

**Budget Line Items**

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s)

Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.

Dashboard EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD - 1st Stage X

EDI Grant Agreement

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
iab

BA Summary Report: --Select-- SOU History Report: --Select--

Budget Adjustment Process

- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.

EDI Grant Agreement

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
Approved AB

BA Summary Report: --Select-- SOU History Report: --Select--         Budget Adjustment Process



## Agreement Acknowledgements and Approval

- 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).
- Click the **Approve** button at the top or bottom of the screen.
- Click **OK** on the **Are you sure?** message.

Approval Process - EDI Grant Agreement Approval

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

◀ Back ✖ Reject ✔ Approve

Request Number: \_\_\_\_\_  
 WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	12/20/2022 11:40:...	EDI - Local Co...	Andra - Beyer	Andra.Beyer@...	Approved	New Process	
EDI BIS Director - 2nd Approval ...	12/20/2022 1:02:1...	EDI - Local BIS...	Andra - Beyer	Andra.Beyer@...	Approved		
▶ EDI State Regional Coordinator	12/20/2022 1:05:3...						
EDI State Supervisor - 4th Approv...	12/20/2022 1:05:3...						
EDI Local Superintendent (or desi...	12/20/2022 1:05:3...						
EDI State Requisition Coordinator...	12/20/2022 1:05:3...						

**Current Approval Stage Information**

Approved By*	<input type="text" value="Beyer Andra"/>	Approval Stage*	<input type="text" value="3rd Approval Stage"/>
Approver School*	<input type="text" value="Oklahoma Department of Career and Technol..."/>	Approver Role*	<input type="text" value="EDI - State Regional Coordinator"/>
Approver Email*	<input type="text" value="Andra.Beyer@careertech.ok.gov"/>	Approval Date*	<input type="text" value="12/20/2022"/>

**Approval/Rejection Note**

Format ▼ **B** **I** **U** [bulleted list] [numbered list] [link] [unlink] [undo] [redo] [image] [table]

**Private Note**

Format ▼ **B** **I** **U** [bulleted list] [numbered list] [link] [unlink] [undo] [redo] [image] [table]

File Name	Uploaded On	Note	Attachment	
Firefighter			<a href="#">Download</a>	Public
Refresher		Refresher		Public

◀ Back ✖ Reject ✔ Approve

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

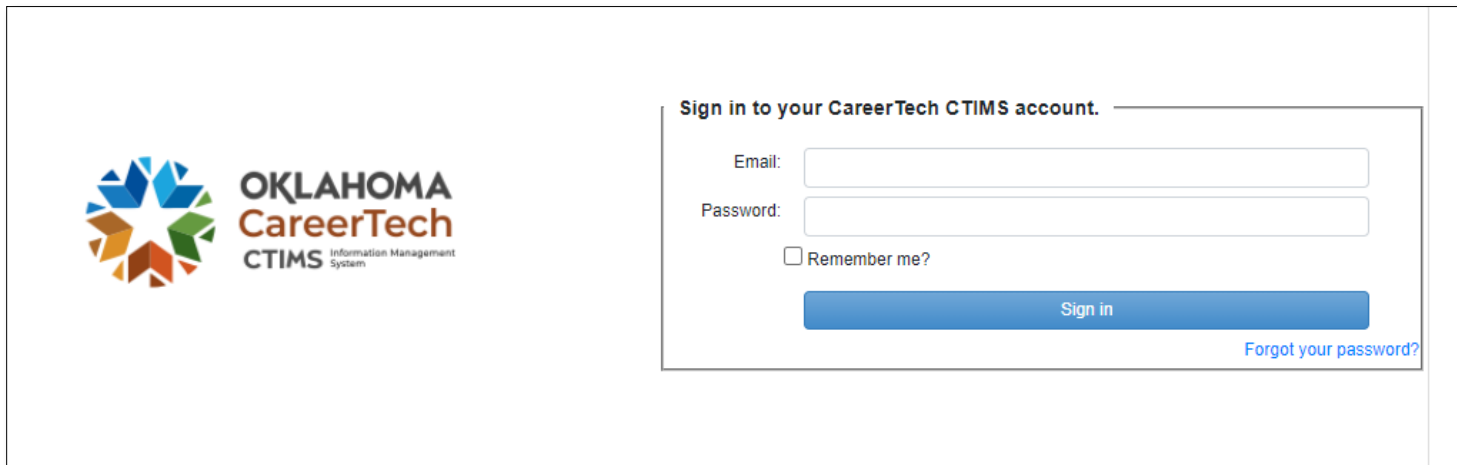
## [EDI - State Initiative Supervisor \(Agreement Process\)](#)

See instructions for EDI - State Regional Coordinator [here](#).

## [EDI-Local Superintendent/CEO \(Agreement Process\)](#)

### [Logging into CTIMS](#)

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




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

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

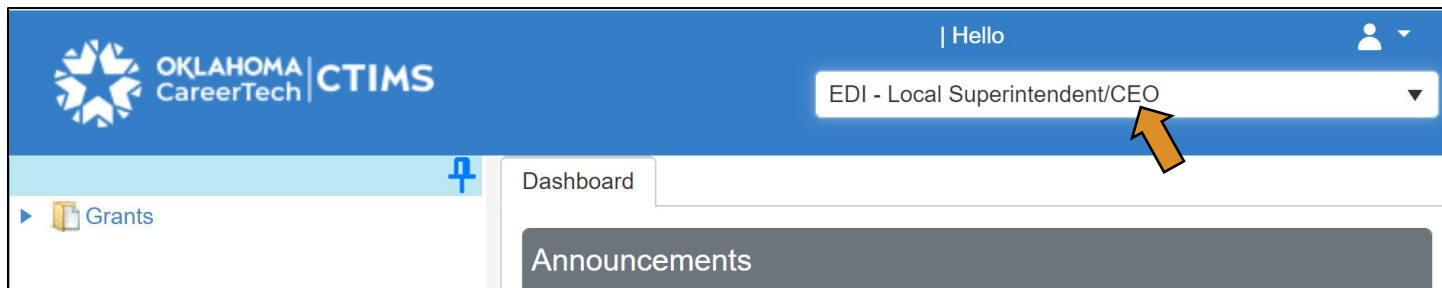
Click here to login to CTIMS



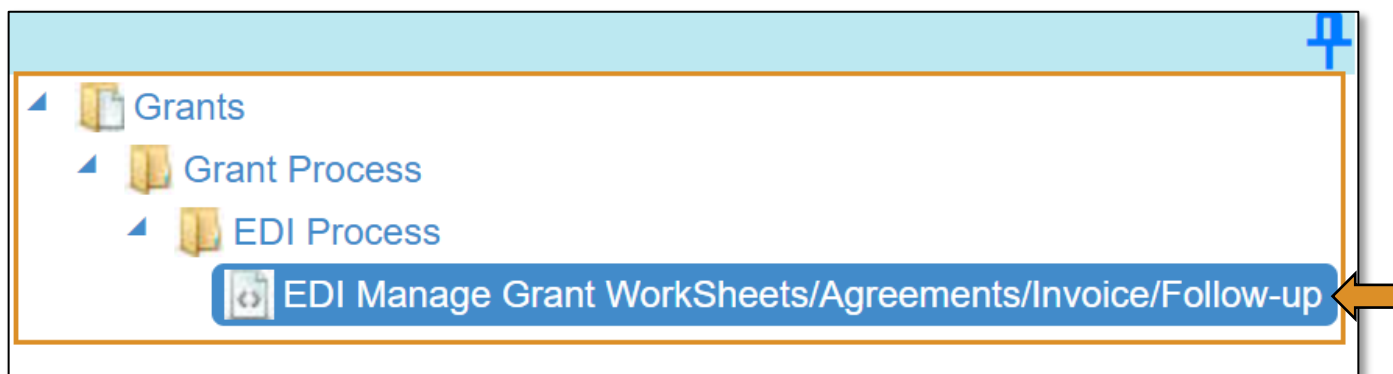
## Accessing the Agreement List

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 **EDI – Local Superintendent/CEO** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Superintendent/CEO** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)



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



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 populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

Dashboard | EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X

### EDI Grant Fund Worksheets List

1. Fiscal Calendar Year\*: 2022-2023

2. Grant Fund Type\*: EDI

3. Organization Type\*: Technology Center Districts

4. Organization\*: Enter the first three characters of any ...

5. Organization District\*:

6. Program Initiative\*: --Select--

Approval Function Type\*: All 7.

Filter on Status\*: All 8.

9. Search

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

### EDI Grant Fund Worksheets List

Fiscal Calendar Year\*: 2022-2023

Grant Fund Type\*: EDI

Organization Type\*: Technology Center Districts

Organization\*: Technology Center

Organization District\*: Technology Center

Program Initiative\*: Economic Development - Firefighter (Type 83) -444

Approval Function Type\*: All

Filter on Status\*: All

Save changes | Cancel changes | Export to Excel

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

## Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.

**EDI Grant Agreement**

Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

**Budget Line Items**

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s) Budget Line Detail Information

+ Add Budget Line Remove Budget Line Cancel Budget Line Changes

Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.

**EDI Grant Agreement**

Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
ab

BA Summary Report: --Select-- SOU History Report: --Select-- Refresh View WED PEF View SOU Agreement Summary + Save as Draft Submit for Approval

Budget Adjustment Process Approval Process

- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.

**EDI Grant Agreement**

Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit for Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
ab

BA Summary Report: --Select-- SOU History Report: --Select-- Refresh View WED PEF View SOU Agreement Summary + Save as Draft Submit for Approval

Budget Adjustment Process **Approval Process**

## Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the **Approval/Rejection Note** section.
- Click the **Approve** button at the top or bottom of the screen.
- Click **OK** on the **Are you sure?** message.

**Approval Process - EDI Grant Agreement Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number

WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	12/20/2022 11:40:31 AM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Approved	New Process	
EDI BIS Director - 2nd Approval Stage	12/20/2022 1:02:17 PM	EDI - Local BIS Di...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI State Regional Coordinator - 3rd A...	12/20/2022 1:16:36 PM	EDI - State Regio...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI State Supervisor - 4th Approval Stage	12/20/2022 1:26:47 PM	EDI - State Initiati...	Andra - Beyer	Andra.Beyer@car...	Approved		
▶ <b>EDI Local Superintendent (or designe</b>	12/20/2022 1:27:46 PM						
EDI State Requisition Coordinator - 6th ...	12/20/2022 1:27:46 PM						
EDI Local Finance Coordinator - Full A	12/20/2022 1:27:46 PM						

**Current Approval Stage Information**

Approved By\*  Approval Stage\*

Approver School\*  Approver Role\*

Approver Email\*  Approval Date\*

**Approval/Rejection Note**

Format

**Private Note**

Format

Browse   View to Public

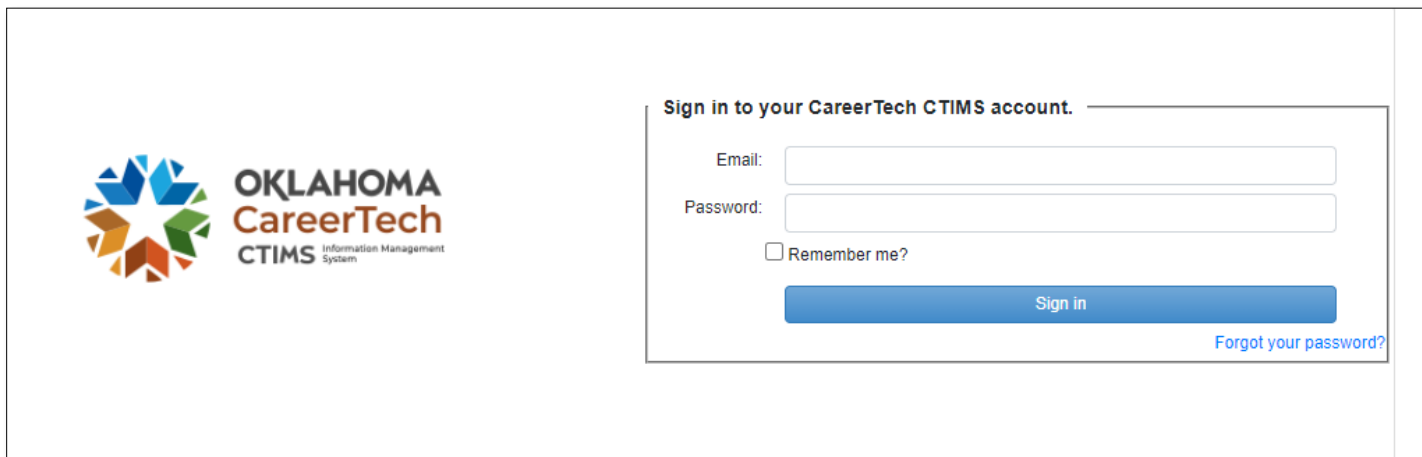
Attachment Note

The *Agreement* will now go to the **EDI – State Requisition Coordinator** for approval and then it will go to the **EDI – Local Finance Coordinator** (instructions below for EDI-Local Finance Coordinator).

## [EDI – Local Finance Coordinator \(Agreement Process\)](#)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

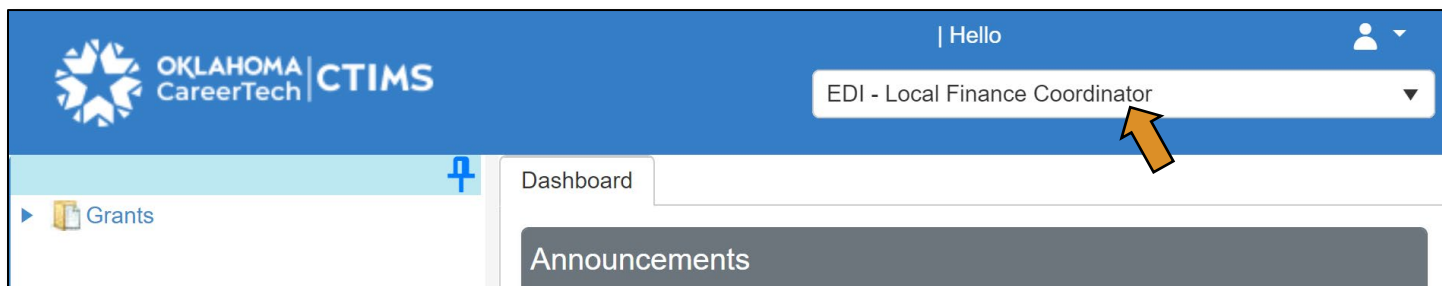
Click here to login to CTIMS



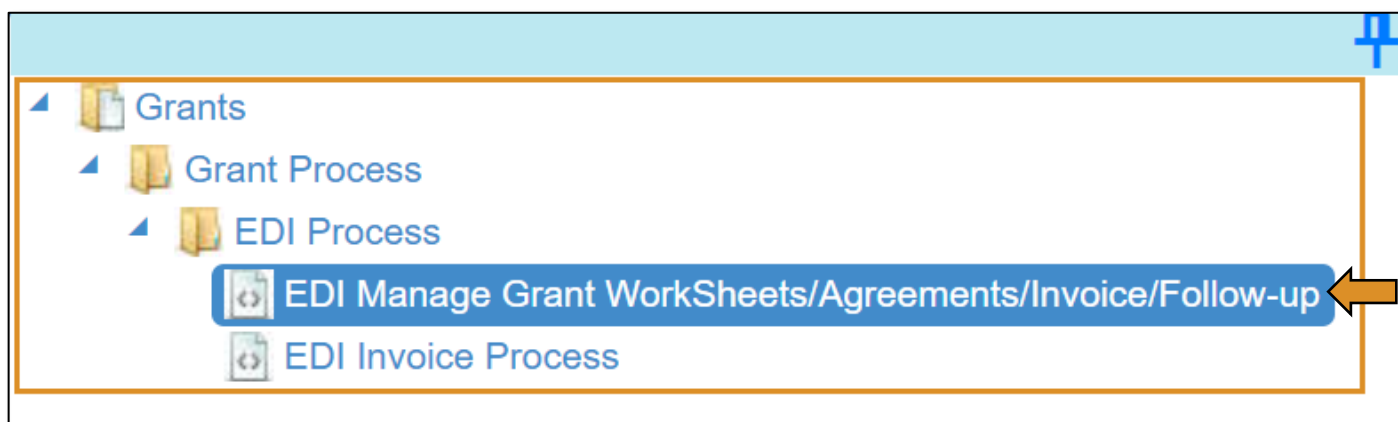
## Accessing the Agreement List

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 **EDI – 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 **EDI – Local Finance Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



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





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 populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

Dashboard | EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X

### EDI Grant Fund Worksheets List

1. Fiscal Calendar Year\*: 2022-2023

2. Grant Fund Type\*: EDI

3. Organization Type\*: Technology Center Districts

4. Organization\*: Enter the first three characters of any ...

5. Organization District\*:

6. Program Initiative\*: --Select--

Approval Function Type: \* All 7.

Filter on Status: \* All 8. 9. Search

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

### EDI Grant Fund Worksheets List

Fiscal Calendar Year\*: 2022-2023

Grant Fund Type\*: EDI

Organization Type\*: Technology Center Districts

Organization\*: Technology Center

Organization District\*: Technology Center

Program Initiative\*: Economic Development - Firefighter (Type 83) -444

Approval Function Type: \* All

Filter on Status: \* All Search

Save changes
  Cancel changes

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

## Reviewing the Agreement

- Click on **Budget Line Items** to expand it and review the budget.

The screenshot shows the 'EDI Grant Agreement' interface. The 'Budget Line Items' section is expanded, and an orange arrow points to the 'Budget Line Items' menu item. Below this, there is a 'Grant Allocation' table and a 'Budget Line(s)' section with a table of budget line items.

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched Funds	Status
Firefighter 1 (14s 1c 100h)	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	\$0.00	Active

- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.

The screenshot shows the 'EDI Grant Agreement' interface with the 'View SOU' and 'Agreement Summary' buttons highlighted by orange arrows. The interface includes a header, navigation tabs, and a main content area with various sections and buttons.

## Entering OCAS Codes

- 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 technology center is responsible for selecting OCAS codes. See the [OCAS Codes for WED](#) document for a list of OCAS codes.

EDI Grant Agreement

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$27,035.90	\$17,410.00	\$17,410.00	\$15,360.00	\$0.00	\$11,675.90	\$15,360.00

Budget Line(s)

Budget Line(OCAS CODE) Function - Object - Program	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Matched
Select	firefighter 1 (14s 1c 100h) 9/6/22, Phillip Ott	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	

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

EDI Grant Agreement

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note: ab

BA Summary Report: --Select--

Budget Adjustment Process

## Agreement Acknowledgements and Approval

- 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).
- Click the **Approve** button at the top or bottom of the screen.

Approval Process - EDI Grant Agreement Approval

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Back
Reject
Approve

Request Number: WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local Coordinator - 1st Stage	12/20/2022 11:40:31 ...	EDI - Local Coor...	Andra - Beyer	Andra.Beyer@ca...	Approved	New Process	
EDI BIS Director - 2nd Approval Stage	12/20/2022 1:02:17 PM	EDI - Local BIS ...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI State Regional Coordinator - 3rd ...	12/20/2022 1:16:36 PM	EDI - State Regio...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI State Supervisor - 4th Approval St...	12/20/2022 1:26:47 PM	EDI - State Initiati...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local Superintendent (or designe...	12/20/2022 1:39:56 PM	EDI - Local Supe...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI State Requisition Coordinator - 6t...	12/21/2022 8:22:46 AM	EDI - State Requi...	Andra - Beyer	Andra.Beyer@ca...	Approved		
▶ EDI Local Finance Coordinator - Ful	12/21/2022 8:29:00 AM						

**Current Approval Stage Information**

Approved By* Beyer Andra	Approval Stage* Fully Approved Stage
Approver School* Oklahoma Department of Career and Technology Ed...	Approver Role* EDI - Local Finance Coordinator
Approver Email* Andra.Beyer@careertech.ok.gov	Approval Date* 12/21/2022

**Approval/Rejection Note**

Format
B I U
List icons
Link icons
Table icon

**Private Note**

Format
B I U
List icons
Link icons
Table icon

Browse   View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment	Public
Firefighter			<a href="#">Download</a>	Public
Refresher		Refresher		Public

Back
Reject
Approve

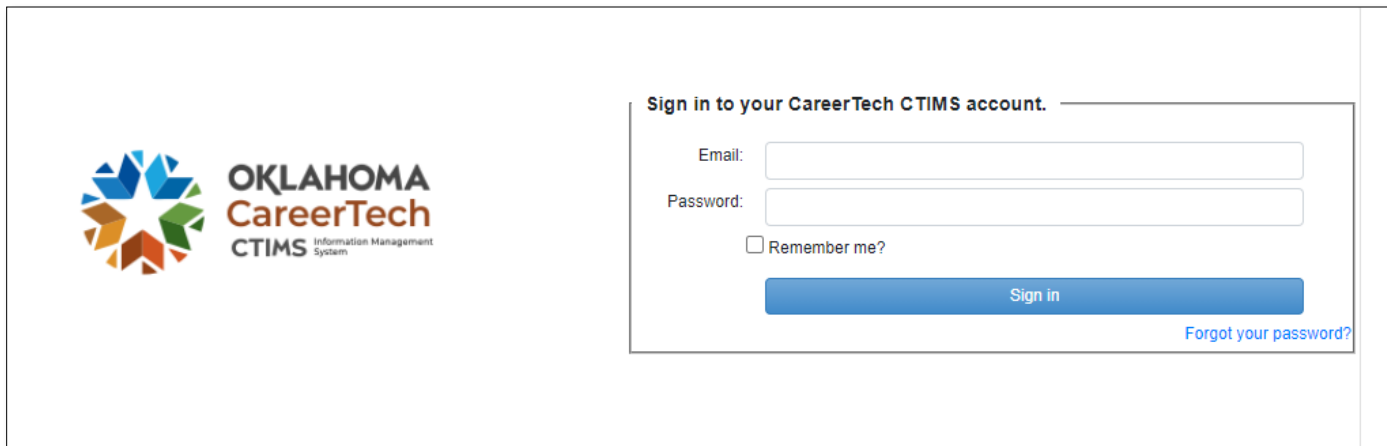
## Budget Adjustment Process

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

## EDI – Local Coordinator (Budget Adjustment Process)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

Click here to login to CTIMS

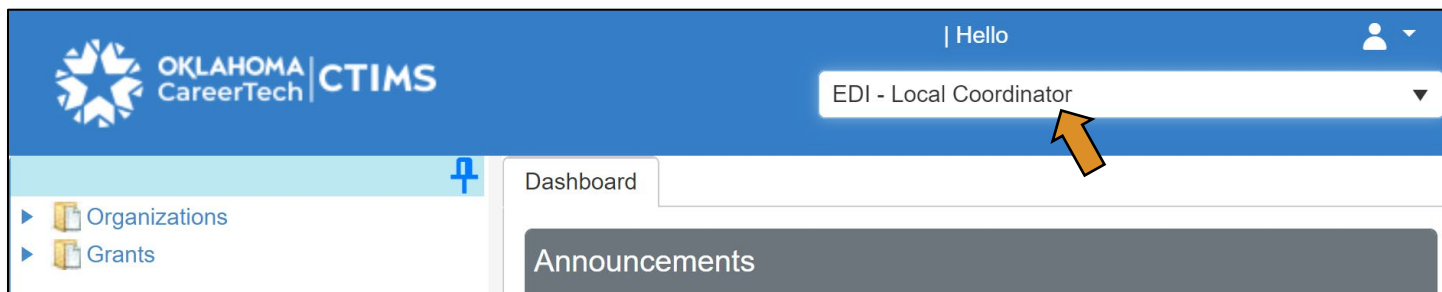


## Accessing the Agreement List

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

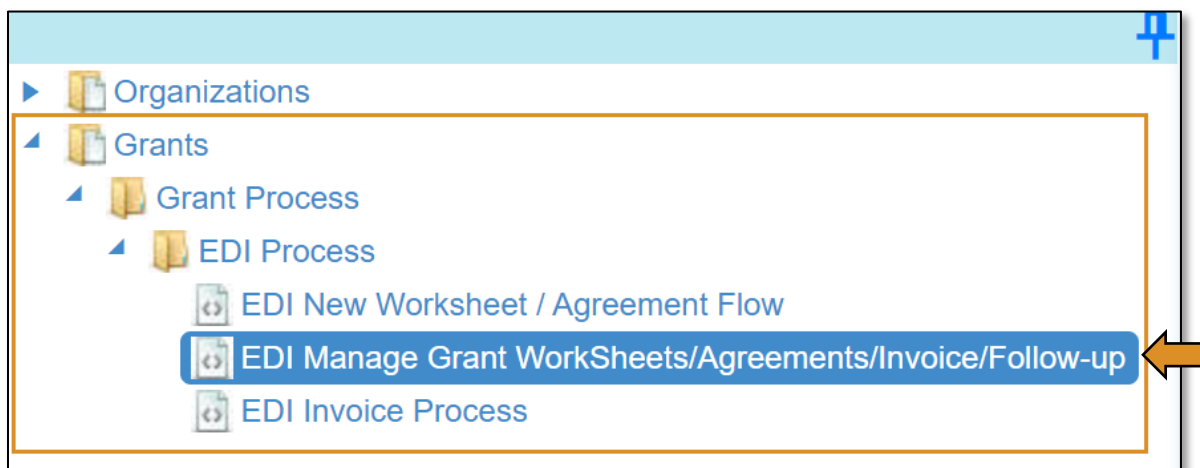
If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Finance Coordinator** contact [CTIMSupport@careertech.ok.gov](mailto:CTIMSupport@careertech.ok.gov).



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

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



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 populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Worksheets List' form with the following fields and callouts:

- 1. Fiscal Calendar Year\*: 2022-2023
- 2. Grant Fund Type\*: EDI
- 3. Organization Type\*: Technology Center Districts
- 4. Organization\*: Enter the first three characters of any ...
- 5. Organization District\*: (empty)
- 6. Program Initiative\*: --Select--
- 7. Approval Function Type\*: All
- 8. Filter on Status\*: All
- 9. Search button

- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

The screenshot shows the 'EDI Grant Fund Worksheets List' form with the following fields populated:

- Fiscal Calendar Year\*: 2022-2023
- Grant Fund Type\*: EDI
- Organization Type\*: Technology Center Districts
- Organization\*: Technology Center
- Organization District\*: Technology Center
- Program Initiative\*: Economic Development - Firefighter (Type 83) -444
- Approval Function Type\*: All
- Filter on Status\*: All
- Buttons: Save changes, Cancel changes, Export to Excel

Below the form is a table with the following columns: Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, Agreement, and Agreement Approval Stage. A yellow arrow points to the Agreement column.

Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Stage
ELD COUNTY PUBLIC SA...	EDI State Supervisor - Fully Appr...		WS- -EDI-EDI-FIREFTR-444-15X111745-C62D...	WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E...	New-Draft

## Initiating the Budget Adjustment

- At the bottom right corner of the **EDI Grant Agreement** screen, click **Budget Adjustment Process**.

The screenshot shows the 'EDI Grant Agreement' interface. At the bottom right, the 'Budget Adjustment Process' button is highlighted with a red arrow. The interface includes sections for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. A confirmation message at the bottom states: 'This record is fully approved, you are not authorized to change data within this record.'

- You will be asked to confirm that you are reinitiating the agreement approval process. Click **OK**.

The screenshot shows a confirmation dialog box titled 'EDI Grant Agreement Budget Adjustment Process'. The message reads: 'You are going to reinitiate the agreement approval process and initiating the budget adjustment process, Are you sure?'. There are 'Cancel' and 'OK' buttons at the bottom right, with a red arrow pointing to the 'OK' button.

- 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 cell in the *Units* column to change the number of units.
- Do not use **Remove Budget Line** option – it does not work in the *Budget Adjustment Process*.

**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.

The screenshot shows the 'Budget Line Detail Information' table. The table has columns for Budget Line(OCAS CODE), Function - Object - Program, Agreement Line Desc., Units, Unit Cost, Req. Unit Type, Total, Approv Total, and Match. A red arrow points to the 'Units' column for the first row, and another red arrow points to the 'Approv Total' column for the same row.

Budget Line(OCAS CODE)	Function - Object - Program	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Match
1000-100-330		Firefighter	1	\$12,050.00	Cost Per Class	\$12,050.00	\$12,050.00	

**NOTE:** Once the changes have been made, you can Save as Draft by clicking **Save as Draft**. This will save the changes that were just made without submitting to the next approval stage, so you can return and finish later.

**Recommendation is to always click *Save as Draft* to make sure you don't lose any work.**



## Acknowledgements and Approval

- Next, expand the **Acknowledgments** section by clicking on the words.
- Add your **Budget Adjustment Justification Note** and **Acknowledgement Note** (these fields are required.)
- Click to check the box to verify that the information provided is accurate and complete.
- Select **Submit for Approval**.

The screenshot displays the 'EDI Grant Agreement' interface. At the top, there is a navigation bar with buttons for 'Refresh', 'BA Detail Report', 'View SOU', 'Agreement Summary', '+ Save as Draft', and 'Submit for Approval'. Below this is a sidebar menu with sections like 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements' (which is highlighted). The main content area is divided into two sections: 'Budget Adjustment Justification Note' and 'Acknowledgement Note'. The 'Budget Adjustment Justification Note' section has a rich text editor with a toolbar and contains the text 'Changed number of units. -ab'. The 'Acknowledgement Note' section has a text area with the text 'Approved. AB'. A checkbox is checked, with the text 'By checking this box, I certify that the information provided is accurate and complete.' Below the text area, there is another 'Submit for Approval' button. Orange arrows point to the 'Acknowledgements' menu item, the 'Submit for Approval' button in the top bar, the 'Budget Adjustment Justification Note' field, and the 'Submit for Approval' button in the bottom bar.

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

**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](#).

**\*\*Contact the [regional coordinator](#) prior to initiating a budget adjustment\*\***

### 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 [WED Guidelines](#).

### 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.

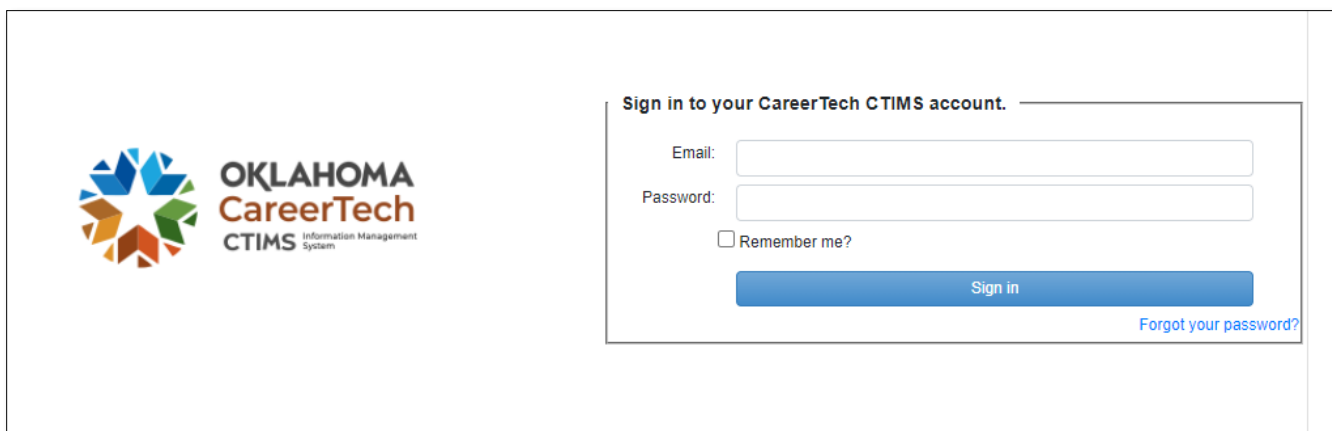
## EDI – Local Coordinator (Invoice Process)

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.

### Logging into CTIMS

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






Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](http://oklahoma.gov) and select the green CTIMS Login button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance

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

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

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

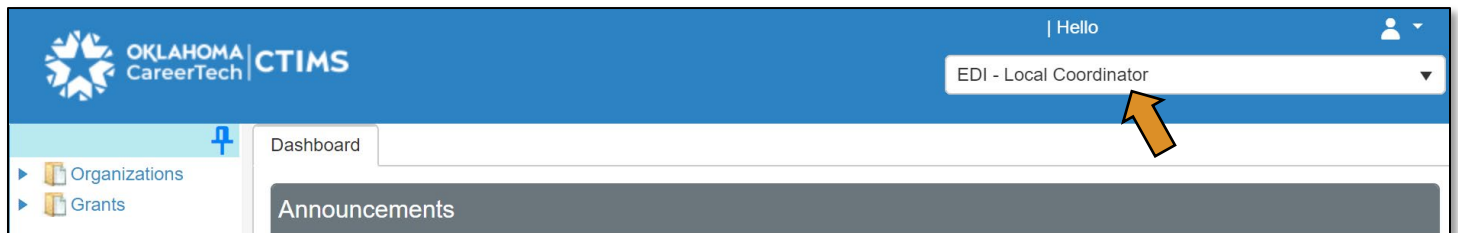
Click here to login to CTIMS



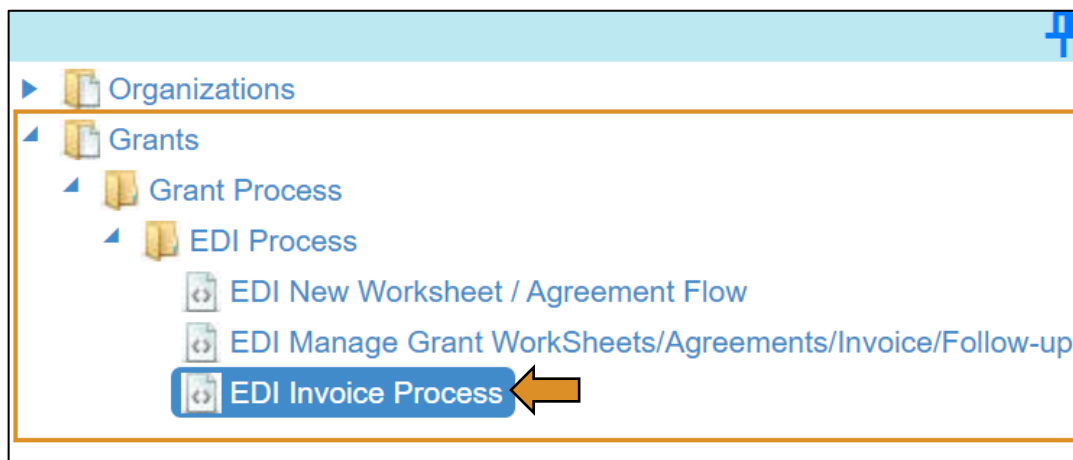
## Accessing the Invoice

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 **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Invoice Process** link.



## Creating a New Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. The fields are as follows:

- 1. Fiscal Calendar Year\*: 2022-2023
- 2. Grant Fund Type\*: EDI
- 3. Organization Type\*: Technology Center Districts
- 4. Organization\*: Technology Center
- 5. Organization District\*: Technology Center
- 6. Program Initiative\*: Economic Development - Firefighter (Type 83) -444
- 7. Approval Function Type\*: All
- 8. Filter on Status\*: All
- 9. Search button

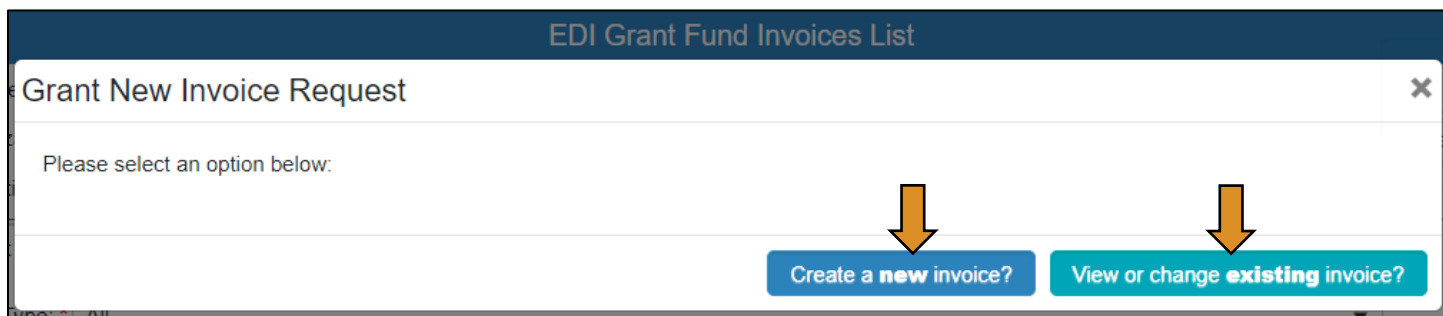
- After clicking the **Search** button, select **New Invoice** to start a new invoice.

The screenshot shows the table view of the 'EDI Grant Fund Invoices List'. The table has the following columns: New Invoice, Provider Name, Client Name, Agreement, BAP Process, and Agreement Submission Date. The first row is highlighted, and an arrow points to the 'New Invoice' button in the first column.

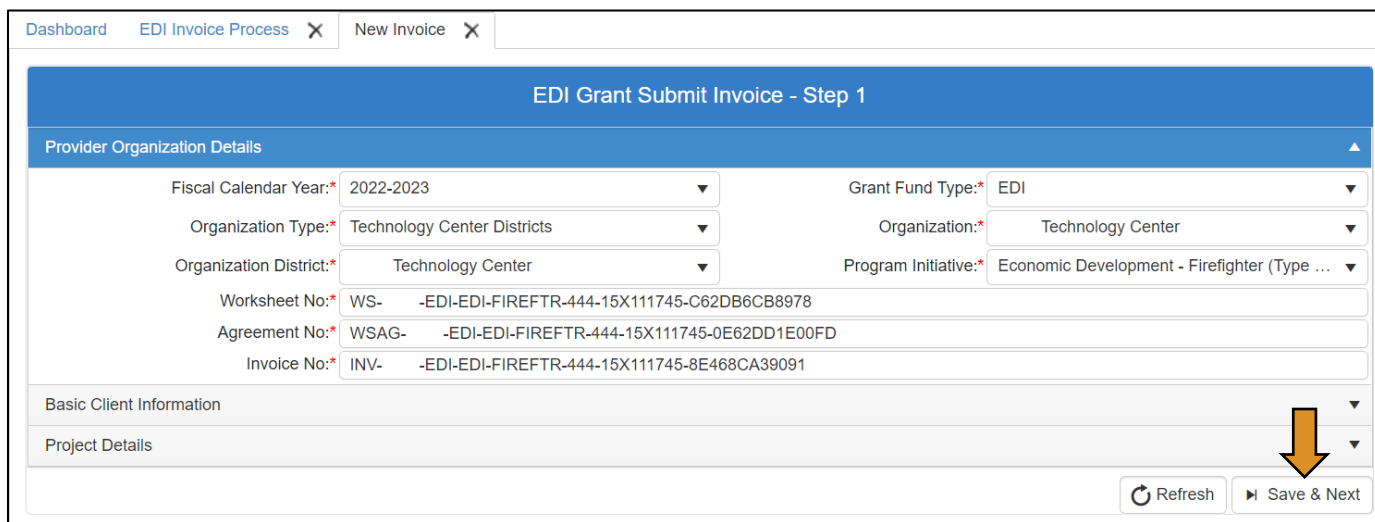
New Invoice	Provider Name	Client Name	Agreement	BAP Process	Agreement Submission Date
<b>New Invoice</b>	Technology Center	FIRE DEPT	WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D9...	No	06/15/2023 08:29:59

A box will pop up asking if you want to create a **new** invoice or if you would like to view or change **existing** invoice?

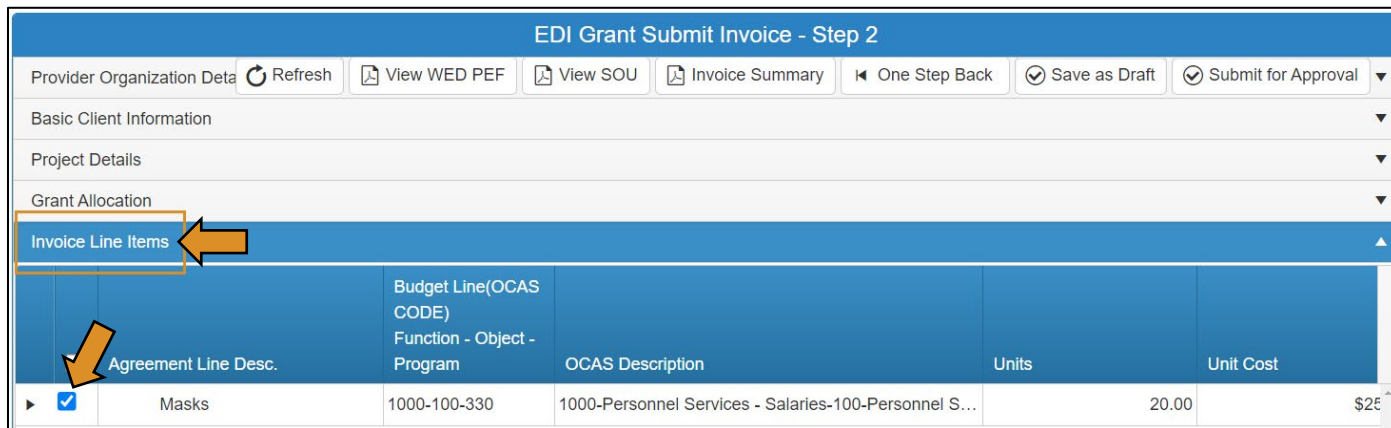
- Click on the button you need – this pop-up is to help prevent unnecessary new invoices being created.



- Double check that everything is correct on the screen.
- Click **Save & Next**.



- On the **EDI Grant Submit Invoice-Step 2** screen, select the budget line item you want to invoice by clicking on the checkbox next to the line item. You may select multiple line items to invoice.



- Click on the black arrow next to the line item to expand the details.
- Click the **Edit** button to make changes. **NOTE:** Check all invoice line items at once, click the check box in the column header.

Invoice Line Items				
<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	
<input checked="" type="checkbox"/>	Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	
+ Add Invoice				
<input type="checkbox"/>	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	
<input checked="" type="checkbox"/>	Active	Masks	1000-100-330	

- Make the necessary changes to the **Units**, **Unit Cost**, and/or **Req. Unit Type** fields by clicking in the cell 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.

Invoice Line Items							
<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	
<input checked="" type="checkbox"/>	Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00	Cost Per Each	
+ Add Invoice							
<input type="checkbox"/>	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Matched Funds
<input checked="" type="checkbox"/>	Active	Masks	1000-100-330	20.00	25.00	Cost Per Each	0.00

- Expand the Attachments section by clicking on the word **Attachments**. Upload required documents. Refer to page 12 of the WED [Guidelines](#) for invoicing requirements.

**IMPORTANT:** Invoice line items and the attached supporting documents must match.  
All attachments must be uploaded in one PDF.

- Click **Select files...** to locate the files on your computer.
- Then, select **Upload & Save file** to attach the file.
  - A message box will say you have successfully uploaded the file. Close this box.
- Add a note in the **Attachment Note:** section for extenuating circumstances related to the line items attachments.

EDI Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

**Attachments**

Browse:

Attachment Note:

Active/inactive file(s)  Delete file(s)

Status	File Name	Attachment Note*	Uploaded Date	Action
--------	-----------	------------------	---------------	--------

Acknowledgements

- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an Acknowledgment Note in the box.
- Click **Save as Draft**.
- Then, click the **Submit for Approval** button.

EDI Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

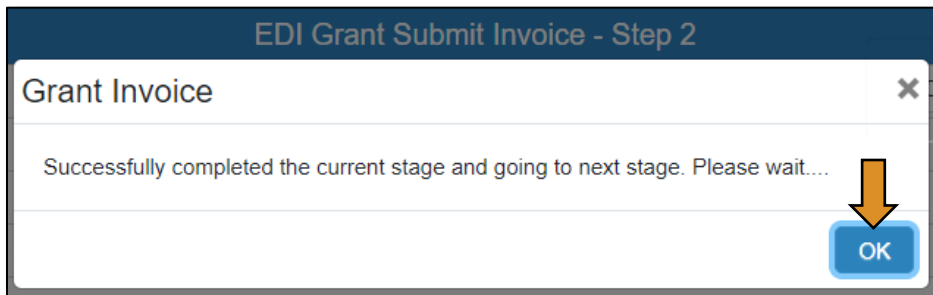
Acknowledgement Note:

**B I U** (inherited size) (inherited font) Format

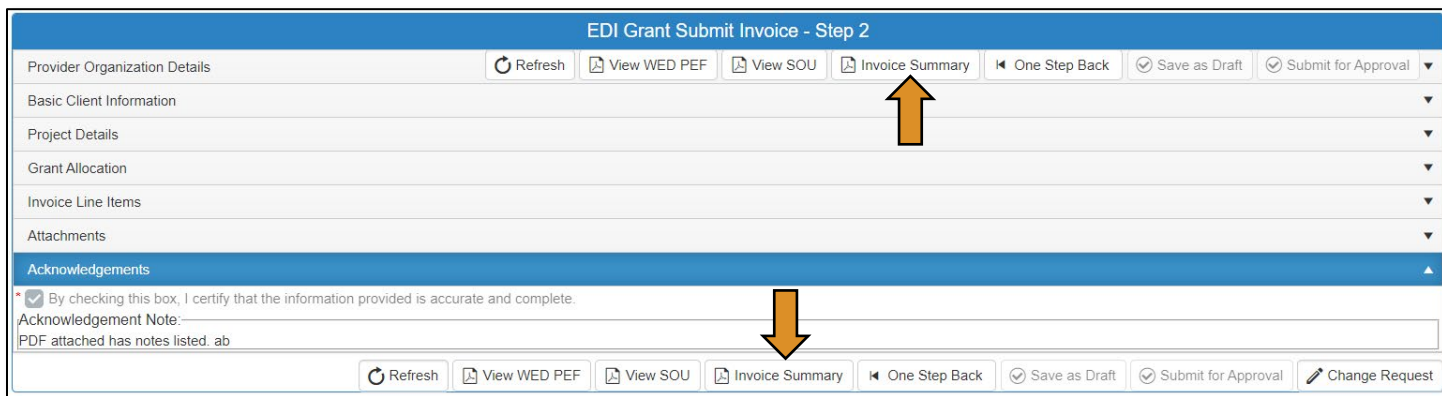
PDF attached has notes listed. ab



- A message will pop-up to let you know that you have submitted the invoice successfully.
- Click the OK.



- Click the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

Dashboard EDI Invoice Process X INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 X Invoice Summary X

Technology Center-5470: 1 of 1 Page 1 of 1

PDF

### Invoice Individual Summary

Report Generation Date: 6/16/2023 1:08:45 PM

**INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 - 5470**

**Economic Development - Firefighter (Type 83) -444**

School Name: **Technology Center** Client Name: **FIRE DEPT - 15X111745**

Vendor Number: PO Number: **800912345**

Date of Request Submitted: **6/16/2023 1:05 PM** First Submitted By: **Andra Beyer**

Last Submitted On: **6/16/2023 1:05 PM** Last Submitted By: **Andra Beyer**

Fully Approved Date : Fully Approved By:

Fully Approver Role:

Budget Line Description	Units	Unit Cost	Unit Type Code	Request Item Total
Masks	20.00	\$25.00	Each	\$500.00
<b>Total Invoiced</b>				<b>\$500.00</b>

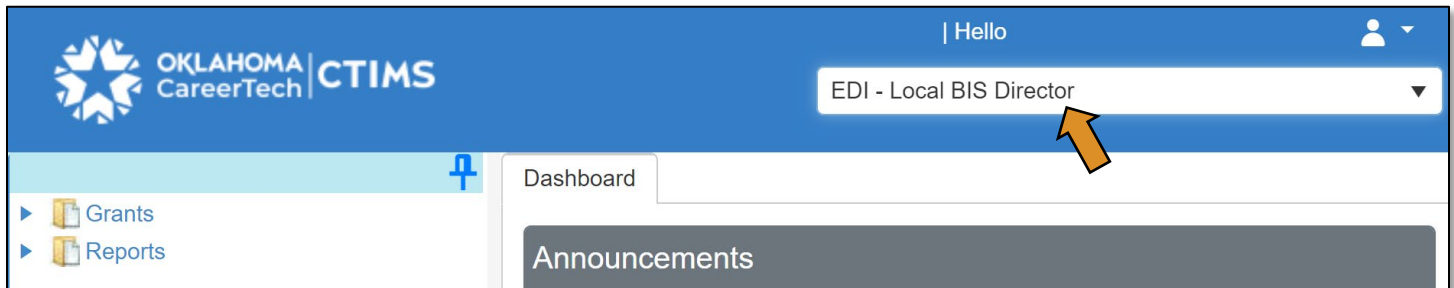
The invoice has been successfully submitted and will go to the **EDI – Local BIS Director**.

## EDI – Local BIS Director (Invoice Process)

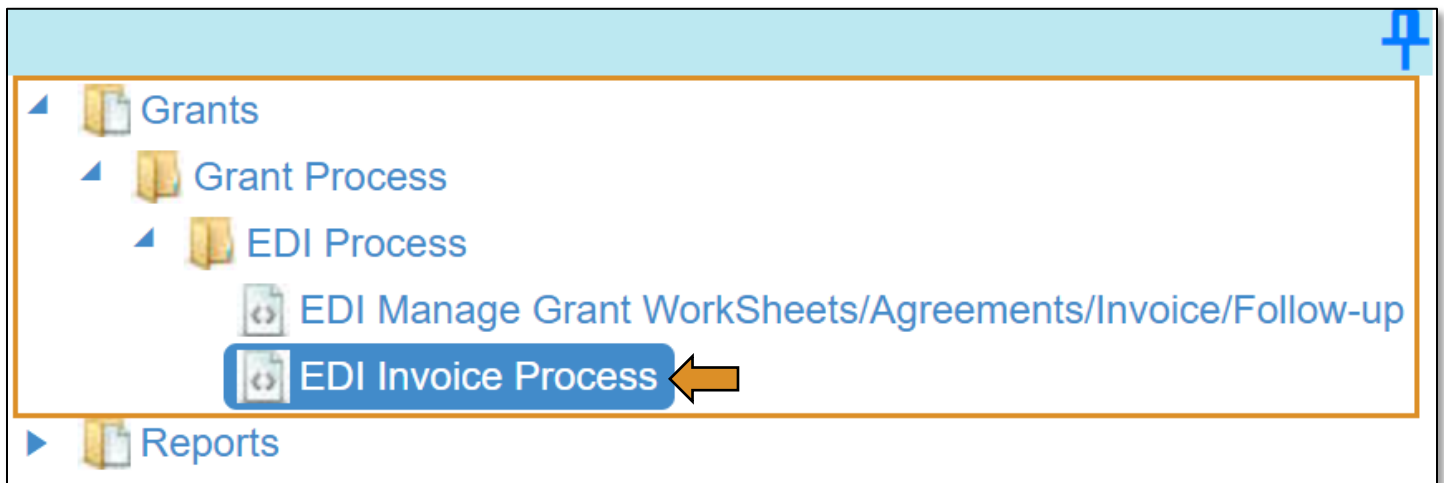
### Accessing Invoice

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 **EDI – Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local BIS Director** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Invoice Process** link.



Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. The fields are as follows:

- 1. Fiscal Calendar Year: 2022-2023
- 2. Grant Fund Type: EDI
- 3. Organization Type: Technology Center Districts
- 4. Organization: Technology Center
- 5. Organization District: Technology Center
- 6. Program Initiative: Economic Development - Firefighter (Type 83) -444
- 7. Approval Function Type: All
- 8. Filter on Status: All
- 9. Search button

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details. Click on the blue Invoice link to open the invoice.

The screenshot shows the 'Manage Grant Invoices' tab selected. The form fields are the same as in the previous screenshot. Below the form, there is a table with the following data:

Status	BAP Process	Paymer Days	Organization	Client Name	Program Initiative	Invoice
Yes	No	0	Technology Center	FIRE DEPT	Economic Development - Firefight...	INV-2223-EDI-EDI-FIREFTR-444-15X111

Below the table, there is an 'Invoice Approval Summary' section with the following data:

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Ap
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov	06/16/2023 13:05:43	EDI

## EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.

Dashboard EDI Invoice Process X INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 X

### EDI Grant Submit Invoice - Step 1

**Provider Organization Details**

Fiscal Calendar Year:\* 2022-2023 Grant Fund Type:\* EDI  
 Organization Type:\* Technology Center Districts Organization:\* Technology Center  
 Organization District:\* Technology Center Program Initiative:\* Economic Development - Firefighter (Type 83) -...  
 Worksheet No.\* WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9  
 Agreement No.\* WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA  
 Invoice No.\* INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information  
 Project Details

Refresh Next Step

## EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice-Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Expand the Attachments section by clicking on the word **Attachments**.
- Upload required documents and/or double check the attachments that were uploaded by the EDI – Local Coordinator. Refer to page 12 of the WED [Guidelines](#) for invoicing requirements.
- Click **Select files...** to locate the files on your computer.
- Select **Upload & Save file** to attach the file.
  - A message box will say you have successfully uploaded the file. Close this box.
- Add a note in the **Attachment Note:** section for extenuating circumstances related to the line items attachments.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information  
 Project Details  
 Grant Allocation  
 Invoice Line Items

**Attachments**

Browse: Select files... Upload & Save file

Attachment Note:

Active/Inactive file(s) Delete file(s) Download all files

Status	File Name	Attachment Note	Uploaded Date	Action	
<input type="checkbox"/> Active	DataRequestForm.pdf		06/16/2023 13:05:11	Download	Public

Acknowledgements Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

**IMPORTANT:** Invoice line items and the attached supporting documents must match.  
All attachments must be uploaded in one PDF.

- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an acknowledgment note in the box.
  - If you don't have a note to add, type your initials, as this field is required.
- Click the **Approval Process** button.

EDI Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
PDF attached has notes listed. ab

## Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Invoice Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.

**Approval Process - EDI Grant Invoice Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number  
INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 1:05:43 PM	EDI - Local Coordi...	Andra - Beyer	Andra.Beyer@car...	Approved	New Process	
▶ EDI Local BIS Director - 2nd Approval	6/16/2023 1:58:28 PM						
EDI Local Finance Coordinator - 3rd Appr...	6/16/2023 1:58:28 PM						
EDI State Regional Coordinator - 4th App...	6/16/2023 1:58:28 PM						
EDI State Requisition Coordinator - 5th A...	6/16/2023 1:58:28 PM						
ODCTE EDI Finance Reviewer - Fully Ap...	6/16/2023 1:58:28 PM						

**Current Approval Stage Information**

Approved By\* 
 Approval Stage\*

Approver School\* 
 Approver Role\*

Approver Email\* 
 Approval Date\*

**Approval/Rejection Note**

Format

**Private Note**

Format

Browse   View to Public

Attachment Note

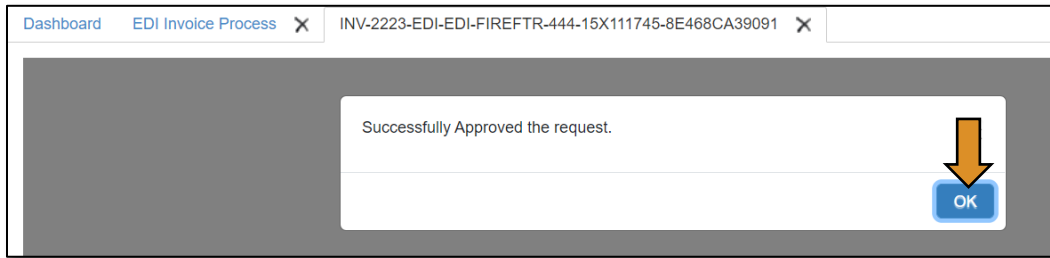
File Name	Uploaded On	Note	Attachment	Public
DataRequestForm.pdf	06/16/2023		Download	Public

- A message will pop up asking if you are sure. Click **OK**.

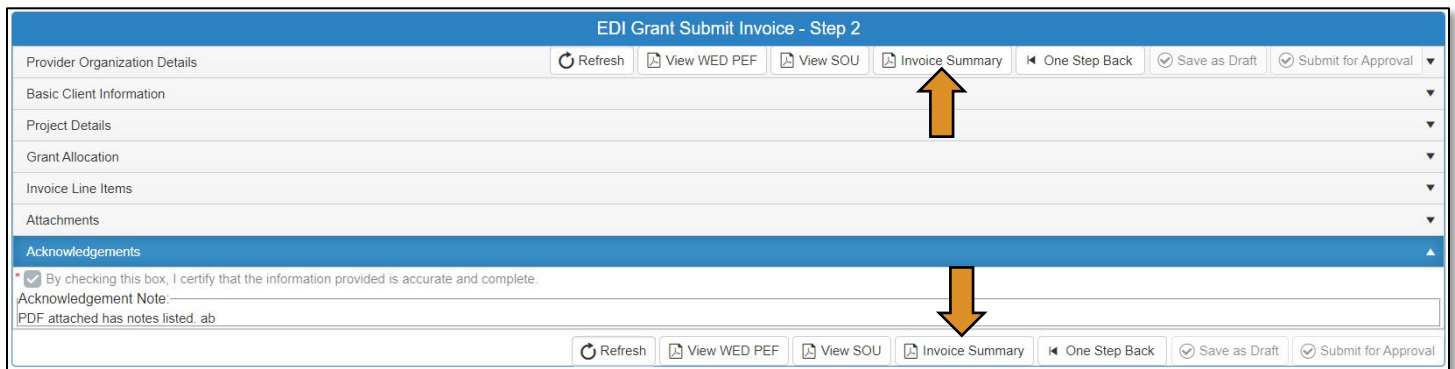
**Approval Process - EDI Grant Invoice Approval**

Are you sure?

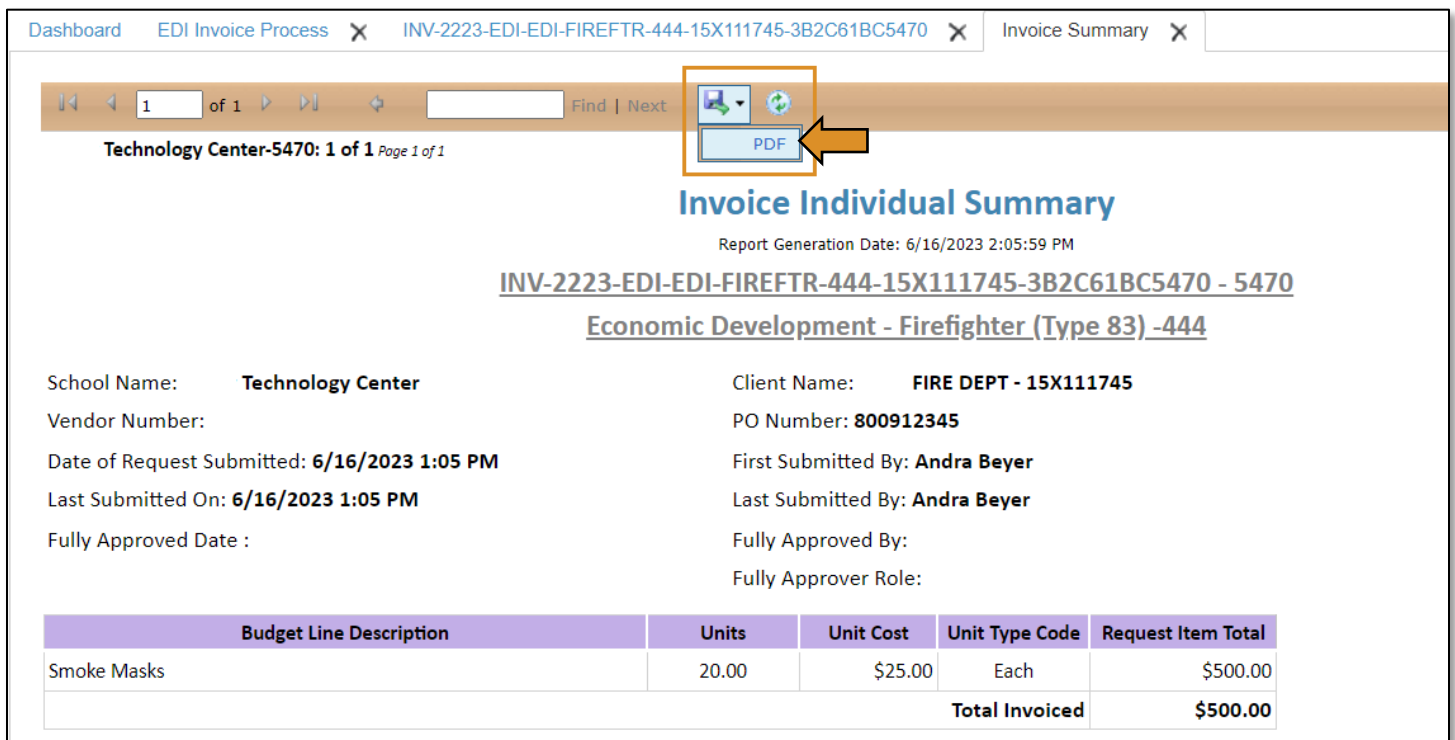
- A message will pop up saying, ‘Successfully Approved the request’. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.



The *invoice* has been successfully submitted and will go to the EDI – Local Finance Coordinator.

## Invoice Change Request

To make changes to an invoice after it has been submitted for approval, you will need to do a change request in the invoice.

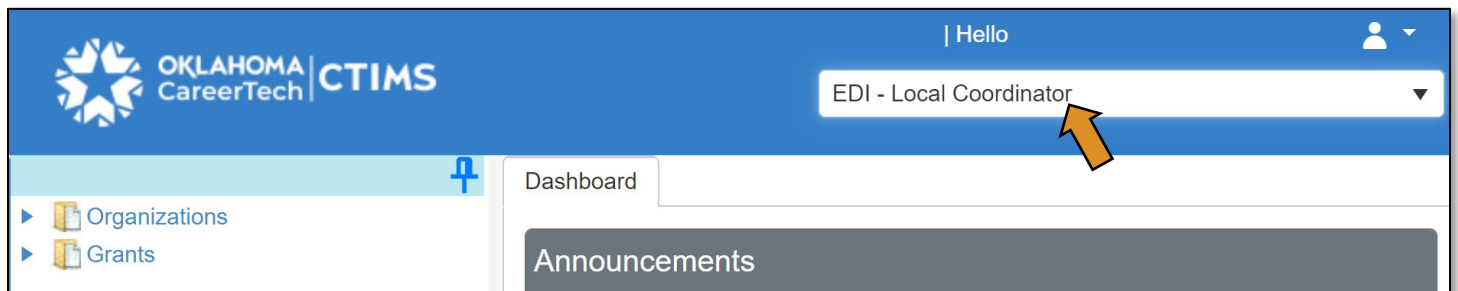
**IMPORTANT:** Changes to an Invoice can only be made by the EDI – Local Coordinator.

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.

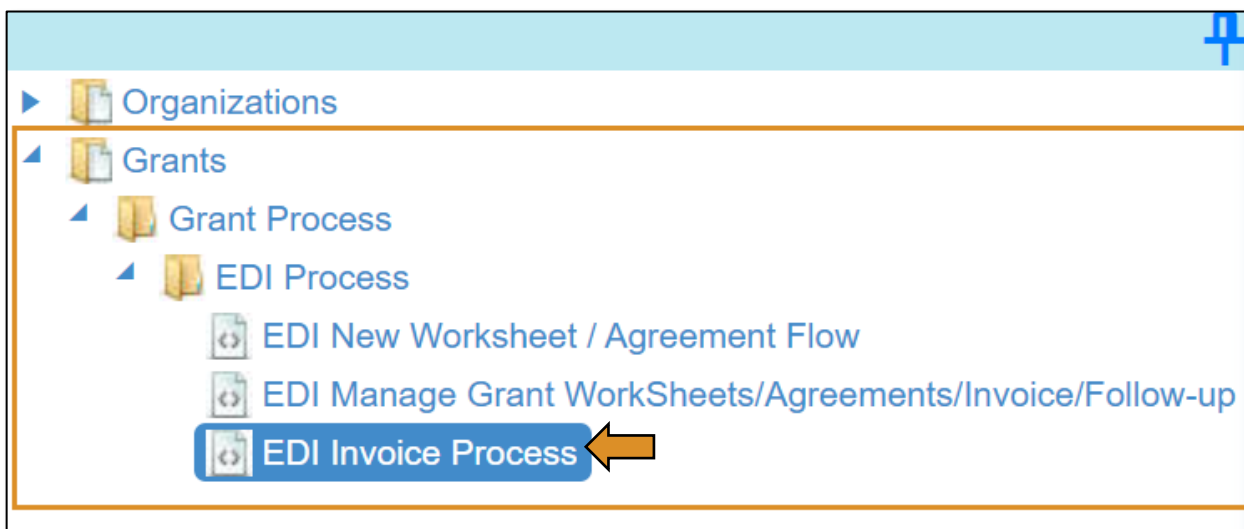
## EDI – Local Coordinator (Invoice Change Request)

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 **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Invoice Process** link.





## Accessing Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as **All**.
8. **Filter on Status\*** - this will remain as **All**.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. The fields and their corresponding callout numbers are:

- 1. Fiscal Calendar Year\* (2022-2023)
- 2. Grant Fund Type\* (EDI)
- 3. Organization Type\* (Technology Center Districts)
- 4. Organization\* (Technology Center)
- 5. Organization District\* (Technology Center)
- 6. Program Initiative\* (Economic Development - Firefighter (Type 83) -444)
- 7. Approval Function Type\* (All)
- 8. Filter on Status\* (All)
- 9. Search button

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details.
- Click on the blue Invoice link to open the invoice.

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver Role
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov	06/16/2023 13:05:43	EDI - Local Coordina
EDI Local BIS Director - 2nd Approval ...	Approved		Andra.Beyer@careertech.ok.gov	06/16/2023 14:03:18	EDI - Local BIS Direc
EDI Local Finance Coordinator - 3rd Ap...					EDI - Local Finance t

### EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.

- Collapse the **Invoice Line Items** section by clicking on another row/section. For example: click on the **Grant Allocation** row. You should now see the **Change Request** button at the bottom right of the screen.

- 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 black arrow to the left of the invoice line item you need to change.
- Click the **Edit** button to make the changes.

Invoice Line Items			
	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description
<input checked="" type="checkbox"/>	Firefighter	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...
+ Add Invoice			
	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program
<input type="checkbox"/>	Active	Firefighter	1000-100-330

**NOTE:** You can change the **Units**, **Unit Cost**, **Req. Unit Type**, and **Matched Funds** to change the Total and Total to be Invoiced columns.

Invoice Line Items										
Units	Unit Cost	Req. Unit Type	Matched Funds	Total	Approv Total	Avl. to Invoice	Current Line Invoiced	Total Invoiced		
1.00	\$12,050.00	Cost Per Class	\$0.00	\$12,050.00	\$12,050.00	\$0.00	\$12,050.00	\$12,050.00		
Units	Unit Cost	Req. Unit Type	Matched Funds	Total	Total To Be Invoiced	Date Of Expense	Serial Number			
1.00	\$12,050.00	Cost Per Class	\$0.00	\$12,050.00	\$12,050.00					
				\$12,050.00	\$12,050.00					
				\$0.00	\$12,050.00	\$12,050.00	\$0.00	\$12,050.00	\$12,050.00	

- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an acknowledgment note in the box explaining any changes that were made.
- At this point, you can **Save as Draft** and come back to it later or **Submit for Approval** to send it to the next approval stage.

**EDI Grant Submit Invoice - Step 2**

Provider Organization Details  
 Basic Client Information  
 Project Details  
 Grant Allocation  
 Invoice Line Items  
 Attachments  
Acknowledgements

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

B
I
U
(inherited size)
(inherited font)
Format

PDF attached has notes listed. ab

### Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Invoice Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.

**Approval Process - EDI Grant Invoice Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
▶ EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coordi...	Andra - Beyer	Andra.Beyer@car...	Cancel for Change...	New Process	
EDI Local BIS Director - 2nd Approval St...	6/16/2023 2:37:27 PM						
EDI Local Finance Coordinator - 3rd Appr...	6/16/2023 2:37:27 PM						
EDI State Regional Coordinator - 4th App...	6/16/2023 2:37:27 PM						
EDI State Requisition Coordinator - 5th A...	6/16/2023 2:37:27 PM						
ODCTE EDI Finance Reviewer - Fully Ap...	6/16/2023 2:37:27 PM						

**Current Approval Stage Information**

Approved By: Beyer Andra  
 Approver School: Oklahoma Department of Career and Technology Educati...  
 Approver Email: Andra.Beyer@careertech.ok.gov

Approval Stage\*: 2nd Approval Stage  
 Approver Role\*: EDI - Local BIS Director  
 Approval Date\*: 06/16/2023

**Approval/Rejection Note**

**Private Note**

Browse: Select files...  View to Public

Attachment Note

File Name	Uploaded On	Note	Attachment
DataRequestForm.pdf	06/16/2023		Download Public

- A message will pop up asking if you are sure. Click **OK**.

**Approval Process - EDI Grant Invoice Approval**

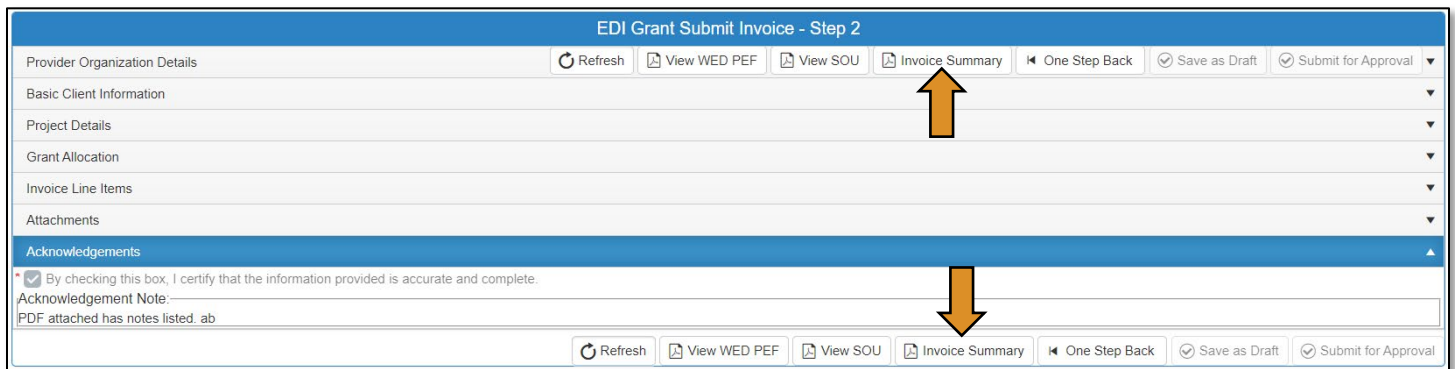
Are you sure?

Cancel OK

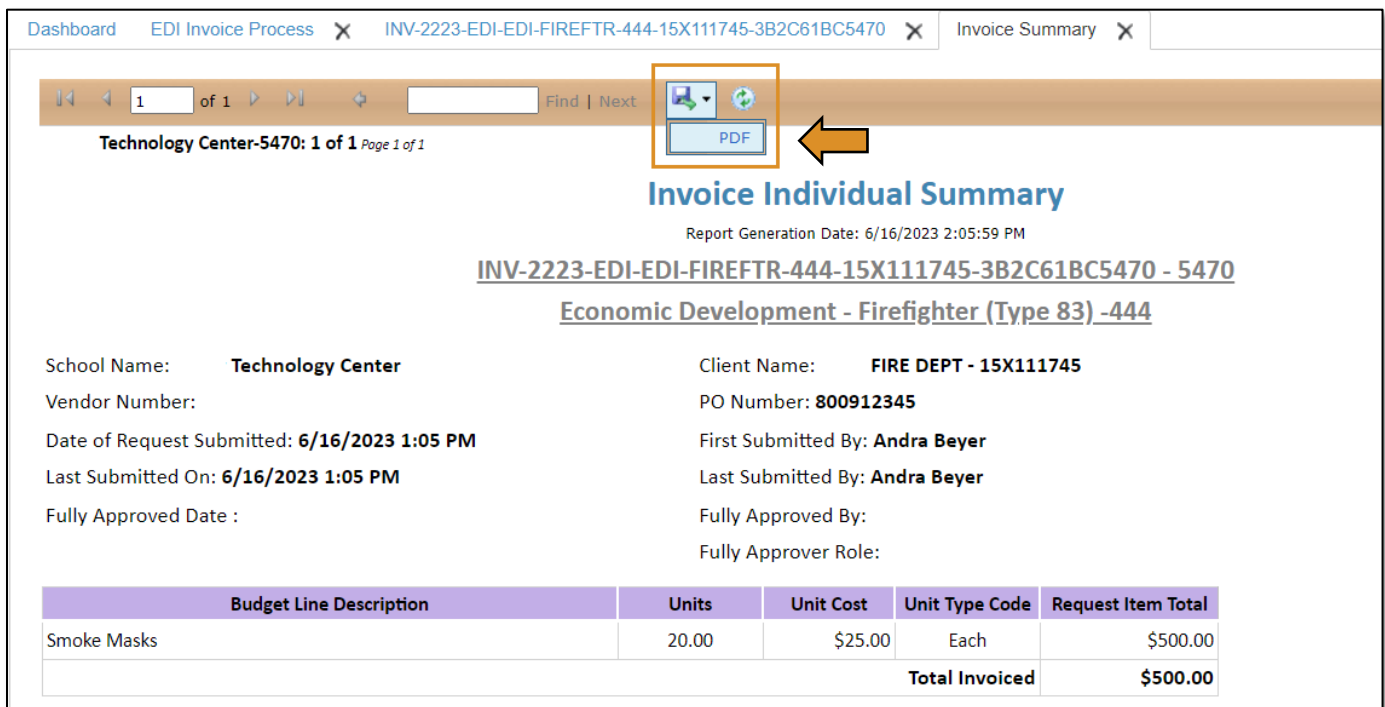
- A message will pop up saying, ‘Successfully Approved the request’. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

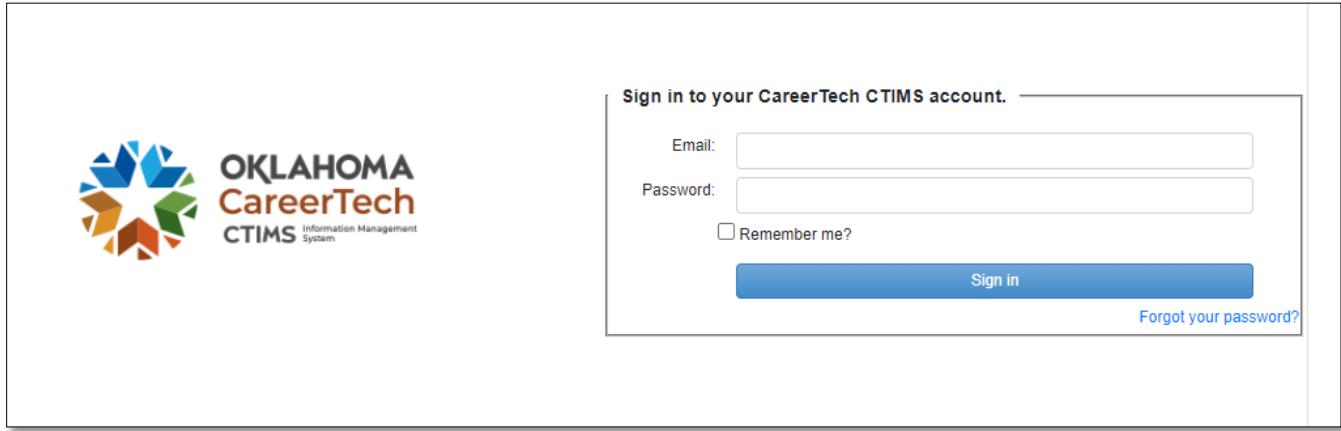


The *invoice* has been successfully submitted and will go to the EDI – Local BIS Director.

## [EDI – Local BIS Director \(Invoice Process\)](#)

### Logging into CTIMS

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



**Sign in to your CareerTech CTIMS account.**

Email:

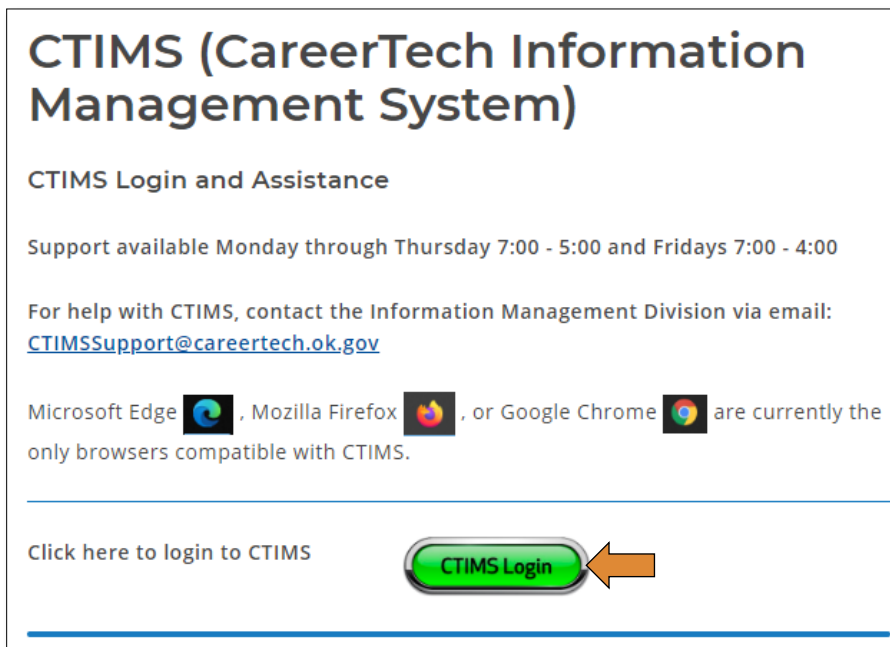
Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)

Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.






## CTIMS (CareerTech Information Management System)


### CTIMS Login and Assistance

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

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

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

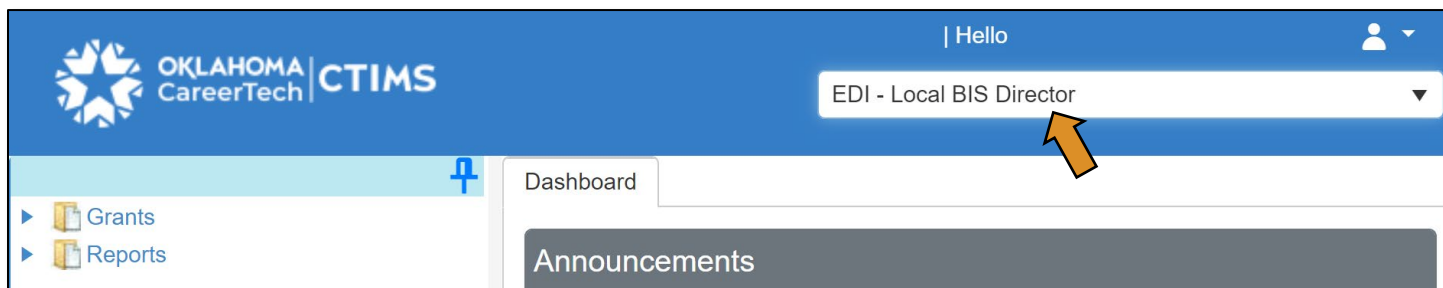
---

Click here to login to CTIMS [CTIMS Login](#) 

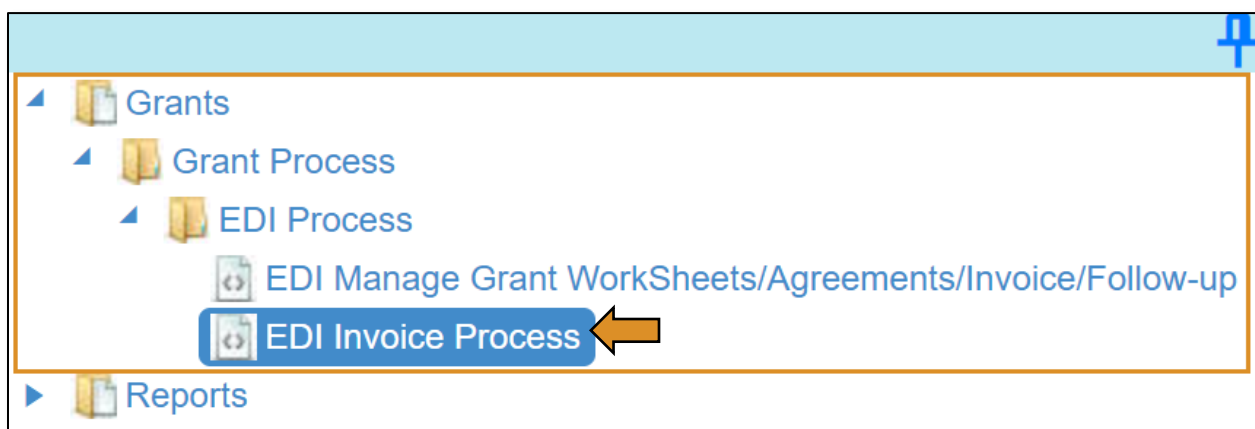
## Accessing Invoice

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 **EDI – Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local BIS Director** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Invoice Process** link.





Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. The fields are as follows:

- Fiscal Calendar Year\*:** 2022-2023 (tagged 1)
- Grant Fund Type\*:** EDI (tagged 2)
- Organization Type\*:** Technology Center Districts (tagged 3)
- Organization\*:** Technology Center (tagged 4)
- Organization District\*:** Technology Center (tagged 5)
- Program Initiative\*:** Economic Development - Firefighter (Type 83) -444 (tagged 6)
- Approval Function Type\*:** All (tagged 7)
- Filter on Status\*:** All (tagged 8)
- Search:** (tagged 9)

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details.
- Click on the blue Invoice link to open the invoice.

The screenshot shows the 'EDI Grant Fund Invoices List' form with the 'Manage Grant Invoices' tab selected. The form fields are the same as in the previous screenshot. Below the form, there is a table of invoices. The first invoice is expanded to show its approval summary.

Status	BAP Process	Paymer Days	Organization	Client Name	Program Initiative	Invoice
Yes	No	0	Technology Center	FIRE DEPT	Economic Development - Firefight...	INV-2223-EDI-EDI-FIREFTR-444-15X111

The expanded invoice shows the following approval summary:

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov	06/16/2023 13:05:43

## EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.

Dashboard EDI Invoice Process X INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470 X

### EDI Grant Submit Invoice - Step 1

**Provider Organization Details**

Fiscal Calendar Year:\* 2022-2023 Grant Fund Type:\* EDI  
 Organization Type:\* Technology Center Districts Organization:\* Technology Center  
 Organization District:\* Technology Center Program Initiative:\* Economic Development - Firefighter (Type 83) -...  
 Worksheet No.\* WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9  
 Agreement No.\* WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA  
 Invoice No.\* INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information  
 Project Details

Refresh Next Step

## EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice-Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Expand the Attachments section by clicking on the word **Attachments**.
- Upload required documents and/or double check the attachments that were uploaded by the EDI – Local Coordinator. Refer to page 12 of the WED [Guidelines](#) for invoicing requirements.
- Click **Select files...** to locate the files on your computer.
- Select **Upload & Save file** to attach the file.
  - A message box will say you have successfully uploaded the file. Close this box.
- Add a note in the **Attachment Note:** section for extenuating circumstances related to the line items attachments.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information  
 Project Details  
 Grant Allocation  
 Invoice Line Items

**Attachments**

Browse: Select files... Upload & Save file

Attachment Note:

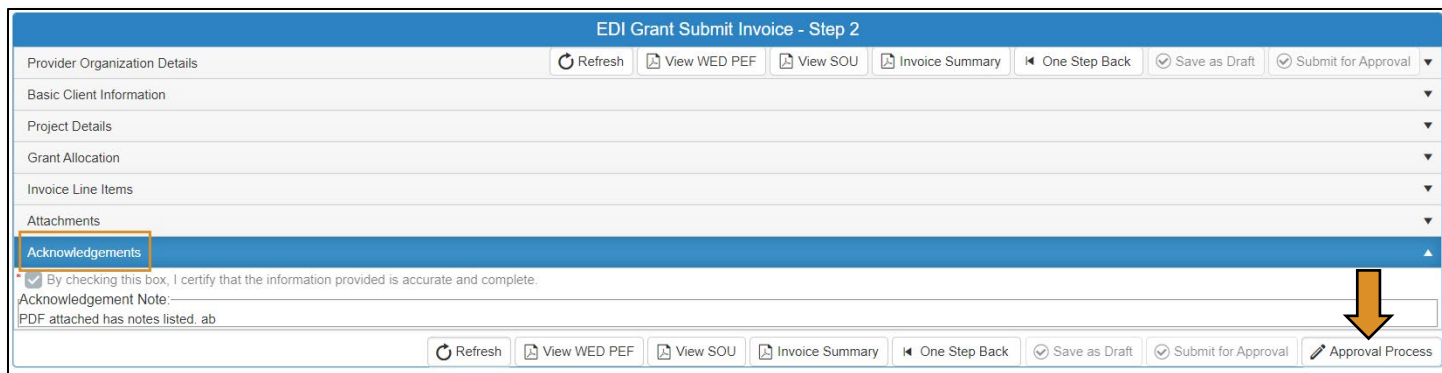
Active/Inactive file(s) Delete file(s) Download all files

Status	File Name	Attachment Note	Uploaded Date	Action	
<input type="checkbox"/> Active	DataRequestForm.pdf		06/16/2023 13:05:11	Download	Public

Acknowledgements Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval Approval Process

**IMPORTANT:** Invoice line items and the attached supporting documents must match.  
All attachments must be uploaded in one PDF.

- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an acknowledgment note in the box.
  - If you don't have a note to add, type your initials, as this field is required.
- Click the **Approval Process** button.



EDI Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

**Acknowledgements**

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
PDF attached has notes listed. ab

## Agreement Acknowledgements and Approval

- On the **Approval Process – EDI Grant Invoice Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).
- Click the **Approve** button at the top or bottom of the screen.

Approval Process - EDI Grant Invoice Approval

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number:  
INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coor...	Andra - Beyer	Andra.Beyer@ca...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coor...	Andra - Beyer	Andra.Beyer@ca...	Approved		
▶ EDI Local BIS Director - 2nd Approv	6/19/2023 9:32:41 AM						
EDI Local Finance Coordinator - 3rd A...	6/19/2023 9:32:41 AM						
EDI State Regional Coordinator - 4th A...	6/19/2023 9:32:41 AM						
EDI State Requisition Coordinator - 5t...	6/19/2023 9:32:41 AM						

**Current Approval Stage Information**

Approved By* Beyer Andra	Approval Stage* 2nd Approval Stage
Approver School* Oklahoma Department of Career and Technology Educati...	Approver Role* EDI - Local BIS Director
Approver Email* Andra.Beyer@careertech.ok.gov	Approval Date* 06/16/2023

**Approval/Rejection Note**

Format

B I U

**Private Note**

Format

B I U

Browse   View to Public

Attachment Note

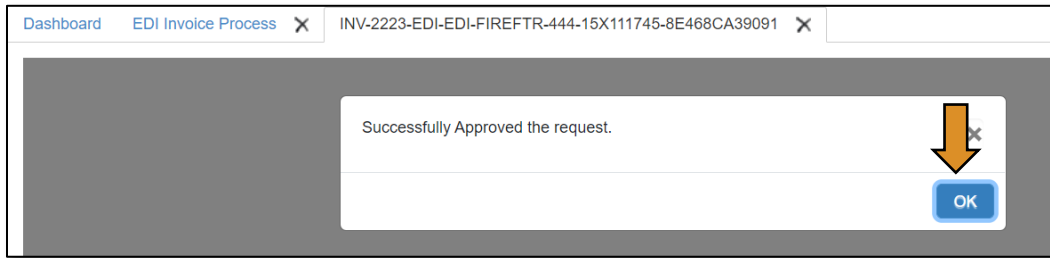
File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

- A message will pop up asking if you are sure. Click **OK**.

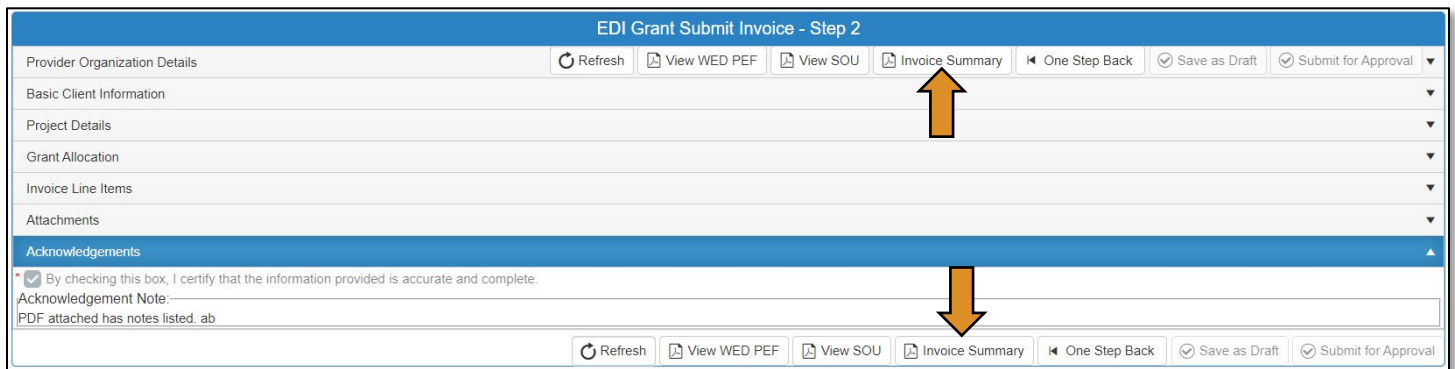
Approval Process - EDI Grant Invoice Approval

Are you sure?

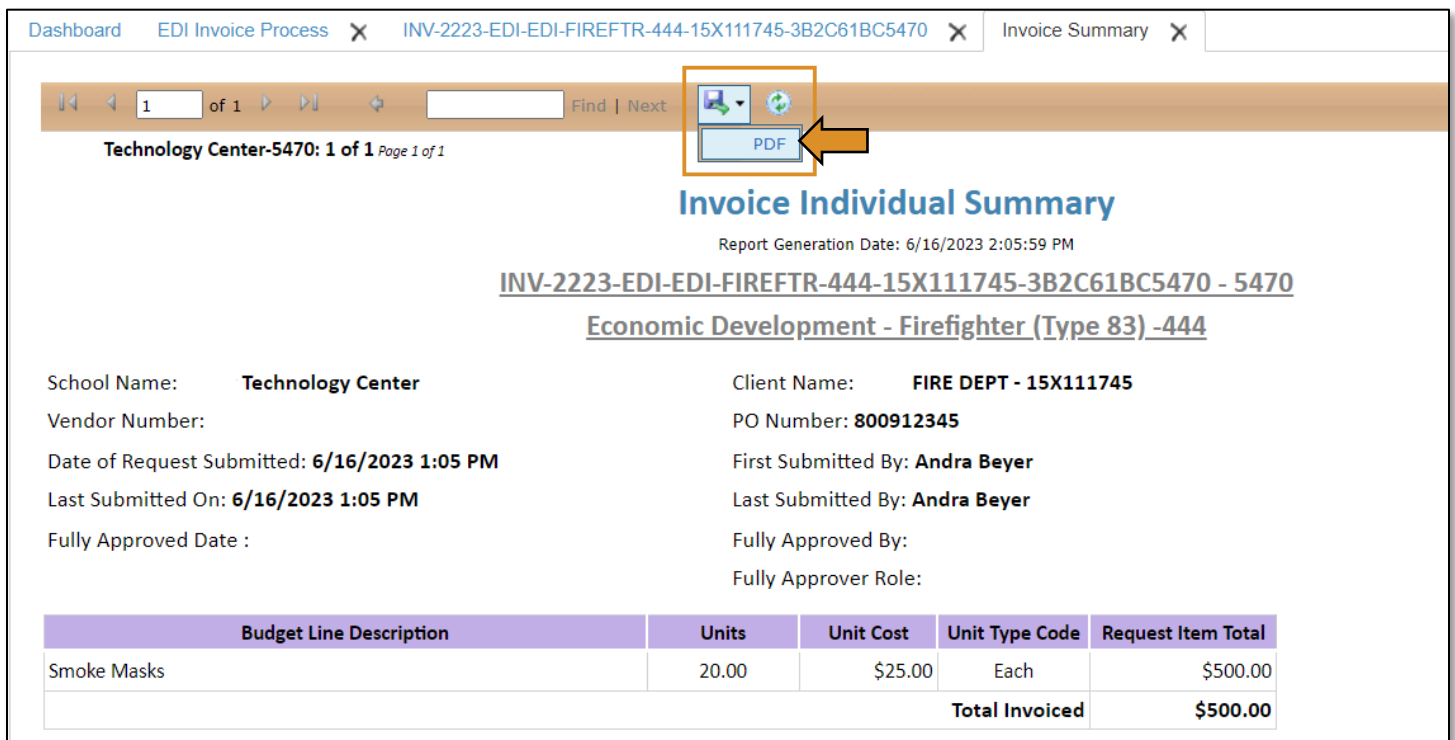
- A message will pop up saying, ‘Successfully Approved the request’. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

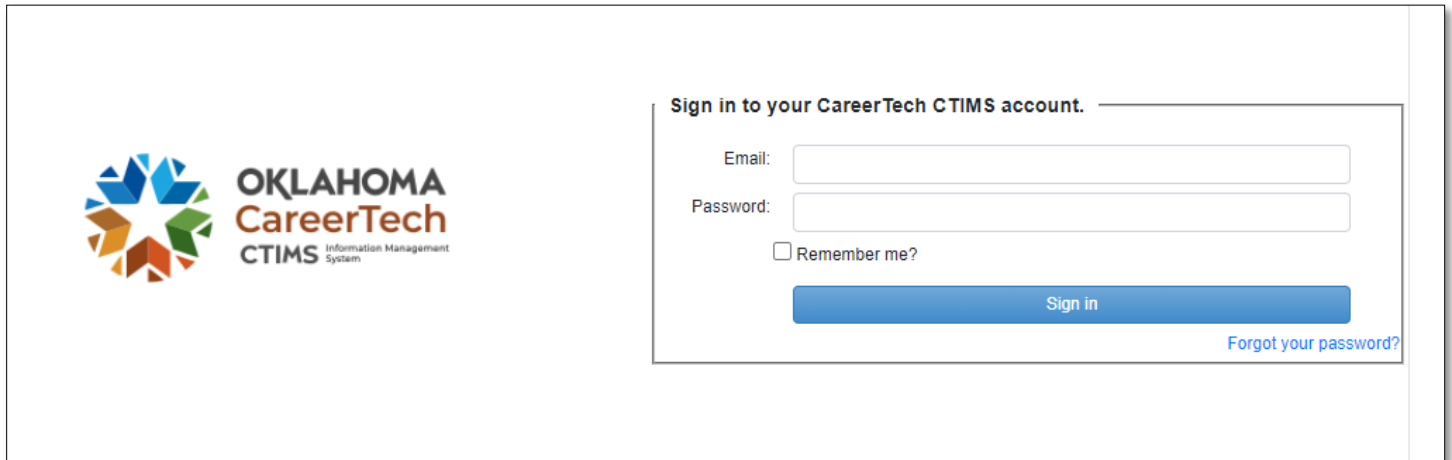


The *invoice* has been successfully submitted and will go to the EDI – Local Finance Coordinator.

## [EDI – Local Finance Coordinator \(Invoice Process\)](#)

### Logging into CTIMS

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



**OKLAHOMA CareerTech CTIMS**  
Information Management System

**Sign in to your CareerTech CTIMS account.**

Email:

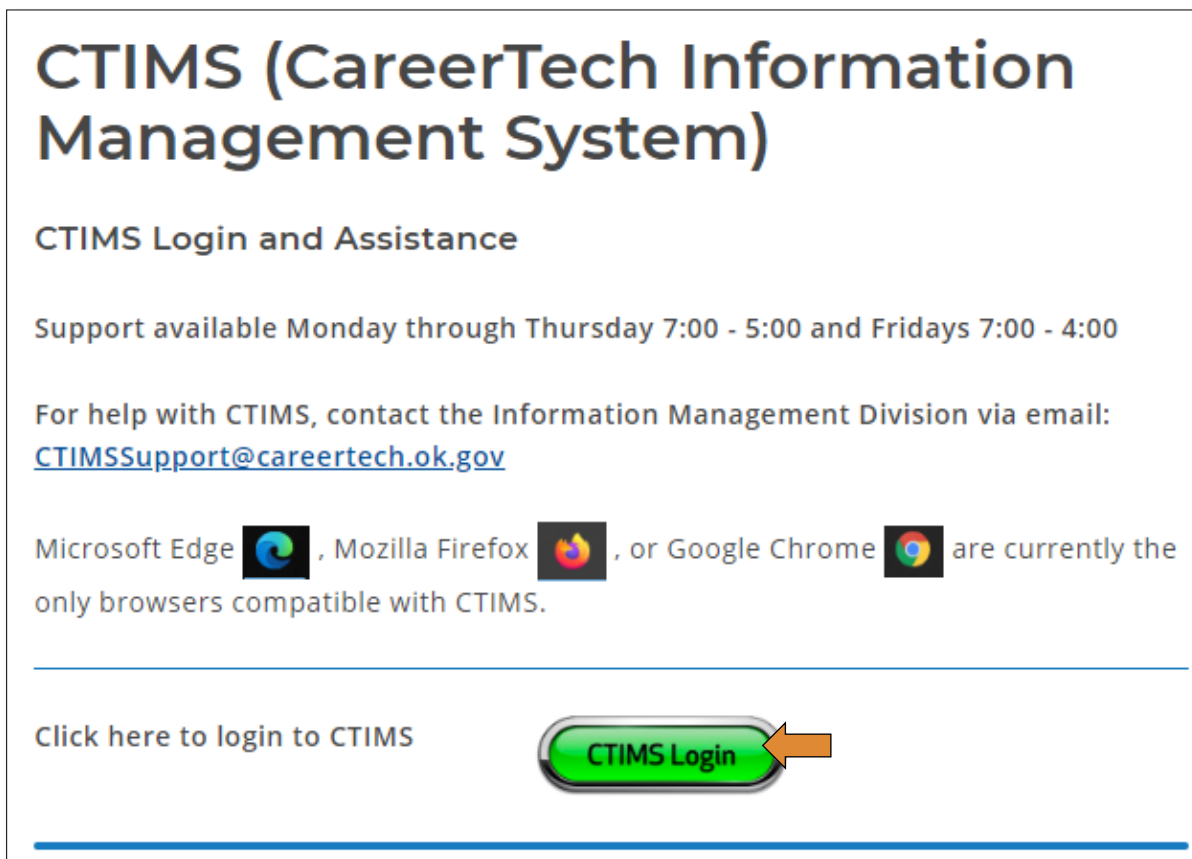
Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)

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






# CTIMS (CareerTech Information Management System)


## CTIMS Login and Assistance

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

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

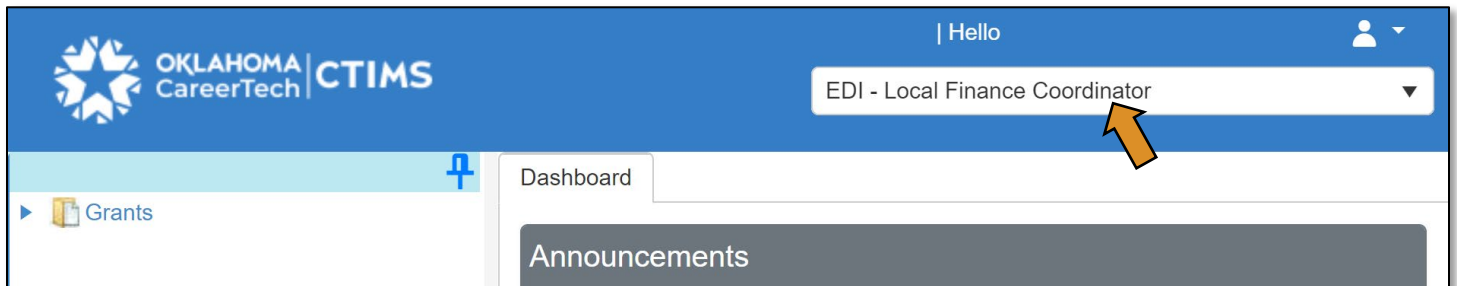
Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

---

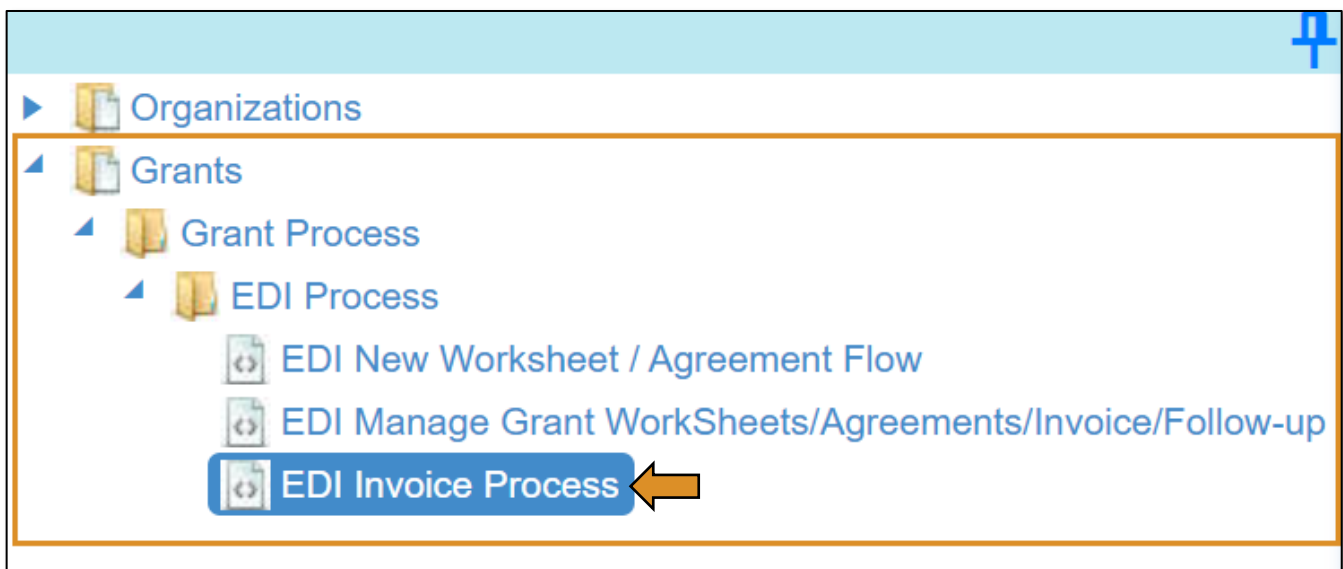
Click here to login to CTIMS 

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 **EDI – 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 **EDI – Local Finance Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Invoice Process** link.



## Accessing the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. The fields are as follows:

- 1. Fiscal Calendar Year\*: 2022-2023
- 2. Grant Fund Type\*: EDI
- 3. Organization Type\*: Technology Center Districts
- 4. Organization\*: Technology Center
- 5. Organization District\*: Technology Center
- 6. Program Initiative\*: Economic Development - Firefighter (Type 83) -444
- 7. Approval Function Type\*: All
- 8. Filter on Status\*: All
- 9. Search button

- After clicking the **Search** button, select **Manage Grant Invoices** tab to open an invoice that has already been started. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details.
- Click on the blue Invoice link to open the invoice.

The screenshot shows the 'Manage Grant Invoices' tab selected. Below the filters, there are buttons for 'Save changes', 'Cancel changes', 'Export to Excel', and 'Refresh'. A table lists invoices with columns for BAP Status, BAP Process, Paymer Days, Organization, Client Name, Program Initiative, and Invoice. One invoice is expanded to show an 'Invoice Approval Summary' table.

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approve
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov		EDI - Loc...
EDI Local BIS Director - 2nd Approval ...					EDI - Loc...



EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.

Dashboard EDI Invoice Process X INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091 X

### EDI Grant Submit Invoice - Step 1

**Provider Organization Details**

Fiscal Calendar Year:\* 2022-2023 Grant Fund Type:\* EDI  
 Organization Type:\* Technology Center Districts Organization:\* Technology Center  
 Organization District:\* Technology Center Program Initiative:\* Economic Development - Firefighte...  
 Worksheet No.\* WS- -EDI-EDI-FIREFTR-444-15X111745-C62DB6CB8978  
 Agreement No.\* WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD  
 Invoice No.\* INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091

Basic Client Information  
 Project Details

Refresh Next Step

EDI Grant Submit Invoice Step-2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

EDI Grant Submit Invoice - Step 2

Provider Organization Details Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information  
 Project Details  
 Grant Allocation

**Invoice Line Items**

Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type
<input checked="" type="checkbox"/> Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00	Cost Per Each

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Matched Funds	Total
Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each	\$0.00	

- Verify the documents that are attached match the line items by clicking on the Attachments row.

**IMPORTANT: Invoice line items and the attached supporting documents must match.**  
All attachments must be uploaded in one PDF.

- Click the **Approval Process** button at the bottom of the screen. The invoice will now go to the next approval stage.

**EDI Grant Submit Invoice - Step 2**

Provider Organization Details

Basic Client Information ▼

Project Details ▼

Grant Allocation ▼

Invoice Line Items ▼

Attachments ▼

**Acknowledgements** ▲

By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:  
 PDF attached has notes listed. ab

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

**Approval Process - EDI Grant Invoice Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number:  
 INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coor...	Andra - Beyer	Andra.Beyer@ca...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coor...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local BIS Director - 2nd Approval...	6/19/2023 9:37:10 AM	EDI - Local BIS ...	Andra - Beyer	Andra.Beyer@ca...	Approved		
▶ EDI Local Finance Coordinator - 3rd	6/19/2023 9:58:40 AM						
EDI State Regional Coordinator - 4th A...	6/19/2023 9:58:40 AM						
EDI State Requisition Coordinator - 5t...	6/19/2023 9:58:40 AM						
ODCTE FDI Finance Reviewer - Fully	6/19/2023 9:58:40 AM						

**Current Approval Stage Information**

Approved By*	<input type="text" value="Beyer Andra"/>	Approval Stage*	<input type="text" value="2nd Approval Stage"/>
Approver School*	<input type="text" value="Oklahoma Department of Career and Technology Educati..."/>	Approver Role*	<input type="text" value="EDI - Local BIS Director"/>
Approver Email*	<input type="text" value="Andra.Beyer@careertech.ok.gov"/>	Approval Date*	<input type="text" value="06/16/2023"/> <input type="button" value="Calendar"/>

**Approval/Rejection Note**

Format

**Private Note**

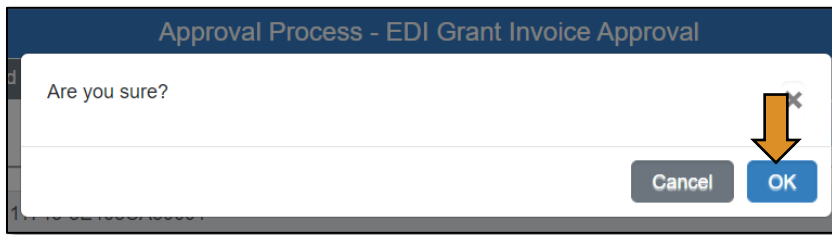
Format

Browse   View to Public

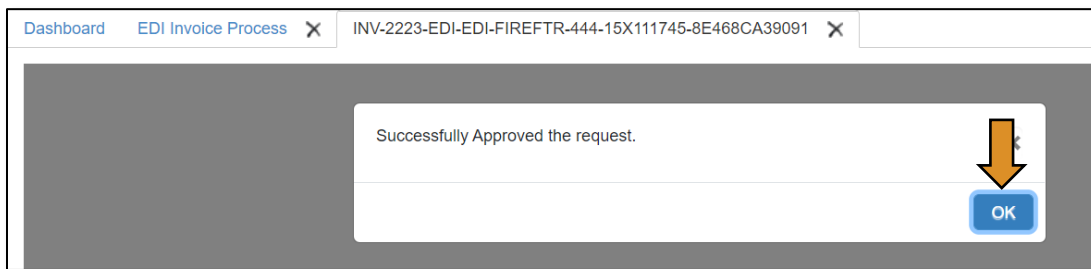
Attachment Note

File Name	Uploaded On	Note	Attachment
DataRequestForm.pdf	06/16/2023		Download Public

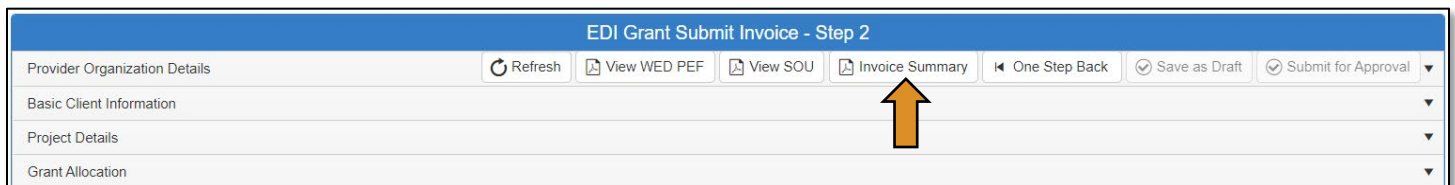
- A message will pop up asking if you are sure. Click **OK**.



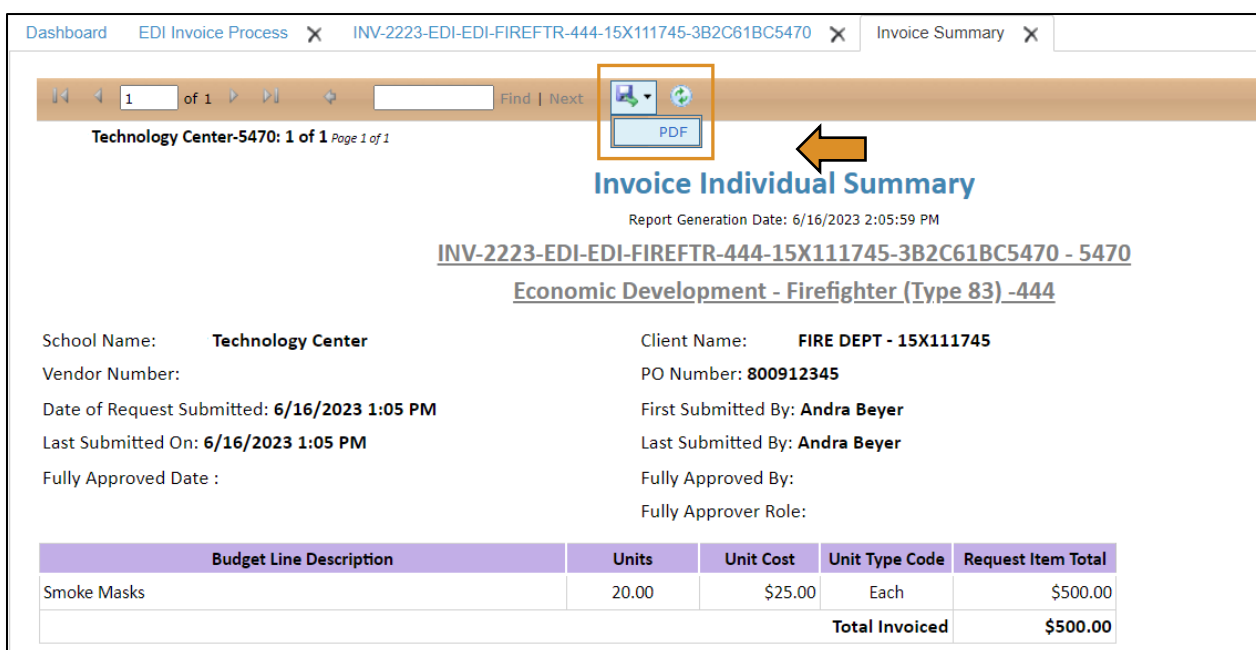
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

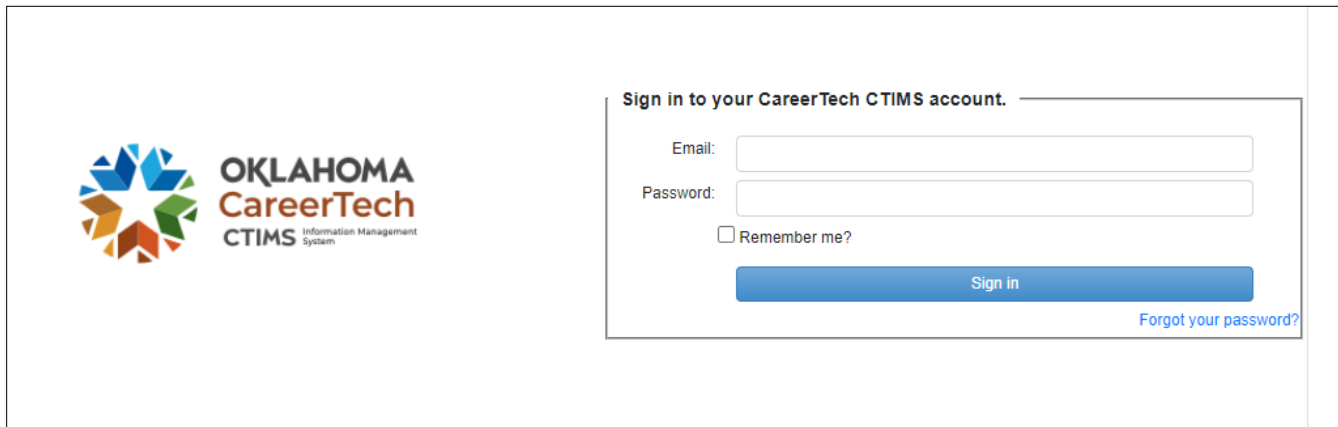


The *invoice* has been successfully submitted and will go to the EDI – State Regional Coordinator.

## [EDI – State Regional Coordinator \(Invoice Process\)](#)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




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

## CTIMS (CareerTech Information Management System)


**CTIMS Login and Assistance**

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

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

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

---

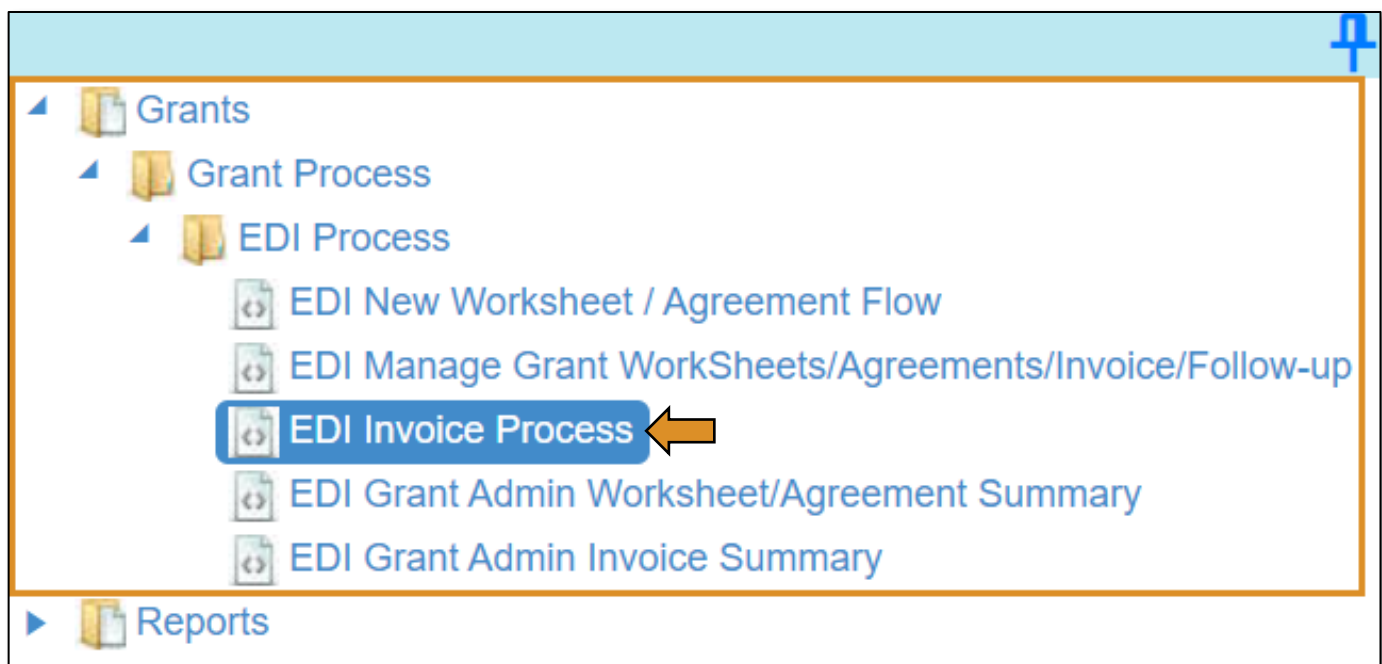
Click here to login to CTIMS 

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 **EDI – State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – State Regional Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Invoice Process** link.



## Accessing the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

1. **Fiscal Calendar Year\*** - this field automatically displays the current year.
2. **Grant Fund Type\*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type\*** - should automatically default to *Technology Center Districts*.
4. **Organization\*** - type the first three letters of your school or organization name and select it.
5. **Organization District\*** - should automatically default to your organization.
6. **Program Initiative\*** - select initiative you are needing from the drop-down menu.
7. **Approval Function Type\*** - this will remain as *All*.
8. **Filter on Status\*** - this will remain as *All*.
9. Click **Search**.

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

The screenshot shows the 'EDI Grant Fund Invoices List' form. The fields are as follows:

- 1. Fiscal Calendar Year: 2022-2023
- 2. Grant Fund Type: EDI
- 3. Organization Type: Technology Center Districts
- 4. Organization: Technology Center
- 5. Organization District: Technology Center
- 6. Program Initiative: Economic Development - Firefighter (Type 83) -444
- 7. Approval Function Type: All
- 8. Filter on Status: All
- 9. Search button

- After clicking the **Search** button, select **Manage Grant Invoices** tab to open an invoice that has already been started, but not submitted for approval.
- Click on the blue Invoice link to open the invoice.

The screenshot shows the 'Manage Grant Invoices' tab selected. Below the form, there is an 'Invoice Approval Summary' table. The table has the following columns: Approval Stage, Approval Status, Approval/Rejection Note, Approver Email, Approval Date, and Approver. The table contains two rows of approval data.

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver
EDI Local BIS Coordinator - 1st Stage	Approved	New Process	Andra.Beyer@careertech.ok.gov		EDI - Local
EDI Local BIS Director - 2nd Approval ...					EDI - Local

### EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.

Dashboard   EDI Invoice Process INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091

#### EDI Grant Submit Invoice - Step 1

Provider Organization Details ▲

Fiscal Calendar Year:* 2022-2023 ▼	Grant Fund Type:* EDI ▼
Organization Type:* Technology Center Districts ▼	Organization:* Technology Center ▼
Organization District:* Technology Center ▼	Program Initiative:* Economic Development - Firefighte... ▼
Worksheet No:* WS- -EDI-EDI-FIREFTR-444-15X111745-C62DB6CB8978	
Agreement No:* WSAG- -EDI-EDI-FIREFTR-444-15X111745-0E62DD1E00FD	
Invoice No:* INV- -EDI-EDI-FIREFTR-444-15X111745-8E468CA39091	

Basic Client Information ▼

Project Details ▼

Refresh
Next Step

### EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

#### EDI Grant Submit Invoice - Step 2

Provider Organization Data Refresh View WED PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval

Basic Client Information ▼

Project Details ▼

Grant Allocation ▼

Invoice Line Items ▲

☐	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost
☑	Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00
Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
Active	Smoke Masks	1000-100-330		20.00	\$25.00 Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
  - **IMPORTANT: You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.**
- Click the **Approval Process** button at the bottom of the screen.

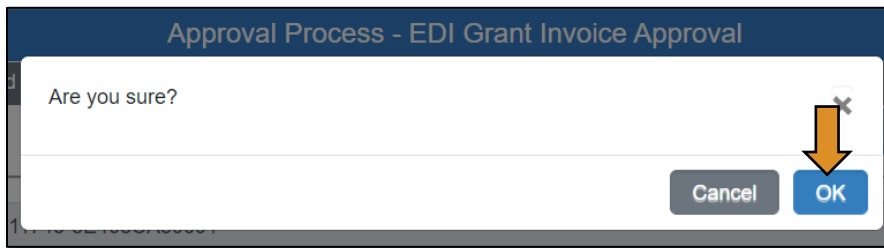
- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local BIS Director - 2nd Approval...	6/19/2023 9:37:10 AM	EDI - Local BIS ...	Andra - Beyer	Andra.Beyer@ca...	Approved		
EDI Local Finance Coordinator - 3rd A...	6/19/2023 10:01:46 AM	EDI - Local Finan...	Andra - Beyer	Andra.Beyer@ca...	Approved		
► EDI State Regional Coordinator - 4th	6/19/2023 10:48:37 AM						
EDI State Requisition Coordinator - 5t...	6/19/2023 10:48:37 AM						
ODCTE EDI Finance Reviewer - Fully	6/19/2023 10:48:37 AM						

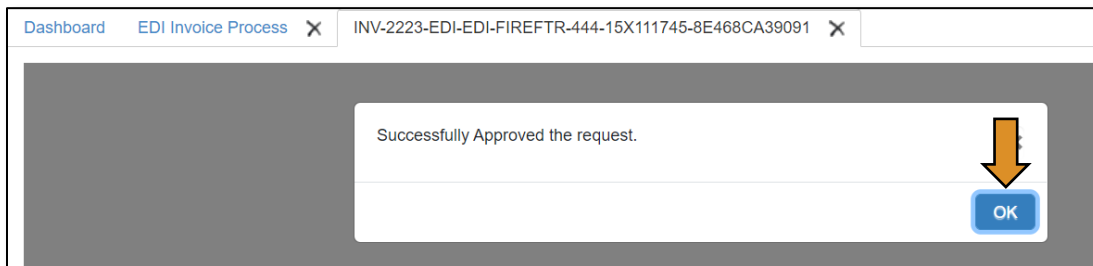
File Name	Uploaded On	Note	Attachment	Public
DataRequestForm.pdf	06/16/2023		Download	Public



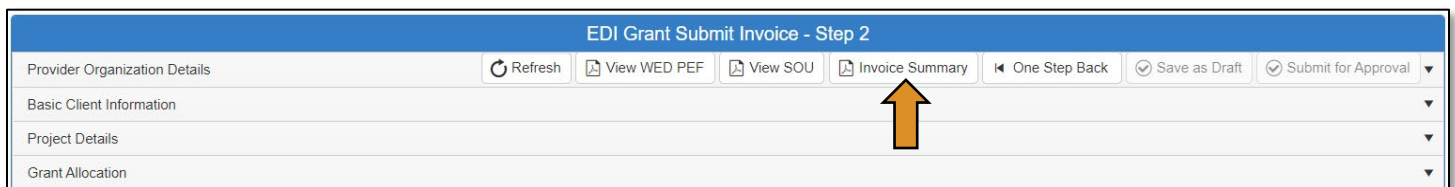
- A message will pop up asking if you are sure. Click **OK**.



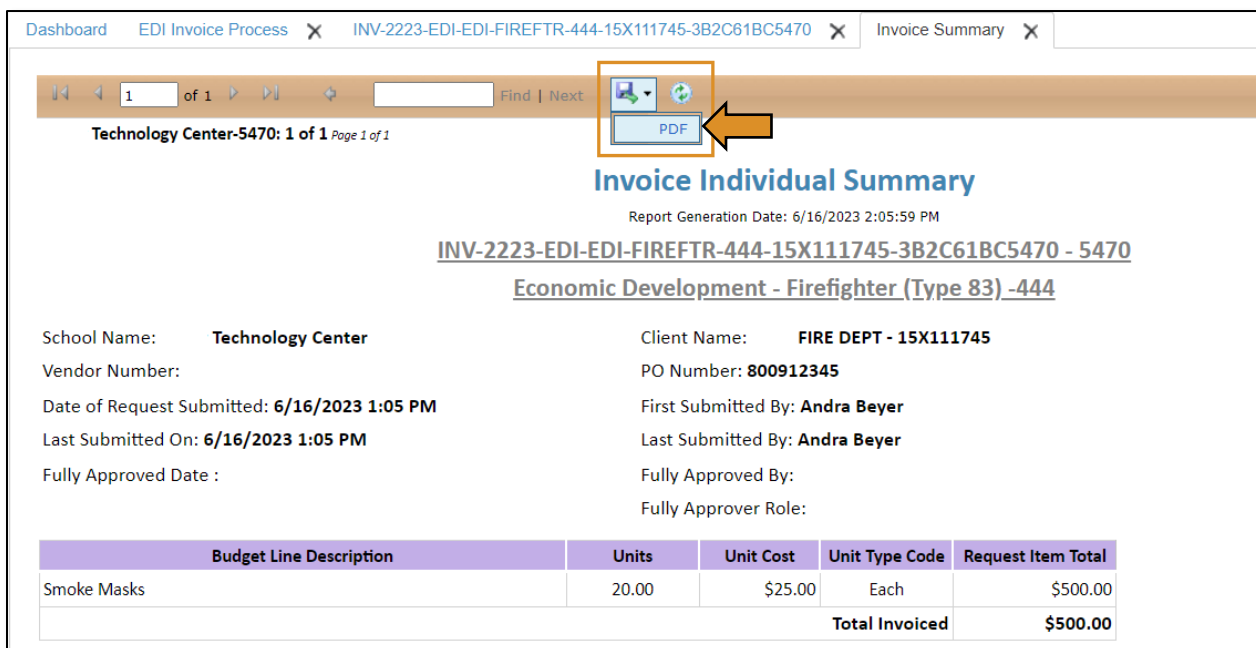
- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

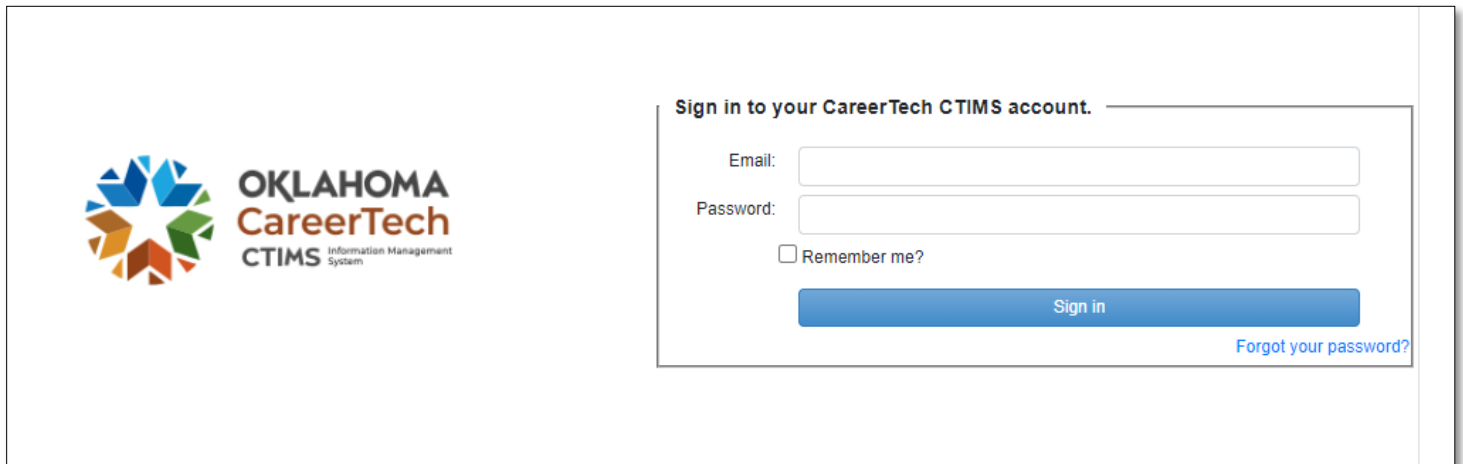


The *invoice* has been successfully submitted and will go to the EDI – State Requisition Coordinator.

## [EDI – State Requisition Coordinator \(Invoice Process\)](#)

### Logging into CTIMS

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



**Sign in to your CareerTech CTIMS account.**

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS Login button.

# CTIMS (CareerTech Information Management System)

## CTIMS Login and Assistance

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

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

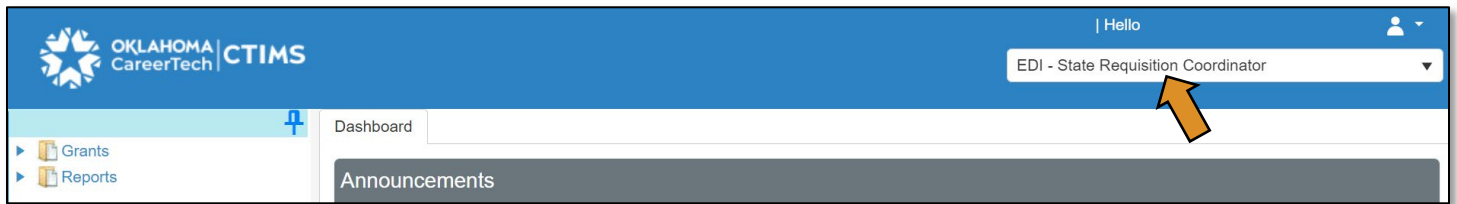
Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS

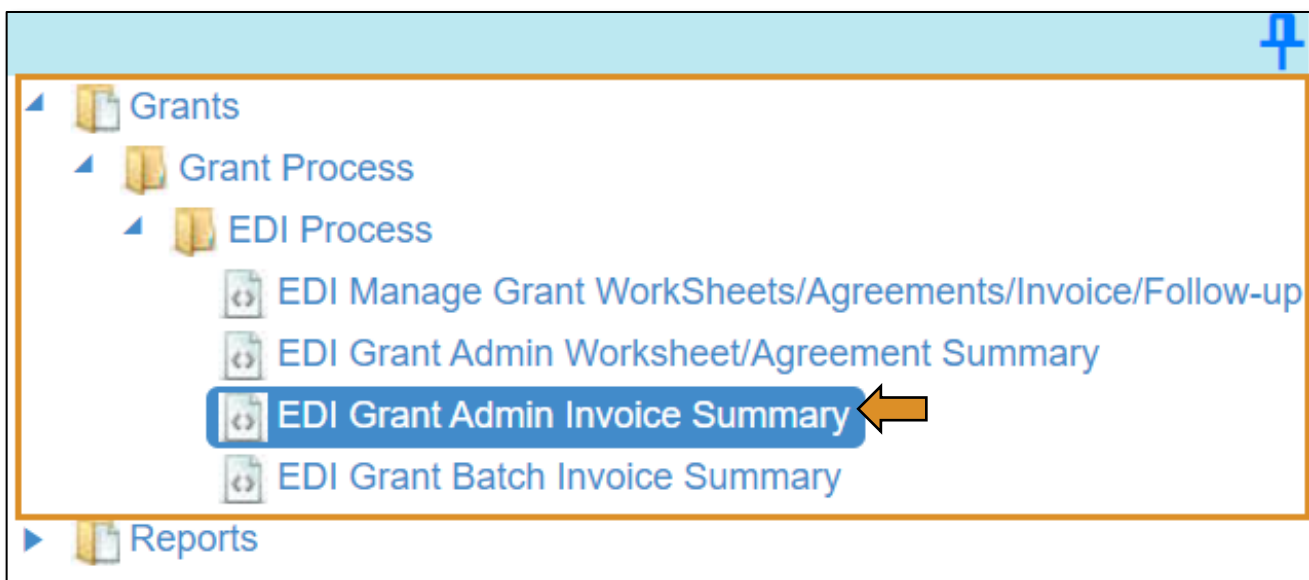


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – State Requisition Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – State Requisition Coordinator** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Grant Admin Invoice Summary** link.



## Accessing the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. **Fiscal Calendar Year:** \* - this field automatically displays the current year.
2. **Grant Fund Type:** \* - automatically defaults to EDI due to your login credentials and role.
3. **Program Initiative:** \* - select initiative you are needing from the drop-down menu or...
  - a. Click the **All** box.
4. **Organization Type:** \* - should automatically default to *Technology Center Districts* or...
  - a. Click the **All** box.
5. **Organization:** \* - type the first three letters of the school or organization name and select it or...
  - a. Click the **All** box.
6. **Approval Function Type:** \* - this will remain as **All**.
7. **Filter on Status:** \* - this will remain as **All**.
8. Click **Search**.

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

The screenshot shows the 'EDI Admin Grant Fund Invoices List' form. The form is titled 'EDI Admin Grant Fund Invoices List' and has a blue header. Below the header, there are several fields with numbered callouts:

- 1.** Fiscal Calendar Year: \* (dropdown menu showing 2022-2023)
- 2.** Grant Fund Type: \* (dropdown menu showing EDI)
- 3.** Program Initiative: \* (dropdown menu showing EDI-FIREFTR-444 - Economic Devel...)
- 3a.** All (checkbox next to Program Initiative)
- 4.** Organization Type: \* (dropdown menu showing Technology Center Districts)
- 4a.** All (checkbox next to Organization Type)
- 5.** Organization: \* (text input field showing Search Organizations...)
- 5a.** All (checkbox next to Organization)
- 6.** Approval Function Type: \* (dropdown menu showing All)
- 7.** Filter on Status: \* (dropdown menu showing All)
- 8.** Search (button)


At the top of the form, there are tabs for 'Dashboard' and 'EDI Grant Admin Invoice Summary'. Below the form, there are tabs for 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.


**EDI Admin Grant Fund Invoices List**


Fiscal Calendar Year:\* 2022-2023  
 Program Initiative:  All \* EDI-FIREFTR-444 - Economic Development - Firefighter (Typ...  
 Organization:\*   All

Grant Fund Type:\* EDI  
 Organization Type:  All \* Technology Center Districts

Grant Worksheet/Agreement/Invoice List    Manage Grant Invoices 

Save changes    Cancel changes    Export to Excel    Refresh

Status	BAP Process	Paymer Days	Organization	Client Name	Program Initiative	Invoice
<input type="checkbox"/>	Yes	No	0	Technology Center	ENID FIRE DEPT	Economic Development - Firefight... <a href="#">INV-2223-EDI-EDI-FIREFTR-444-15X111745-...</a> 

 Invoice Approval Summary

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver Role	Private No
EDI Local BIS Coordinator - 1st ...	Approved	New Process	Andra.Beyer@careertech.ok...	06/16/2023 13:05:43	EDI - Local Coordinator	

### EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.


Dashboard   EDI Grant Admin Invoice Summary    INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

**EDI Grant Submit Invoice - Step 1**

**Provider Organization Details**

Fiscal Calendar Year:\* 2022-2023    Grant Fund Type:\* EDI  
 Organization Type:\* Technology Center Districts    Organization:\* Technology Center  
 Organization District:\* Technology Center    Program Initiative:\* Economic Development - Firefighter (Type 8...  
 Worksheet No.\* WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9  
 Agreement No.\* WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA  
 Invoice No.\* INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information  
 Project Details

## EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

EDI Grant Submit Invoice - Step 2						
Provider Organization Details <input type="button" value="Refresh"/> <input type="button" value="View WED PEF"/> <input type="button" value="View SOU"/> <input type="button" value="Invoice Summary"/> <input type="button" value="One Step Back"/> <input type="button" value="Save as Draft"/> <input type="button" value="Submit for Approval"/>						
Basic Client Information						
Project Details						
Grant Allocation						
Invoice Line Items						
<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	
<input checked="" type="checkbox"/>	Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00	
<input type="checkbox"/>	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
<input type="checkbox"/>	Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
  - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.
- Click the **Approval Process** button at the bottom of the screen.

EDI Grant Submit Invoice - Step 2						
Provider Organization Details <input type="button" value="Refresh"/> <input type="button" value="View WED PEF"/> <input type="button" value="View SOU"/> <input type="button" value="Invoice Summary"/> <input type="button" value="One Step Back"/> <input type="button" value="Save as Draft"/> <input type="button" value="Submit for Approval"/>						
Basic Client Information						
Project Details						
Grant Allocation						
Invoice Line Items						
Attachments						
Acknowledgements						
<input checked="" type="checkbox"/> By checking this box, I certify that the information provided is accurate and complete. Acknowledgement Note: PDF attached has notes listed. ab						
<input type="button" value="Refresh"/> <input type="button" value="View WED PEF"/> <input type="button" value="View SOU"/> <input type="button" value="Invoice Summary"/> <input type="button" value="One Step Back"/> <input type="button" value="Save as Draft"/> <input type="button" value="Submit for Approval"/> <input type="button" value="Change Request"/> <input type="button" value="Approval Process"/>						

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

**Approval Process - EDI Grant Invoice Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approve button to finalize your changes and submission to further Process.

Request Number: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI Local BIS Director - 2nd Approval ...	6/19/2023 9:37:10 AM	EDI - Local BIS D...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI Local Finance Coordinator - 3rd Ap...	6/19/2023 10:01:46 AM	EDI - Local Finan...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI State Regional Coordinator - 4th A...	6/19/2023 1:23:18 PM	EDI - State Regio...	Andra - Beyer	Andra.Beyer@car...	Approved		
► EDI State Requisition Coordinator - 5	6/19/2023 1:25:08 PM						
ODCTE EDI Finance Reviewer - Fullv...	6/19/2023 1:25:08 PM						

**Current Approval Stage Information**

Approved By\* 
 Approval Stage\*

Approver School\* 
 Approver Role\*

Approver Email\* 
 Approval Date\*

**Approval/Rejection Note**

Format

**Private Note**

Format

Browse   View to Public

Attachment Note

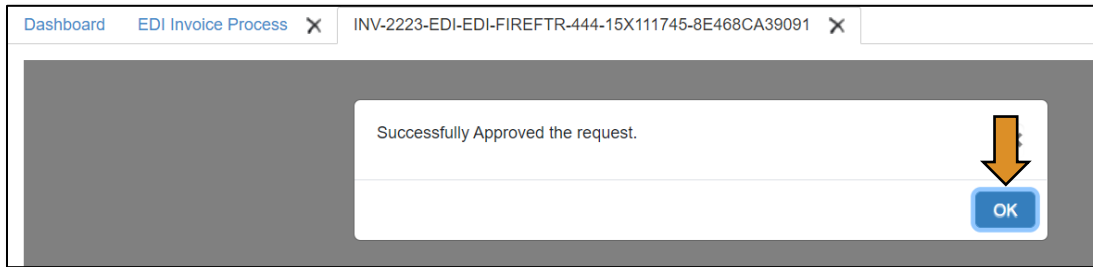
File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		<a href="#">Download</a>	Public

- A message will pop up asking if you are sure. Click **OK**.

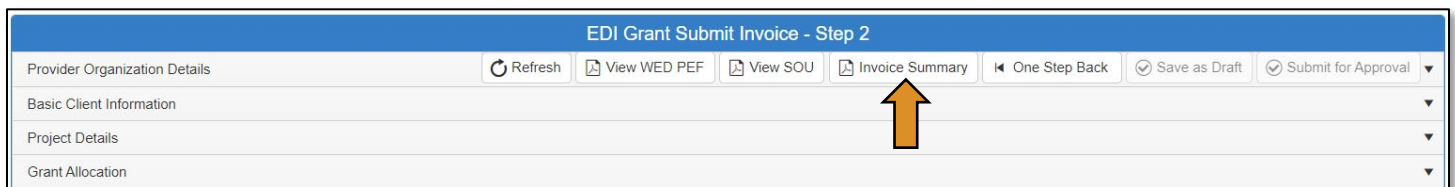
**Approval Process - EDI Grant Invoice Approval**

Are you sure?

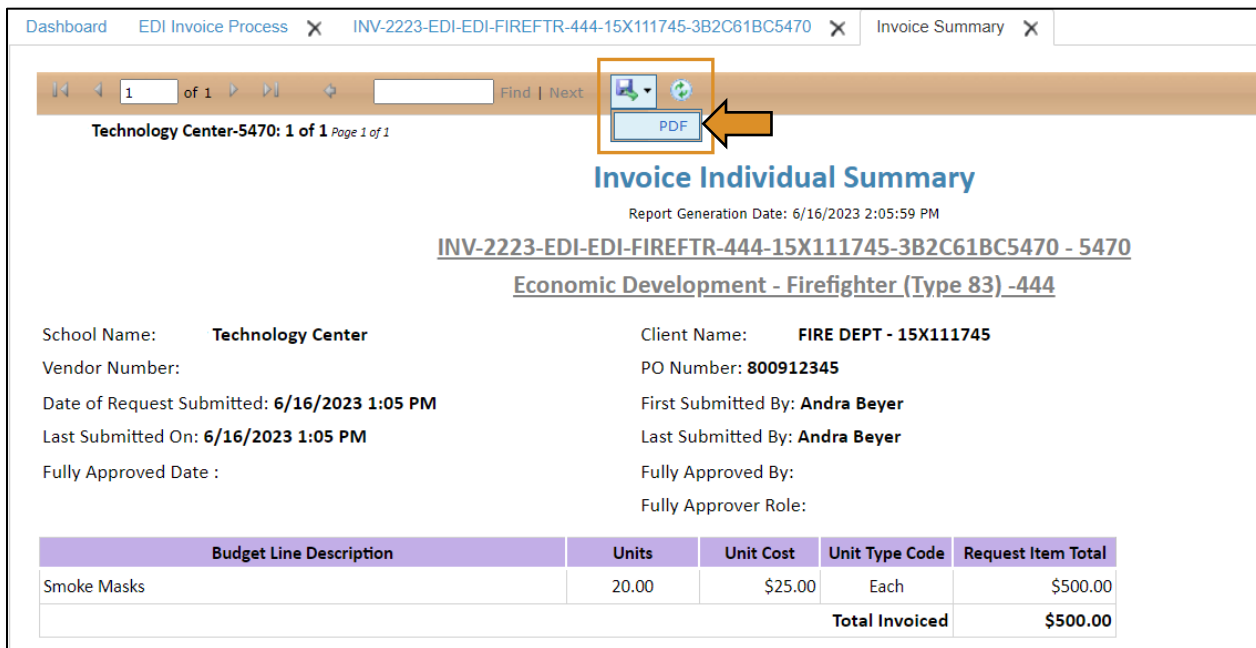
- A message will pop up saying, ‘Successfully Approved the request’. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.



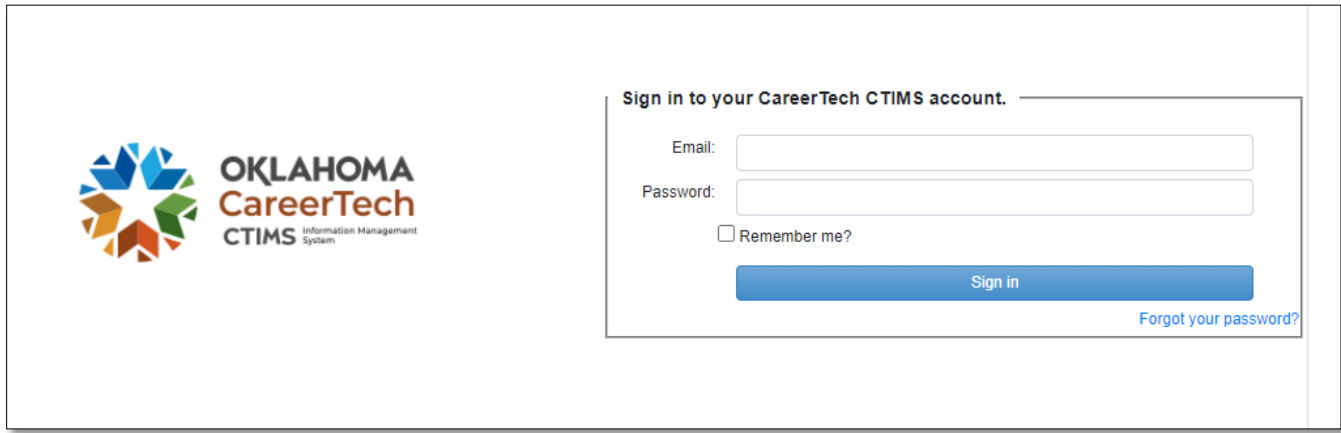
The *invoice* has been successfully submitted and will go to the ODCTE – EDI Finance Reviewer (final approval).



## [ODCTE – EDI Finance Reviewer \(Invoice Process\)](#)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

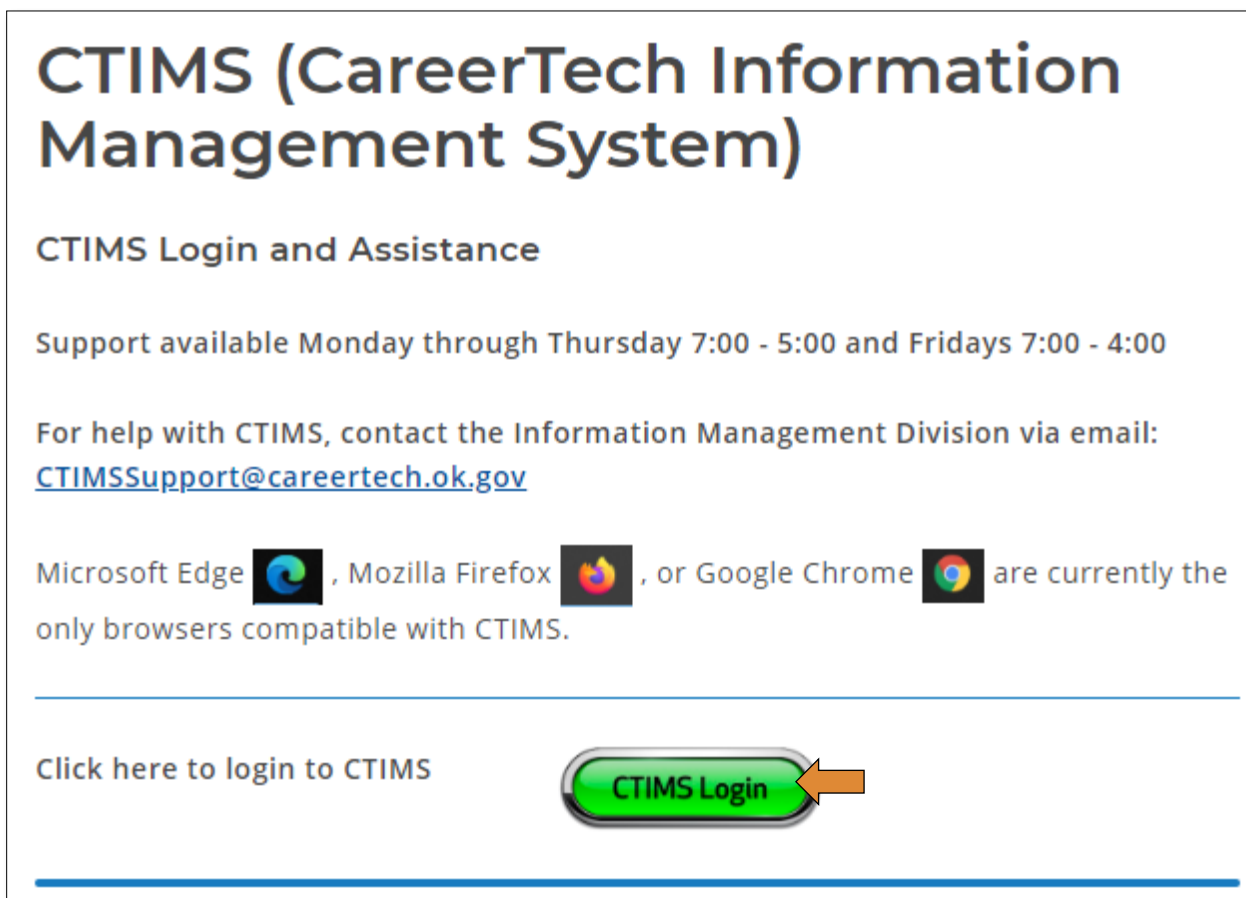
Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)

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






# CTIMS (CareerTech Information Management System)

## CTIMS Login and Assistance

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

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

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

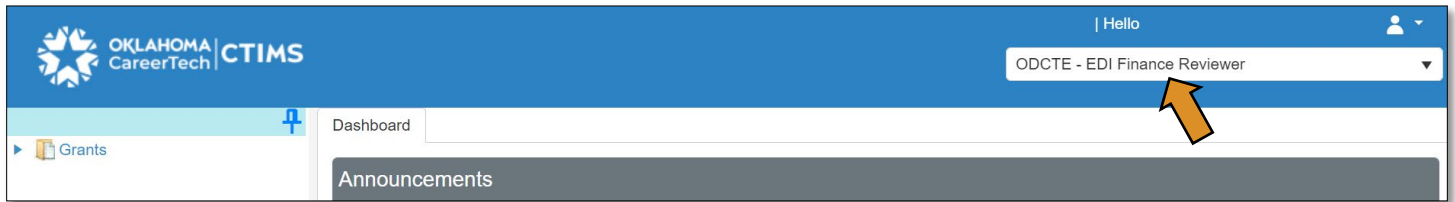
---

[Click here to login to CTIMS](#)

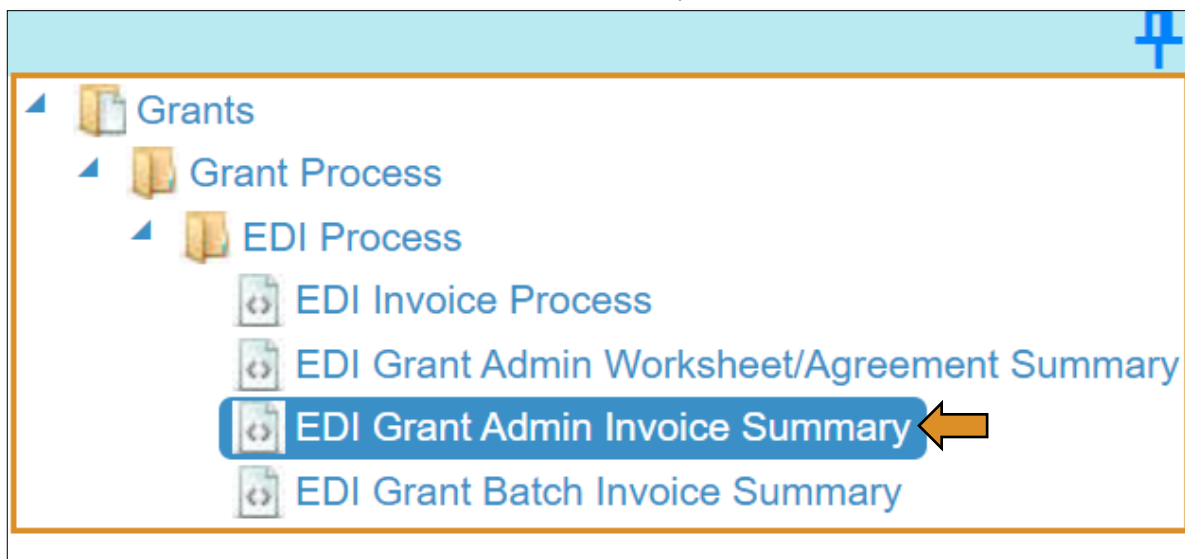
[CTIMS Login](#)

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 **ODCTE – EDI Finance Reviewer** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **ODCTE – EDI Finance Reviewer** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Grant Admin Invoice Summary** link.



## Accessing the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. **Fiscal Calendar Year:** \* - this field automatically displays the current year.
2. **Grant Fund Type:** \* - automatically defaults to EDI due to your login credentials and role.
3. **Program Initiative:** \* - select initiative you are needing from the drop-down menu or...
  - a. Click the **All** box.
4. **Organization Type:** \* - should automatically default to *Technology Center Districts* or...
  - a. Click the **All** box.
5. **Organization:** \* - type the first three letters of the school or organization name and select it or...
  - a. Click the **All** box.
6. **Approval Function Type:** \* - this will remain as **All**.
7. **Filter on Status:** \* - this will remain as **All**.
8. Click **Search**.

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

The screenshot shows the 'EDI Admin Grant Fund Invoices List' form. The form is titled 'EDI Admin Grant Fund Invoices List' and is located under the 'EDI Grant Admin Invoice Summary' tab. The form contains several fields with numbered callouts (1-8) indicating the steps for completion:

- 1.** Fiscal Calendar Year: \* (Dropdown menu showing 2022-2023)
- 2.** Grant Fund Type: \* (Dropdown menu showing EDI)
- 3.** Program Initiative: \* (Dropdown menu showing EDI-FIREFTR-444 - Economic Devel...)
- 3a.** All (Radio button next to Program Initiative)
- 4.** Organization Type: \* (Dropdown menu showing Technology Center Districts)
- 4a.** All (Radio button next to Organization Type)
- 5.** Organization: \* (Text input field showing Search Organizations...)
- 5a.** All (Radio button next to Organization)
- 6.** Approval Function Type: \* (Dropdown menu showing All)
- 7.** Filter on Status: \* (Dropdown menu showing All)
- 8.** Search (Search button)

At the bottom of the form, there are two tabs: 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'.

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.

### EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.

## EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

EDI Grant Submit Invoice - Step 2						
Provider Organization Details <input type="button" value="Refresh"/> <input type="button" value="View WED PEF"/> <input type="button" value="View SOU"/> <input type="button" value="Invoice Summary"/> <input type="button" value="One Step Back"/> <input type="button" value="Save as Draft"/> <input type="button" value="Submit for Approval"/>						
Basic Client Information						
Project Details						
Grant Allocation						
Invoice Line Items						
<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	
<input checked="" type="checkbox"/>	Smoke Masks	1000-100-330	1000-Personnel Services - Salaries-100-Personnel S...	20.00	\$25.00	
<input type="checkbox"/>	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
<input type="checkbox"/>	Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
  - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.
- Click the **Approval Process** button at the bottom of the screen.

EDI Grant Submit Invoice - Step 2						
Provider Organization Details <input type="button" value="Refresh"/> <input type="button" value="View WED PEF"/> <input type="button" value="View SOU"/> <input type="button" value="Invoice Summary"/> <input type="button" value="One Step Back"/> <input type="button" value="Save as Draft"/> <input type="button" value="Submit for Approval"/>						
Basic Client Information						
Project Details						
Grant Allocation						
Invoice Line Items						
Attachments						
Acknowledgements						
<input checked="" type="checkbox"/> By checking this box, I certify that the information provided is accurate and complete. Acknowledgement Note: PDF attached has notes listed. ab						
<input type="button" value="Refresh"/> <input type="button" value="View WED PEF"/> <input type="button" value="View SOU"/> <input type="button" value="Invoice Summary"/> <input type="button" value="One Step Back"/> <input type="button" value="Save as Draft"/> <input type="button" value="Submit for Approval"/> <input type="button" value="Change Request"/> <input type="button" value="Approval Process"/>						

- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

**Approval Process - EDI Grant Invoice Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:37:23 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Cancel for Chang...	New Process	
EDI Local BIS Coordinator - 1st Stage	6/16/2023 2:39:29 PM	EDI - Local Coord...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI Local BIS Director - 2nd Approval ...	6/19/2023 9:37:10 AM	EDI - Local BIS D...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI Local Finance Coordinator - 3rd Ap...	6/19/2023 10:01:46 AM	EDI - Local Finan...	Andra - Beyer	Andra.Beyer@car...	Approved		
EDI State Regional Coordinator - 4th A...	6/19/2023 1:23:18 PM	EDI - State Regio...	Andra - Beyer	Andra.Beyer@car...	Approved		
► EDI State Requisition Coordinator - 5	6/19/2023 1:25:08 PM						
ODCTE EDI Finance Reviewer - Fullv...	6/19/2023 1:25:08 PM						

**Current Approval Stage Information**

Approved By\* 
 Approval Stage\*

Approver School\* 
 Approver Role\*

Approver Email\* 
 Approval Date\*

**Approval/Rejection Note**

Format

**Private Note**

Format

Browse   View to Public

Attachment Note

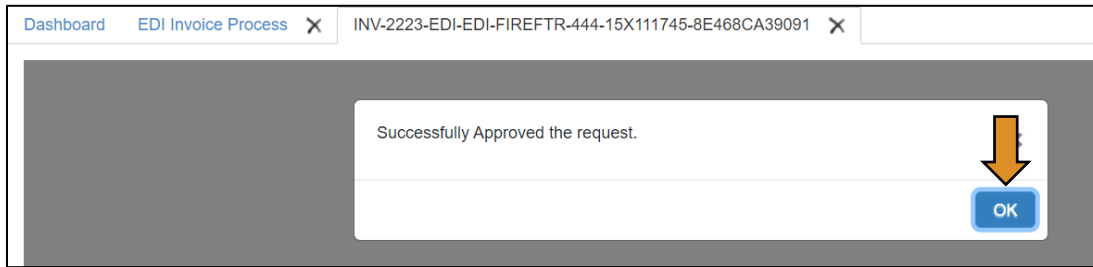
File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		<a href="#">Download</a>	Public

- A message will pop up asking if you are sure. Click **OK**.

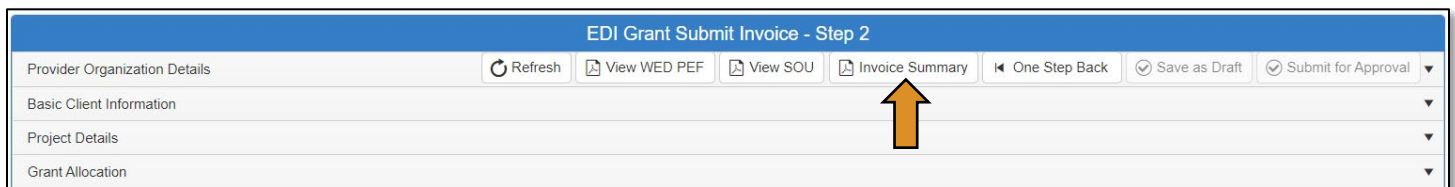
**Approval Process - EDI Grant Invoice Approval**

Are you sure?

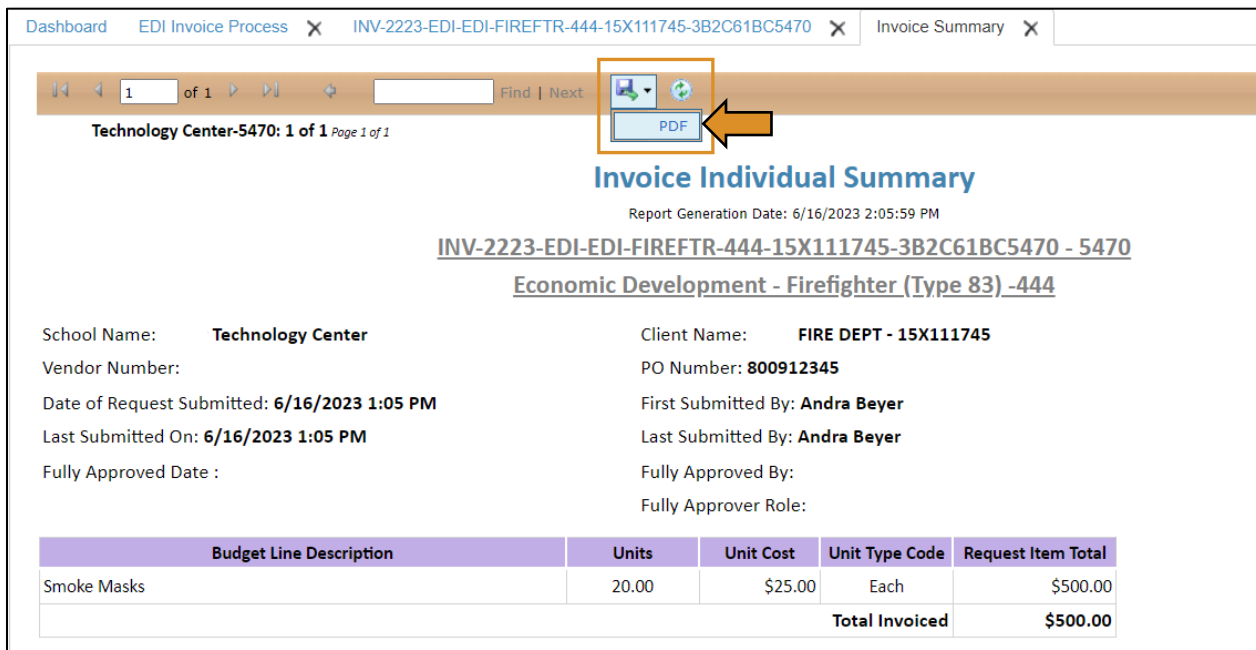
- A message will pop up saying, ‘Successfully Approved the request’. Click **OK**.



- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted. (Optional)



- Click on the blue disc to download a PDF of your invoice summary.

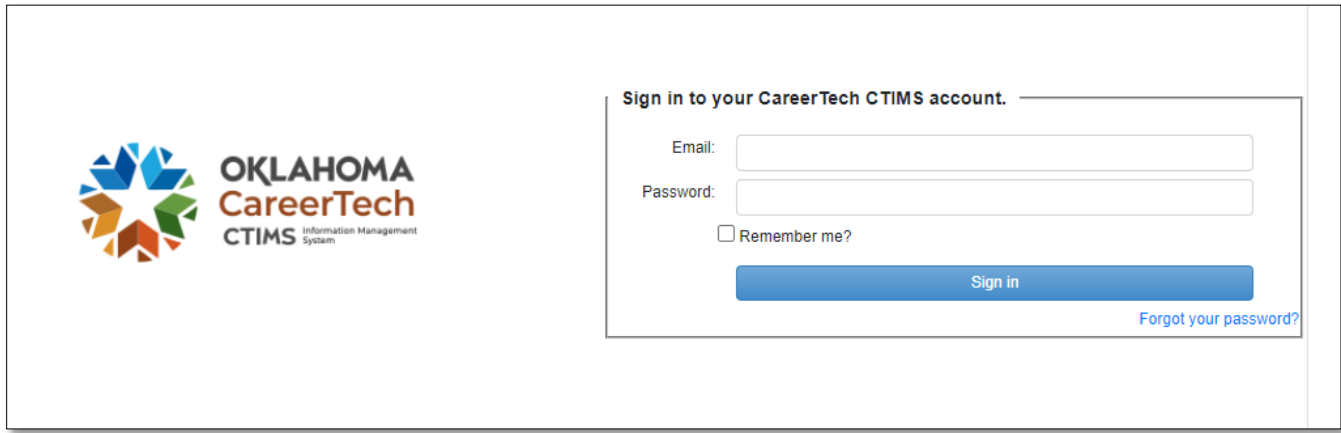


The *invoice* has been successfully submitted and will go to the ODCTE – EDI Finance Reviewer (final approval).

## [ODCTE – EDI Finance Reviewer \(Invoice Process\)](#)

### Logging into CTIMS

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



Sign in to your CareerTech CTIMS account.

Email:

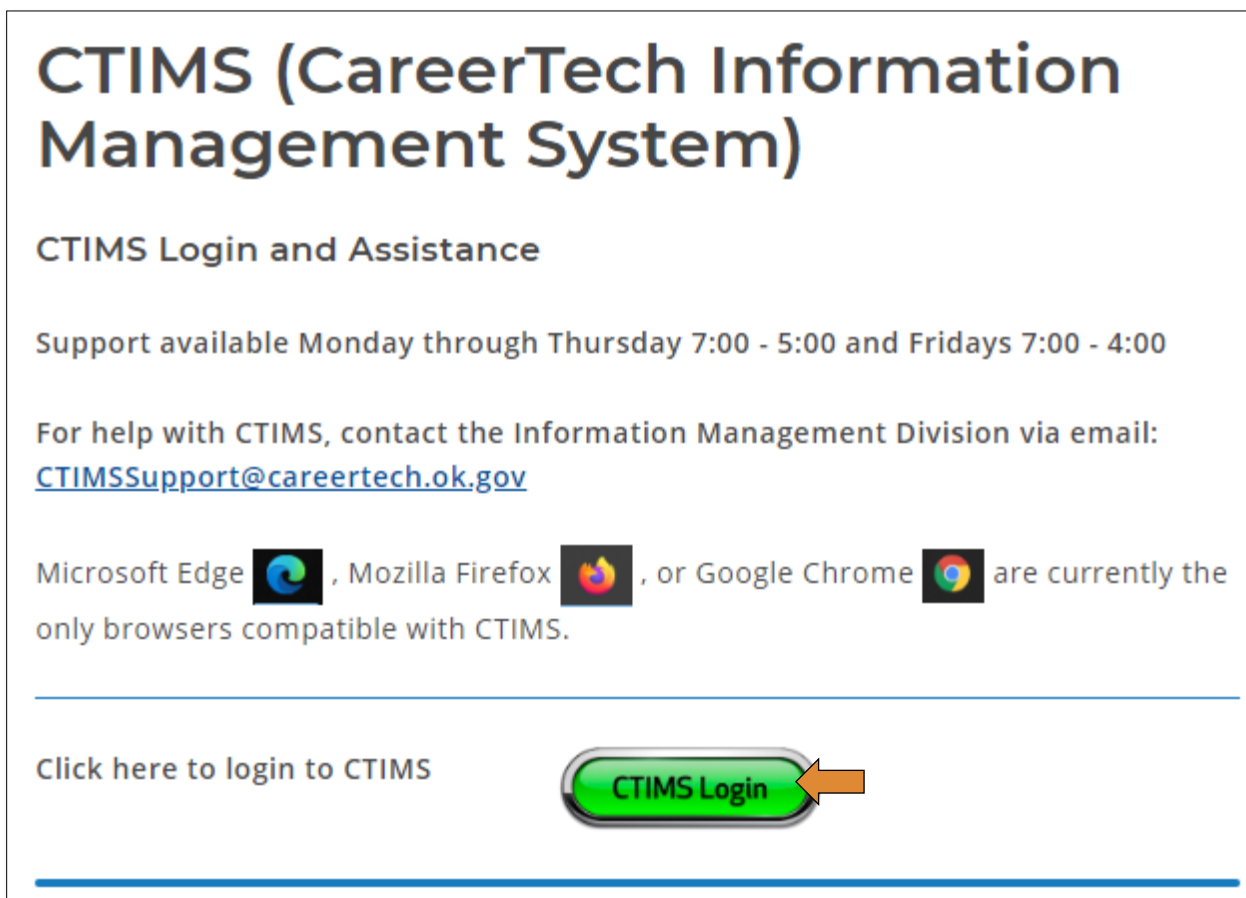
Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)

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






# CTIMS (CareerTech Information Management System)

## CTIMS Login and Assistance


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

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

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

---

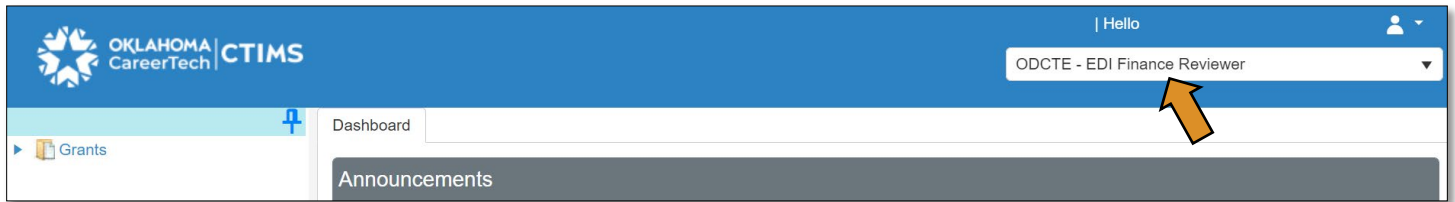
[Click here to login to CTIMS](#)

[CTIMS Login](#) 

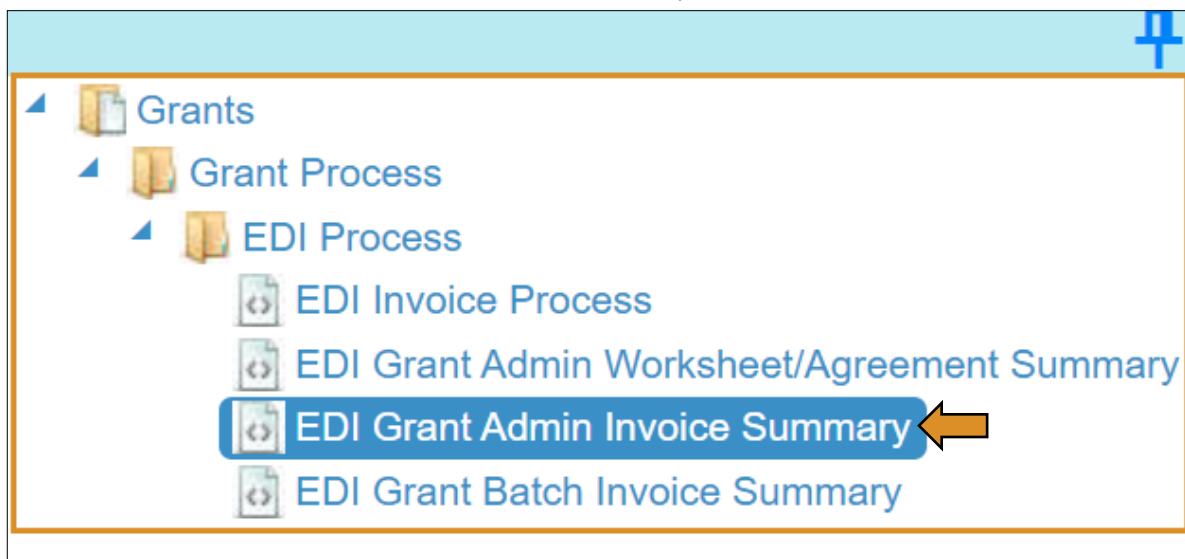


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **ODCTE – EDI Finance Reviewer** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **ODCTE – EDI Finance Reviewer** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Grants, Grant Process & EDI Process**.
- Click on the **EDI Grant Admin Invoice Summary** link.



## Accessing the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. **Fiscal Calendar Year:** \* - this field automatically displays the current year.
2. **Grant Fund Type:** \* - automatically defaults to EDI due to your login credentials and role.
3. **Program Initiative:** \* - select initiative you are needing from the drop-down menu or...
  - a. Click the **All** box.
4. **Organization Type:** \* - should automatically default to *Technology Center Districts* or...
  - a. Click the **All** box.
5. **Organization:** \* - type the first three letters of the school or organization name and select it or...
  - a. Click the **All** box.
6. **Approval Function Type:** \* - this will remain as **All**.
7. **Filter on Status:** \* - this will remain as **All**.
8. Click **Search**.

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

The screenshot shows the 'EDI Admin Grant Fund Invoices List' form. The form is titled 'EDI Admin Grant Fund Invoices List' and is located within a 'Dashboard' tab. The form contains several fields with red asterisks indicating they are required. The fields are: 'Fiscal Calendar Year' (set to 2022-2023), 'Grant Fund Type' (set to EDI), 'Program Initiative' (set to EDI-FIREFTR-444 - Economic Devel...), 'Organization Type' (set to Technology Center Districts), 'Organization' (with a search box and 'All' button), 'Approval Function Type' (set to All), and 'Filter on Status' (set to All). A 'Search' button is located at the bottom right. Numbered callouts (1-8) are placed over the form to indicate the steps for completing it.

Dashboard | EDI Grant Admin Invoice Summary X

### EDI Admin Grant Fund Invoices List

Fiscal Calendar Year: \* 2022-2023 (1.) Grant Fund Type: \* EDI (2.)

Program Initiative:  All \* EDI-FIREFTR-444 - Economic Devel... (3.) Organization Type:  All \* Technology Center Districts (4.)

Organization: \* Search Organizations... (5.)  All (5a.)

Grant Worksheet/Agreement/Invoice List | [Manage Grant Invoices](#)

Approval Function Type: \* All (6.)

Filter on Status: \* All (7.)  (8.)

- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.

**EDI Admin Grant Fund Invoices List**

Fiscal Calendar Year:\* 2022-2023  
 Program Initiative:  All \* EDI-FIREFTR-444 - Economic Development - Firefighter (Typ...  
 Organization:\*   All

Grant Fund Type:\* EDI  
 Organization Type:  All \* Technology Center Districts

Grant Worksheet/Agreement/Invoice List    **Manage Grant Invoices** ←

Save changes   
  Cancel changes   
 Export to Excel   
 Refresh

Status	BAP Process	Paymer Days	Organization	Client Name	Program Initiative	Invoice
<input type="checkbox"/>	Yes	No	0	Technology Center	ENID FIRE DEPT	Economic Development - Firefight... <a href="#">INV-2223-EDI-EDI-FIREFTR-444-15X111745-...</a>

↑ Invoice Approval Summary

Approval Stage	Approval Status	Approval/Rejection Note	Approver Email	Approval Date	Approver Role	Private No
EDI Local BIS Coordinator - 1st ...	Approved	New Process	Andra.Beyer@careertech.ok...	06/16/2023 13:05:43	EDI - Local Coordinator	

### EDI Grant Submit Invoice – Step 1

- Verify that the information is correct, then select **Next Step** to continue to the next screen.

Dashboard    EDI Grant Admin Invoice Summary    INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

**EDI Grant Submit Invoice - Step 1**

**Provider Organization Details**

Fiscal Calendar Year:\* 2022-2023    Grant Fund Type:\* EDI  
 Organization Type:\* Technology Center Districts    Organization:\* Technology Center  
 Organization District:\* Technology Center    Program Initiative:\* Economic Development - Firefighter (Type 8...  
 Worksheet No.\* WS-2223-EDI-EDI-FIREFTR-444-15X111745-E430CDACECB9  
 Agreement No.\* WSAG-2223-EDI-EDI-FIREFTR-444-15X111745-D93F1EE7BAAA  
 Invoice No.\* INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Basic Client Information  
 Project Details

## EDI Grant Submit Invoice – Step 2

On the **EDI Grant Submit Invoice – Step 2** screen, the **Invoice Line Items** section should automatically expand.

- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.

The screenshot shows the 'EDI Grant Submit Invoice - Step 2' interface. The 'Invoice Line Items' section is expanded. The table below shows the details for the 'Smoke Masks' line item.

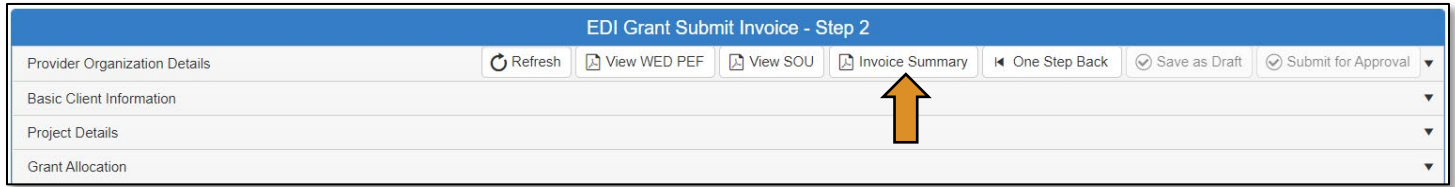
Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type
Active	Smoke Masks	1000-100-330	20.00	\$25.00	Cost Per Each

- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
  - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.
- Verify the invoice information and print the documentation to deliver to the finance department.
- Download the attachments by expanding the **Attachments** section.
  - Click the **Download all files** button.

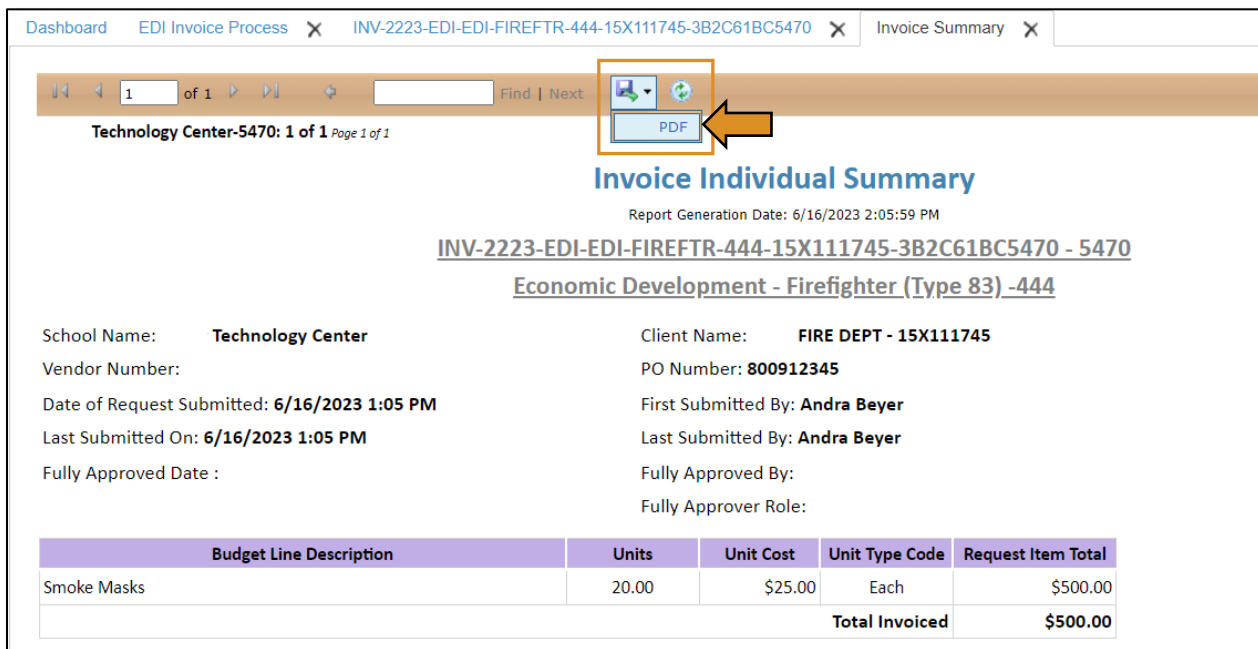
The screenshot shows the 'EDI Grant Submit Invoice - Step 2' interface with the 'Attachments' section expanded. The 'Attachments' section includes a file upload area and a table of existing attachments. An orange arrow points to the 'Download all files' button.

Status	File Name	Attachment Note	Uploaded Date	Action
<input type="checkbox"/> Active	DataRequestForm.pdf		06/16/2023 13:05:11	Download

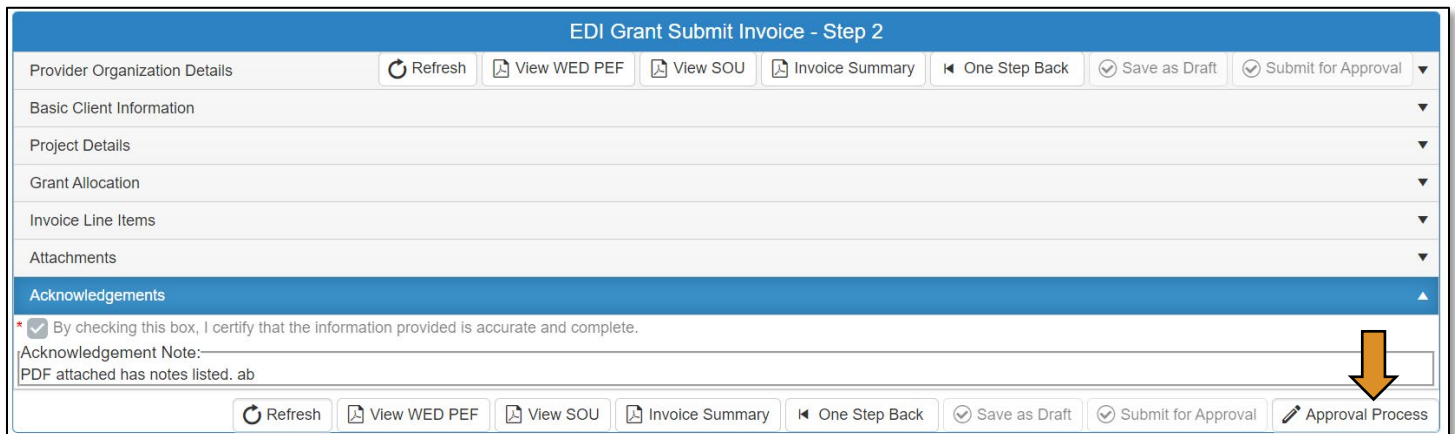
- Go to the **Invoice Summary** button to print or save a PDF report of the claim you have submitted.  
(Optional)



- Click on the blue disc to download a PDF of your invoice summary.



- Click the **Approval Process** button at the bottom of the screen.



- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.

**Approval Process - EDI Grant Invoice Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Request Number: INV-2223-EDI-EDI-FIREFTR-444-15X111745-3B2C61BC5470

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
EDI Local BIS Coordinator - 1st St...	6/16/2023 2:37:23 ...	EDI - Local Co...	Andra - Beyer	Andra.Beyer@...	Cancel for Cha...	New Process	
EDI Local BIS Coordinator - 1st St...	6/16/2023 2:39:29 ...	EDI - Local Co...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI Local BIS Director - 2nd Appr...	6/19/2023 9:37:10 ...	EDI - Local BIS...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI Local Finance Coordinator - 3...	6/19/2023 10:01:4...	EDI - Local Fin...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI State Regional Coordinator - ...	6/19/2023 1:23:18 ...	EDI - State Re...	Andra - Beyer	Andra.Beyer@...	Approved		
EDI State Requisition Coordinator ...	6/19/2023 1:27:20 ...	EDI - State Re...	Andra - Beyer	Andra.Beyer@...	Approved		
▶ <b>ODCTE EDI Finance Reviewer -</b>	6/19/2023 1:54:14 ...						

**Approval/Rejection Note**

Format

**Private Note**

Format

Browse   View to Public

Attachment Note

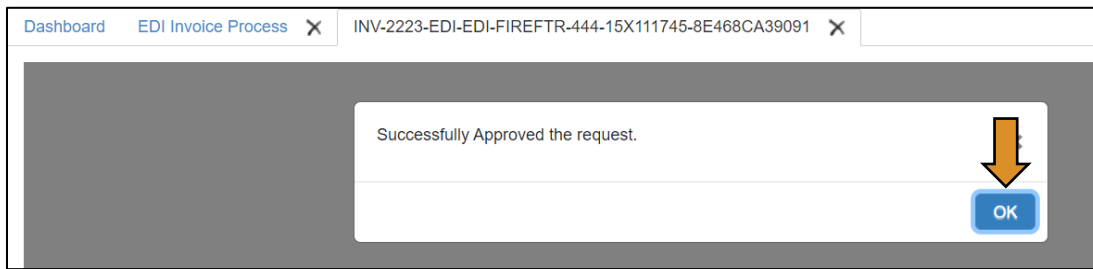
File Name	Uploaded On	Note	Attachment	
DataRequestForm.pdf	06/16/2023		Download	Public

- A message will pop up asking if you are sure. Click **OK**.

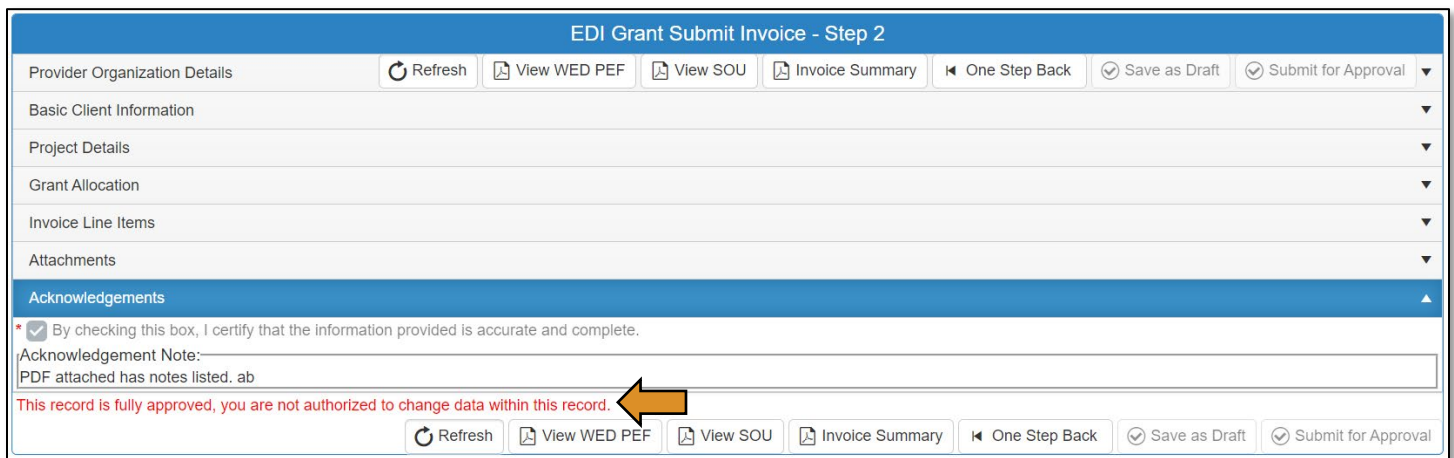
**Approval Process - EDI Grant Invoice Approval**

Are you sure?

- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.



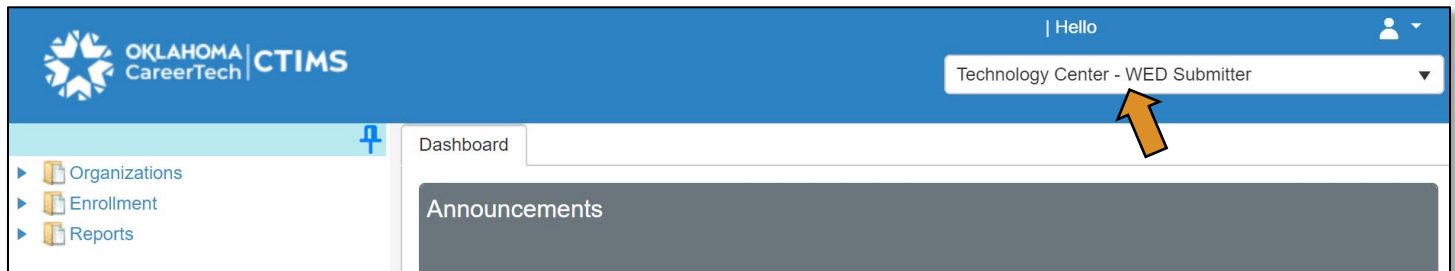
- You will now see that the record is fully approved.



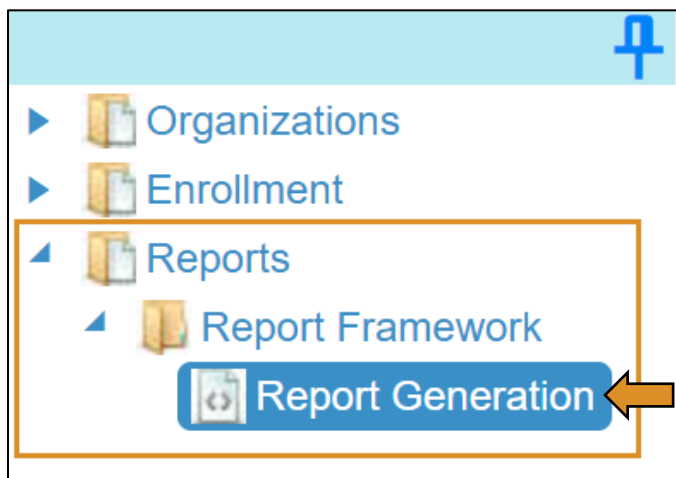
## Printing a PEF

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 **Technology Center – WED Submitter** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

- If you do not see **Technology Center – WED Submitter** contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Reports & Report Framework**.
- Click on the **Report Generation** link.





Complete the **Report Manager** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. **Module:** \* - select *Enrollment*.
2. **Sub Module:** \* - select *ACD / WED Reports*.
3. **Report Title:** \* - select the report that you are wanting to run.
  - a. Select the *Tech Center: WED PEF Detail Report – 511*.
4. **Report Type/School Type:** \* - select *District*.
5. **Calendar Code:** \* - choose the school year you are wanting to run.
6. **Organization Type:** \* - choose *Technology Site Districts*.
7. **Organization:** \* - choose your school.
8. Click **Generate Report**.

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

The screenshot shows the 'Report Manager' form with the following fields and values:

- Module:** Enrollment (1)
- Sub Module:** ACD / WED Reports (2)
- Report Title:** Tech Center: WED PEF Detail Report - 511 (3)
- Report Type/School Type:** District (4)
- Calendar Code:** (5)
- Organization Type:** Technology Center Districts (6)
- Organization:** Technology Center (7)
- Generate Report:** (8)

- 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.

The screenshot shows the search results for the report. The search bar contains the contract number 0002, and the results table shows the following data:

CONT #	PROG TYPE	COURSE NAME	TEACHER
<b>G0002</b>	Adult and Career Development	FrontLine Leadership: 10 Part Series	White

- Click the contract number link to open the PEF. The PEF information will display.
- Click on the blue disc to download a PDF. You can save it for your records or print it after exporting.

**BIS CONTRACT INFORMATION**  
**G0002**

FrontLine Leadership: 10 Part Series

PROG TYPE: 15	MIS CODE:
BEG DATE: 20220803	END DATE: 20230503
COURSE HRS: 40.00	STUDENTS ENROLLED: 16
	STUDENTS IN COURSE FILE: 16

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:

**BIS CONTRACT INFORMATION**  
**G0002**

FrontLine Leadership: 10 Part Series

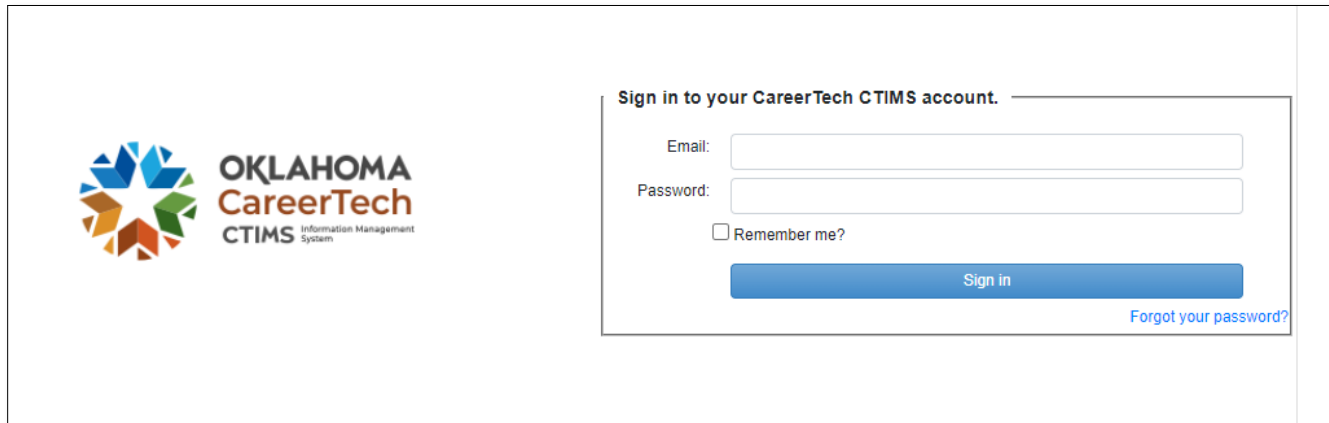
PROG TYPE: 15	MIS CODE:
BEG DATE: 20220803	END DATE: 20230503
COURSE HRS: 40.00	STUDENTS ENROLLED: 16
	STUDENTS IN COURSE FILE: 16

FIRST NAME	LAST NAME	GENDER	AGE	RACE	CLOCK HRS	INDUSTRY
		M	48	03	40.00	PARRISH MANUFACTURING GROUP
		M	53	03	40.00	OPEN

## [View or Request Business Code](#)

### [Logging into CTIMS](#)

Sign in using your school email and CTIMS password at [Contact — CareerTech \(CT\) - okcareertech.org](https://okcareertech.org).



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to [CTIMS \(CareerTech Information Management System\) \(oklahoma.gov\)](https://oklahoma.gov) and select the green CTIMS login button.

# CTIMS (CareerTech Information Management System)


## CTIMS Login and Assistance

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

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

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

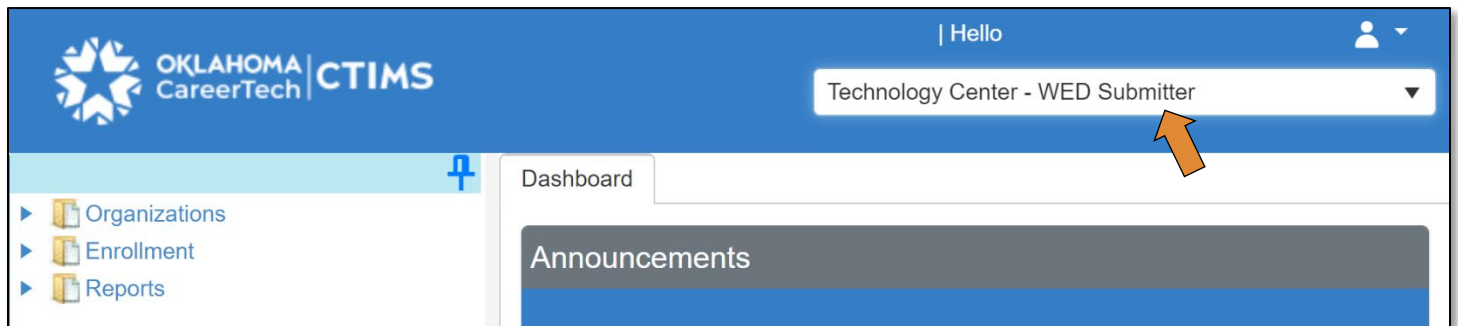
---

Click here to login to CTIMS 

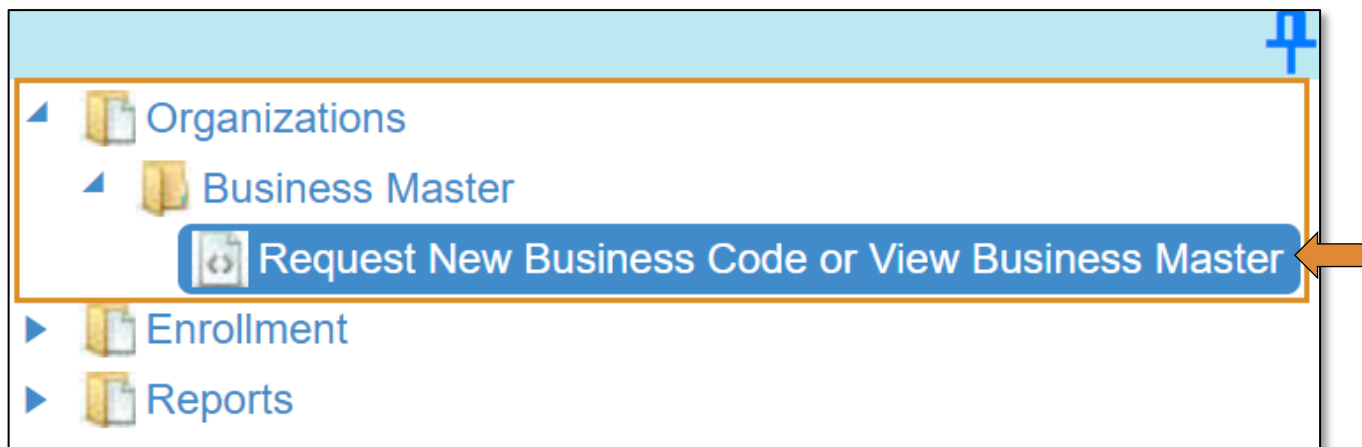
---

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 **Technology Center – Full-time Submitter**, **Technology Center – WED Submitter** or **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **Technology Center – Full-time Submitter**, **Technology Center – WED Submitter** or **EDI – Local Coordinator**, contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).



- Click the arrows next to **Organizations & Business Master**.
- Click on the **Request New Business Code or View Business Master** link.



**NOTE:** Search the Business Master before requesting a new business code to verify that the business does not already have a code in CTIMS. If you find a business code that is inactive, please email [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov), we will make it active for you.

The tagged numbers in the screenshot correspond to the instruction steps below.

**NOTE:** The red asterisks\* represents a required field.

1. To search for an existing business record, select **Find Existing Business**.
2. Click on the down arrow on the **Business Name** box to select different search options.
  - You can search by **Business Name, Business Code, City** or **All**.
3. If you choose **Business Name, Business Code** or **City**, type at least one character in the **Enter Search Text** box, then select the **Search** button.
  - If you select **ALL** and do not enter in any criteria, all records will be displayed.
4. Click **Search**.

The screenshot shows the 'Business Master Request Summary' form. At the top, there is a 'School Type' dropdown menu set to 'Business Masters'. Below it, there are two radio buttons: 'Find Existing Business' (selected) and 'View Requests'. A 'Business Name' dropdown menu is open, showing options: 'Business Name', 'Business Code', 'City', and 'All'. The 'Business Name' option is highlighted. To the right of the dropdown is a search input field with the placeholder text 'Enter search text'. An orange arrow points to the 'Search' button on the right. Below the search field are three buttons: 'Save changes', 'Cancel changes', and '+ New Business Request'.

There may be more than one business with the same name. Match your business name with the address. Also, the same business name could have hyphens or could have been entered as one word. If a business name has hyphens, try searching with and without the hyphens. **NOTE:** You can expand columns by hovering over the line between the columns, the pointer changes to a double arrow, move the arrow right or left to change the size of the column.

The screenshot shows the 'Business Master Request Summary' form with the search results table. The 'School Type' dropdown is now set to 'Tech Sites'. The 'Business Name' dropdown is set to 'Wal'. The search input field contains 'Wal'. The 'Search' button is highlighted. Below the search field are two buttons: 'Export to Excel' and '+ New Business Request'. The table below has the following columns: Status, Business Master Code, Business Master Name, Physical Address, Mailing Address, NAICS Code, NAICS Name, and FEI Number. The table contains three rows of data.

Status	Business Master Code	Business Master Name	Physical Address	Mailing Address	NAICS Code	NAICS Name	FEI Number
▶ Active	7131	WALMART - ANADARKO	1201 WEST PETREE R...		452910	Warehouse Clubs and Supercenters	710794416
▶ Active	49965	Superior Drywall	2547 E. Seminole, Tulsa...		236118	Residential Remodelers	
▶ Active	30329	DENVER ACOUSTICS & ...		P O BOX 82872, Oklaho...	238310	Drywall and Insulation Contractors	

## Requesting a New Business Code

If a business is not found:

- Request a new business code by clicking on the **+ New Business Request** button.
  - You will be directed to a new screen.

**Business Master Request Summary**

School Type \* Tech Sites

Find Existing Business  View Requests

Business Name ▼ Wal

Export to Excel **+ New Business Request** ←

Status	Business Master Code	Business Master Name	Physical Address
--------	----------------------	----------------------	------------------

- In the box next to **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.
- Click **Save & Next**.
  - You will be directed to a new screen.

Dashboard Request New Business Code or View Business Master X Business Master X

**Request New Business Code or View Business Master**

Calendar Year\* ▼

Organization Type\* Business Masters ▼

Business Name\* ←

Reset Back Business Master Summary  Save & Next ←

## Entering Information for New Business

- Click the drop-down to choose the **Primary NAICS Code**, start typing in the NAICS number or a title keyword, the selection will filter down the more you type in.
- 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.)

Request New Business Code or View Business Master

Business Code \*\*\*\*\*

Business Name\* Andra's Flower Shop

Primary NAICS Code\* Please enter 2 characters and Select from the List

DUNS Number Please enter 2 characters and Select from the List

FEI Number

Vendor Number

Federal Business

Type	Street*	City*	State*	Zip*
Physical*				
Mailing				

- Complete the **Physical** and **Mailing** addresses. The Physical address is mandatory. Enter the mailing address if it is different than the physical address. **NOTE:** 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.
- Click on the **Refresh** button if you would like to clear the form and start over.
- Click **Submit for Approval**.
  - If you are missing any data elements, you will get an error message when you try to submit. Correct the errors and resubmit.

Request New Business Code or View Business Master

Business Code \*\*\*\*\*

Business Name\* Andra's Flower Shop

Primary NAICS Code\* (424930) Flower, Nursery Stock, and Florists' Supplies Merchant W...  
(Note: Enter Number or Name)

DUNS Number

FEI Number

Vendor Number

Business Type Required for NAISC code starting with 92\*

City Business  County Business  State Business  Federal Business

Type	Street*	City*	State*	Zip*
Physical*	123 Main Street	Stillwater	Oklahoma	74076-____
Mailing				


Save Changes Submit for Approval Refresh

- Click the **OK** button.
  - Your request has now been successfully submitted for review.



Feel free to email [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov) to let us know you have submitted a business code request.

You will receive an email from [CTIMS@careertech.ok.gov](mailto:CTIMS@careertech.ok.gov) indicating that your request was successfully submitted.


No additional action is required from you at this point.



CareerTech <ctims@careertech.ok.gov>  
New Business Master - Action Required - Fully Approved

To  Andra Beyer  
Cc  Andra Beyer

---


Business Code: 50142 

Business Name: Andra's Flower Shop

Approval Stage: Fully Approved Stage

Approver School Name: Oklahoma Department of Career and Technology Education

Approver Name: Beyer Andra

Approval Status: Submitted successfully 

**Approval Process Note:**

If action is required by your role, click the URL to access the CTIMS application: <https://ctims.okcareertech.org/CTBDSWeb>

**\*\*Note:**

The following browsers are recommended:  
Microsoft Edge ,Google Chrome ,Mozilla Firefox

CTIMS is not recommended with other browsers.


For assistance, contact us at [ctimssupport@careertech.ok.gov](mailto:ctimssupport@careertech.ok.gov)

Thank you,


CareerTech Information Management Division



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.



CareerTech <ctims@careertech.ok.gov>  
New Business Master - Action Required - Pending

To  Andra Beyer  
Cc

Business Name: Hobby Lobby Distribution- S OKC  
Approval Stage: Fully Approved Stage  
Approver School Name: Oklahoma Department of Career and Technology Education  
Approver Name: Beyer Andra  
Approval Status: **Rejected** ←

**Approval Process Note:** Please add physical address. ←

**Action Required Details**  
Next Stage: Business Submitter  
Next Stage User: [kumarendra.mishra@omes.ok.gov](mailto:kumarendra.mishra@omes.ok.gov)  
Approval Status: Pending

If action is required by your role, click the URL to access the CTIMS application: <https://ctims.okcareertech.org/CTBDSWeb>

**\*\*Note:**

The following browsers are recommended:  
Microsoft Edge ,Google Chrome ,Mozilla Firefox  
CTIMS is not recommended with other browsers.

For assistance, contact us at [ctimssupport@careertech.ok.gov](mailto:ctimssupport@careertech.ok.gov)

Thank you,  
CareerTech Information Management Division

## Change Request (Business Code Process)

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, uncheck the box next to **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.

Business Master Request Summary

School Type \* Tech Sites  
 Find Existing Business  View Requests

Calendar Year \* 2021-2022

School Name(s) Select  
 All Sites

All Enter search text

Sta tus	Submitted Date	Approval Stage	Approved Status	Request Business Master Name	Submitter	Submitter Email	Organization	Submitter Role
------------	-------------------	----------------	-----------------	------------------------------	-----------	-----------------	--------------	----------------

- Select the request you wish to change by clicking on the blue Business Master Name hyperlink.

Business Master Request Summary

School Type \* Tech Sites  
 Find Existing Business  View Requests

Calendar Year \* 2021-2022

School Name(s) Select  
 All Sites

All Enter search text

Sta tus	Submitted Date	Approval Stage	Approved Status	Request Business Master Name
▶ Active	10/22/2021	IMD Approver - Fully Ap...	Fully Approved	<a href="#">Andra's Flower Shop</a>

- Click the **Change Request** button.

Request New Business Code or View Business Master

Business Code: \*\*\*\*\*

**Business Name:** Andra's Flower Shop

(424930) Flower, Nursery Stock, and Florists' Supplies Merchant Whole...

Primary NAICS Code: Please enter 2 characters and Select from the List  
(Note: Enter Number or Name)

DUNS Number: \_\_\_\_\_

FEI Number: \_\_\_\_\_

Vendor Number: \_\_\_\_\_

Business Type Required for NAISC code starting with 92\*

City Business  County Business  State Business  Federal Business

Type	Street*	City*	State*	Zip*
Physical*	123 Main Street	Stillwater	Oklahoma	74076
Mailing				

Save Changes   
    
  Submit for Approval

You will get a popup indicating you are going to cancel the approval process and initiate the change request process.

- Click **OK**.

Change Request
✕

You are going to cancel the approval process and initiating the change request process, Are you sure?

- Make the necessary changes to your request.
- Click on **Submit for Approval**.

Request New Business Code or View Business Master

Business Code: \*\*\*\*\*

**Business Name:** Andra's Flower Shop

(424930) Flower, Nursery Stock, and Florists' Supplies Merchant Whole...

Primary NAICS Code: Please enter 2 characters and Select from the List  
(Note: Enter Number or Name)

DUNS Number: \_\_\_\_\_

FEI Number: \_\_\_\_\_

Vendor Number: \_\_\_\_\_

Business Type Required for NAISC code starting with 92\*

City Business  County Business  State Business  Federal Business

Type	Street*	City*	State*	Zip*
Physical*	123 Main Street	Stillwater	Oklahoma	74076
Mailing				

Save Changes   
  Submit for Approval

- Click **OK** on the popup screen.
  - You will be directed to another screen.



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

**Approval Process - New Business Master Approval**

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Click on Approval button to finalize your changes and submission to ODCTE.

Request Number: OBM-BI-50142

Approval Stage	Approval Date	Approver Role	Approved By	Approver Email	Approval Status	Note	Private Note
► Business Submitter - 1st Stage	10/22/2021 1:58:04 PM	Tech Center BIS S...	Andra - Beyer	Andra.Beyer@car...	Cancel for Change...	Change Request Process	
IMD Approver - Fully Approved Stage	10/22/2021 1:58:37 PM						

**Current Approval Stage Information**

Approved By*	Beyer Andra	Approval Stage*	1st Stage
Approver School*	Oklahoma Department of Career and Technology Educa...	Approver Role*	Tech Center BIS Submitter
Approver Email*	Andra.Beyer@careertech.ok.gov	Approval Date*	10/22/2021 <input type="button" value="Calendar"/>

- Click **Ok**.
- Click **Ok**, again.

## View Requests

View the business requests that you have submitted by returning to the screen with the tab entitled **Request New Business Code or View Business Master**.

- Select the radio button beside **View Requests**.
- 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.

Dashboard | Request New Business Code or View Business Master X

Business Master Request Summary

School Type \* Tech Sites

Find Existing Business  View Requests

Calendar Year \* 2021-2022

School Name(s) Select

All Sites

All Enter search text Search

This will bring up the list of requests.

- To see the status of the request, click on the black arrow to the left of the Status column.

Business Master Request Summary

School Type \* Tech Sites

Find Existing Business  View Requests

Calendar Year \* 2021-2022

School Name(s) Select

All Sites

All Enter search text

Export to Excel + New Business Request

Status	Submitted Date	Approval Stage	Approved Status	Request Business Master Name
▶ Active	10/22/2021	IMD Approver - Fully Ap...	Fully Approved	<a href="#">Andra's Flower Shop</a>

You can view the details of the business request as it moves through the approval process.

Export to Excel		+ New Business Request		
Status	Submitted Date	Approval Stage	Approved Status	Request Business Master Name
Active	10/22/2021	IMD Approver - Fully Ap...	Fully Approved	<a href="#">Andra's Flower Shop</a>
Approval Stage		Approval Status	Approval/Rejection Note	
Business Submitter - 1st Stage		Approved	New Process	
Business Submitter - 1st Stage		Cancel for Change ...	Initiated Change request process.	
Business Submitter - 1st Stage		Cancel for Change ...	Change Request Process	
Business Submitter - 1st Stage		Approved		
IMD Approver - Fully Approved Stage		Approved		

## 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 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.
- 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 to view more detailed information by clicking on the arrow next to the section header or line (row).
- On your keyboard, hold down the **Ctrl** key and tap on the **+** or **-** keys to zoom in or out.
- 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 **X** 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 in the approval process?

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 black arrow 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 black arrow 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 instructions on completing 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 a note explaining changes made.**
- Click **Approve**.
- On the pop-up screen, click **OK**.
- Verify the submission by clicking **OK**.
- To inactivate a budget line, scroll to the right, click the box to uncheck it in the **Status** column.
- **Save as Draft**.

Budget Line Items										
Grant Allocation										
Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice				
\$115,643.00	\$80,880.00	\$80,880.00	\$69,800.00	\$0.00	\$45,843.00	\$69,800.00				
Budget Line(s) Budget Line Detail Information										
<input type="button" value="+ Add Budget Line"/> <input type="button" value="X Remove Budget Line"/> <input type="button" value="O Cancel Budget Line Changes"/>										
st	Req. Unit Type	Total	Approv Total	Matched Funds	Status	Budget Line Desc.	Req. Unit Type	Req. Units	Req. Unit Cost	Work She Req. Total
00	Cost Per Student	\$5,000.00	\$5,000.00	\$0.00	<input checked="" type="checkbox"/>	New Hire Orientati	Student	50	\$100.00	\$5
00	Cost Per Hour	\$7,200.00	\$7,200.00	\$0.00	Active	Initial technical,...	Hour	240	\$30.00	\$7
00	Cost Per Hour	\$9,600.00	\$9,600.00	\$0.00	Active	Technical and ...	Hour	160	\$60.00	\$9
00	Cost Per Hour	\$48,000.00	\$48,000.00	\$0.00	Active	Lean Training -...	Hour	240	\$200.00	\$48

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