CareerTech Information Management System (CTIMS)

EDI Complete User Guidebook

IMD Information Management Division

June 2023

Table of Contents

EDI Contacts

Whitney Blaylock
Approval Role: State Regional Coordinator
Cell: (918) 839-2592
Email: Whitney.Blaylock@careertech.ok.gov

Gina Hubbard
Approval Role: State Initiative Supervisor
Cell: (405) 743-5167
Email: Gina.Hubbard@careertech.ok.gov

Andrea Bradley
Approval Role: State Requisition Coordinator
Cell: (405) 743-5572
Email: Andrea.Bradley@careertech.ok.gov

Lori Laufer
Approval Role: State Regional Coordinator
Cell: (405) 385-3176
Email: Lori.Laufer@careertech.ok.gov

Lori Broyles
Approval Role: State Regional Coordinator
Cell: (405) 361-5268
Email: Lori.Broyles@careertech.ok.gov

Max McKnight
Approval Role: State Initiative Supervisor
Cell: (405) 714-7246
Email: Max.Mcknight@careertech.ok.gov

Brian Campbell
Approval Role: State Regional Coordinator
Cell: (405) 743-5548
Email: Brian.Campbell@careertech.ok.gov

Cara Pattison
Approval Role: State Regional Coordinator
Cell: (405) 664-3679
Email: Cara.Pattison@careertech.ok.gov

Patrick Clanin
Approval Role: State Regional Coordinator
Cell: (405) 747-6114
Email: Patrick.Clanin@careertech.ok.gov

Karen Talbott
Approval Role: State Regional Coordinator
Cell: (580) 336-8676
Email: 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 CTIMSsupport@careertech.ok.gov, or contact:

Mika Hickman
Administrative Assistant
Office: (405) 743-5124
Email: Mika.Hickman@careertech.ok.gov

Elizabeth Richardson
Technical Support Specialist
Office: (405) 743-5134
Email: Elizabeth.Richardson@careertech.ok.gov

Dennis Griffith
Performance Data / Analysis Coordinator
Office: (405) 743-6882
Email: Dennis.Griffith@careertech.ok.gov

Brandy Elliott
Data Quality Coordinator
Office: (405) 743-5403
Email: Brandy.Elliott@careertech.ok.gov

Carol Hall
Manager, Information Management Division
Office: (405) 743-5125
Email: 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 CTIMSSupport@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: CTIMSsupport@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. 3rd 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)

EDI Role	Process
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)

EDI Role	Process
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.

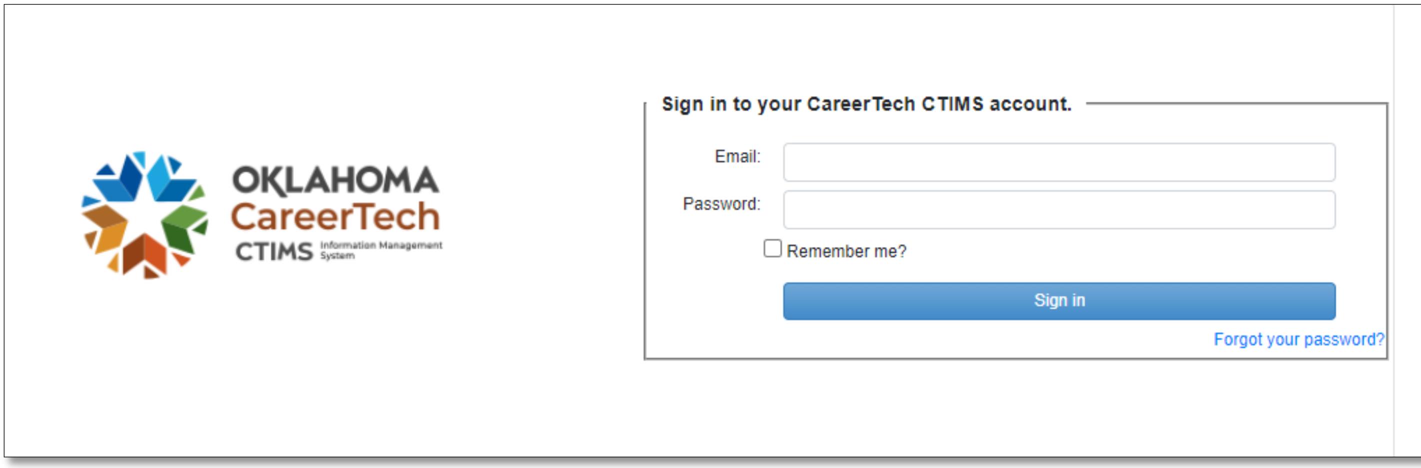
Stage 2 – State Regional Coordinator – 2nd Approval. Reviews and approves or rejects worksheet and line items, and confirms company information is entered completely. If approved, the worksheet goes to the EDI State Supervisor stage. If rejected, it goes back to stage 1.

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

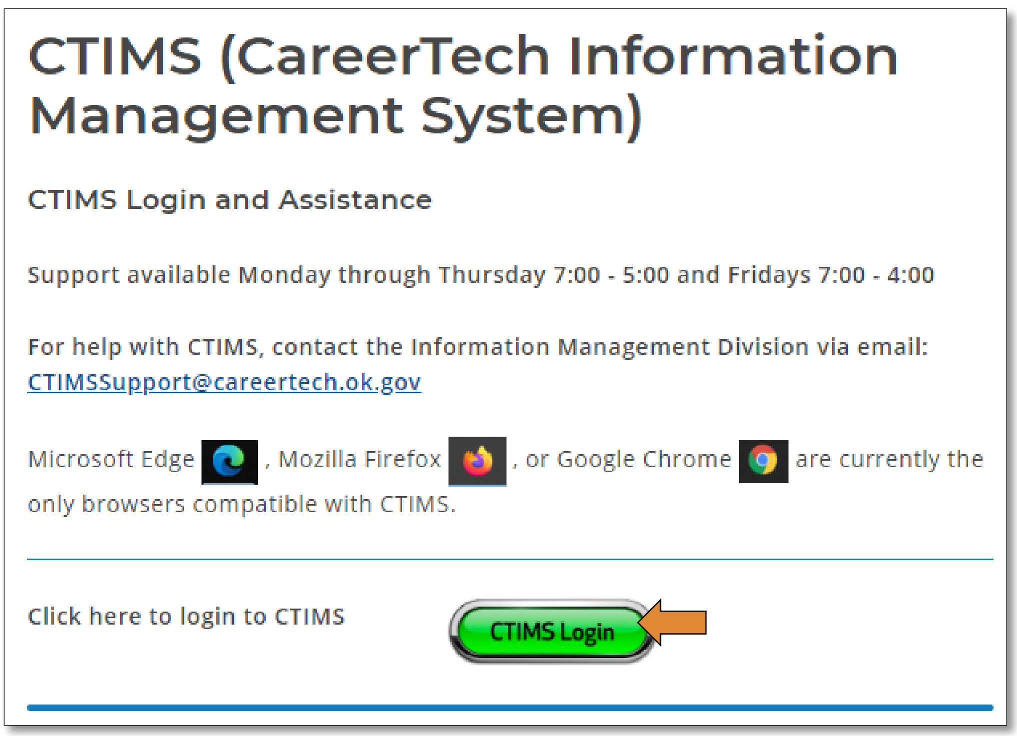
EDI – Local Coordinator (Worksheet Process)

Logging into CTIMS

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

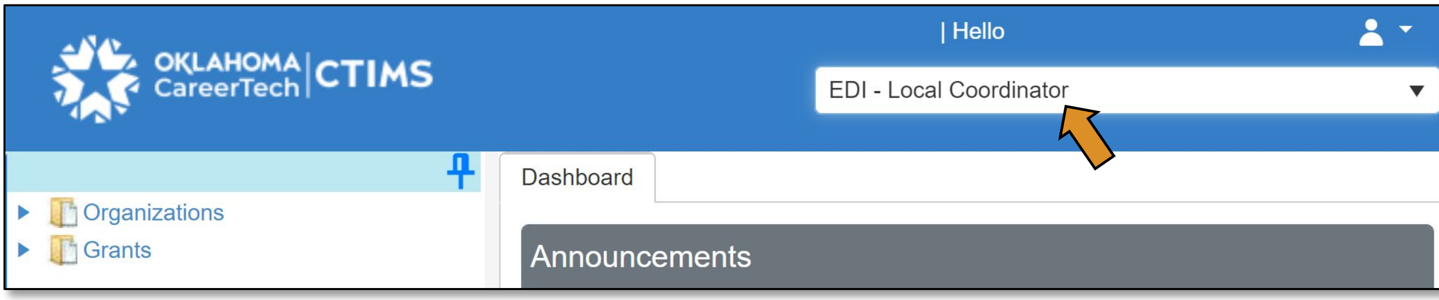


Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.

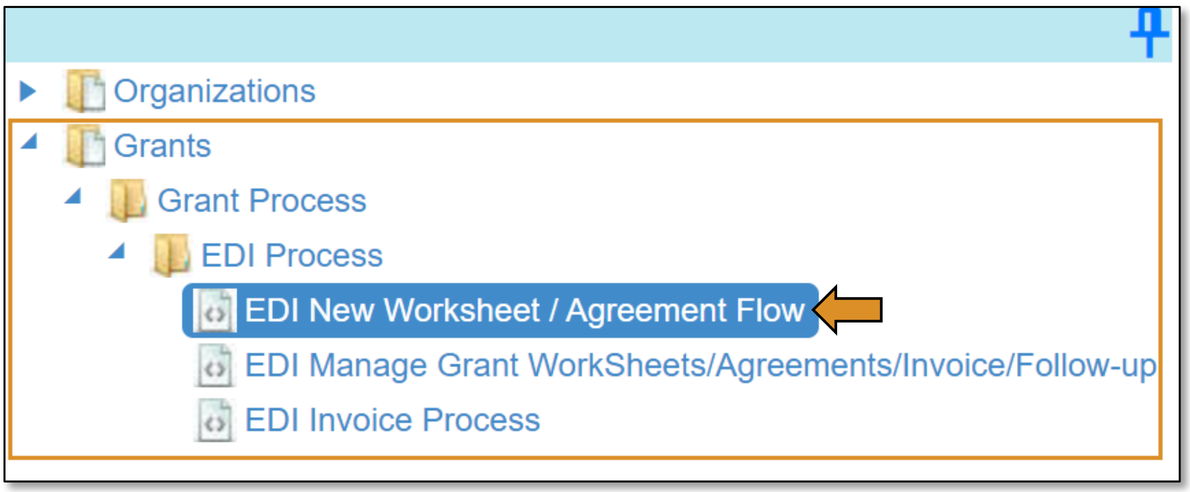


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Coordinator**, contact CTIMSSupport@careertech.ok.gov



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

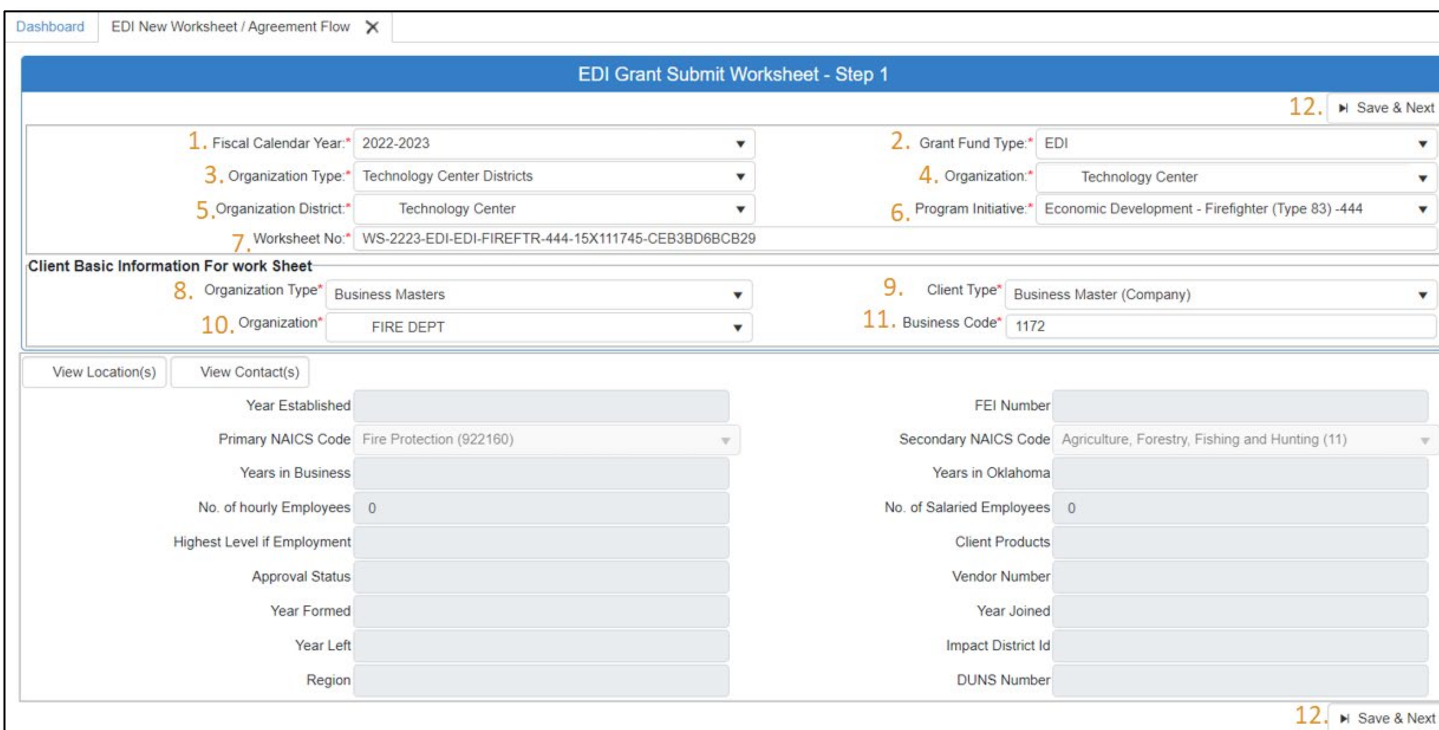


EDI Grant Submit Worksheet – Step 1

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.

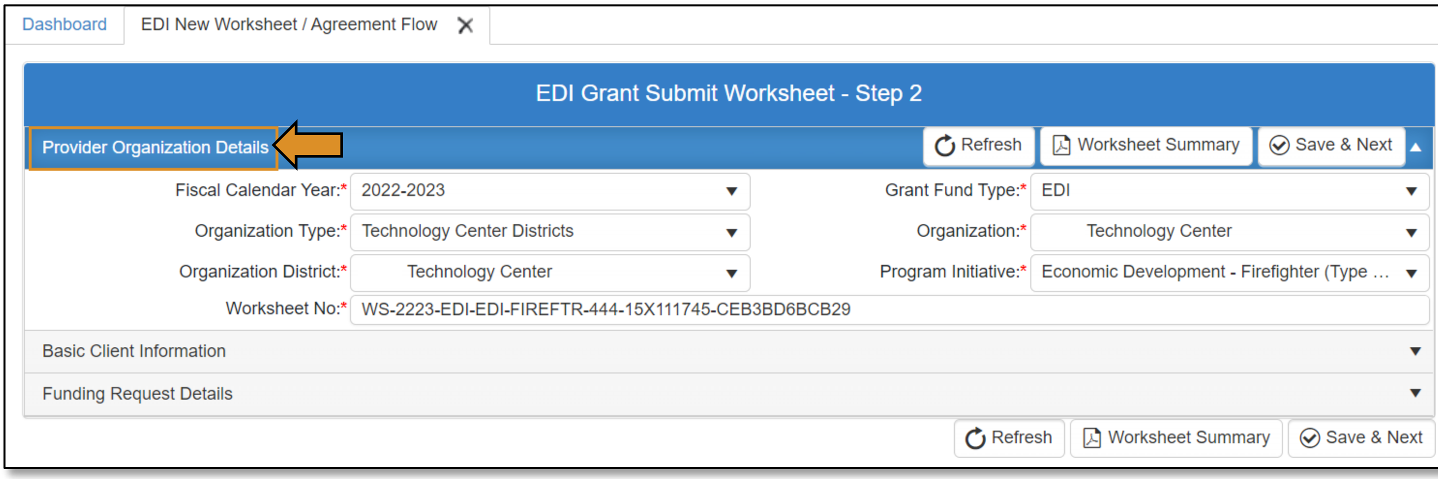
1. **Fiscal Calendar Year*** - this field automatically displays the current year. If you are applying for another year, change this field.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should 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.

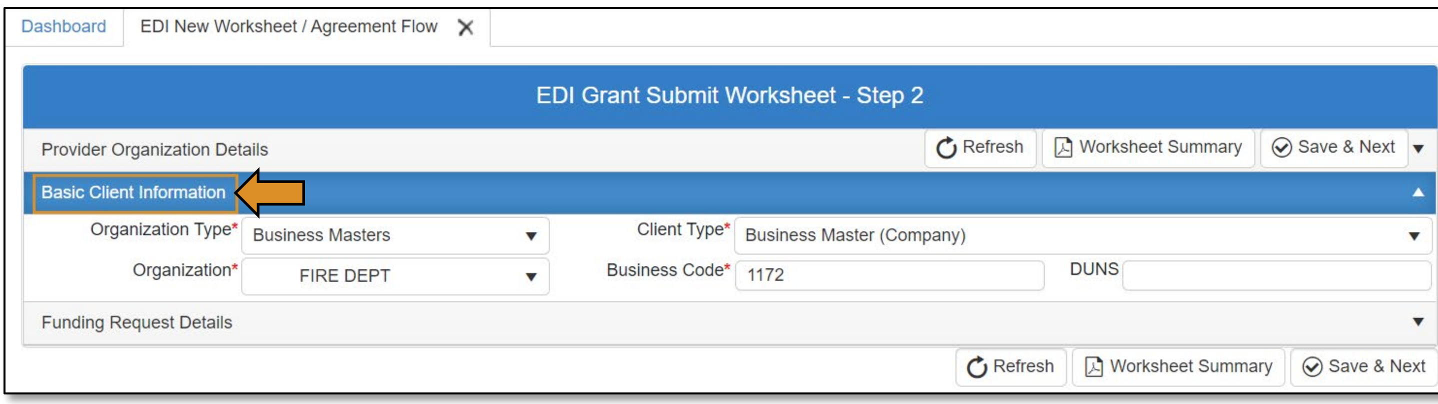


EDI Grant Submit Worksheet – Step 2

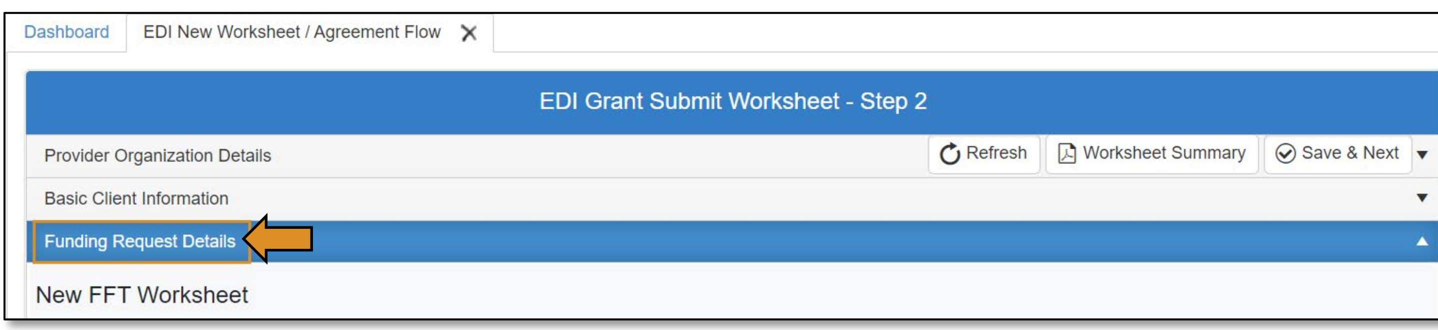
- Verify the client information on the *EDI Grant Submit Worksheet – Step 2* page.
- Expand the **Provider Organization Details** section by clicking on the words if it is not already visible.



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



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

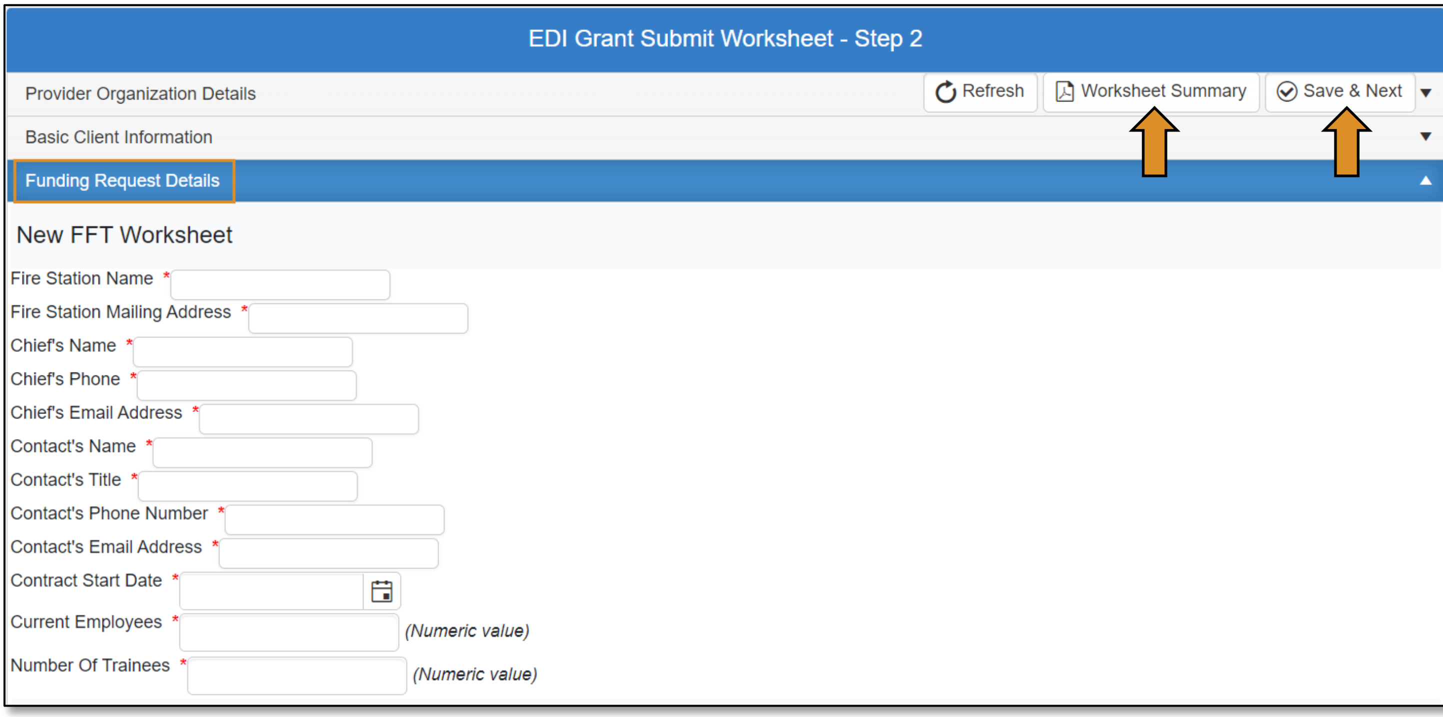


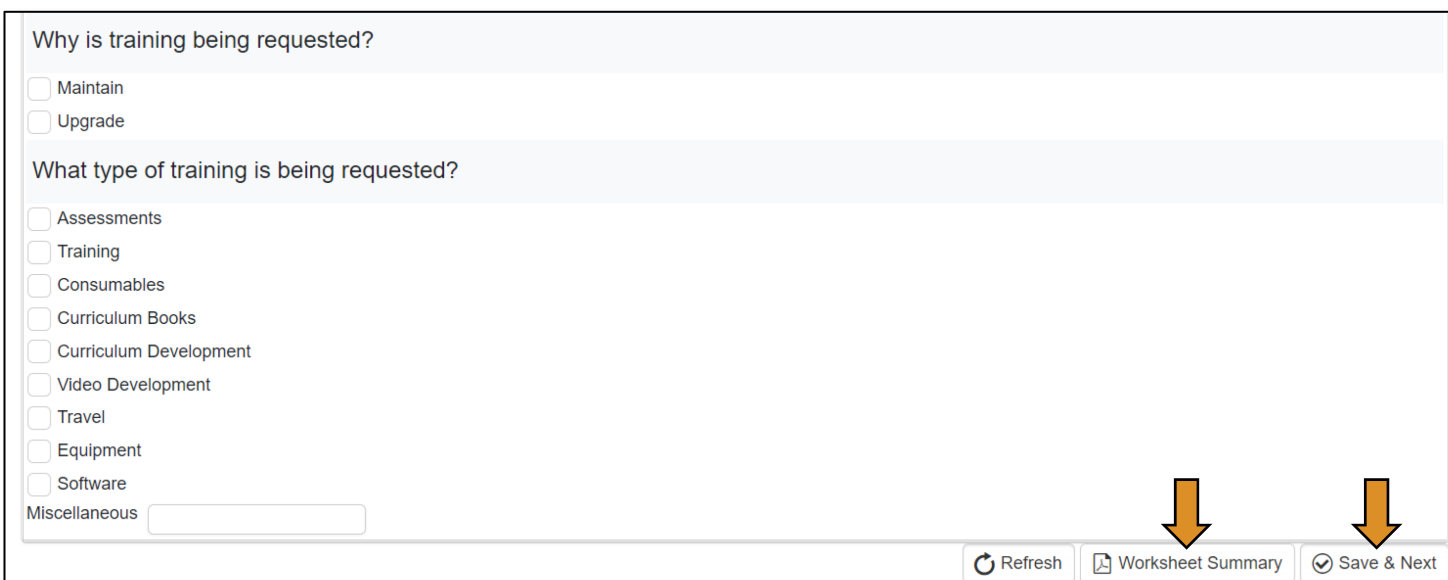
This form is different for each initiative.

- 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.

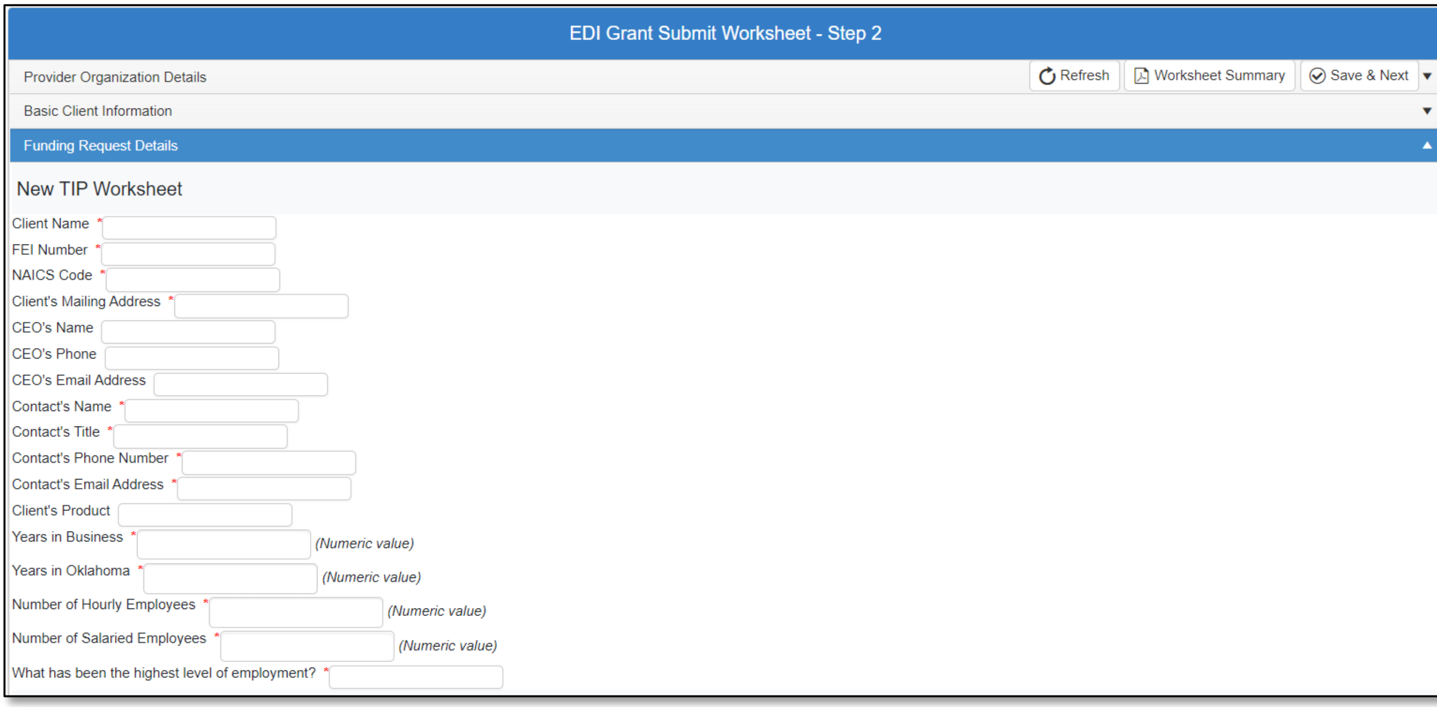
IMPORTANT: You must finish the **EDI Grant Submit Worksheet – Step 2** page and click **Save & Next**.





Program Initiative Example Forms

TIP & TIG Worksheet:



EDI Grant Submit Worksheet - Step 2

Provider Organization Details
Refresh
Worksheet Summary
Save & Next

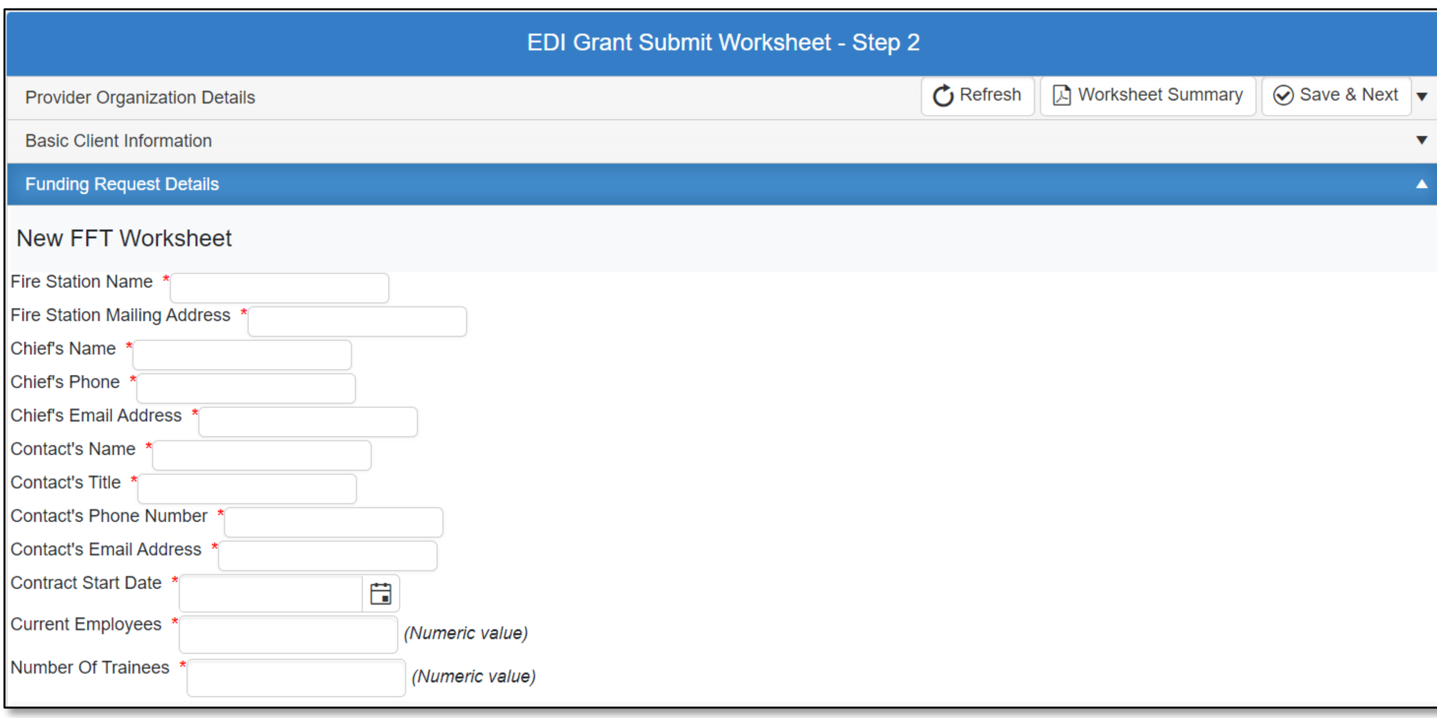
Basic Client Information

Funding Request Details

New TIP Worksheet

Client Name *
FEI Number *
NAICS Code *
Client's Mailing Address *
CEO's Name
CEO's Phone
CEO's Email Address
Contact's Name *
Contact's Title *
Contact's Phone Number *
Contact's Email Address *
Client's Product
Years in Business * (Numeric value)
Years in Oklahoma * (Numeric value)
Number of Hourly Employees * (Numeric value)
Number of Salaried Employees * (Numeric value)
What has been the highest level of employment? *

Firefighter Training Worksheet:



EDI Grant Submit Worksheet - Step 2

Provider Organization Details
Refresh
Worksheet Summary
Save & Next

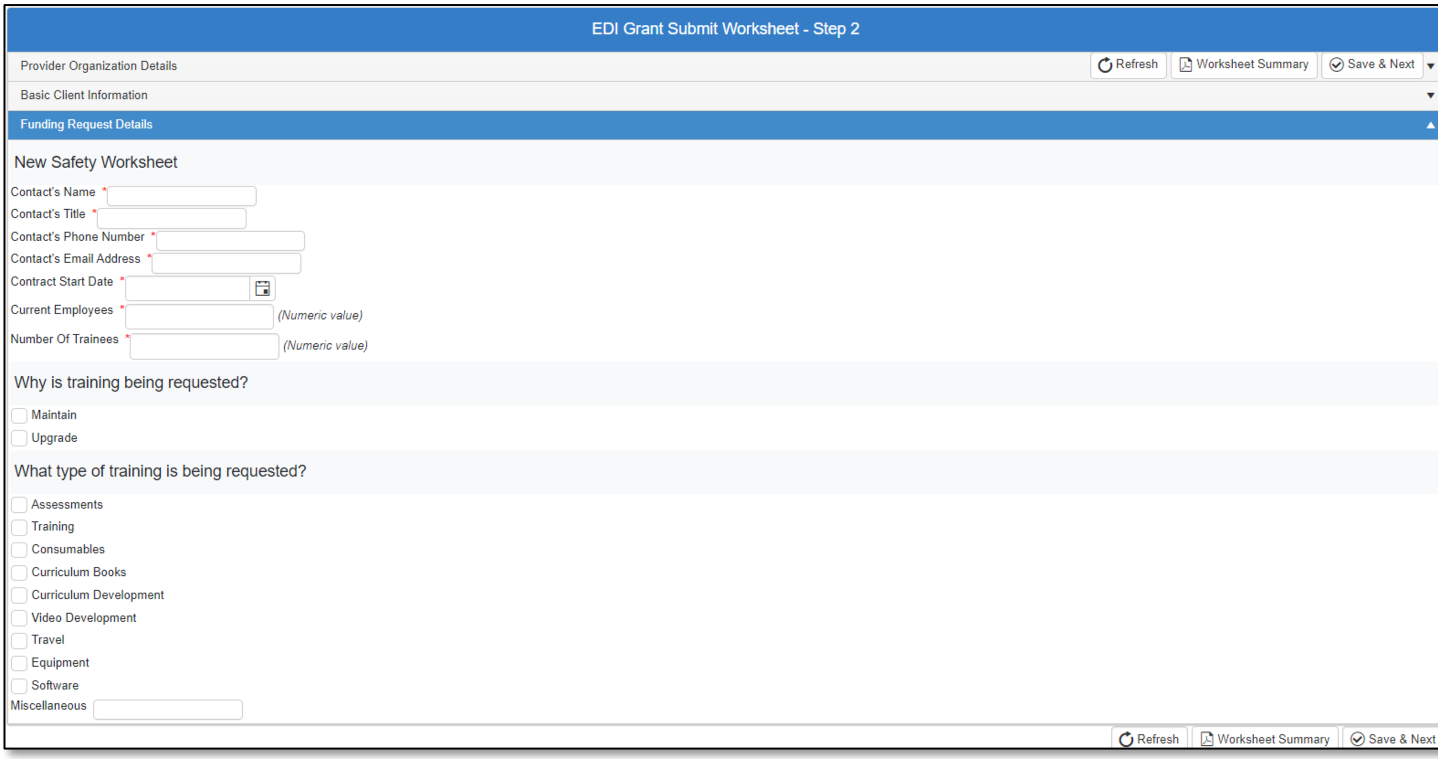
Basic Client Information

Funding Request Details

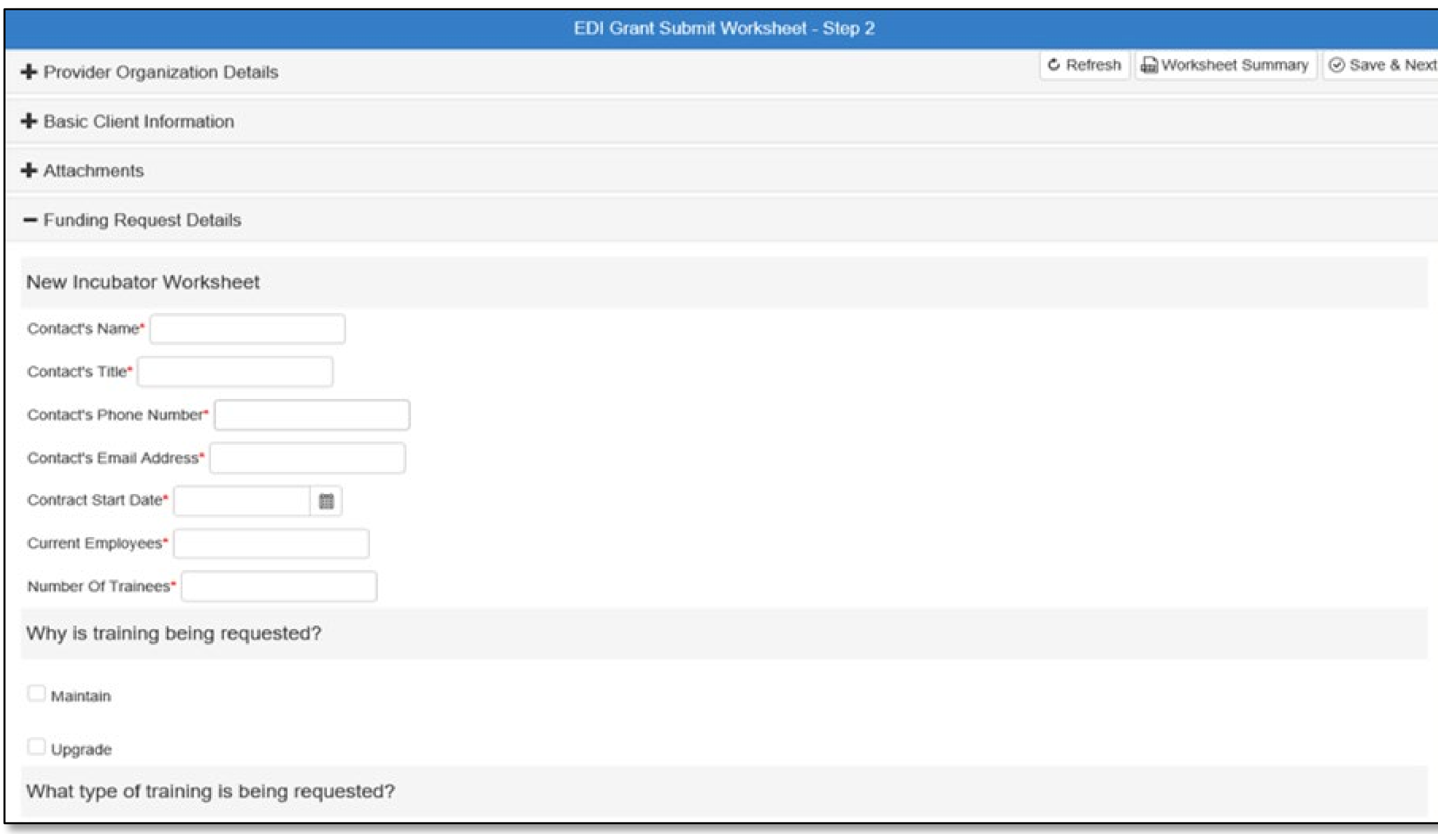
New FFT Worksheet

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)

New Safety Worksheet:



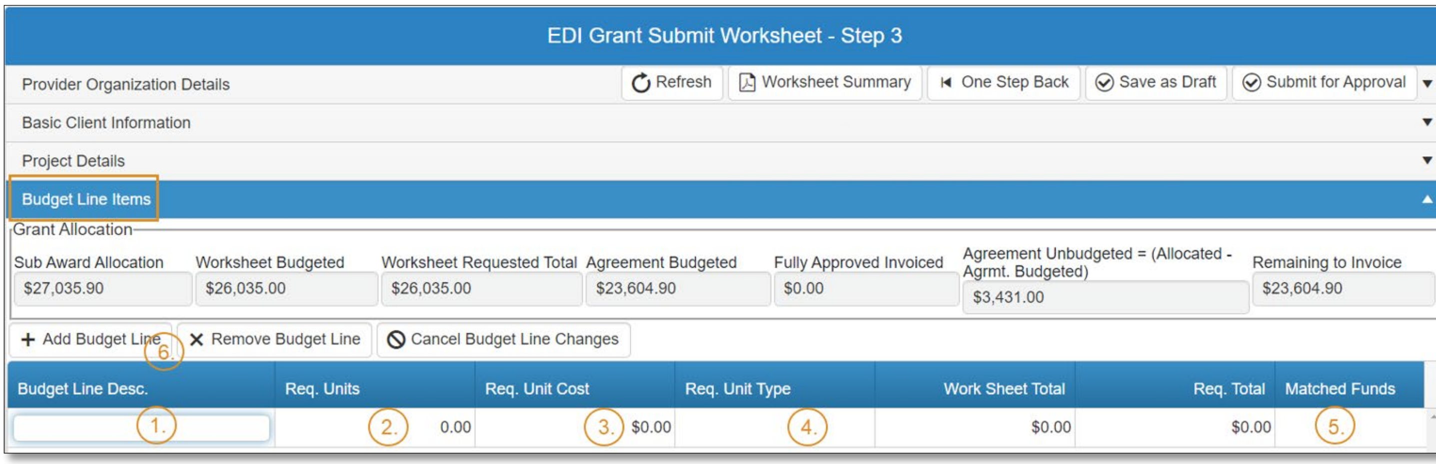
Economic Development – Incubator Worksheet:



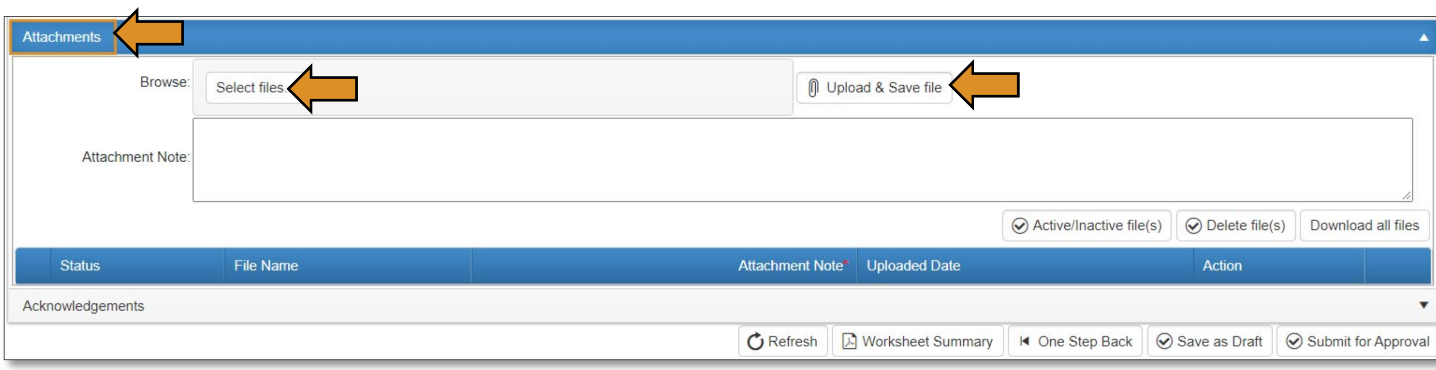
EDI Grant Submit Worksheet – Step 3

- 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.

    1. Complete **Budget Line Desc** with the description of the item.
    2. Complete **Req. Units** (Required Units-Zero (0) is not acceptable in this field).
    3. Complete **Req. Unit Cost** (Required Unit Cost-Zero (0) is not acceptable in this field).
    4. Complete **Req Unit Type** (Required Unit Type)-Select **Req Unit Type** from the drop-down menu.
    5. If your school will match any of the funds, enter that amount under **Matched Funds.**
    6. Click **Add Budget Line**, to add more budget lines and repeat steps 1-5. (You may need to scroll to the right to see all columns).

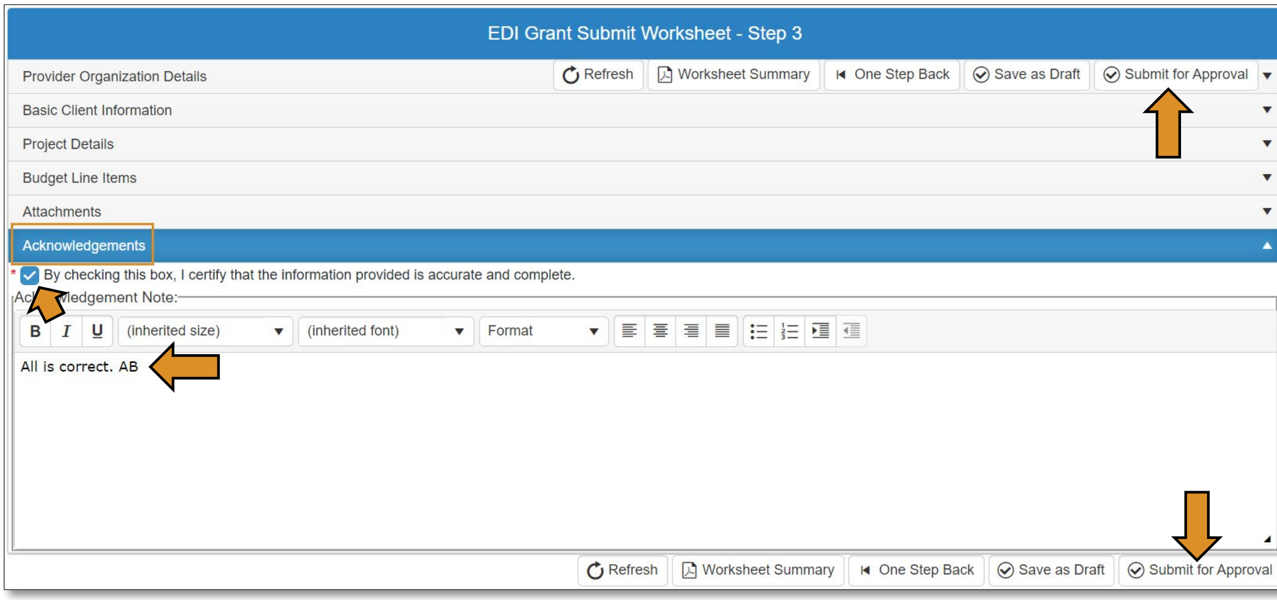


- Add supporting or required attachments. Expand the **Attachments** section by clicking the words.
- Click **Select files…** and find your document.
- Select **Upload & Save file**.



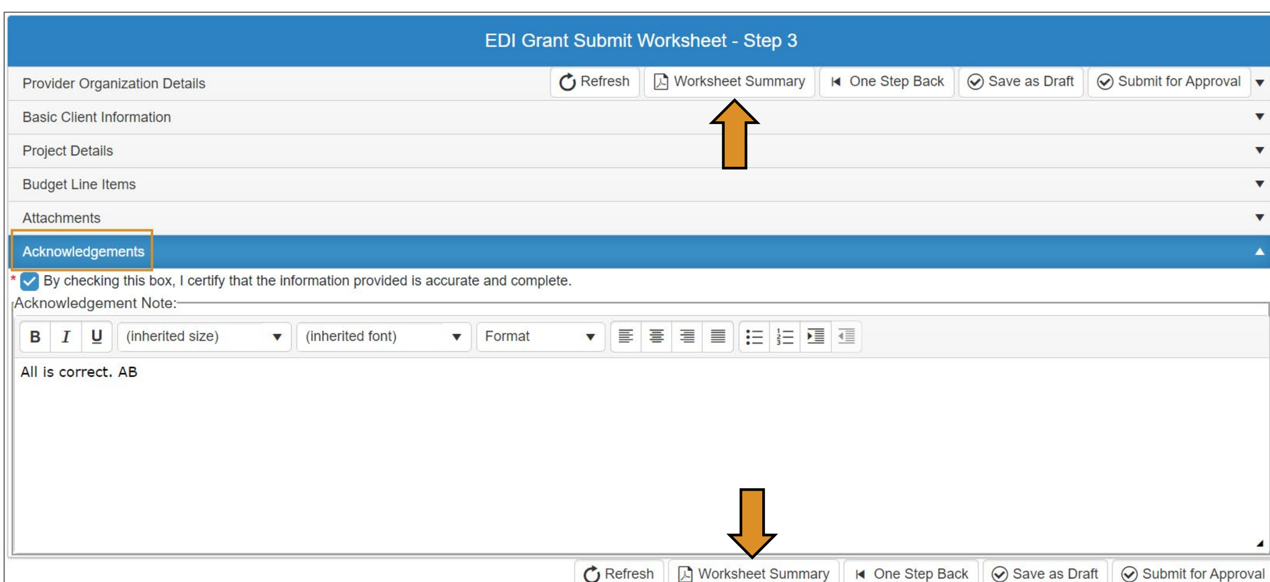
NOTE: If you do not have your attachment file prepared at this time, you can click **Save as Draft** and return later to complete the Worksheet process.

- **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.

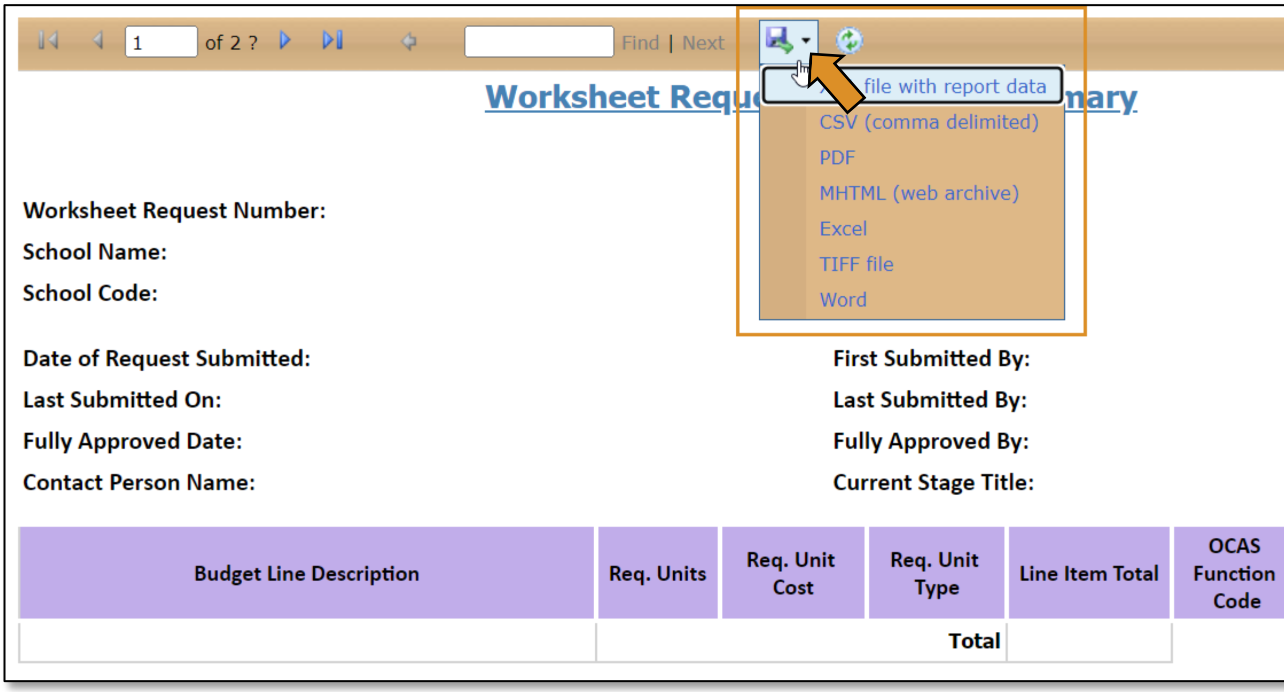


NOTE: To make your worksheet is complete and accurate, you can view or print your worksheet summary page before submitting for approval. **Be sure to **Save as Draft** before viewing the Worksheet Summary.

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



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



- 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.

- 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.

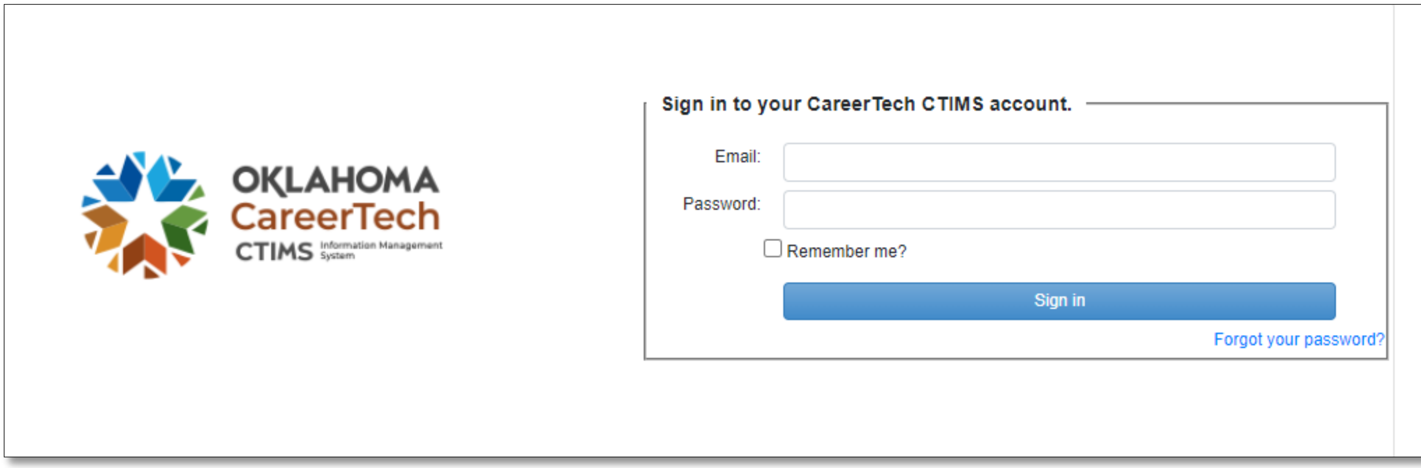
<u>Change Request:</u> After you submit the worksheet/application, if there are any changes that need to be made, due to change in training need or it has been rejected, you will have to use the Change Request process. The *EDI – Local Coordinator* can initiate the change request process at any time <u>before</u> 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 <u>EDI New Worksheet/Agreement Flow</u> option on the left navigation.

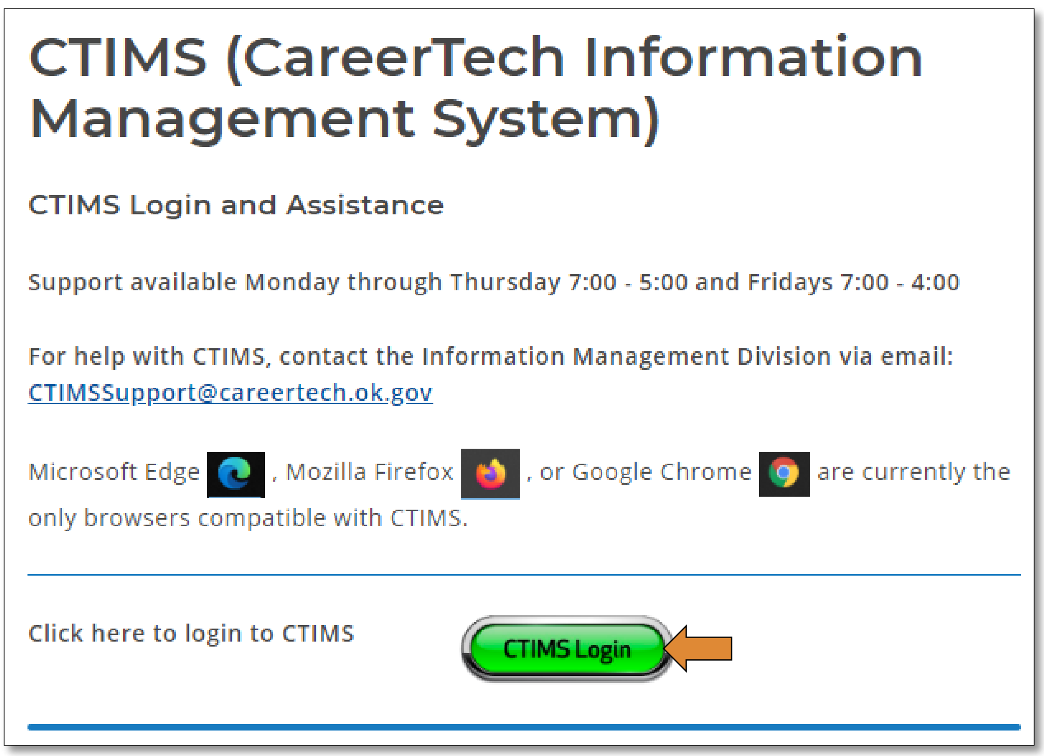
EDI – State Regional Coordinator (Worksheet Process)

Logging into CTIMS

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

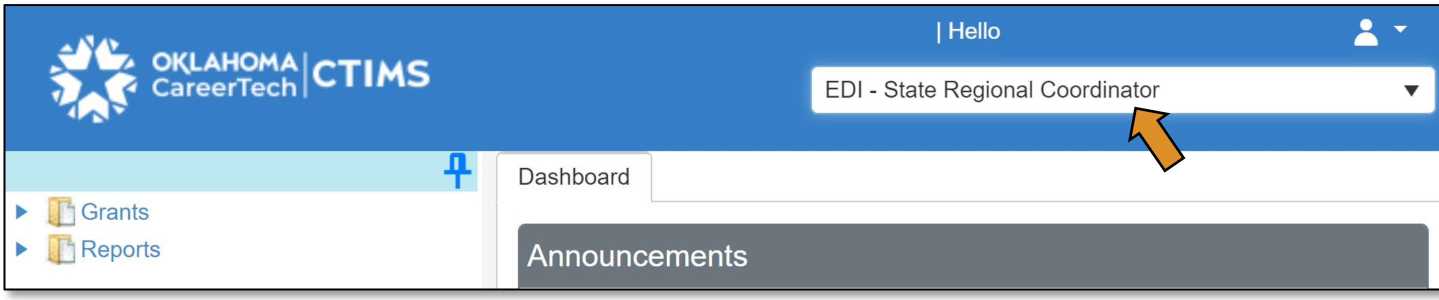


Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.

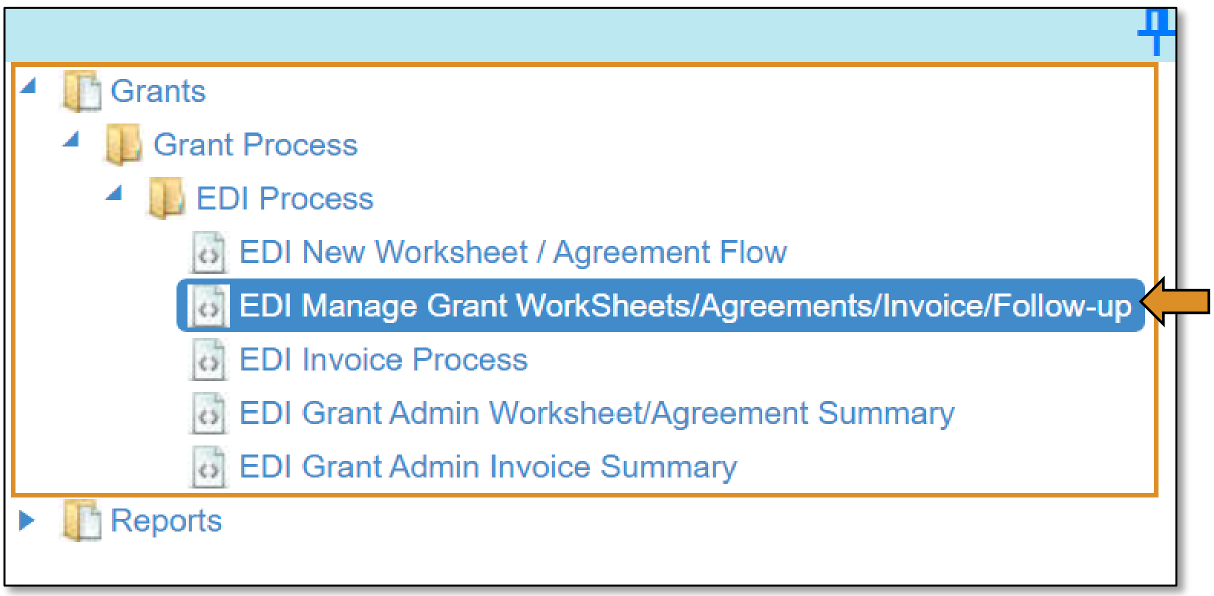


If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

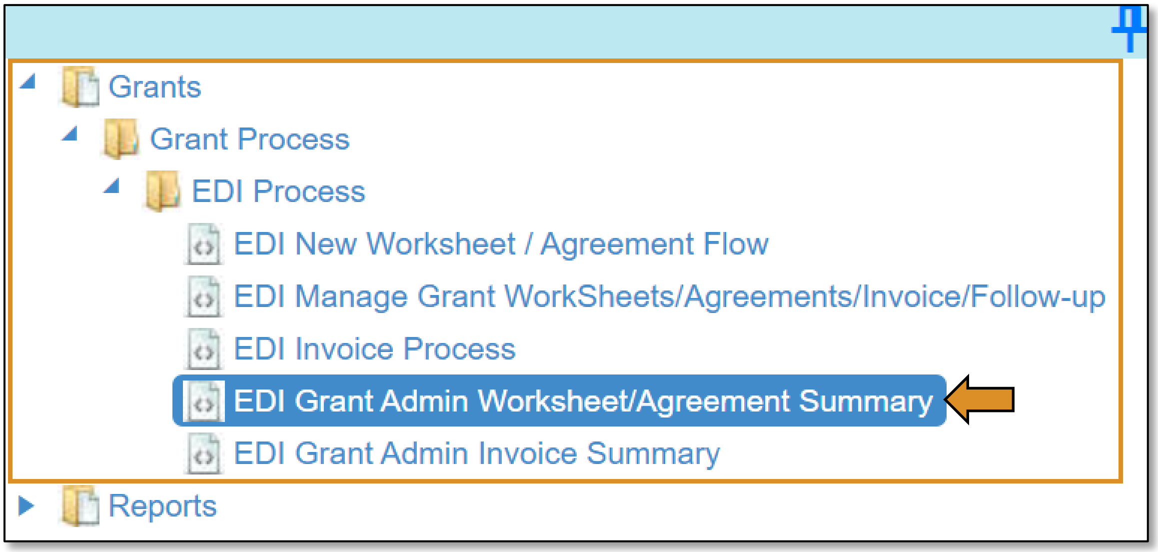
If you do not see **EDI – State Regional Coordinator**, contact CTIMSSupport@careertech.ok.gov



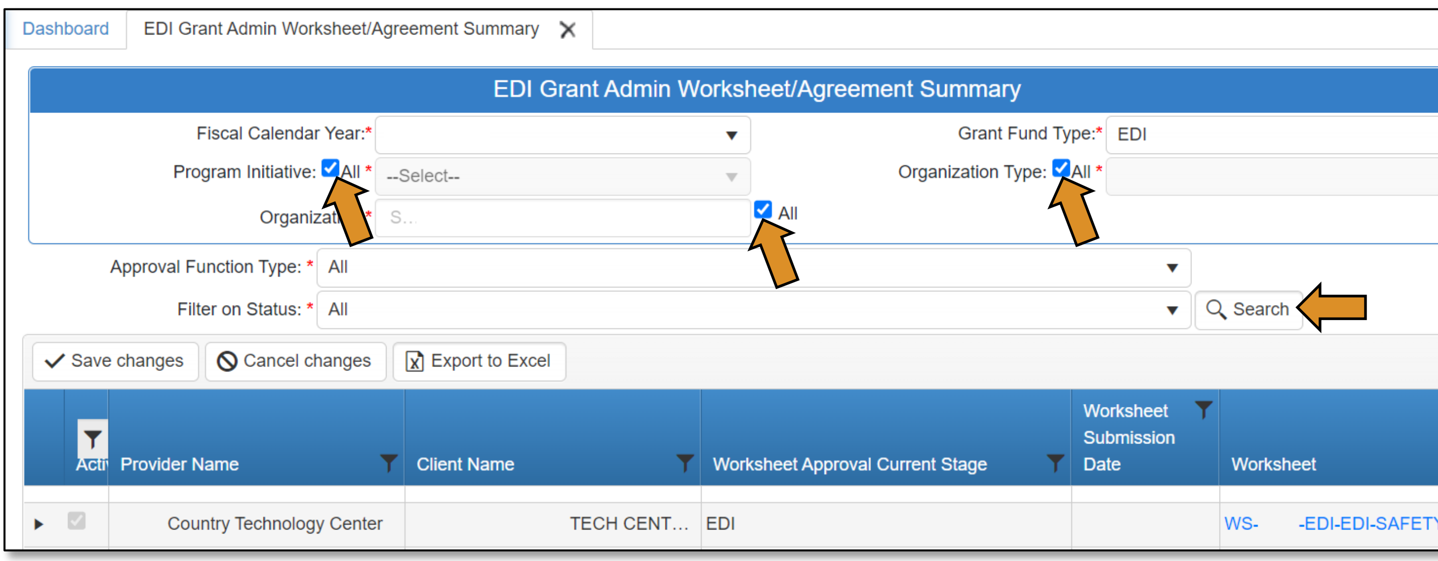
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link to approve individual schools.



- **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.



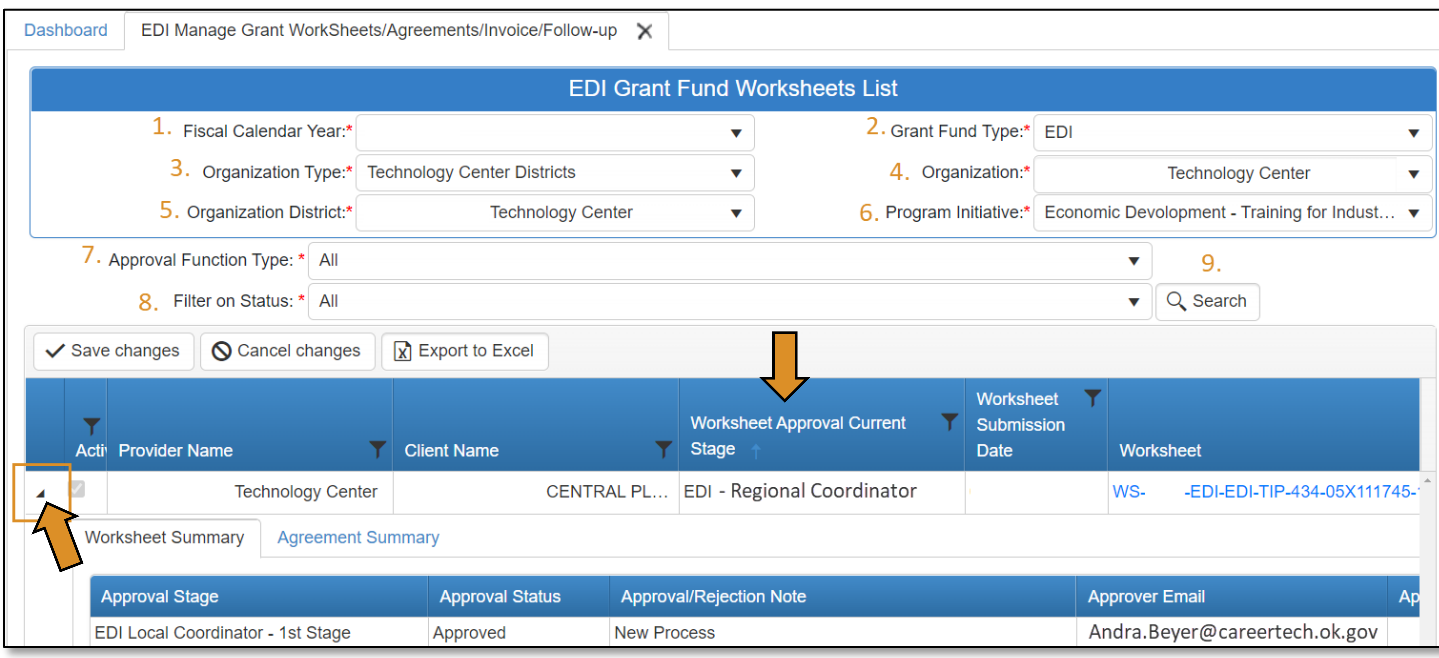
If you are selecting individual schools, complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

NOTE: The red asterisks* represents a required field.

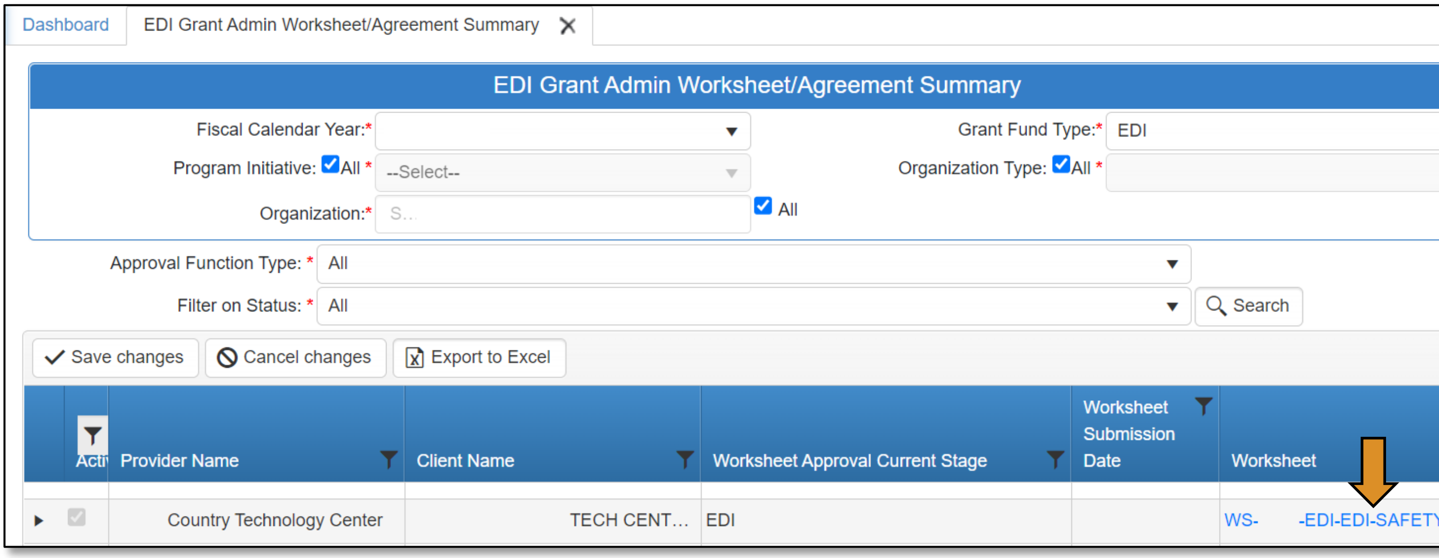
1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
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.

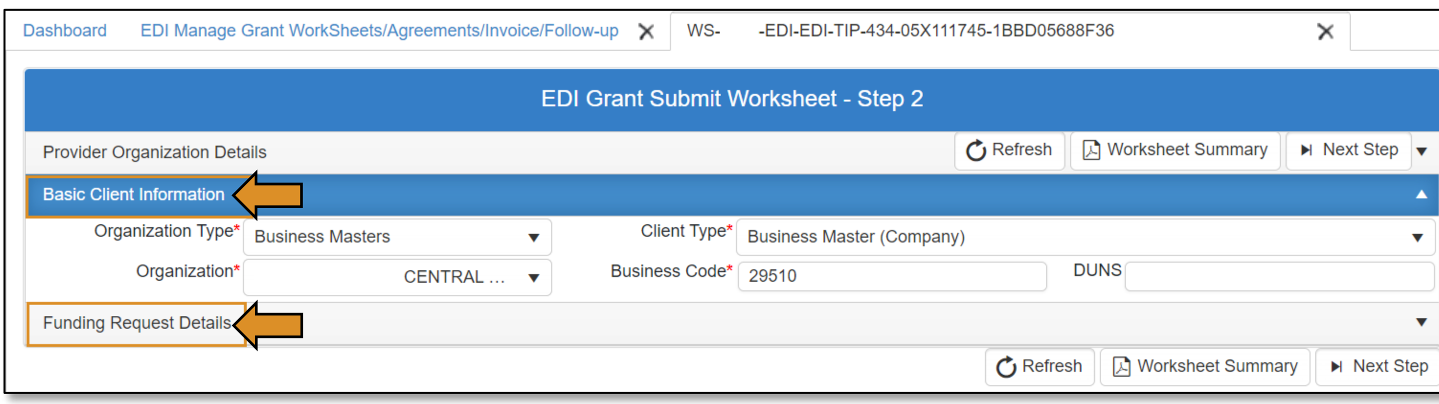


- Click the worksheet blue link under the **Worksheet** column to open the worksheet (or on the EDI Grant Admin Worksheet/Agreement Summary Screen if you are selecting from the list of all your schools).



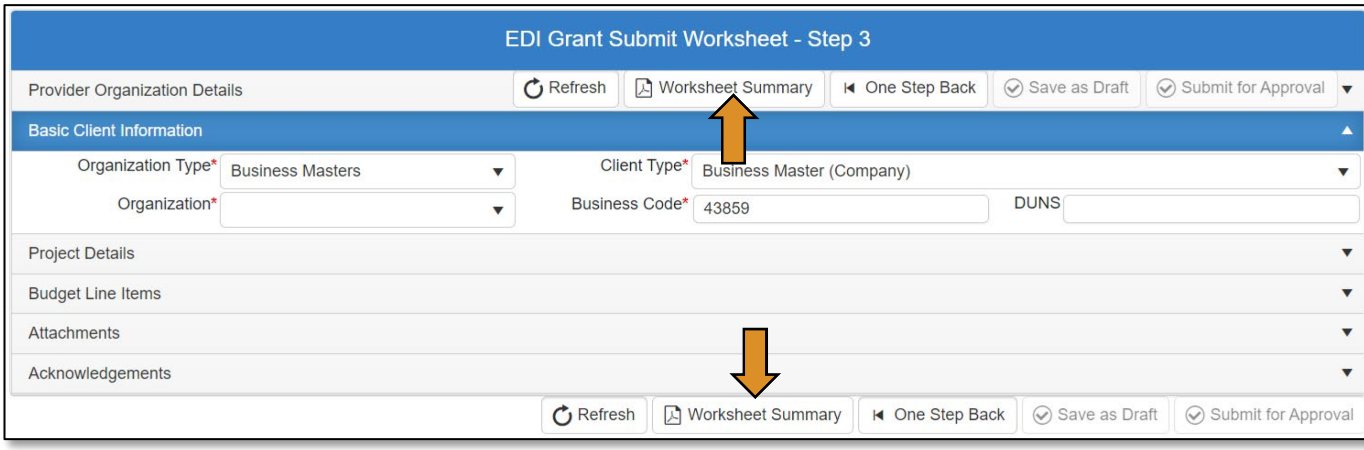
EDI Grant Submit Worksheet – Step 2

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

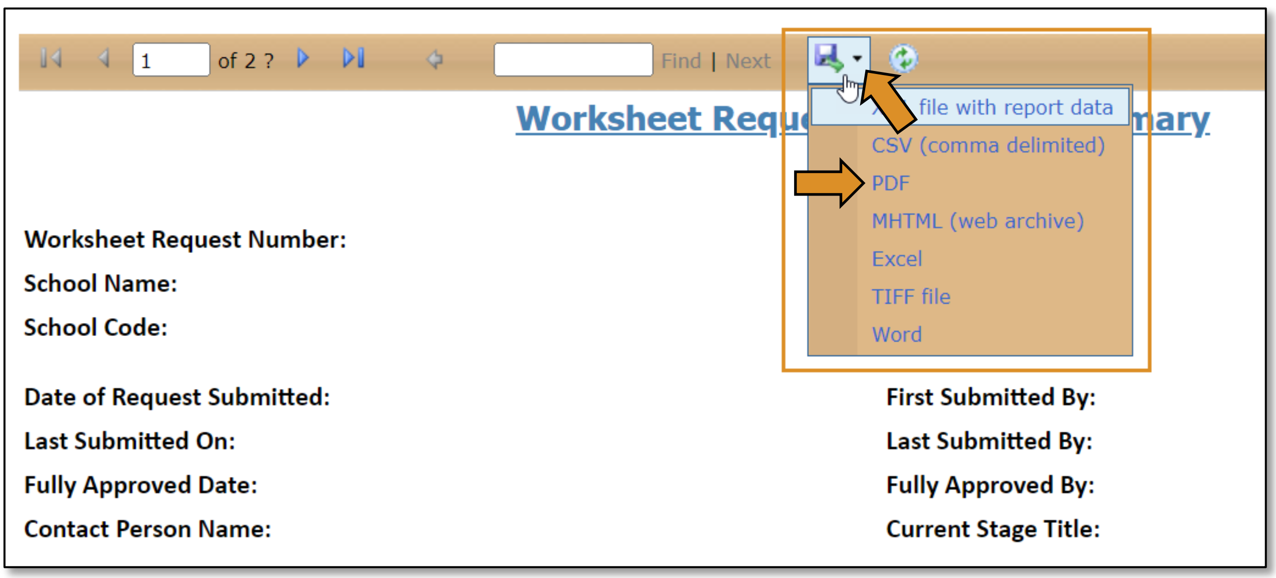


NOTE: We recommend you print a pdf of the **Worksheet Summary** before going to the next step to help with project and budget verification.

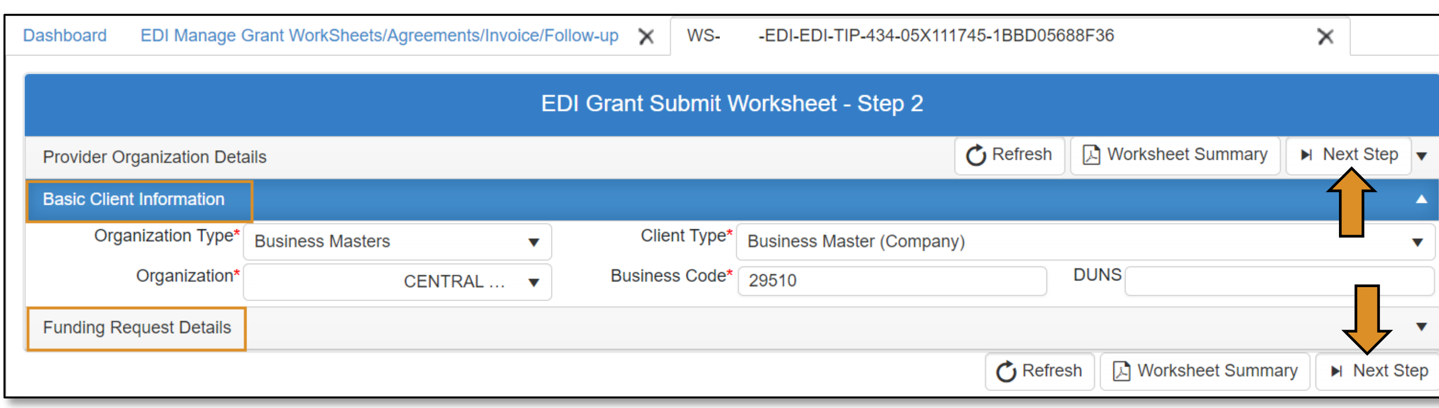
- Click on the **Worksheet Summary** button on the top right of the screen.



- Click the blue disc to export to a **pdf**.

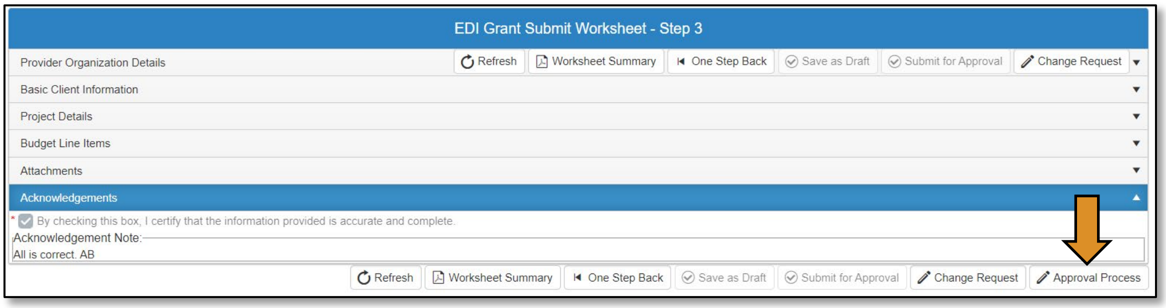


- Click **Next Step** to proceed.



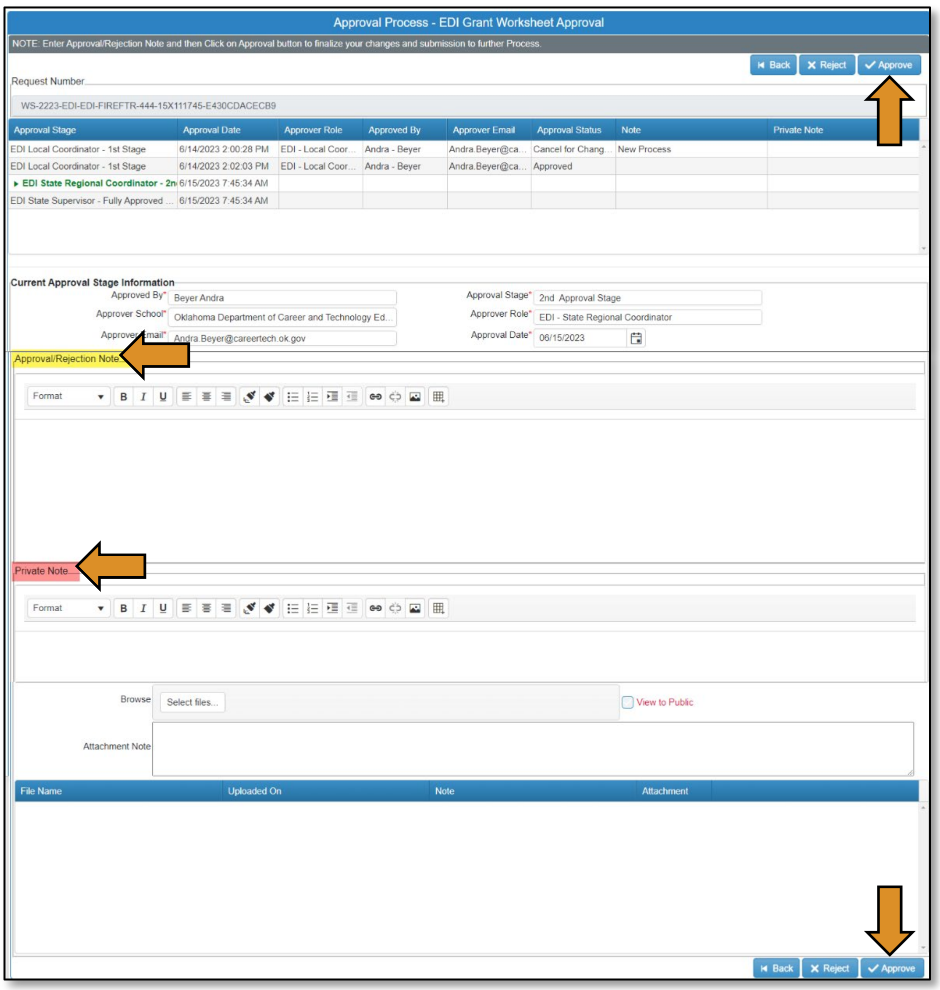
EDI Grant Submit Worksheet – Step 3

- 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.



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

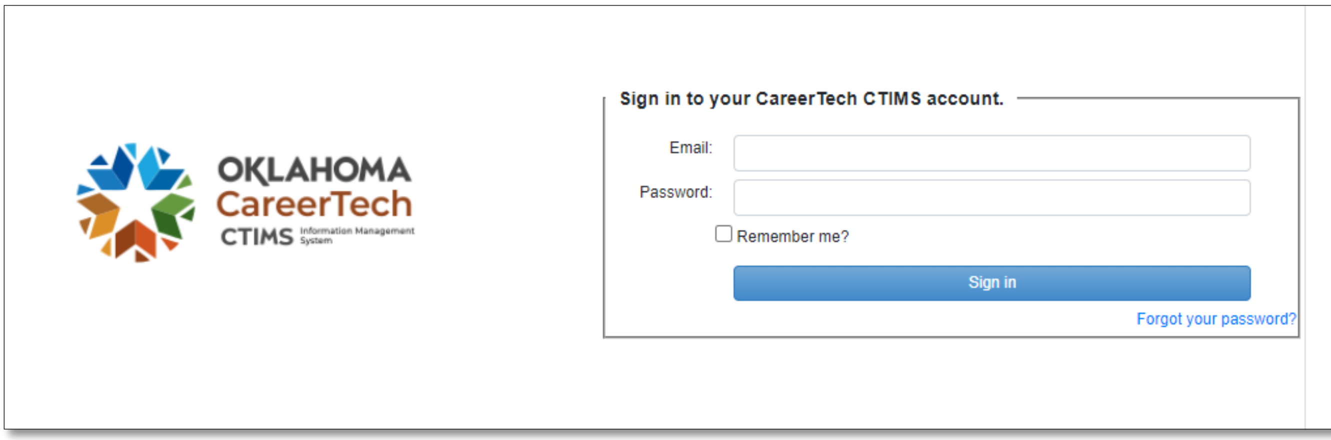
EDI – State Initiative Supervisor (Worksheet Process)

See approval instructions here.

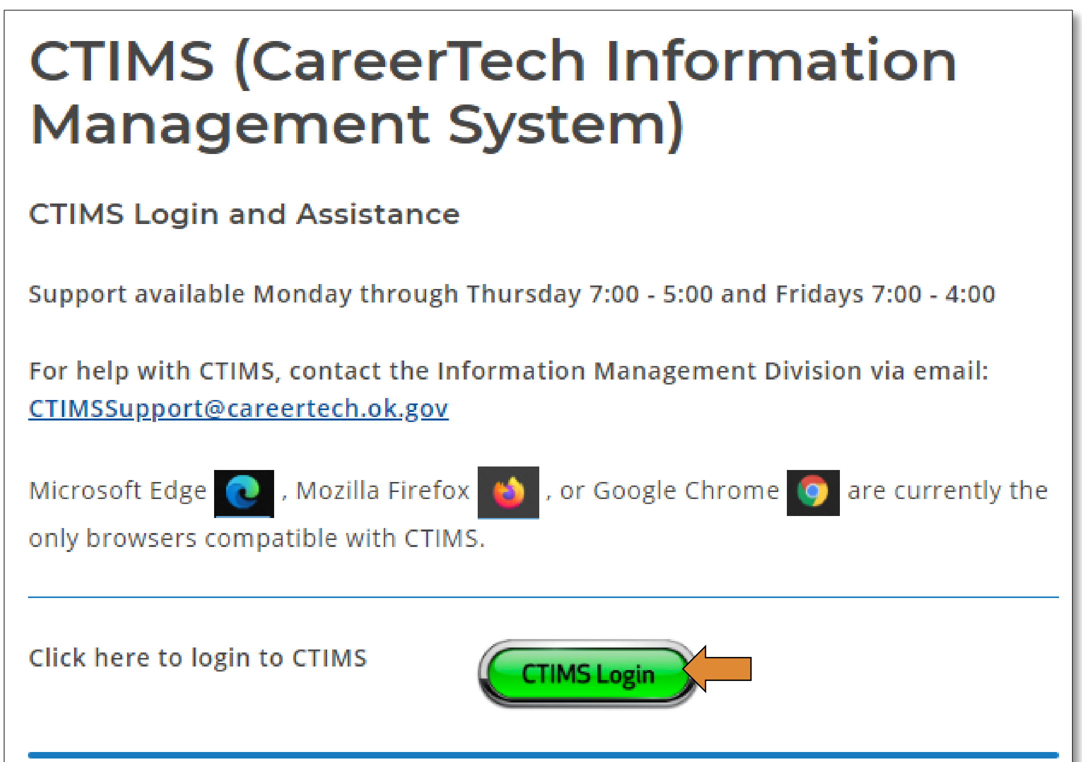
EDI – Local Coordinator, EDI – State Regional Coordinator, or EDI – State Supervisor (Change Request Process)

Logging into CTIMS

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



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

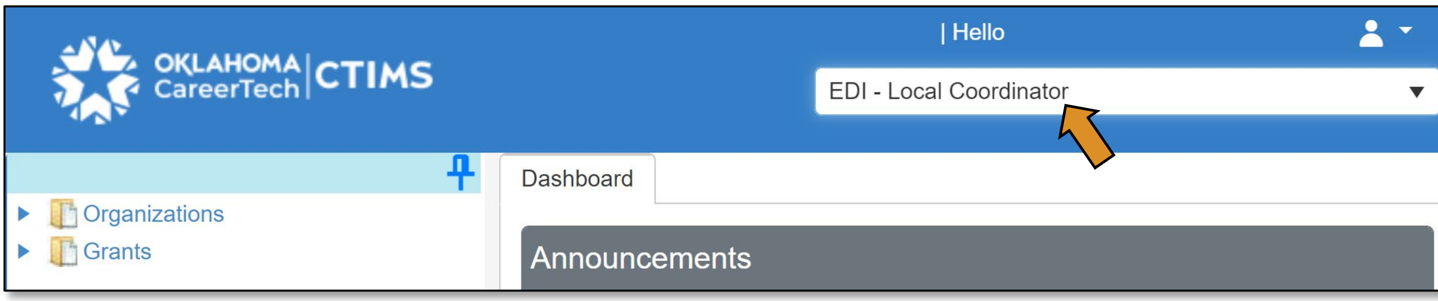


Change Request Process

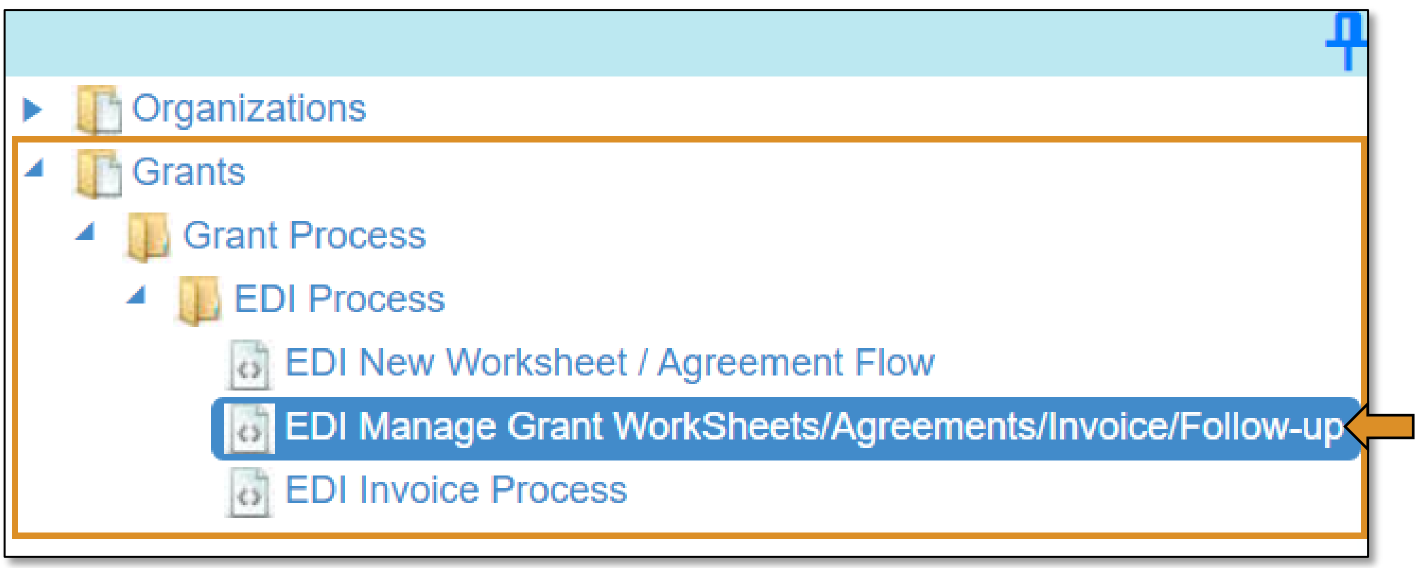
After a **Worksheet** is submitted for approval, you must go through the **Change Request Process** to make any changes. **The EDI – Local Coordinator, ODCTE – State Regional Coordinator,** and **ODCTE – State Supervisor** can initiate the change request at any time during the **Workshee**t process. 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



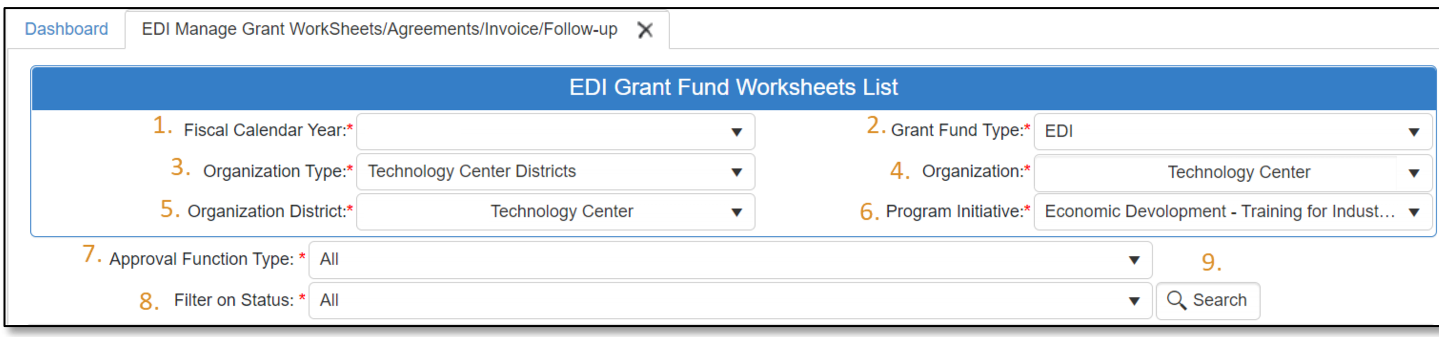
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



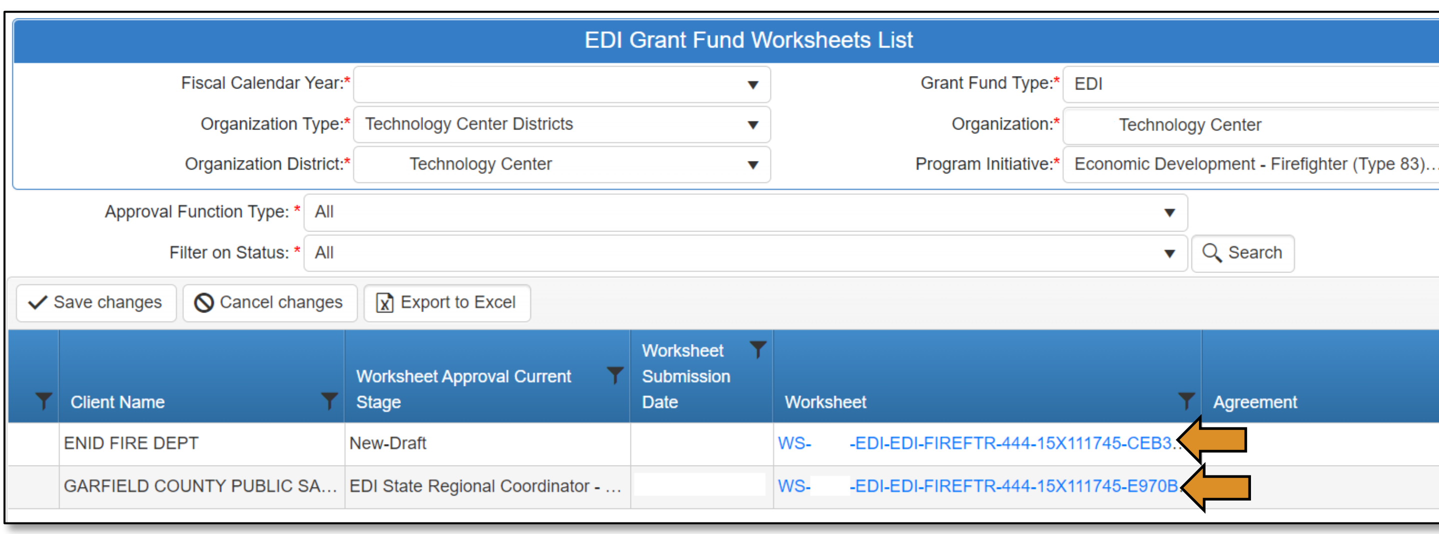
The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

NOTE: The red asterisks* represents a required field.

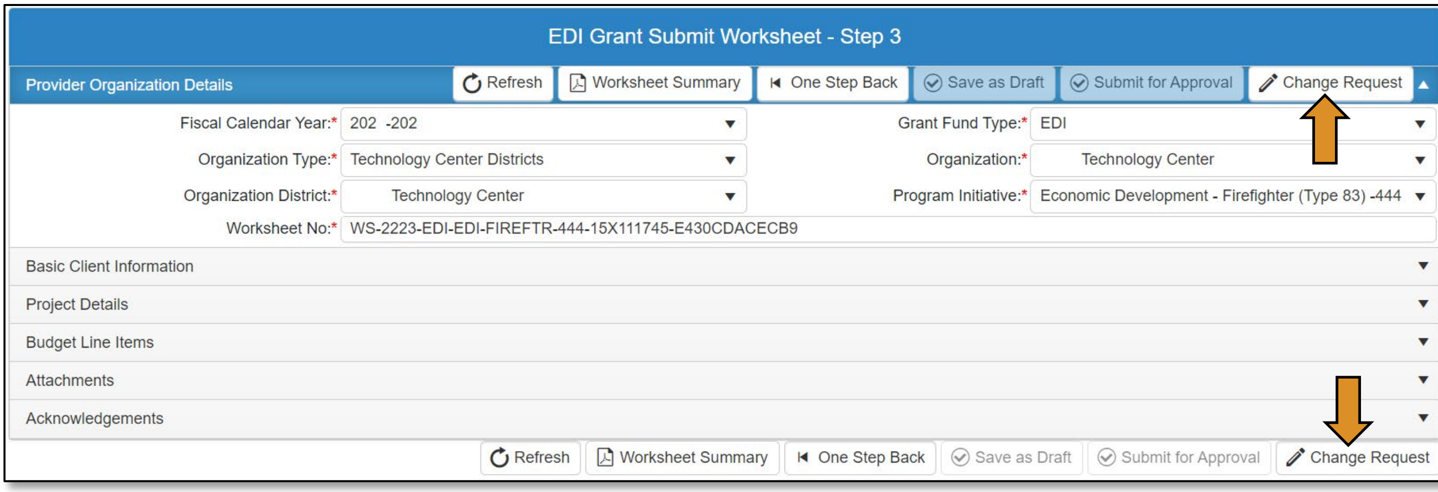
1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
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**.



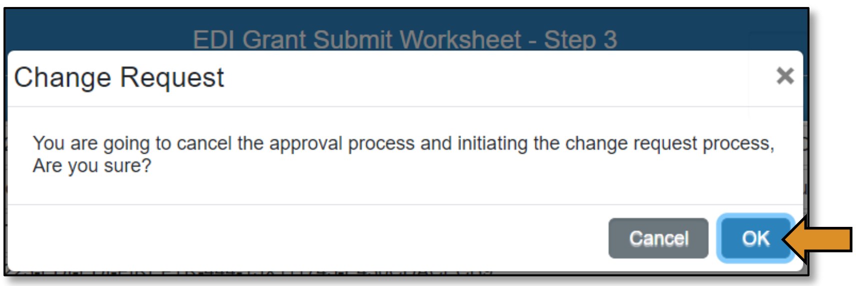
- After clicking the **Search** button, the worksheet/applications that are in the approval process will be listed. Click the worksheet number to open it.



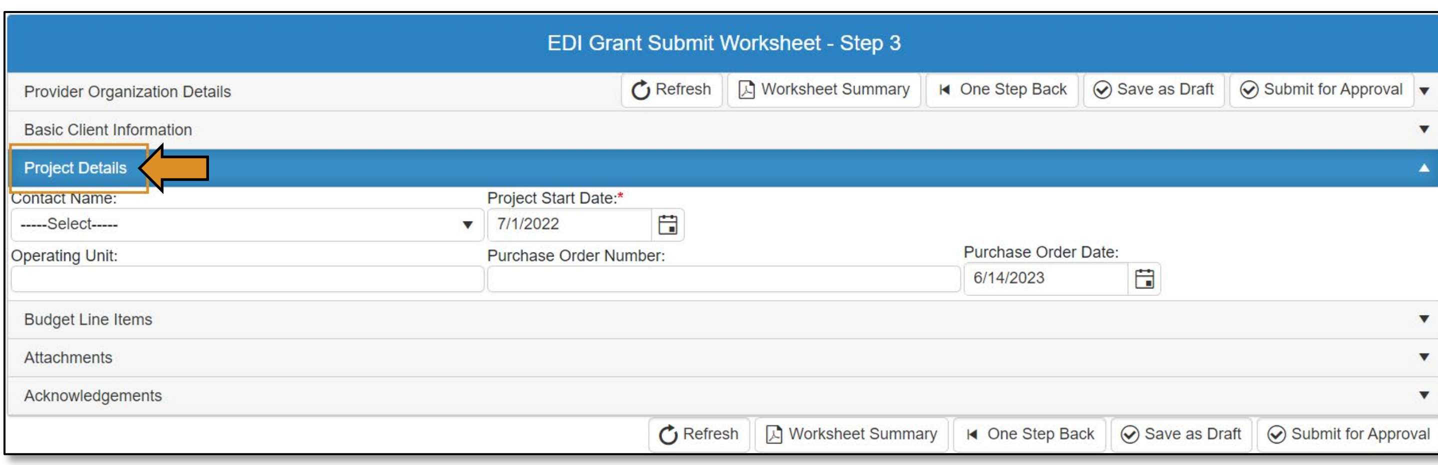
- To make changes to your Worksheet/Application or Budget, select **Change Request**.



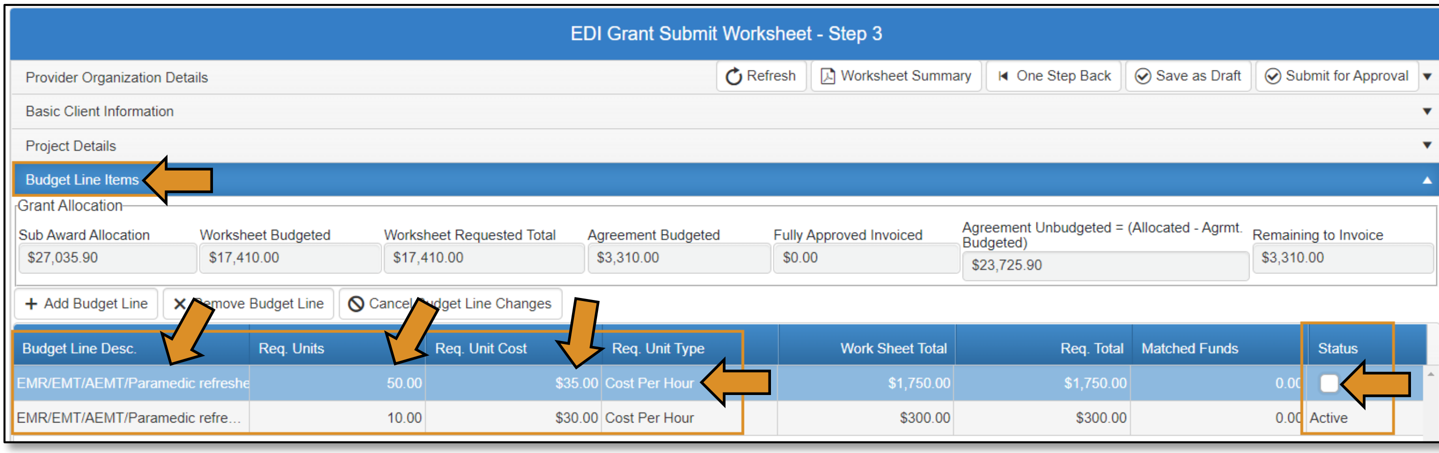
- The Change Request process will cancel the worksheet/application approval process.
    - Click **OK** to continue.



- 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*".



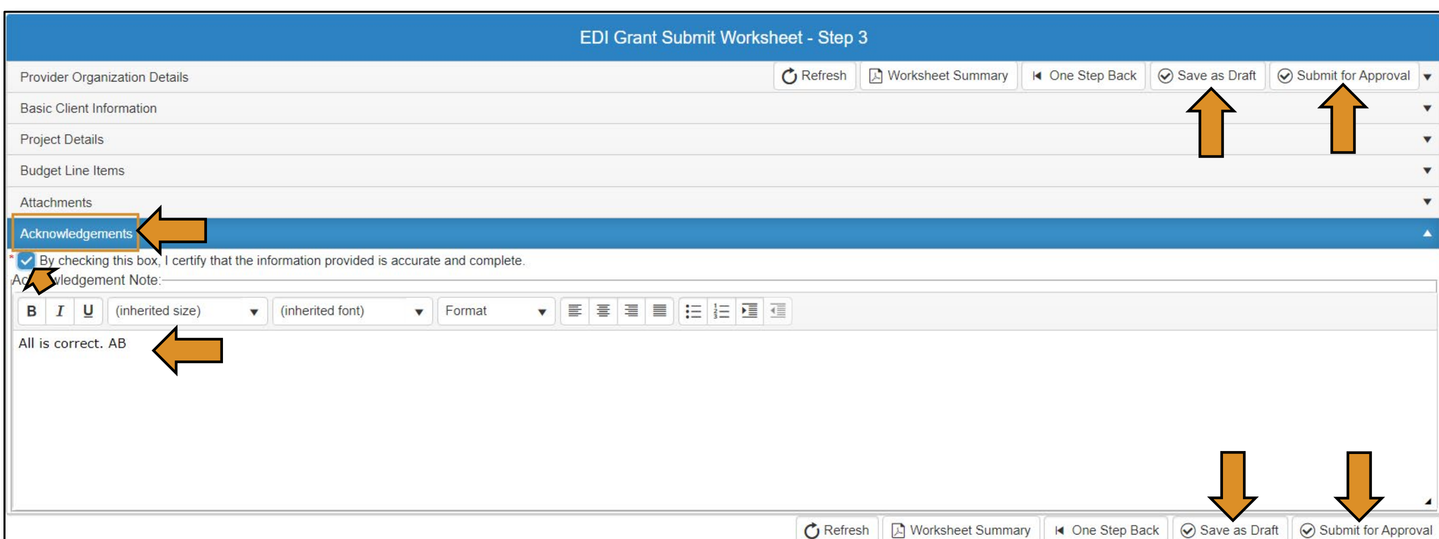
- To revise the budget, expand the *Budget Line Items* section by clicking on the words "*Budget Line Items*".
  - Change the budget line description by clicking in the field under the **Budget Line Desc**. column.
  - Change the **Req. Units, Req. Unit Cost,** and/or the **Req. Unit Type** columns to 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.



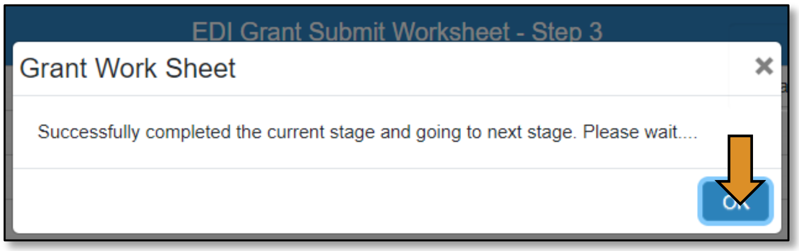
- After making the changes, go to the *Acknowledgement* section.
- Check the certification box and add an acknowledgment note. Add an explanation of any changes made to the agreement in the budget adjustment justification note box.
  - The **Acknowledgment Note*** is a required field.

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.

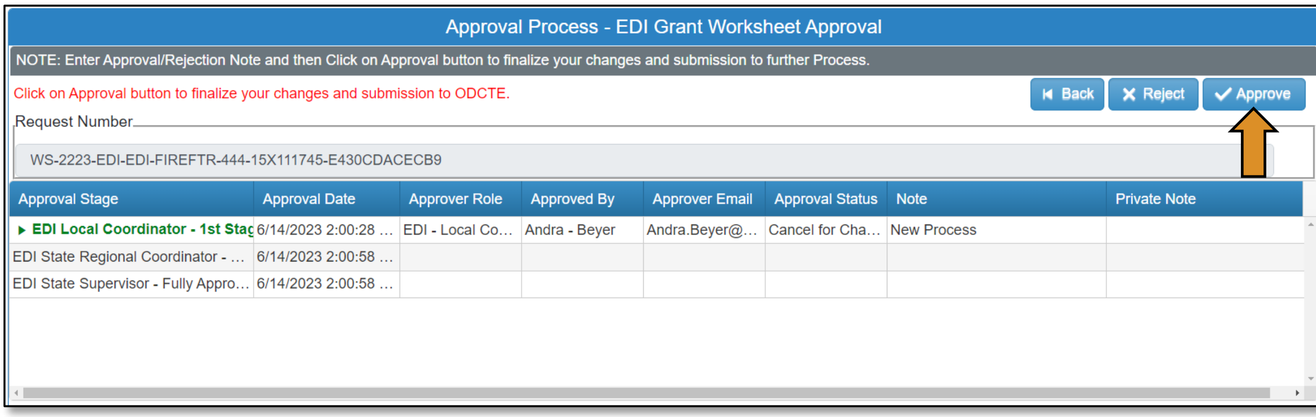
- Select **Submit for Approval** if the changes to the Worksheet are complete.



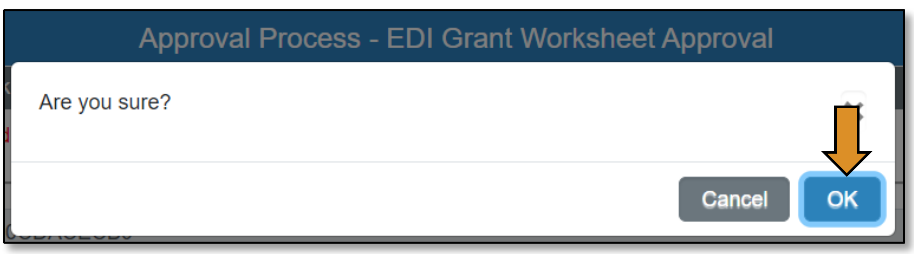
- Click **OK**.



- 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.

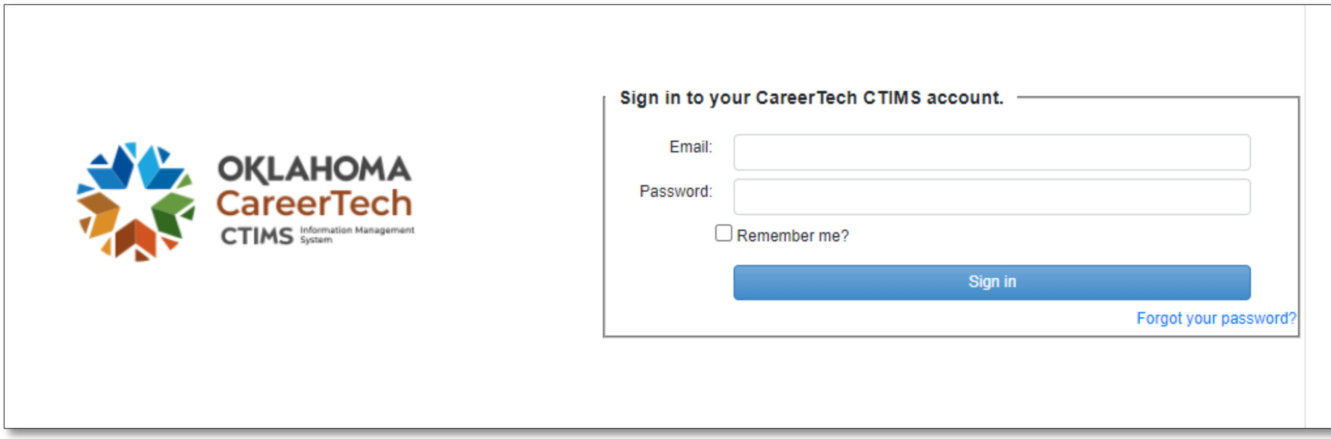
Stage 7 - Local Finance Coordinator – Enters the OCAS codes and adds new codes as needed. The Agreement becomes fully approved. (The tech center is responsible for selecting OCAS codes. See the OCAS Codes for WED for the codes.)

IMPORTANT: The local cordinator 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.

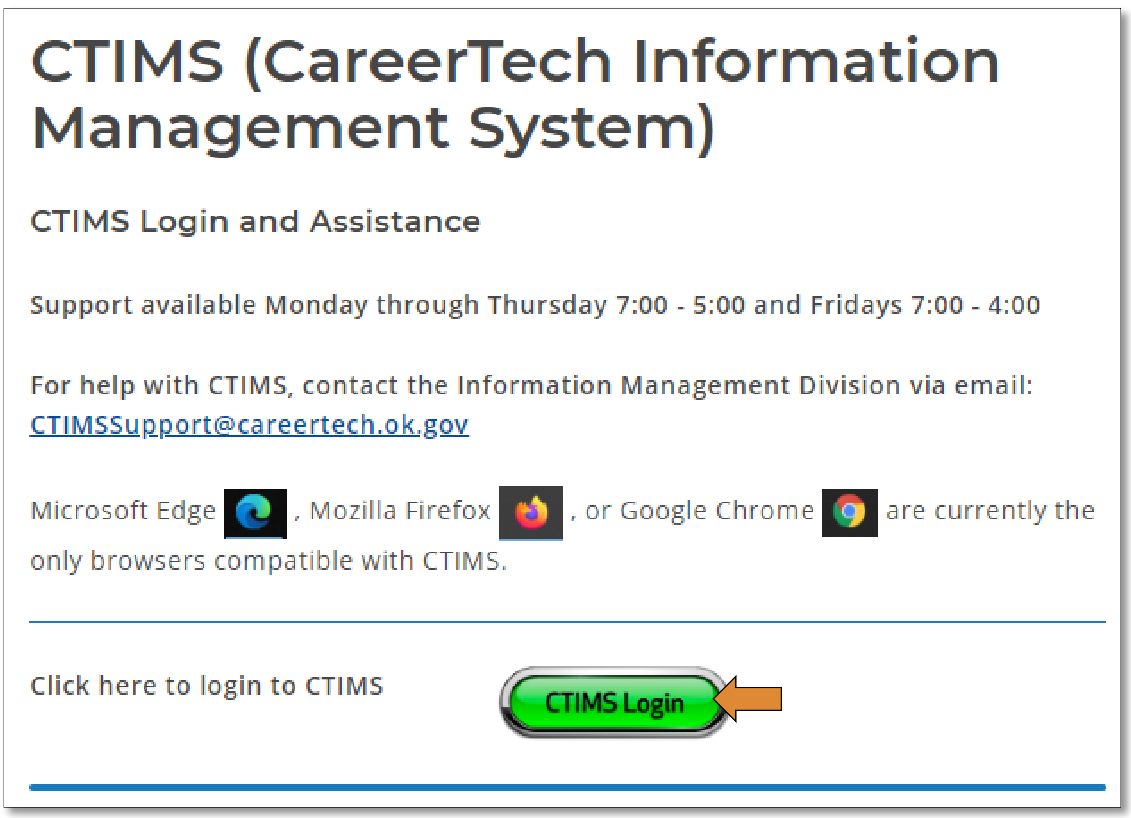
EDI – Local Coordinator (Agreement Process)

Logging into CTIMS

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



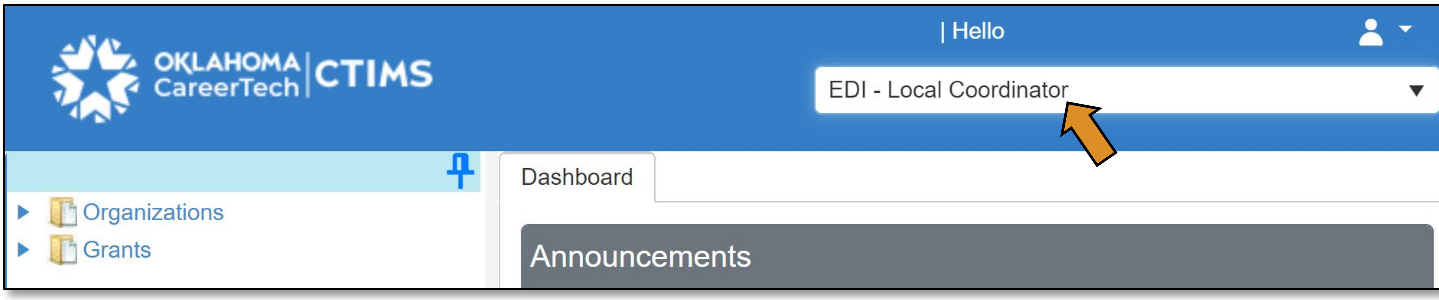
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.



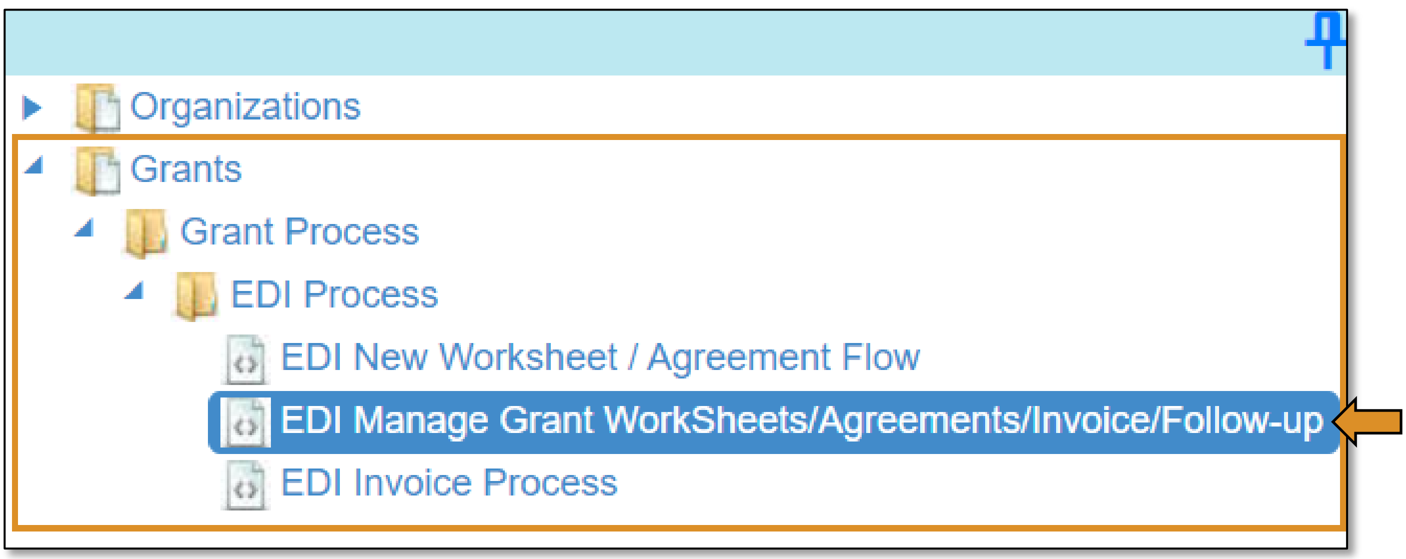
Starting New Agreement

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



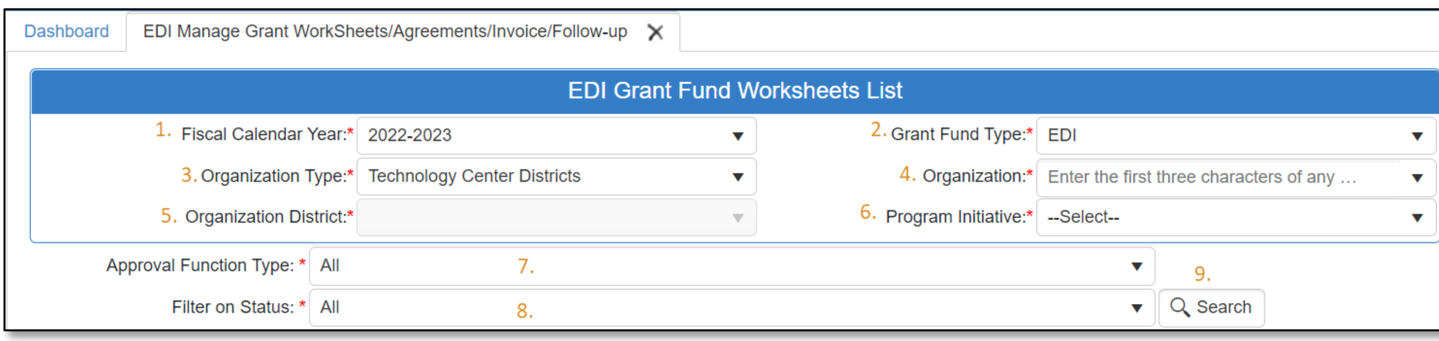
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



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.

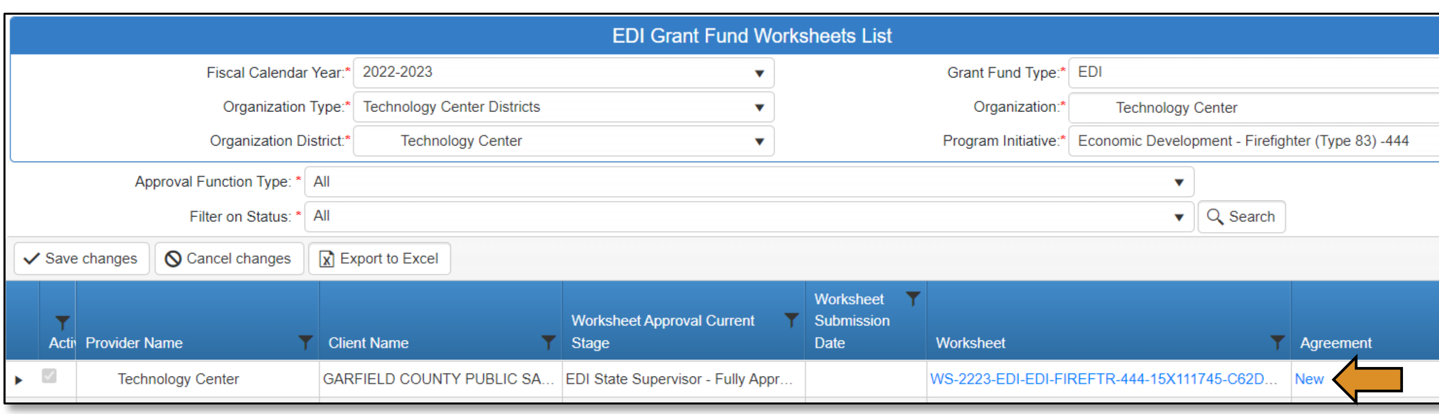
1. **Fiscal Calendar Year*** - this field automatically displays the current year.
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
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.

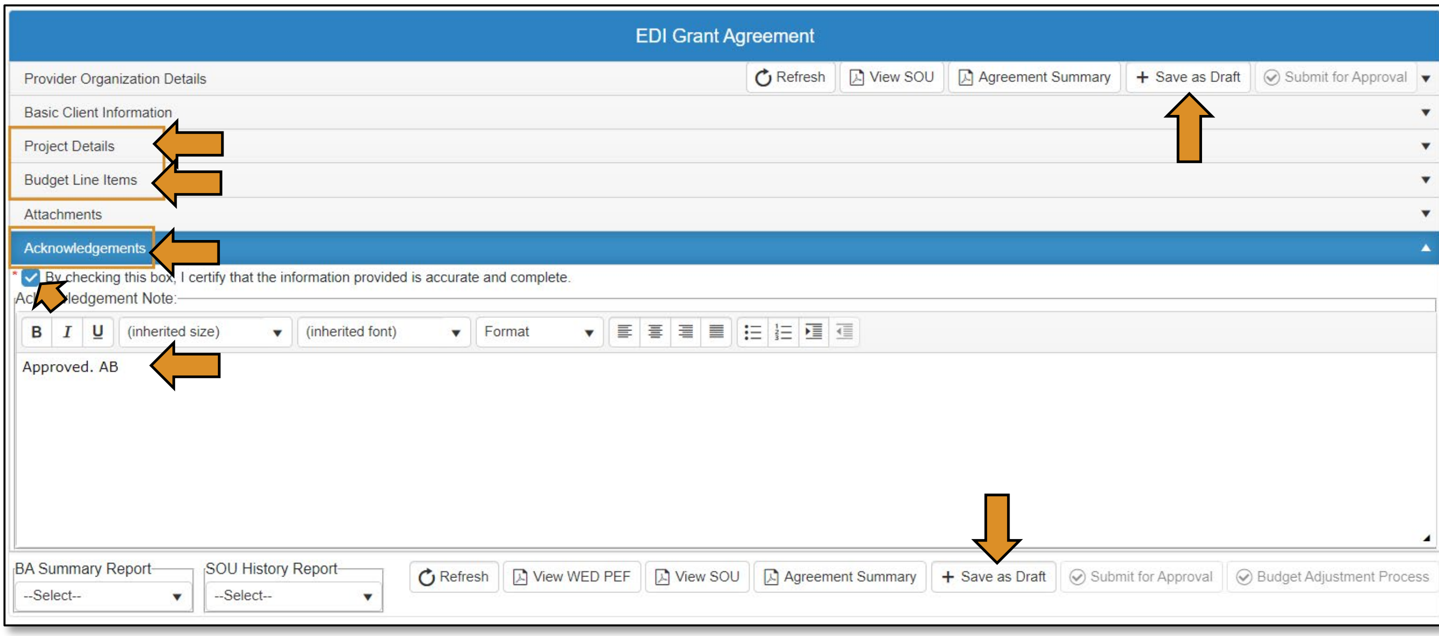


Agreement Details

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



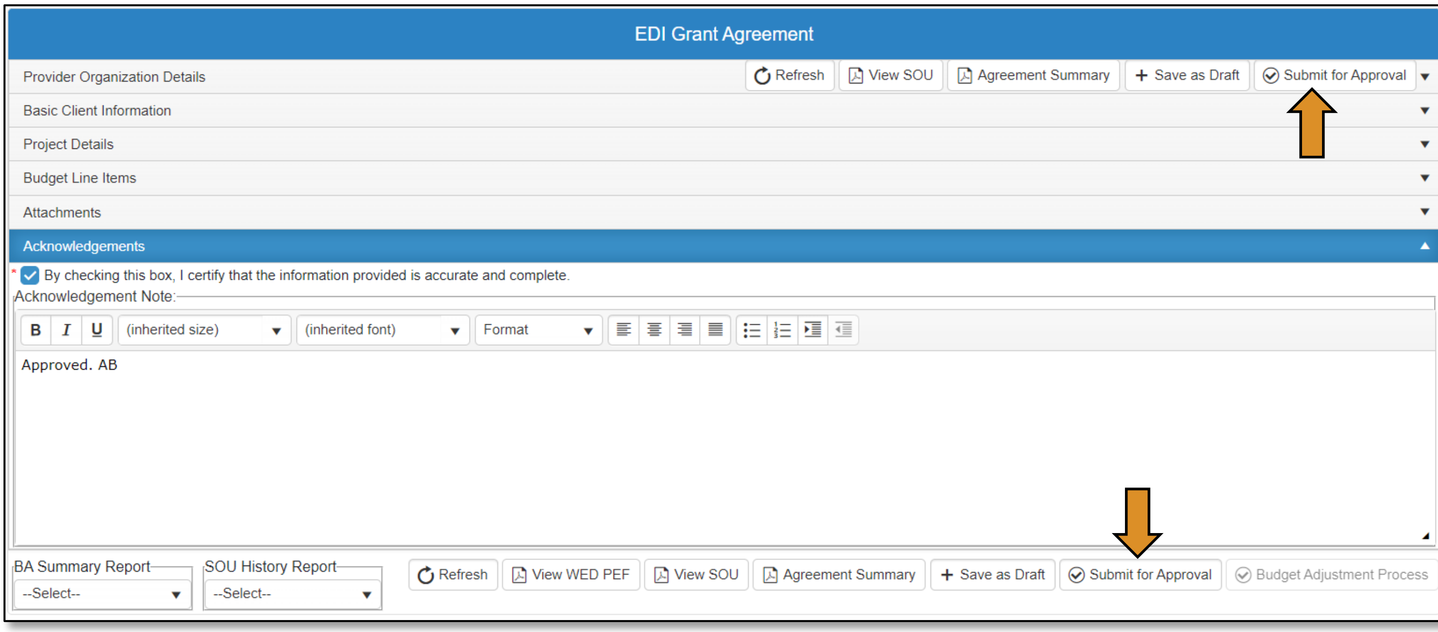
Review the Agreement details, if necessary, by clicking the words to expand the *Project Details* or *Budget Line Items* sections. After reviewing the Agreement details, if necessary, click the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and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



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

Agreement Acknowledgments and Approval

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

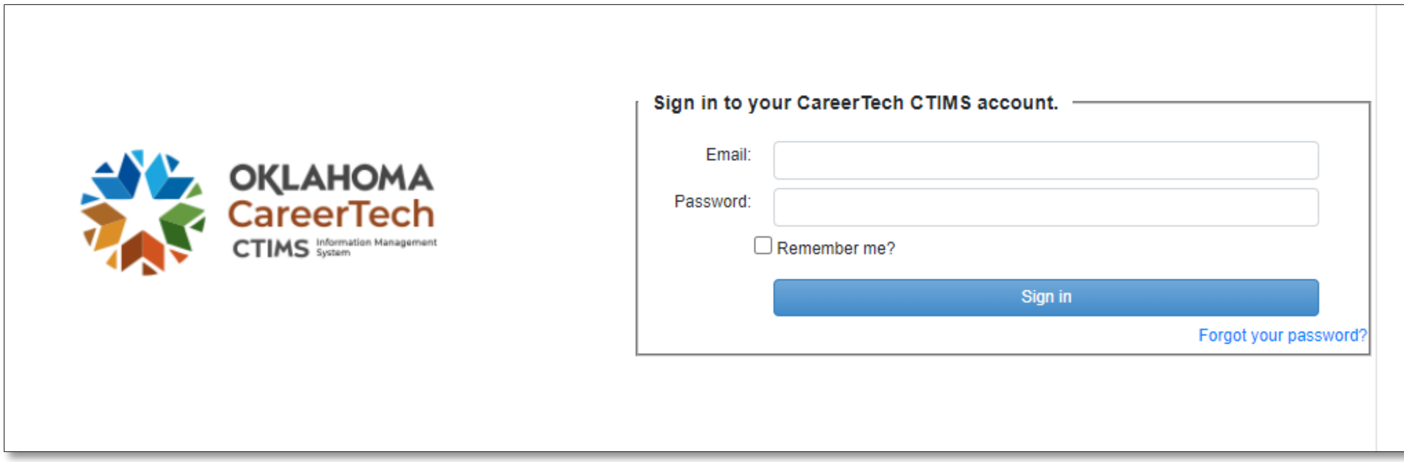


The *agreement* will now go to the **EDI – Local BIS Director** for approval.

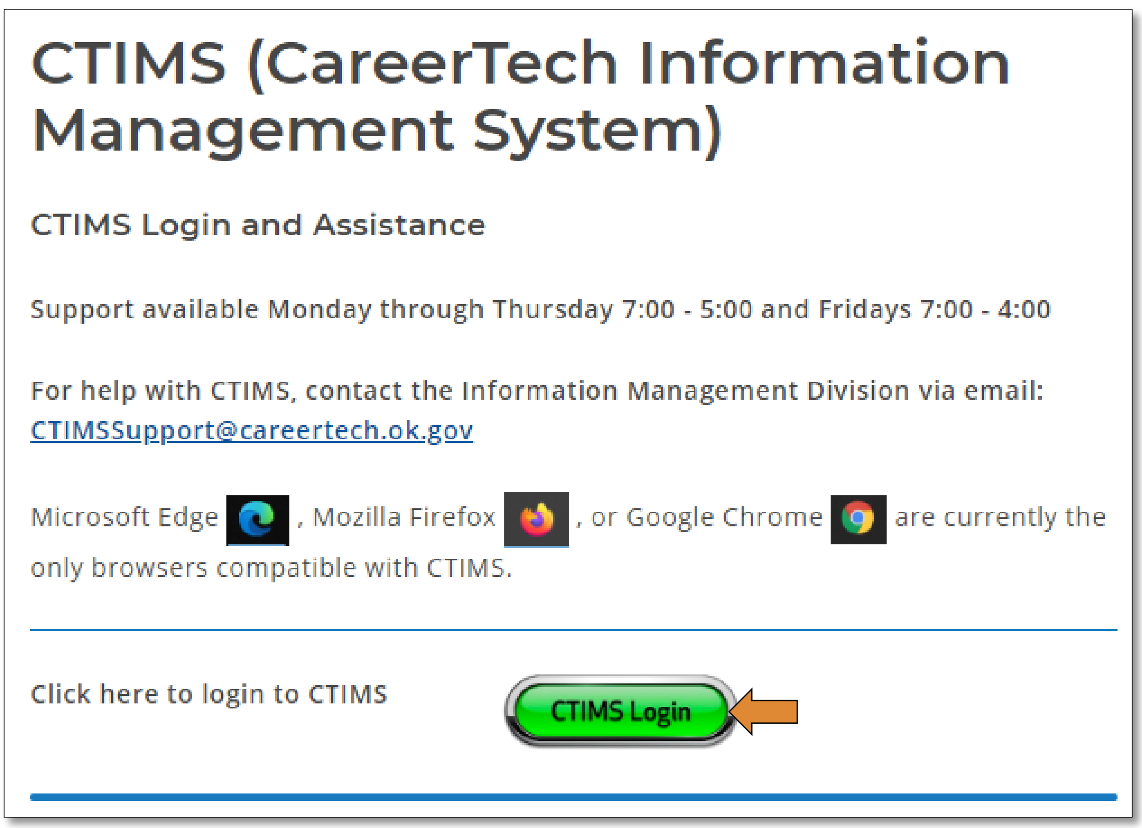
EDI – Local BIS Director (Agreement Process)

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) and select the green **CTIMS Login** button.

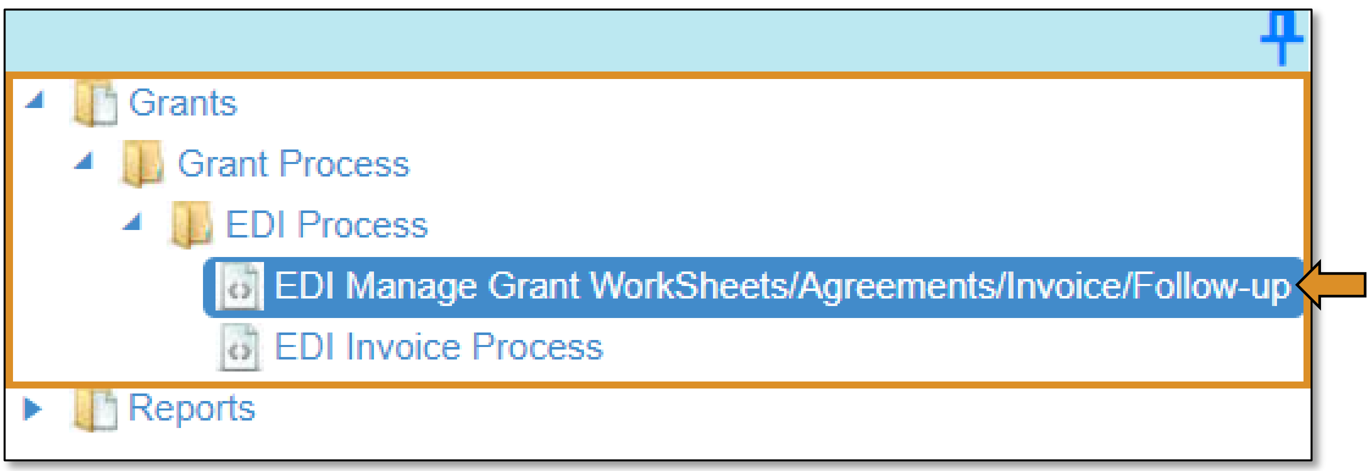


Accessing the Agreement List

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

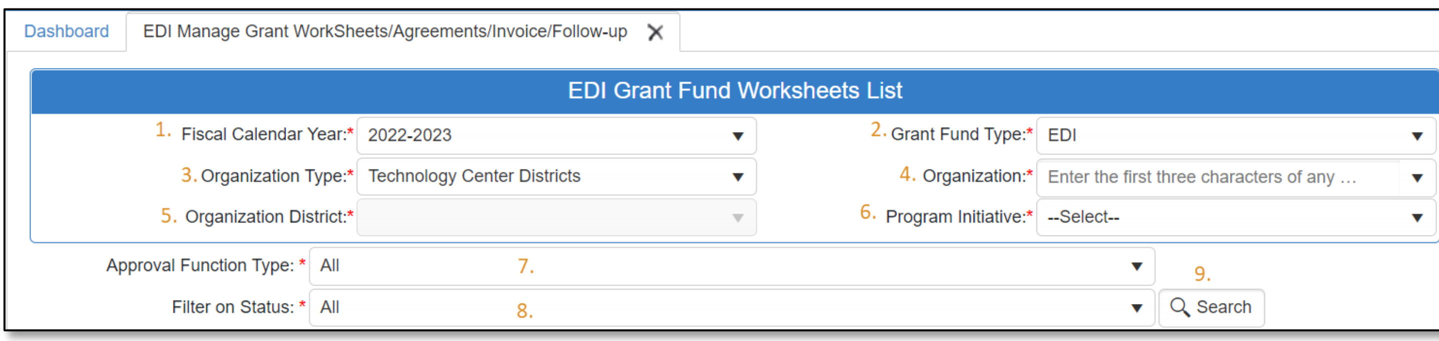
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



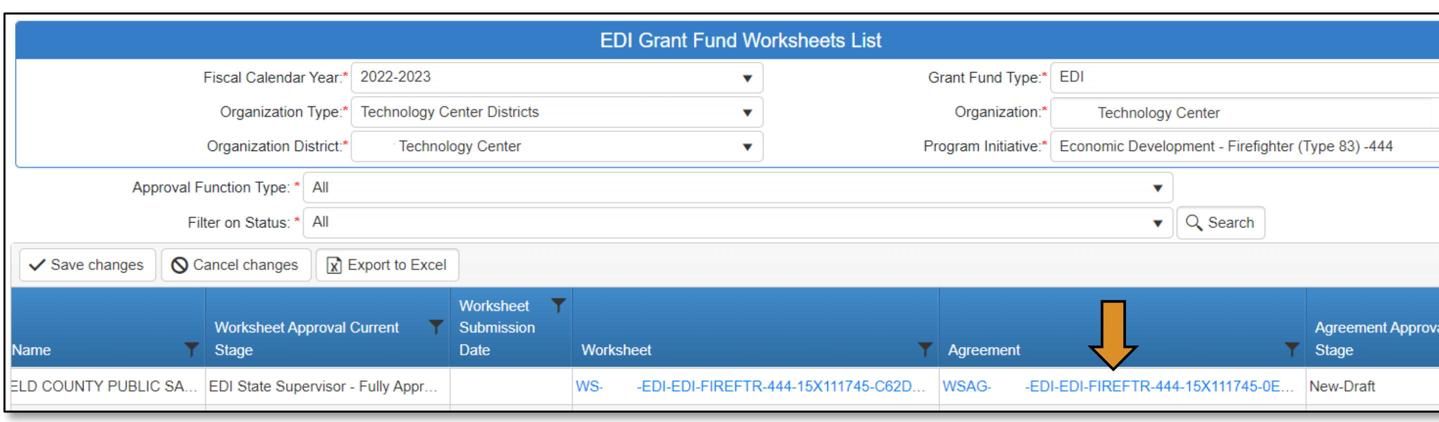
Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

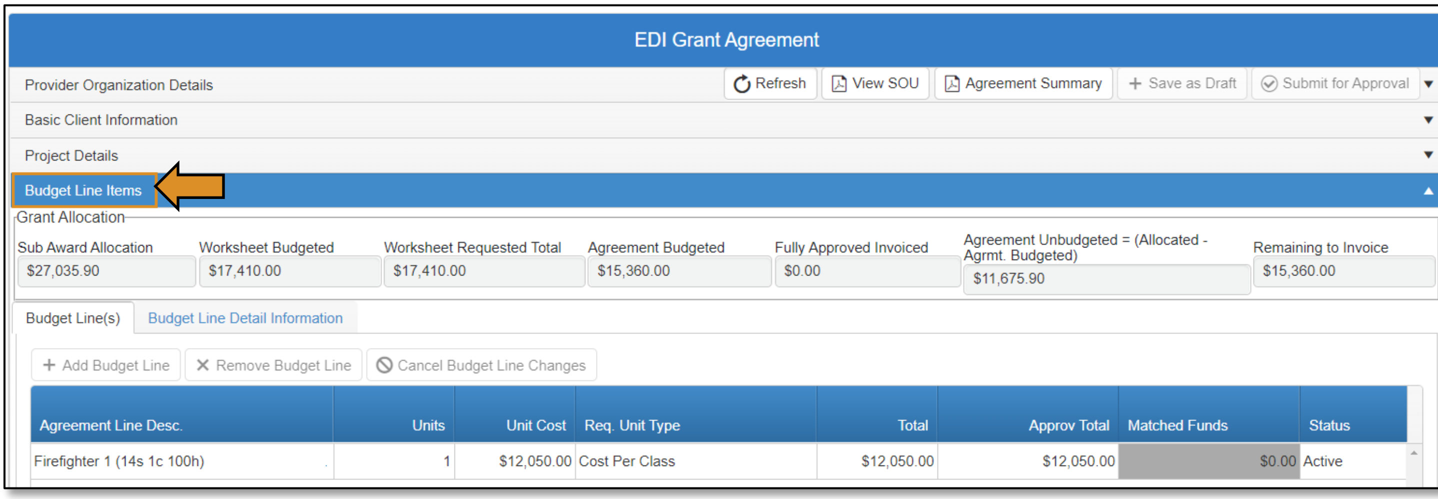


- The **Agreement column** will display an agreement number.
- Click the agreement number link to open the agreement.

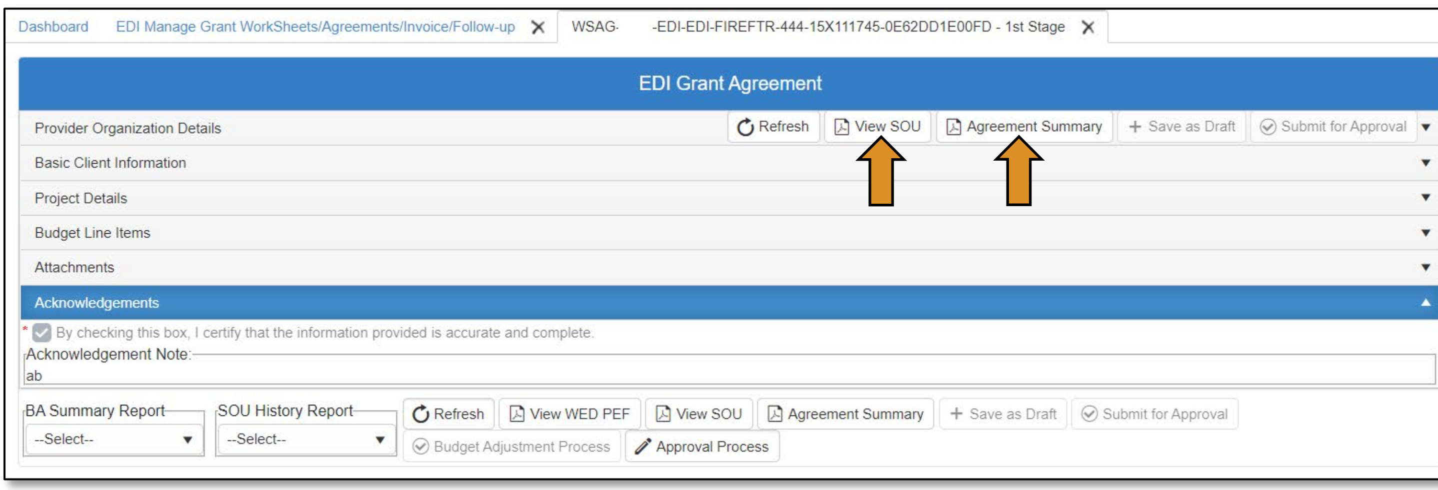


Reviewing the Agreement

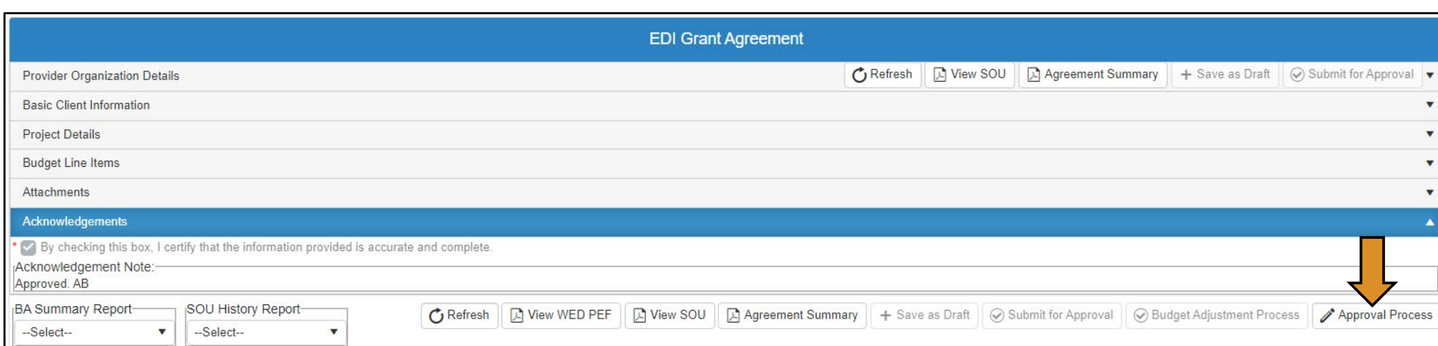
- Click on **Budget Line Items** to expand it and review the budget.



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

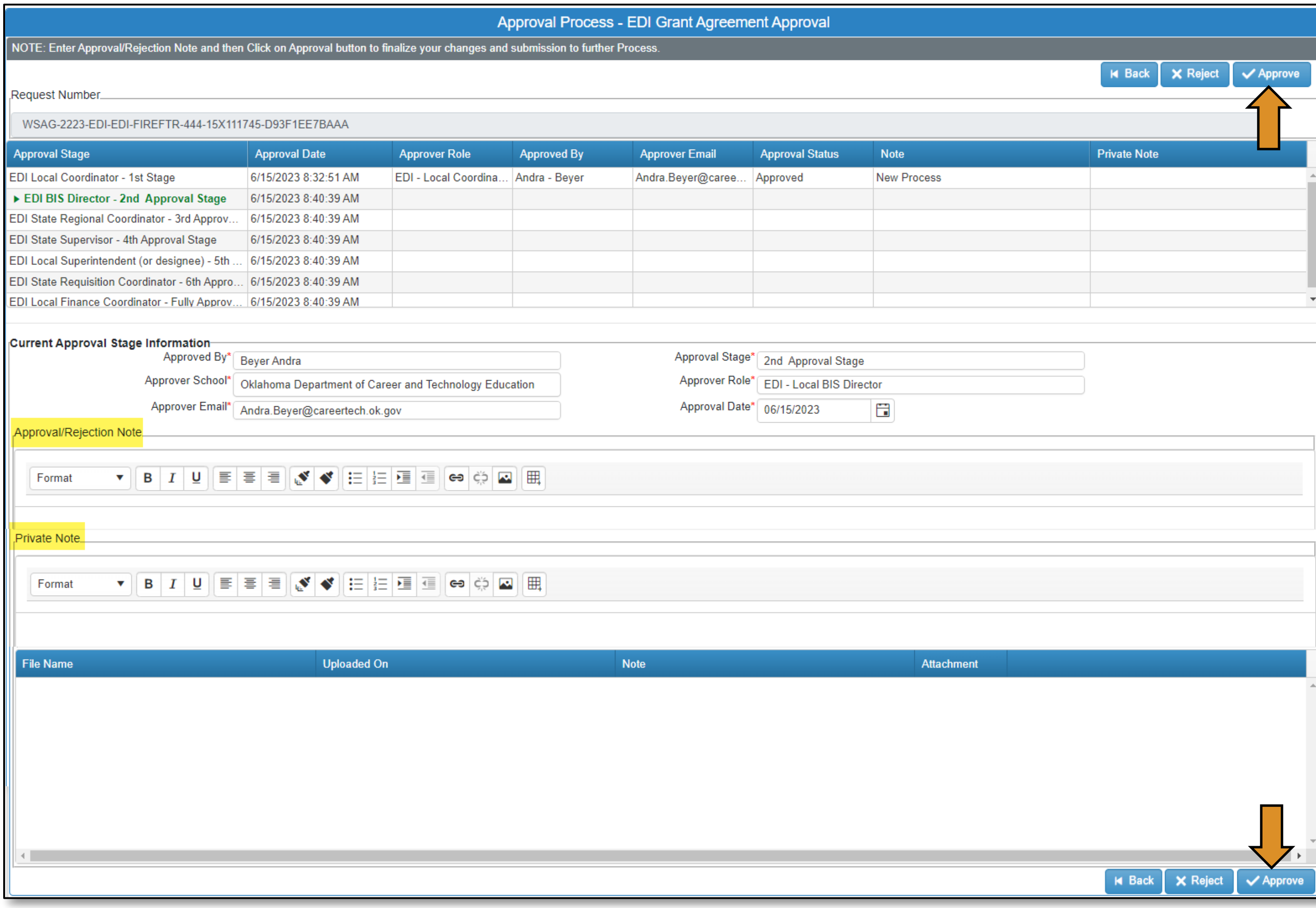


- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.



Agreement Acknowledgements and Approval

- 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.

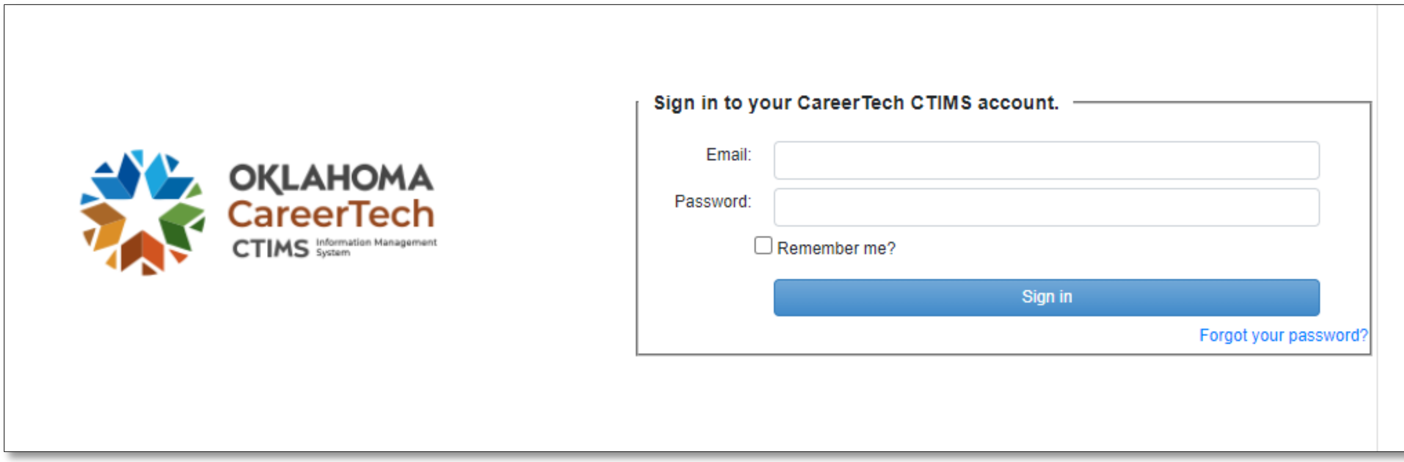


The *agreement* will now go to the **EDI – State Regional Coordinator** for approval.

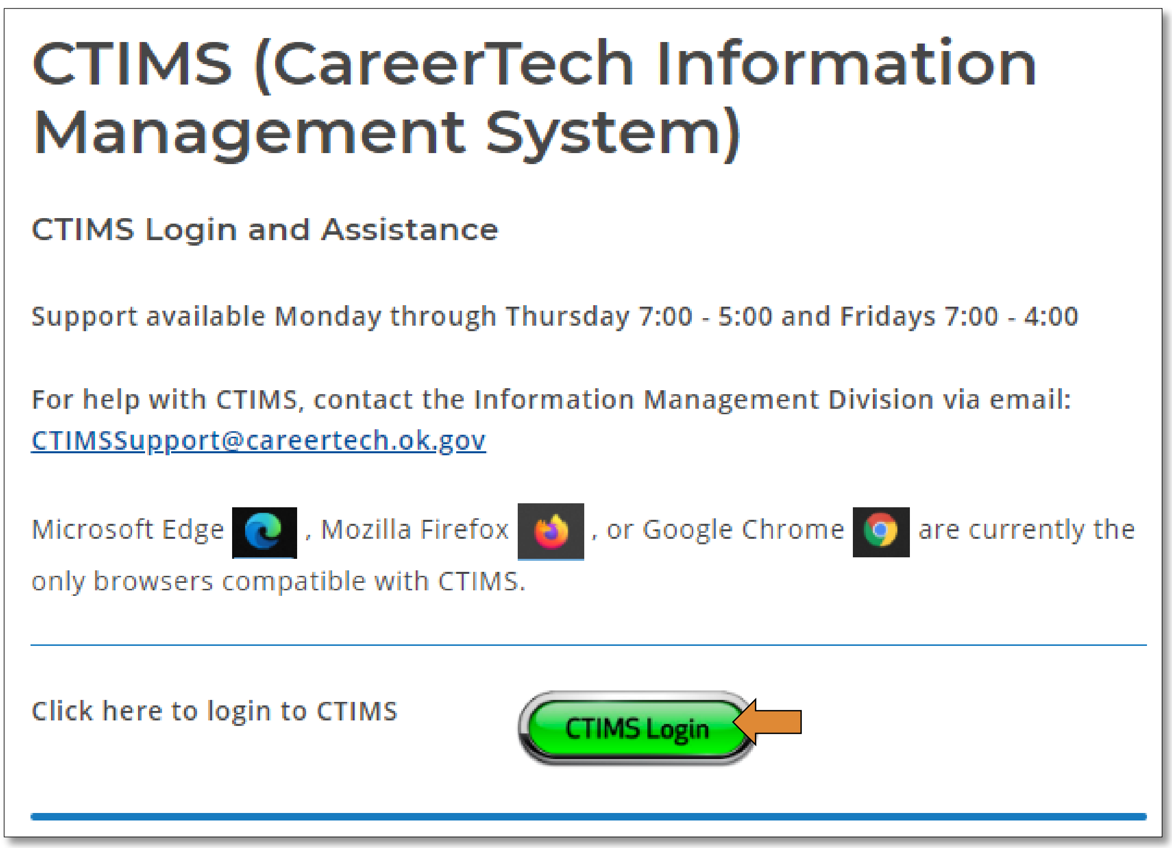
EDI – State Regional Coordinator (Agreement Process)

Logging into CTIMS

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



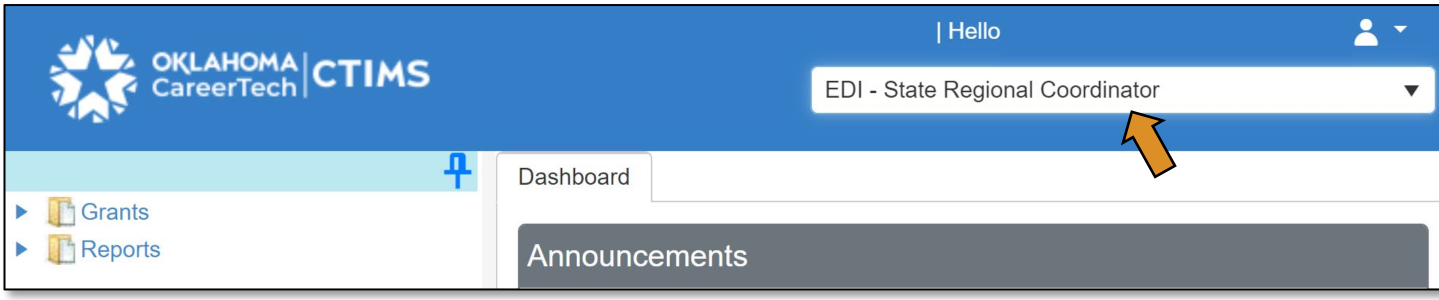
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.



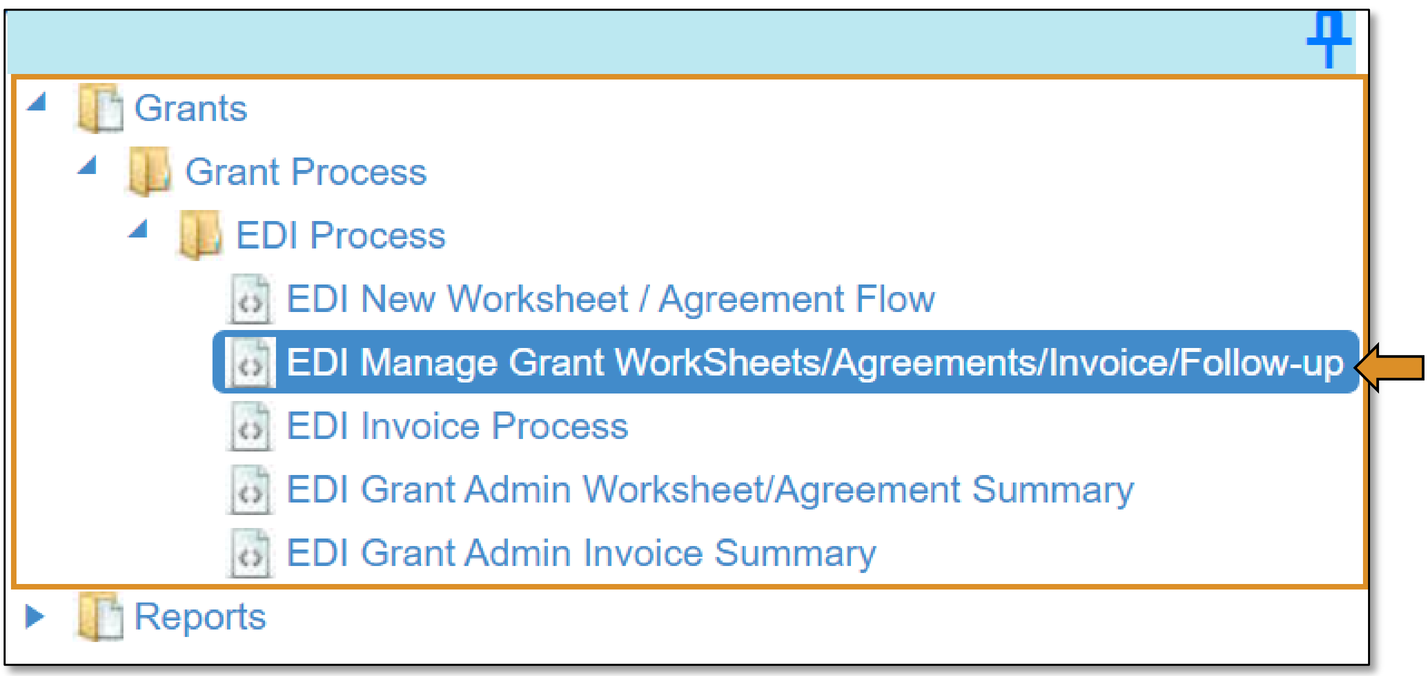
Accessing the Agreement List

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



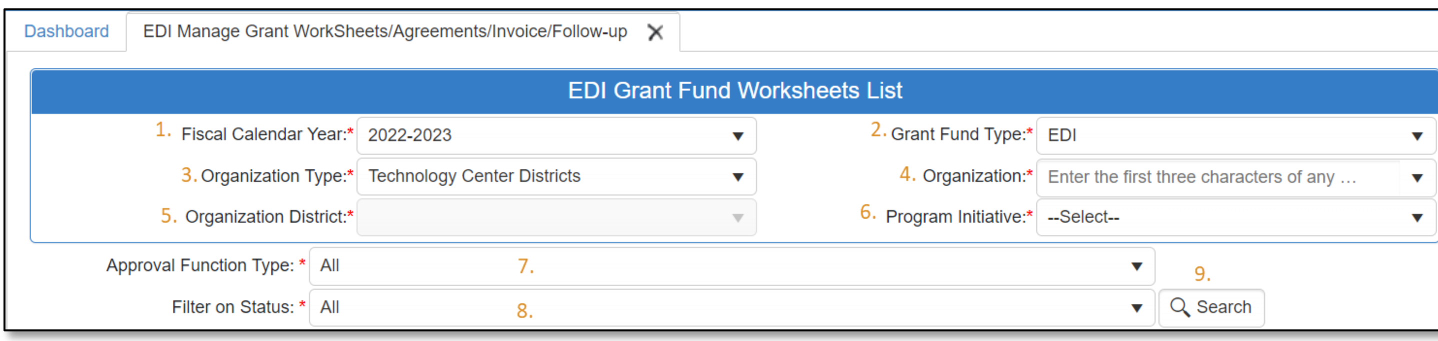
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



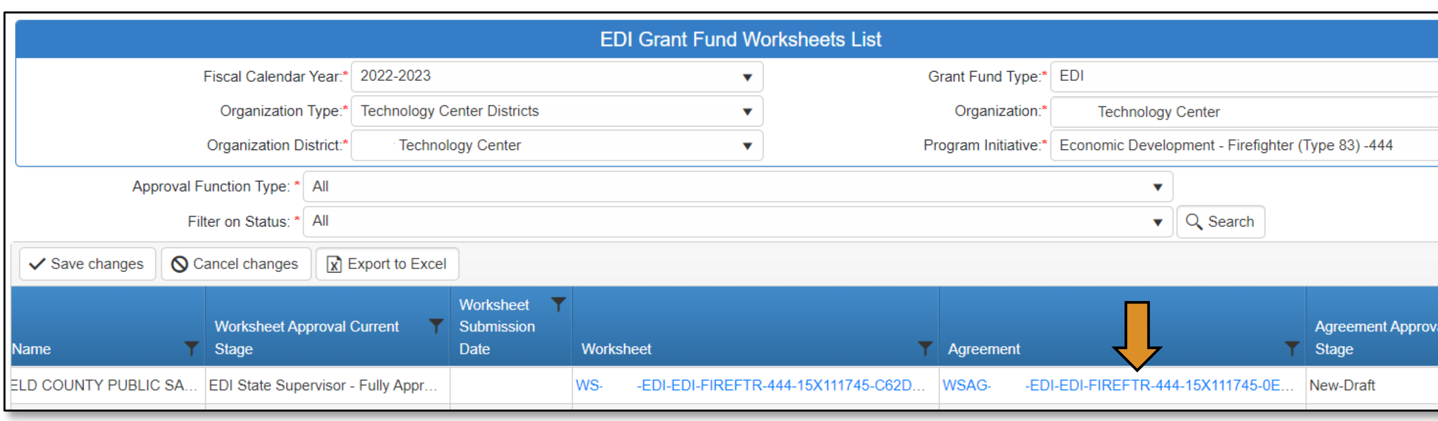
Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

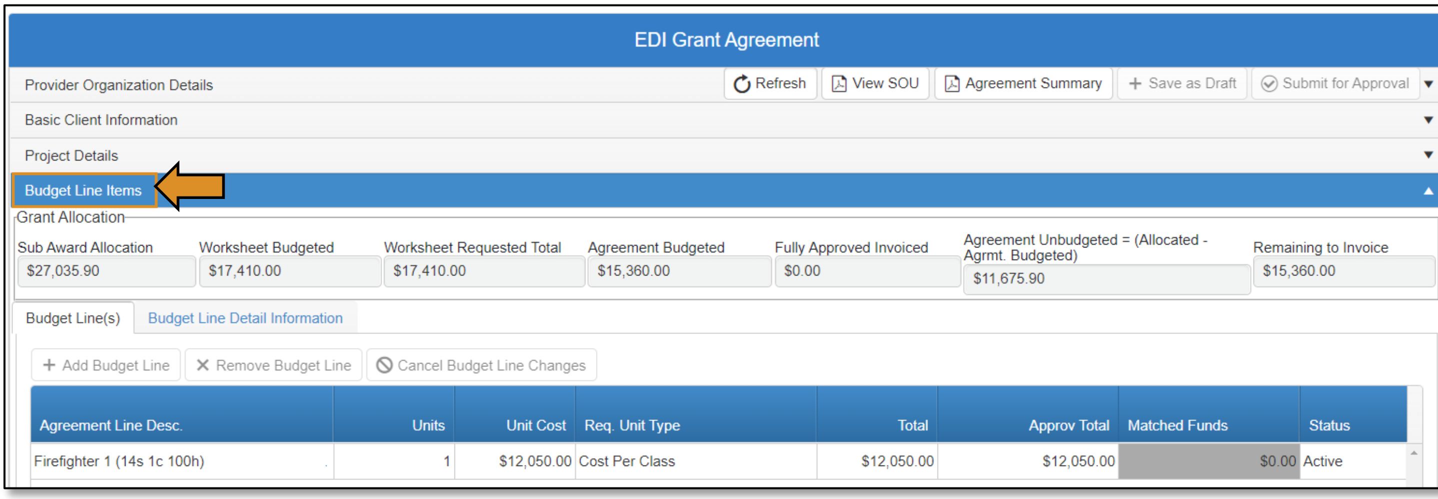


- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

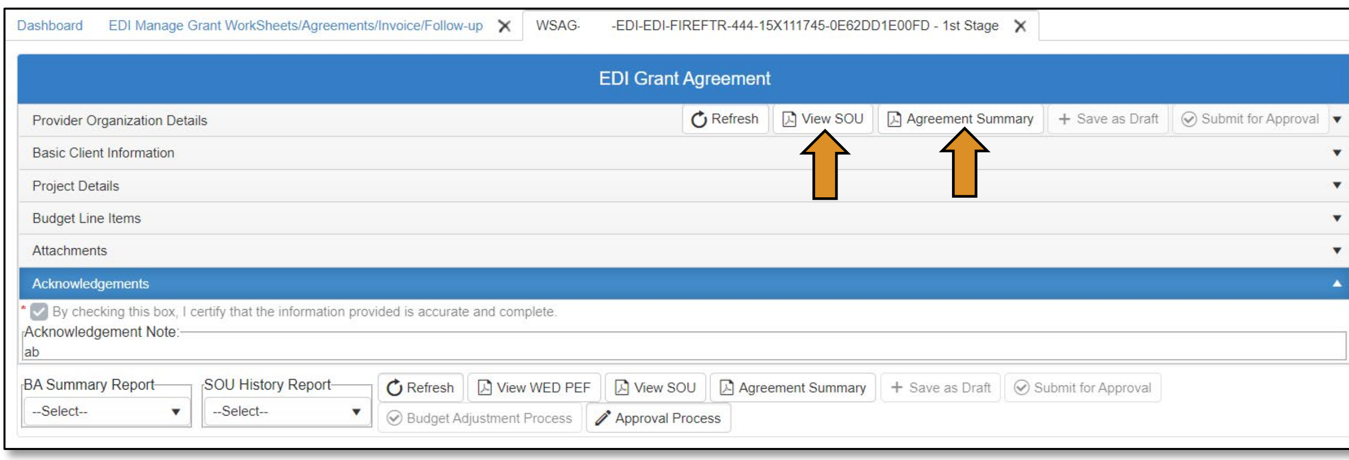


Reviewing the Agreement

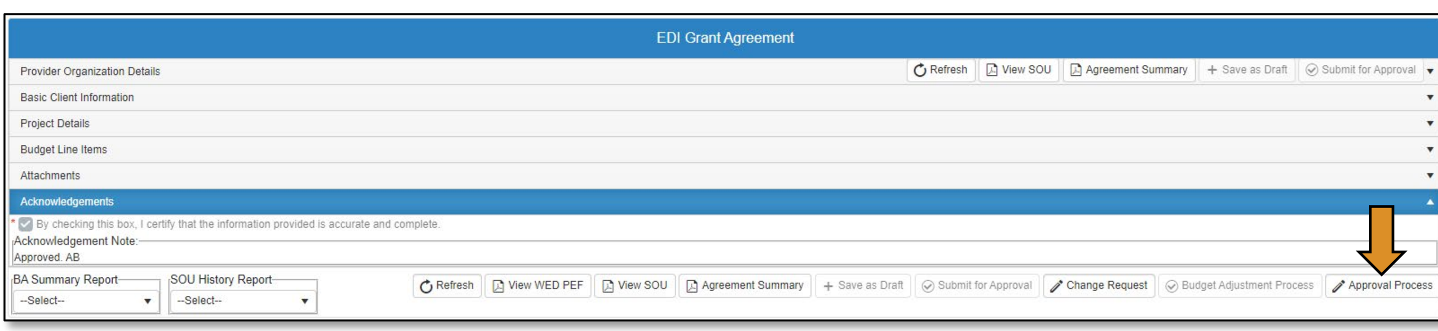
- Click on **Budget Line Items** to expand it and review the budget.



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

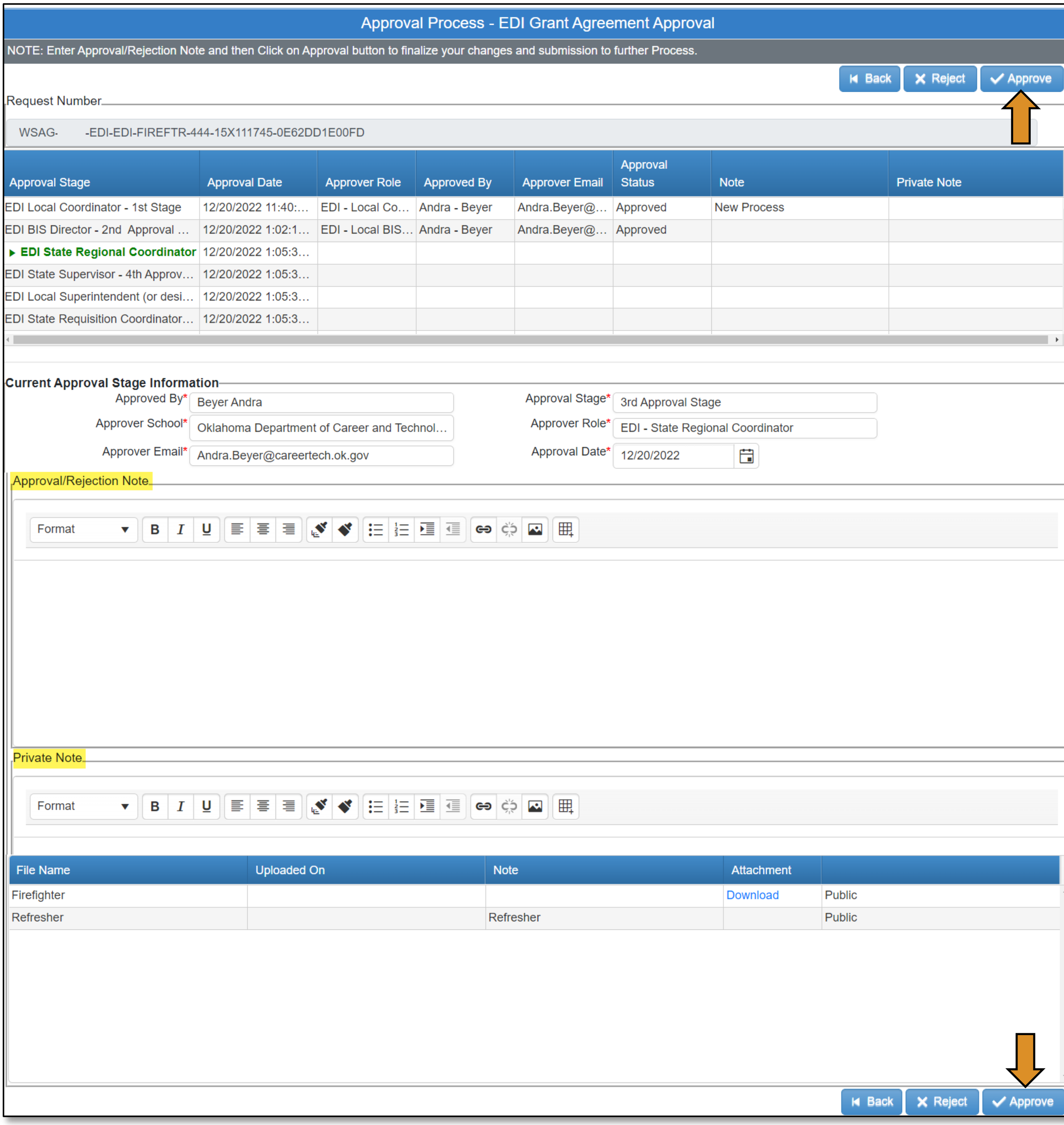


- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.



Agreement Acknowledgements and Approval

- 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.



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

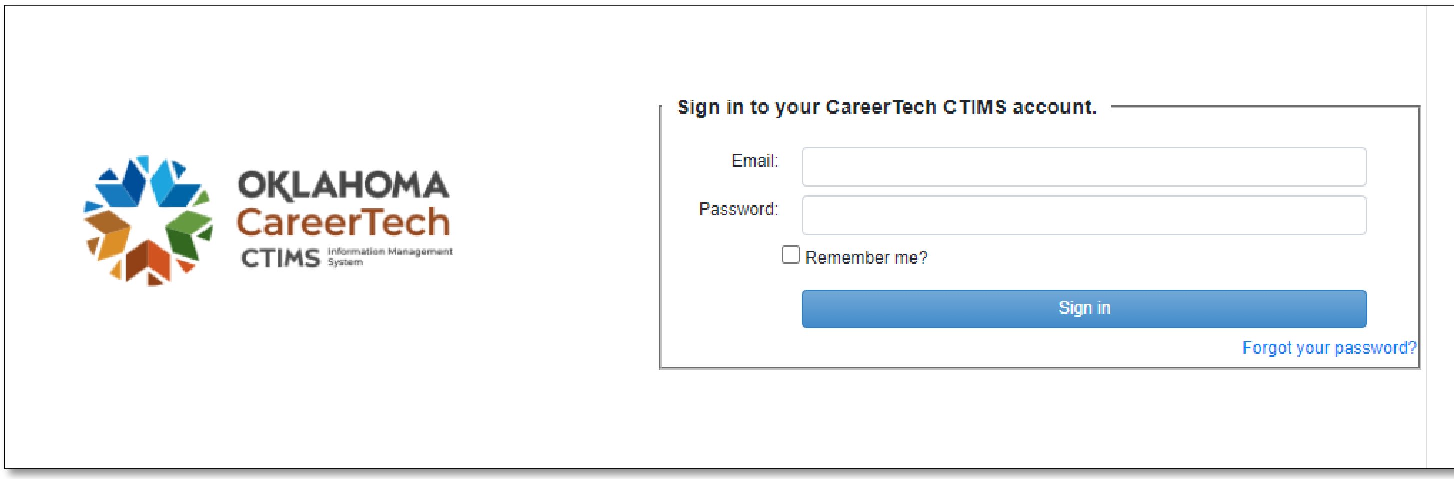
EDI - State Initiative Supervisor (Agreement Process)

See instructions for EDI - State Regional Coordinator here.

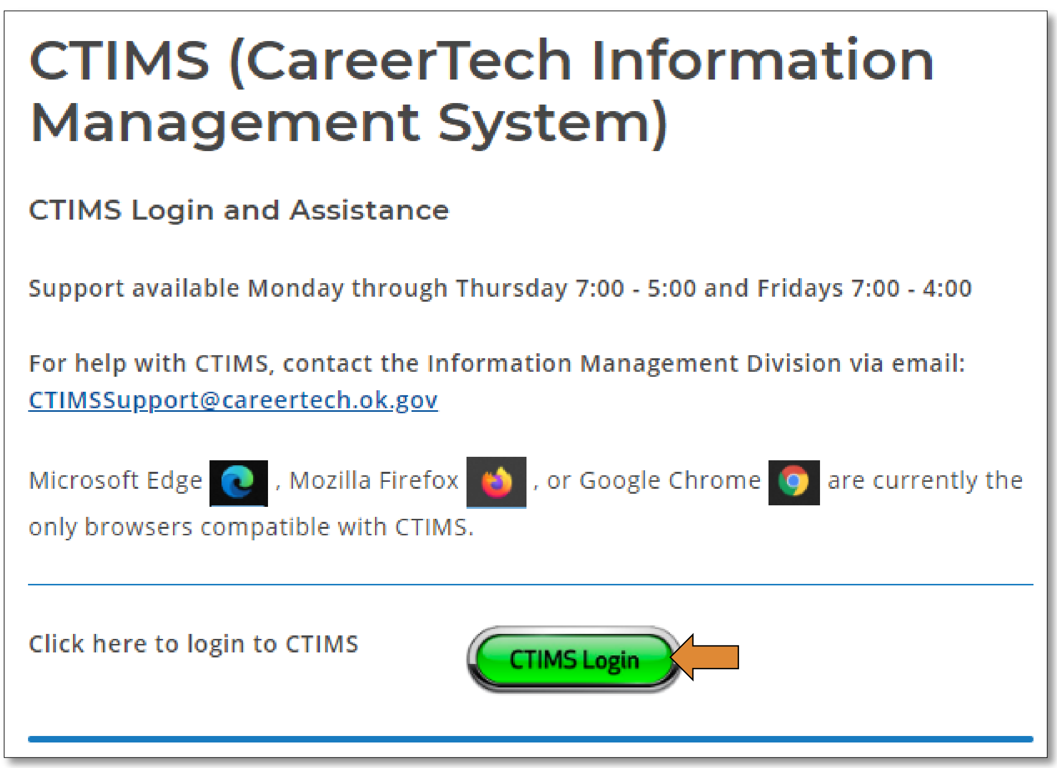
EDI-Local Superintendent/CEO (Agreement Process)

Logging into CTIMS

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



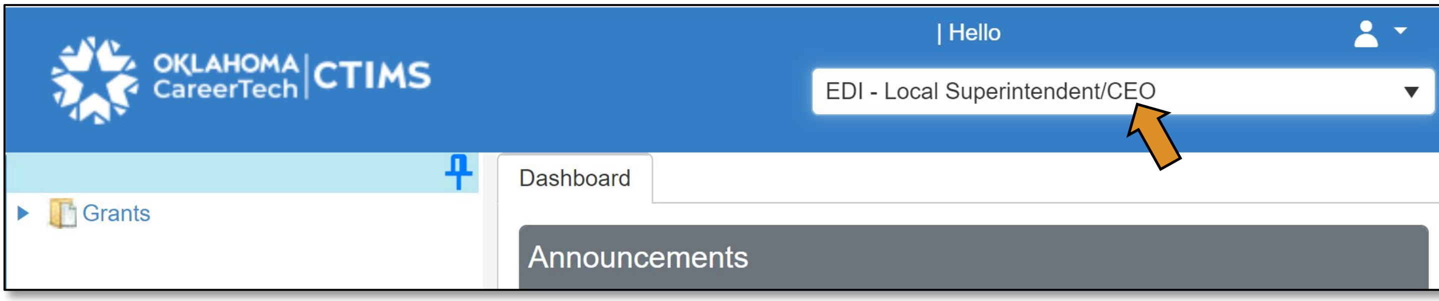
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.



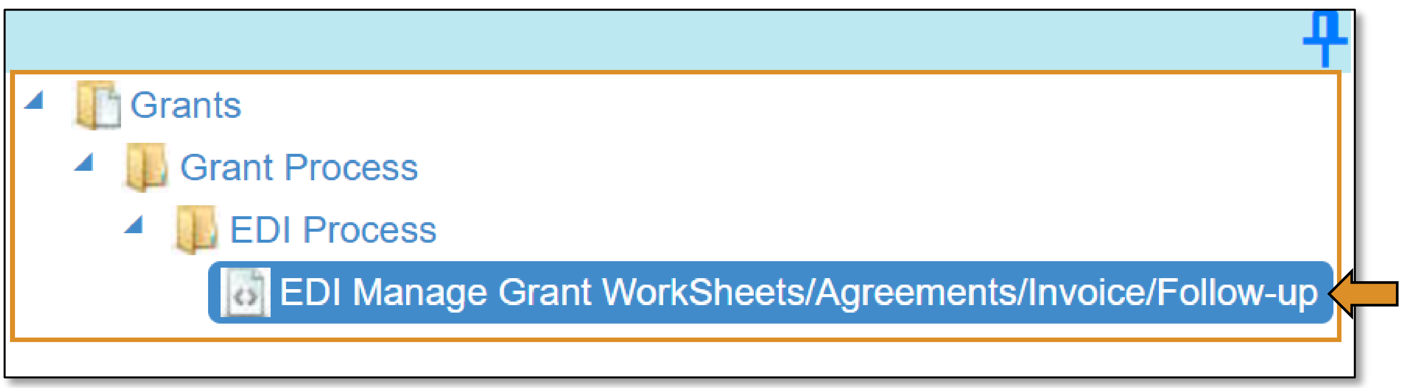
<u>Accessing the Agreement List</u>

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



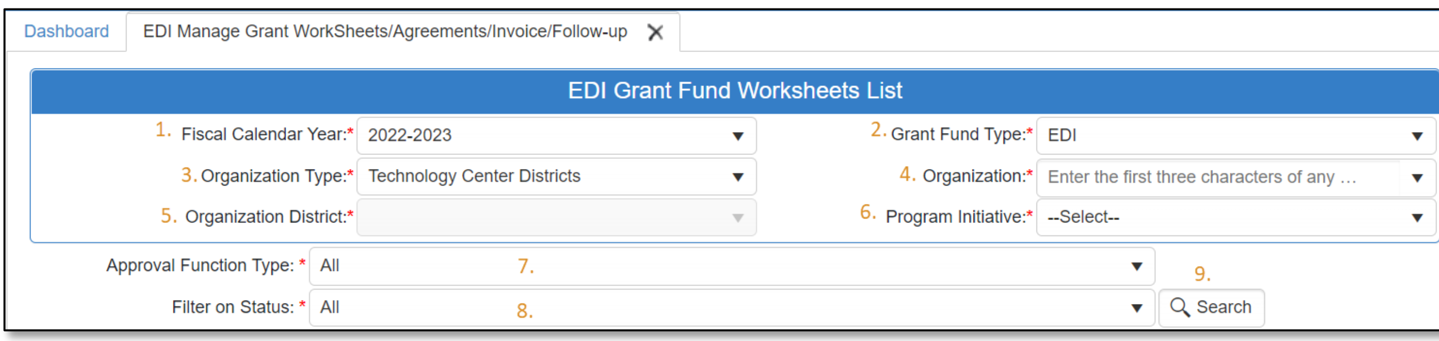
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



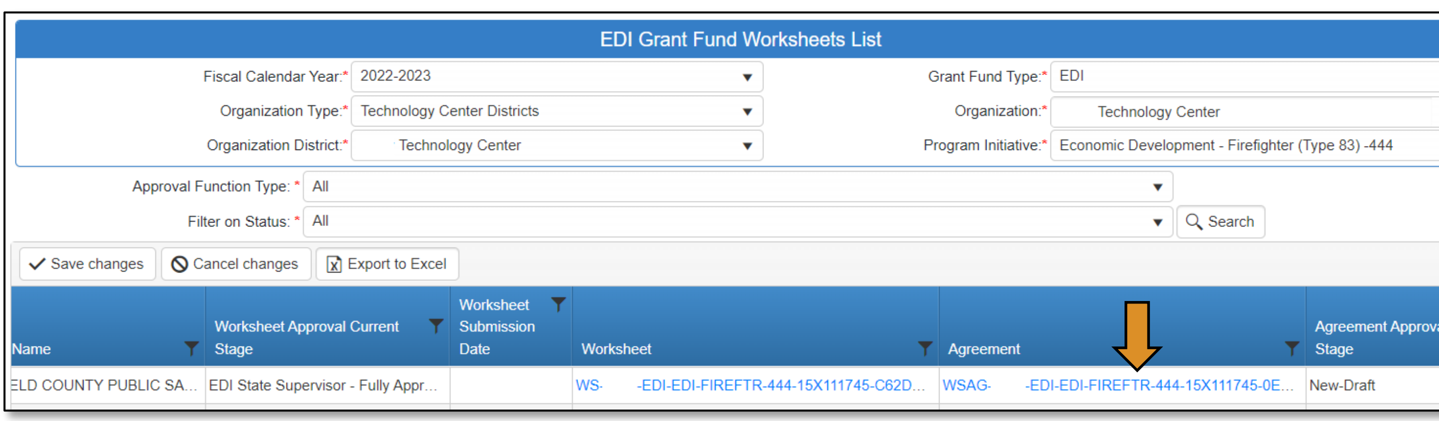
Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

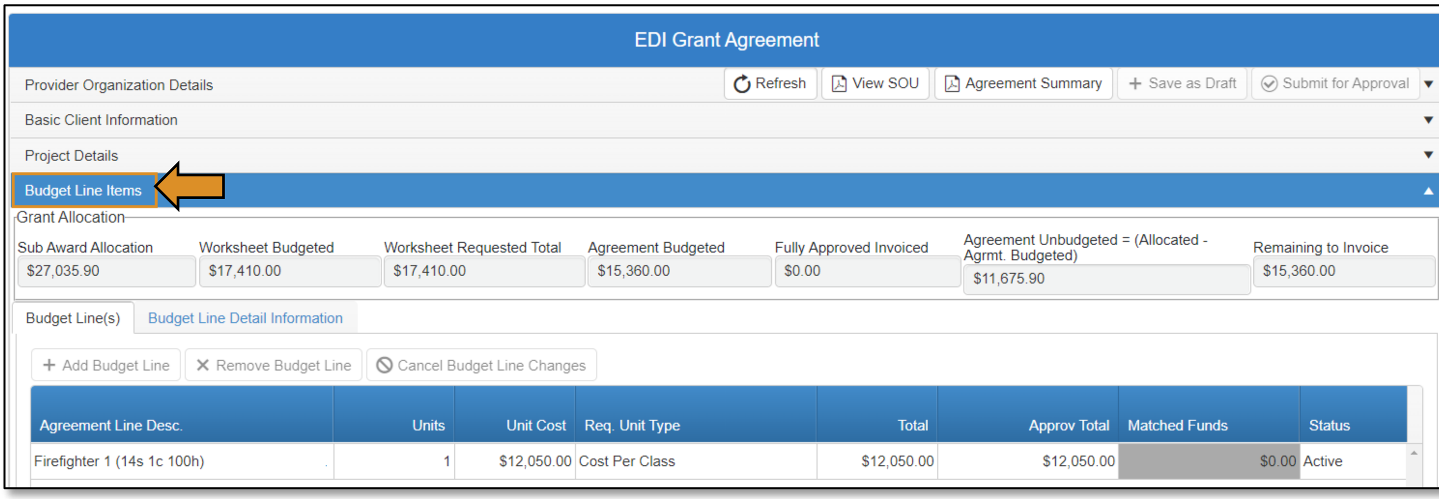


- The **Agreement column** will display an agreement number. Click the agreement number link to open the agreement.

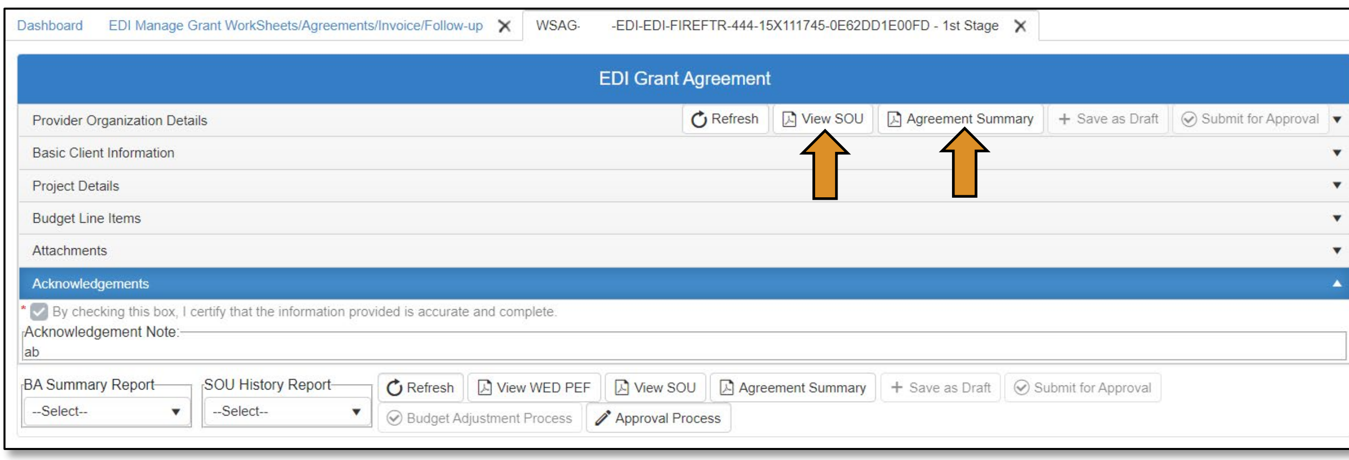


Reviewing the Agreement

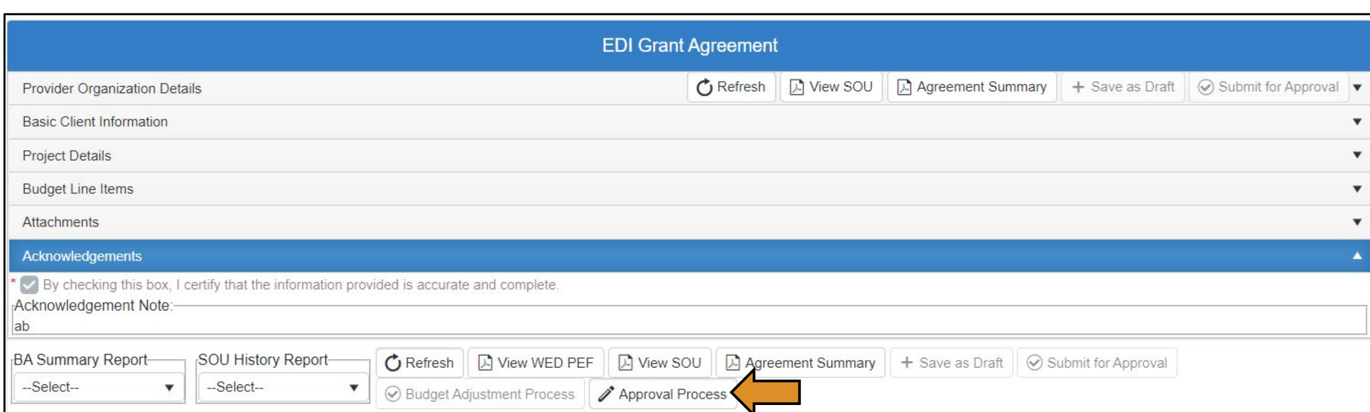
- Click on **Budget Line Items** to expand it and review the budget.



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

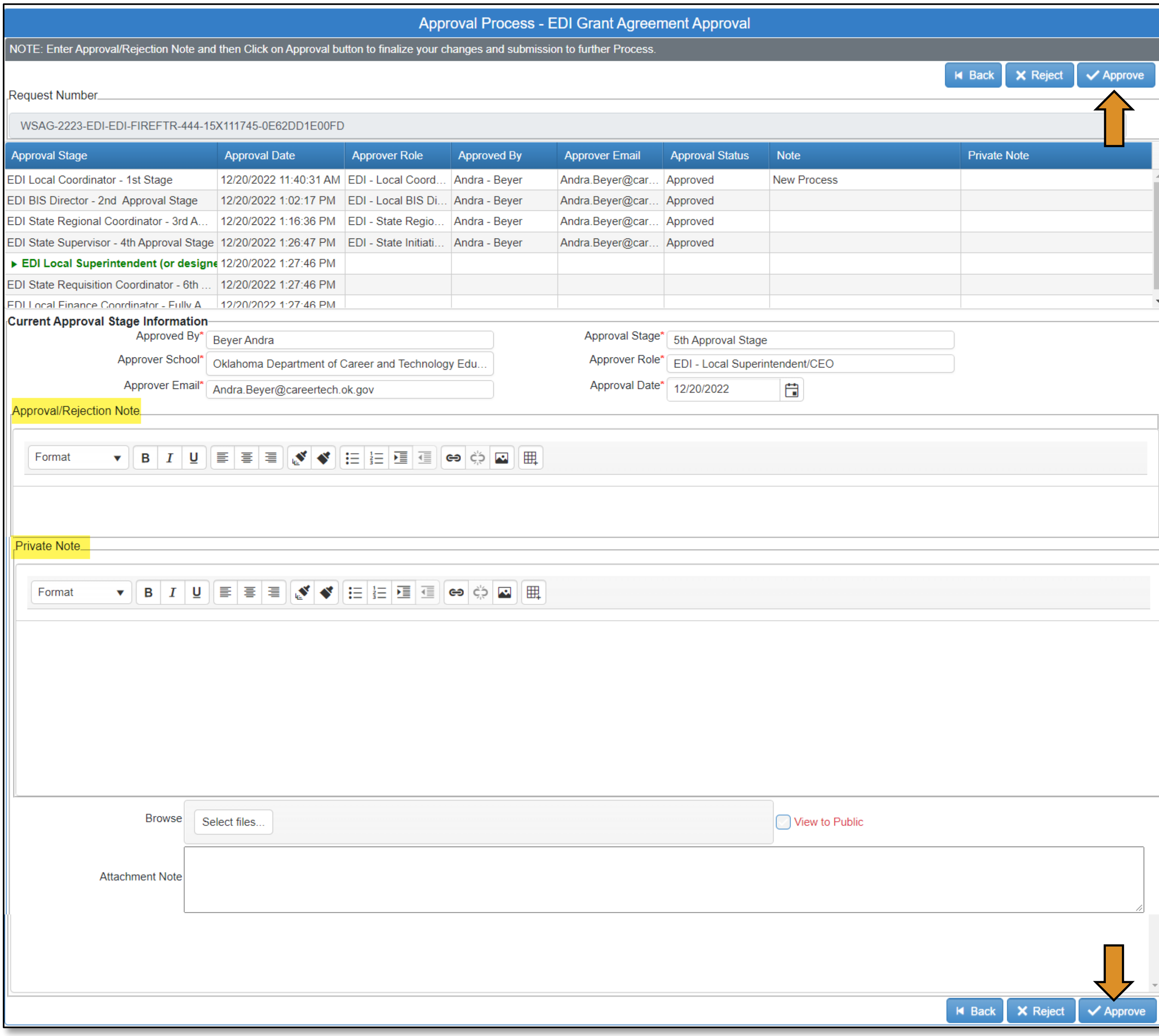


- Once you've reviewed the *Agreement*, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.



Agreement Acknowledgements and Approval

- 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.

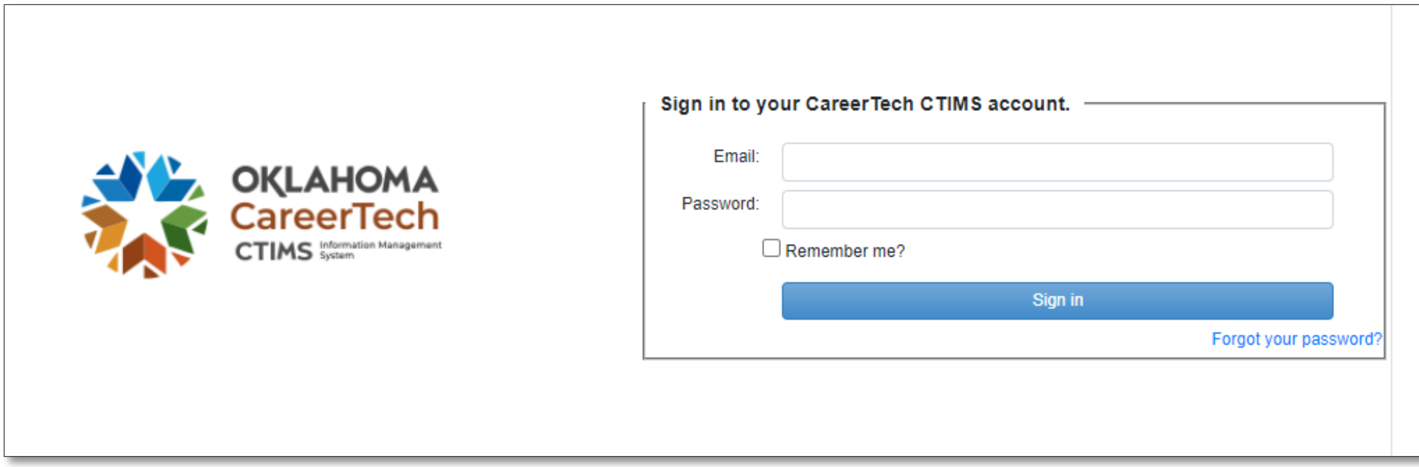


The *Agreement* will now go to the **EDI – State Requisition Coordinator** for approval and then it will go to the **EDI – Local Finance Coordinator** (instructions below for EDI-Local Finance Coordinator).

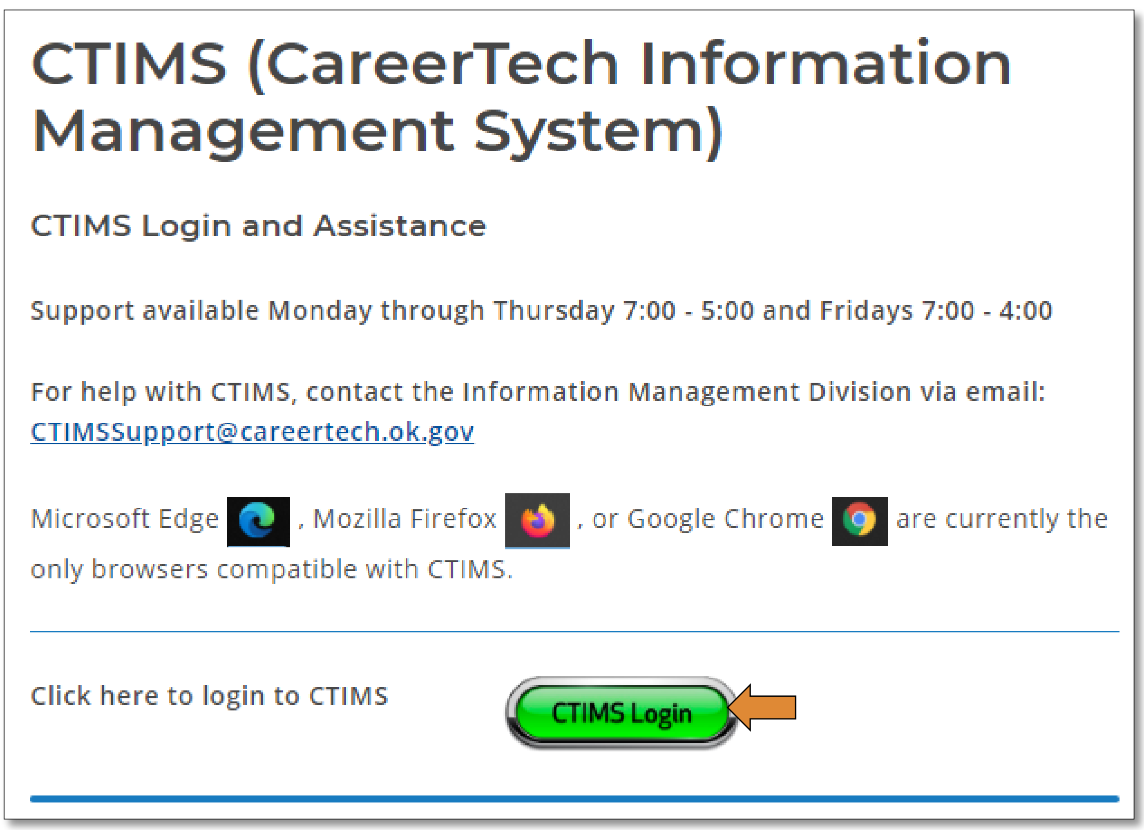
EDI – Local Finance Coordinator (Agreement Process)

Logging into CTIMS

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



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

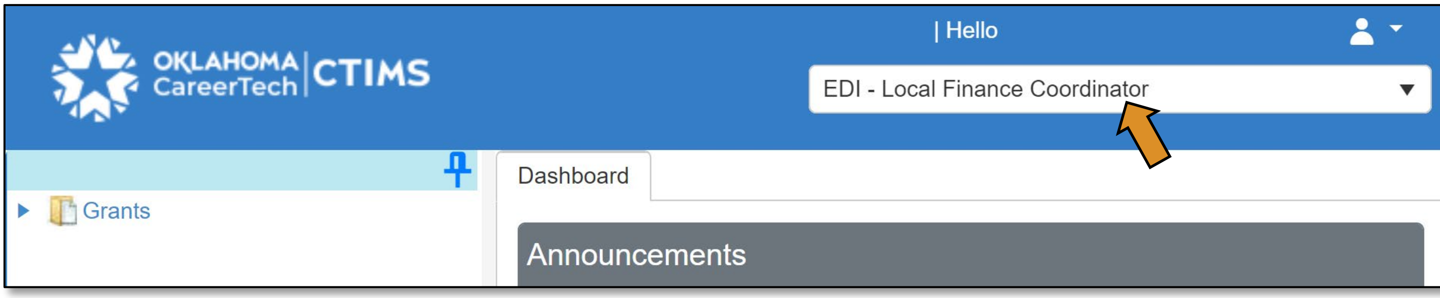
Microsoft Edge , Mozilla Firefox , or Google Chrome are currently the only browsers compatible with CTIMS.

Click here to login to CTIMS CTIMS Login

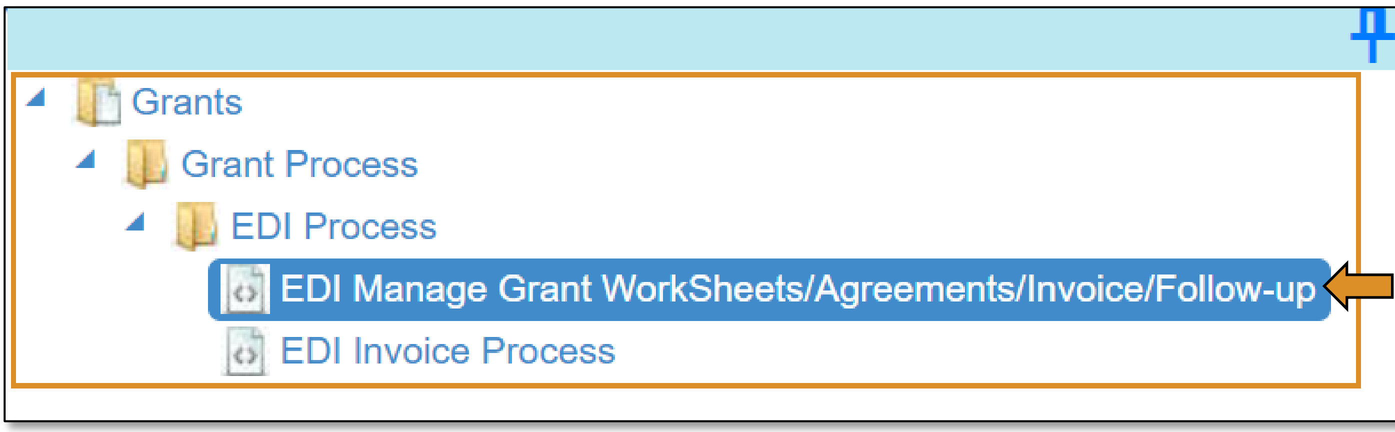
Accessing the Agreement List

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.



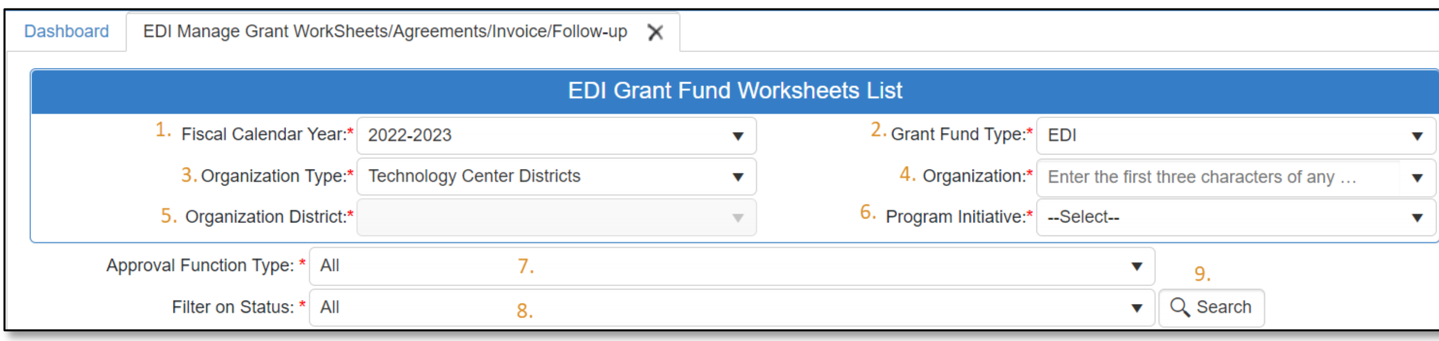
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** link.



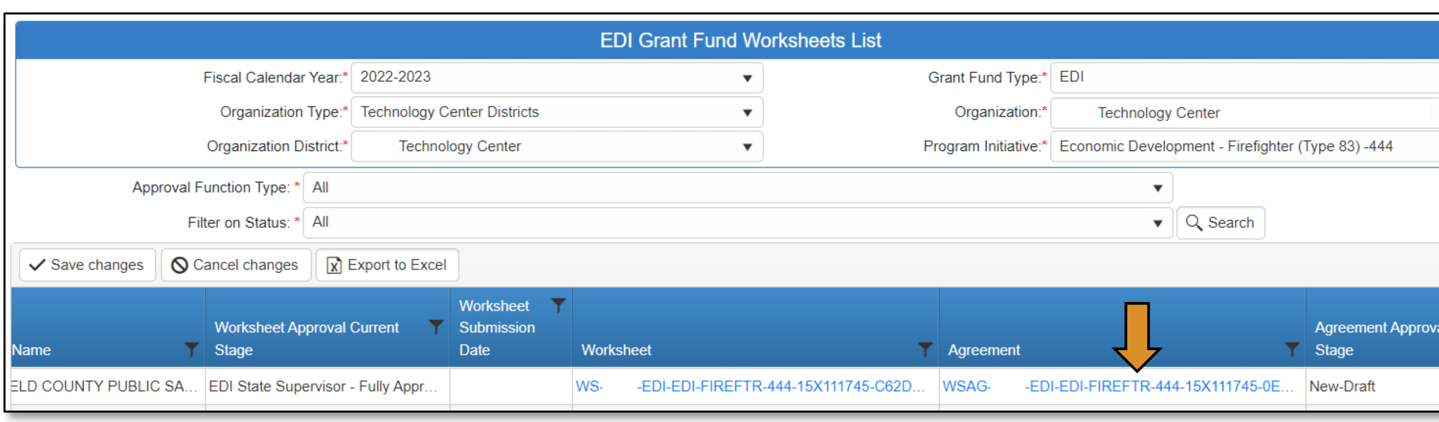
Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

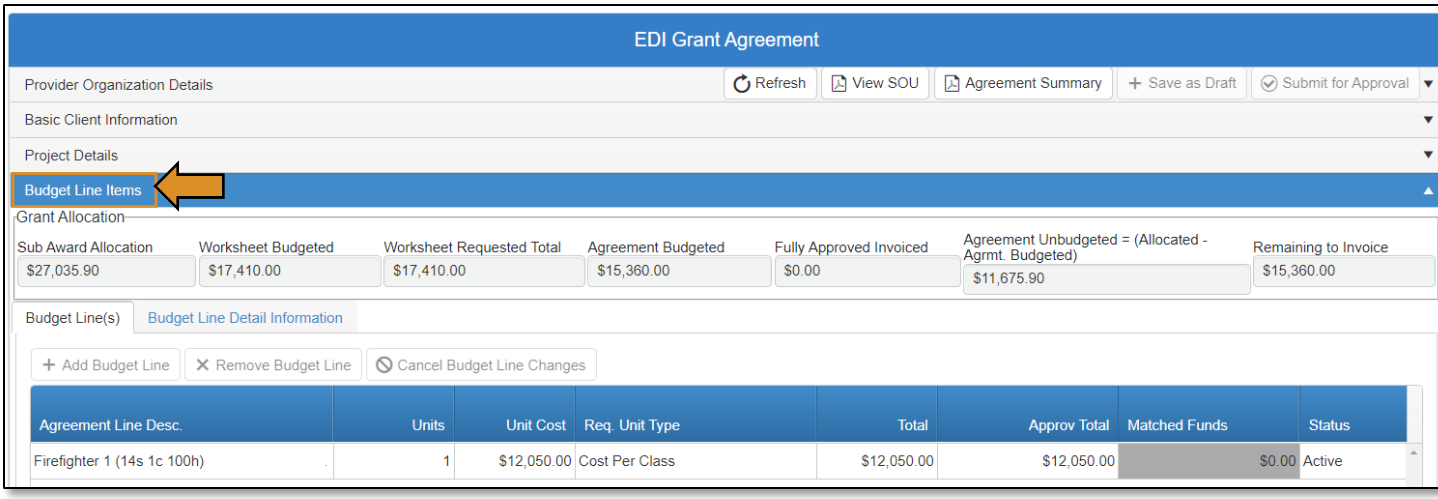


- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.

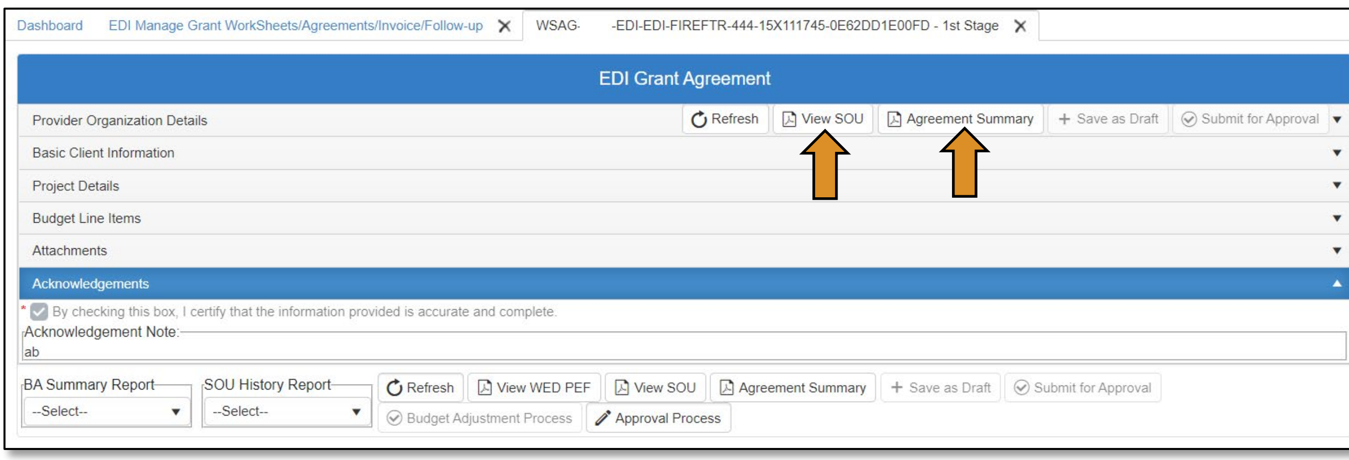


Reviewing the Agreement

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



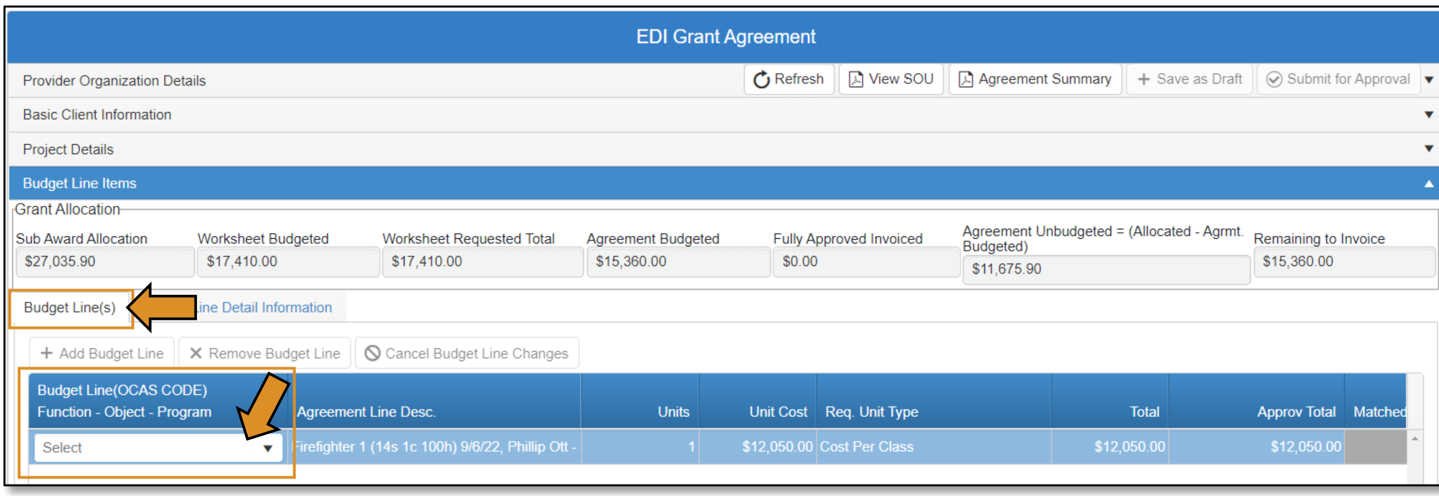
- To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below.



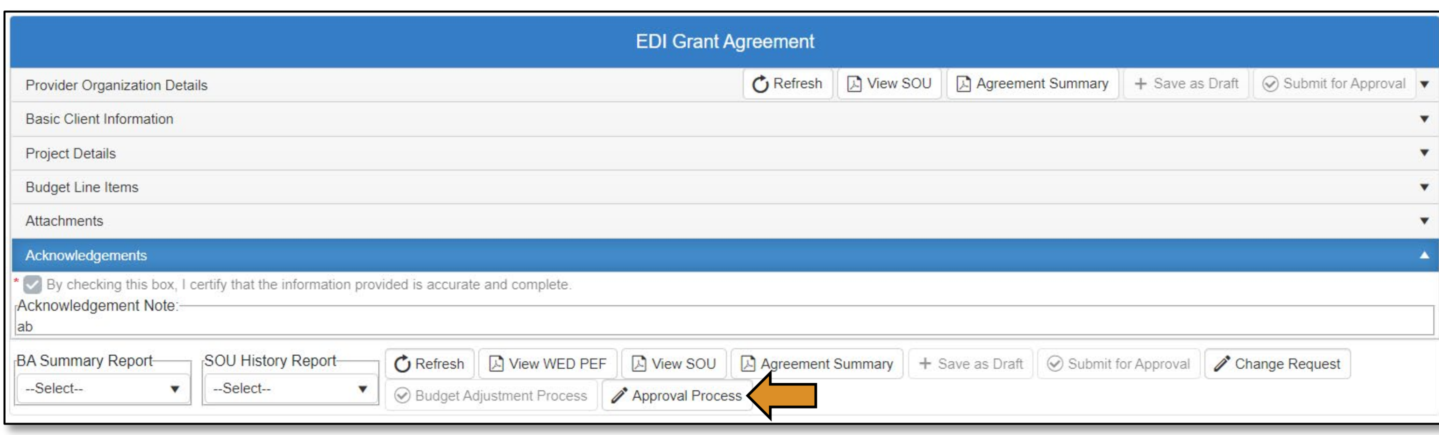
Entering OCAS Codes

- 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.

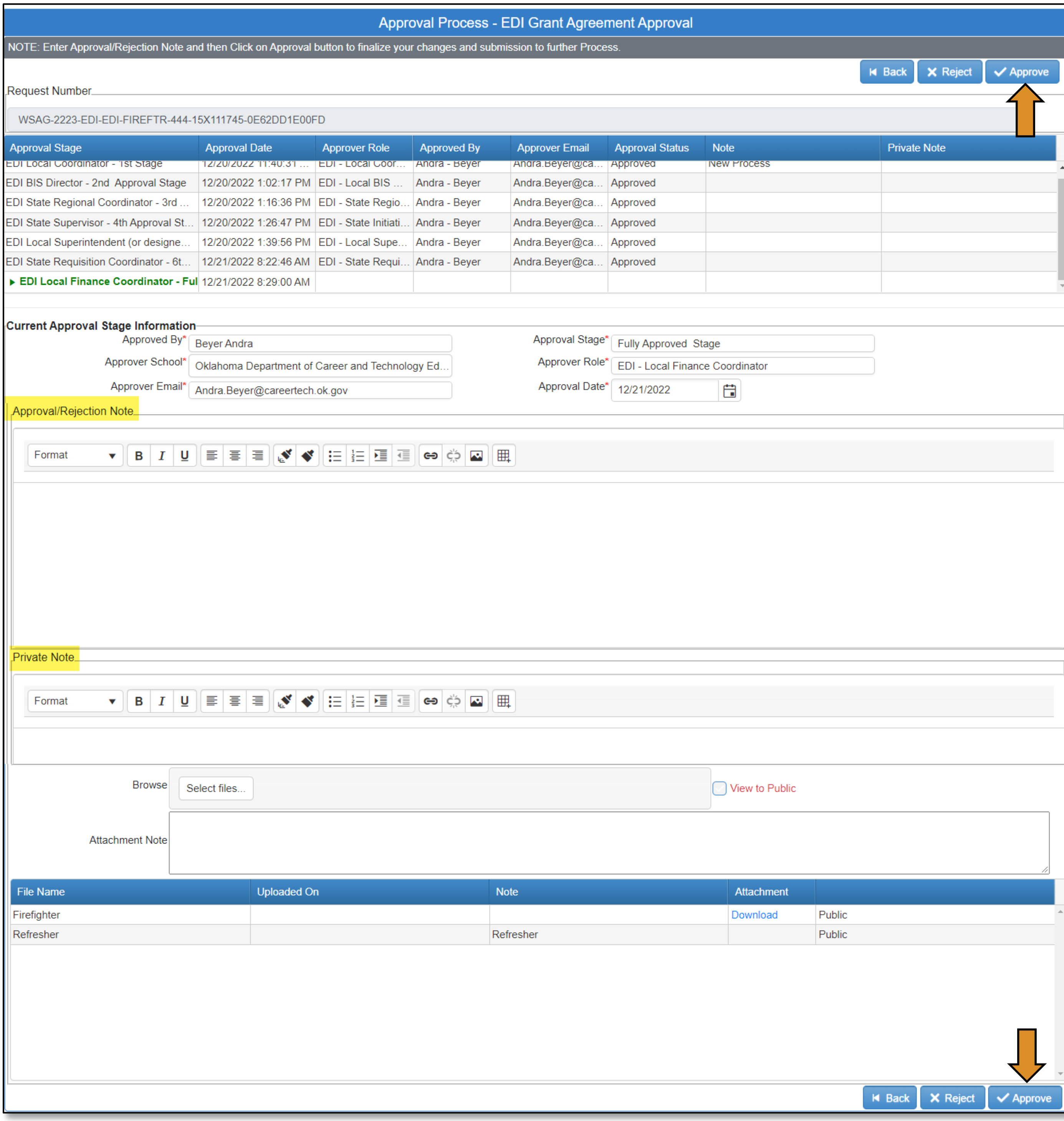


- After reviewing the budget information and entering the OCAS codes, click on the **Approval Process** button at the bottom of the screen.



Agreement Acknowledgements and Approval

- 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.



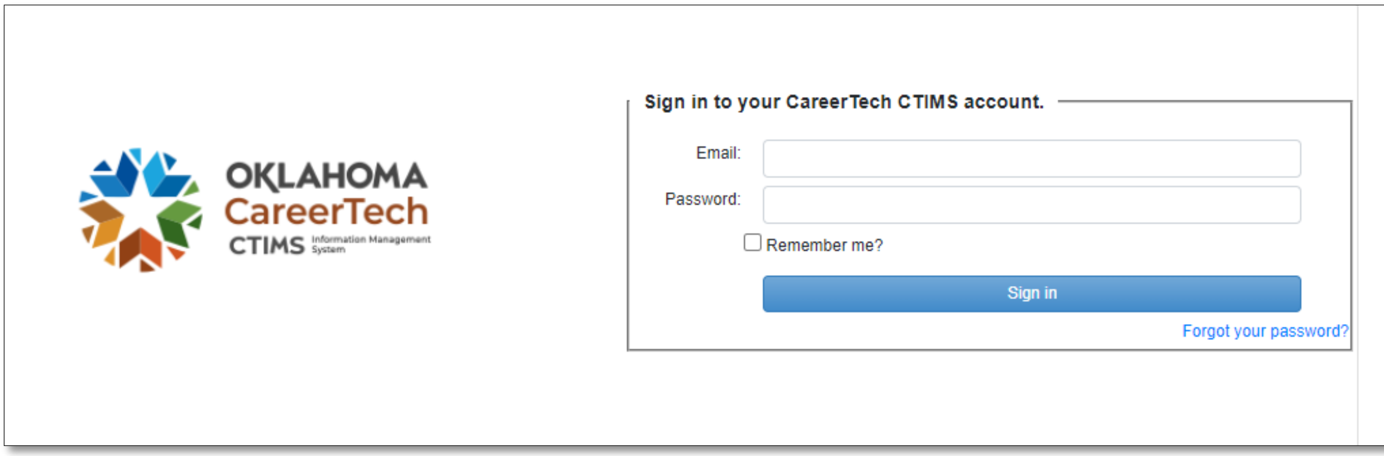
Budget Adjustment Process

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

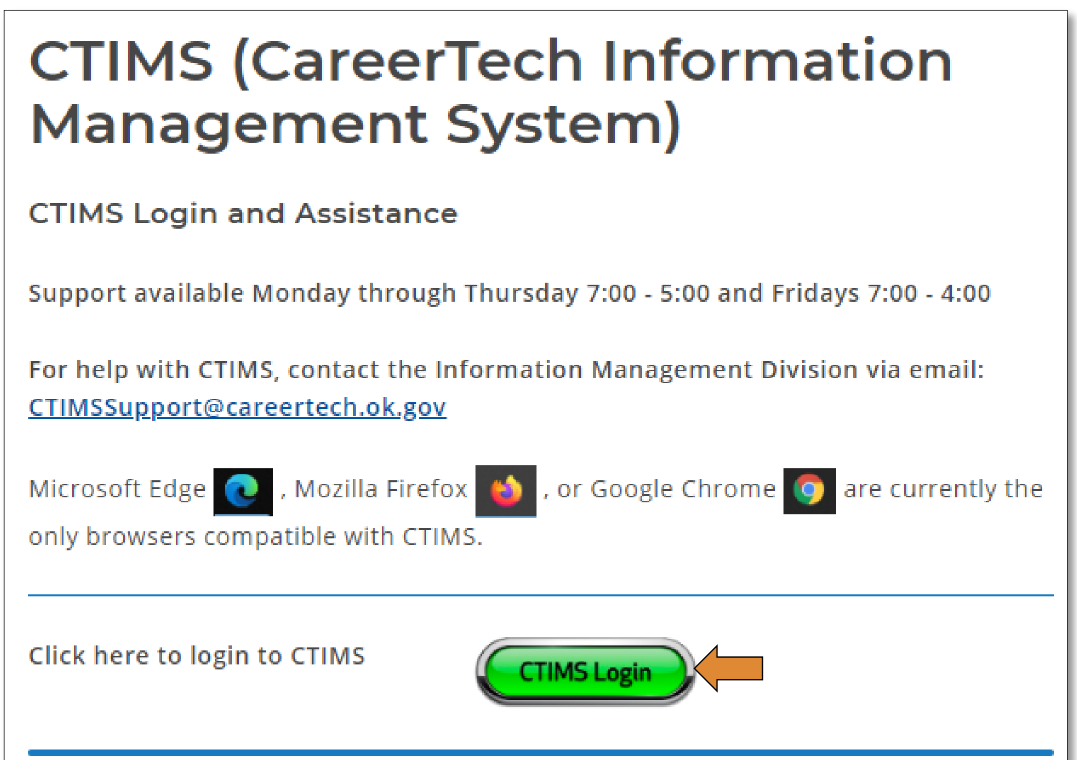
EDI – Local Coordinator (Budget Adjustment Process)

Logging into CTIMS

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



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

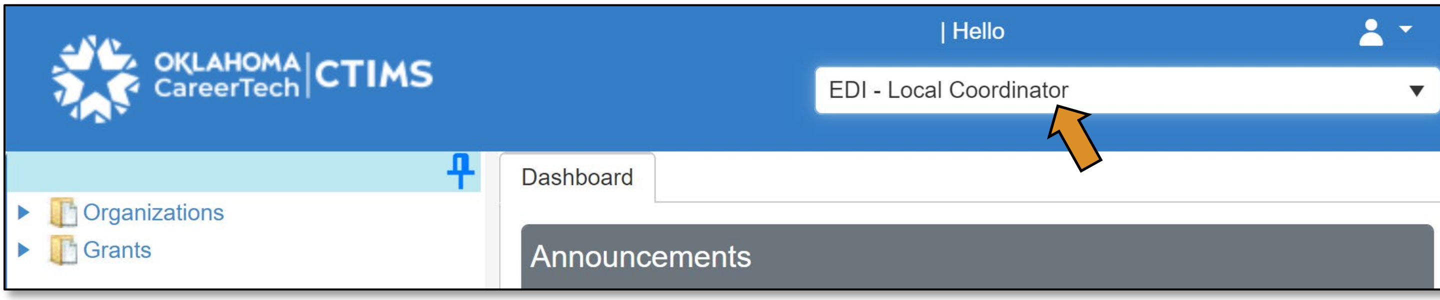


Accessing the Agreement List

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

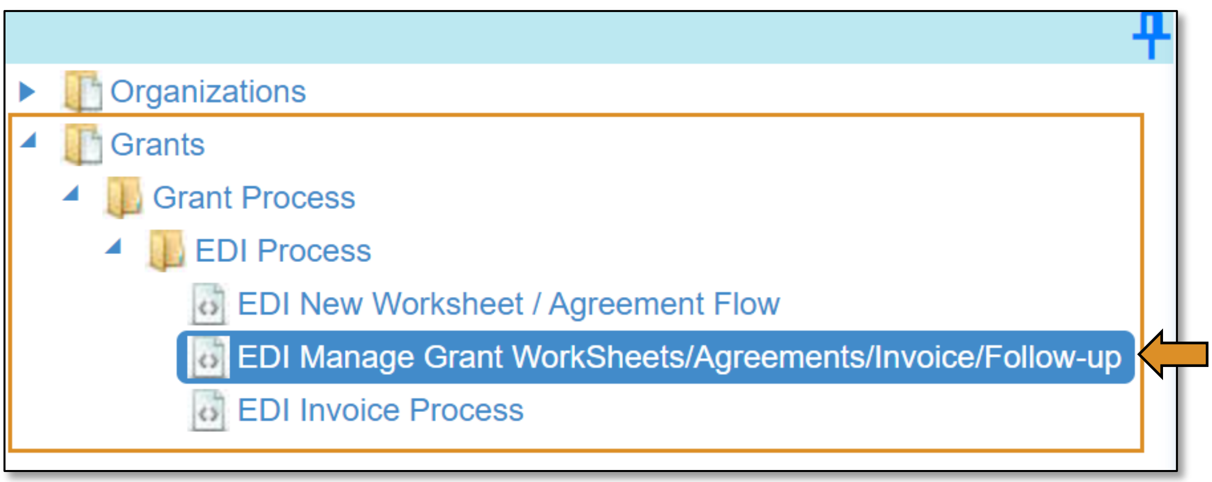
If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **EDI – Local Finance Coordinator** contact 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.

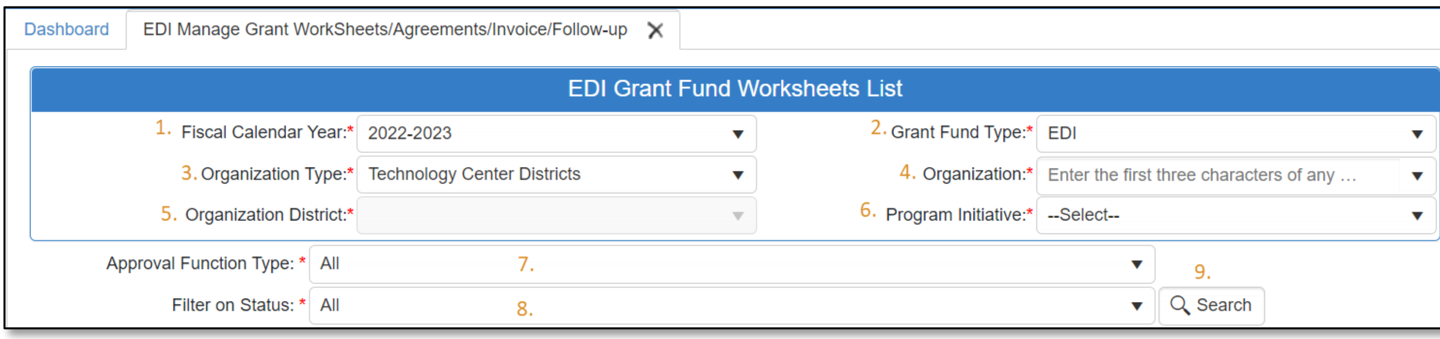
IMPORTANT: Do not select the *EDI New Worksheet/Agreement Flow* link on the left navigation. This will start a completely **new** worksheet.



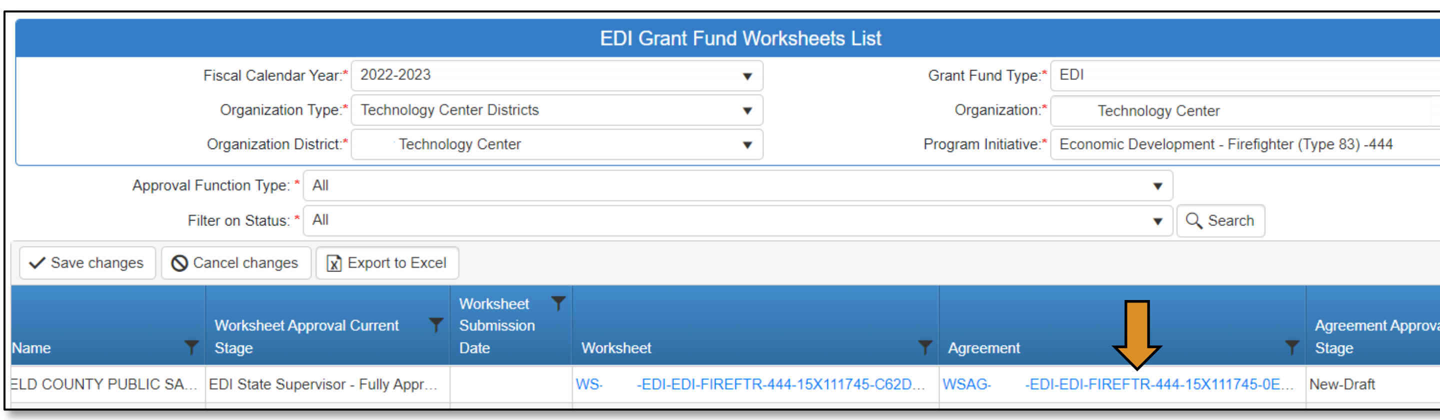
Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

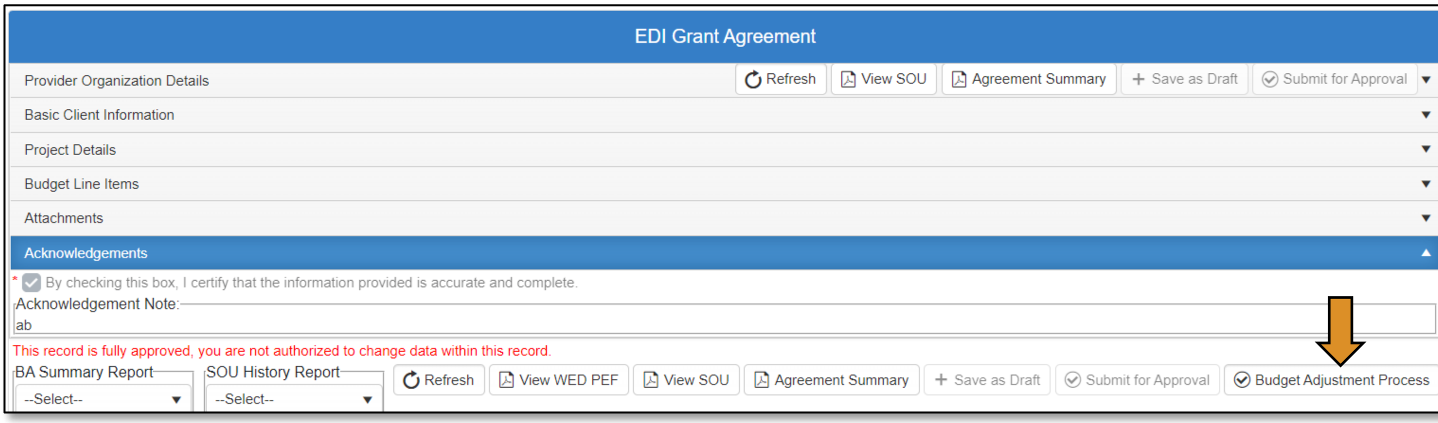


- The **Agreement** column will display an agreement number. Click the agreement number link to open the agreement.



Initiating the Budget Adjustment

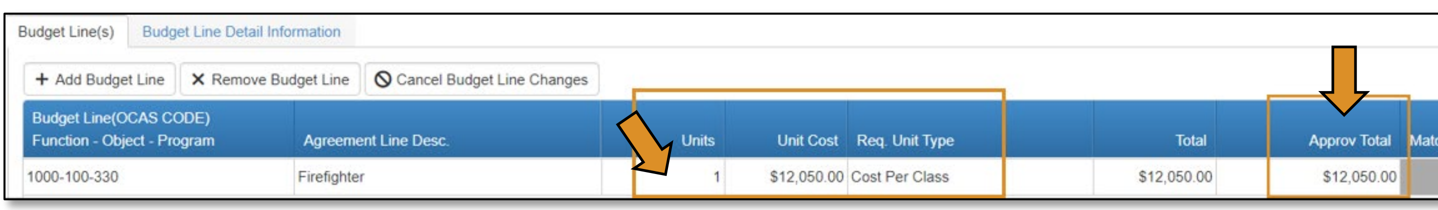
- At the bottom right corner of the **EDI Grant Agreement** screen, click **Budget Adjustment Process.**



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

- 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 <u>not</u> work in the Budget Adjustment Process.*

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

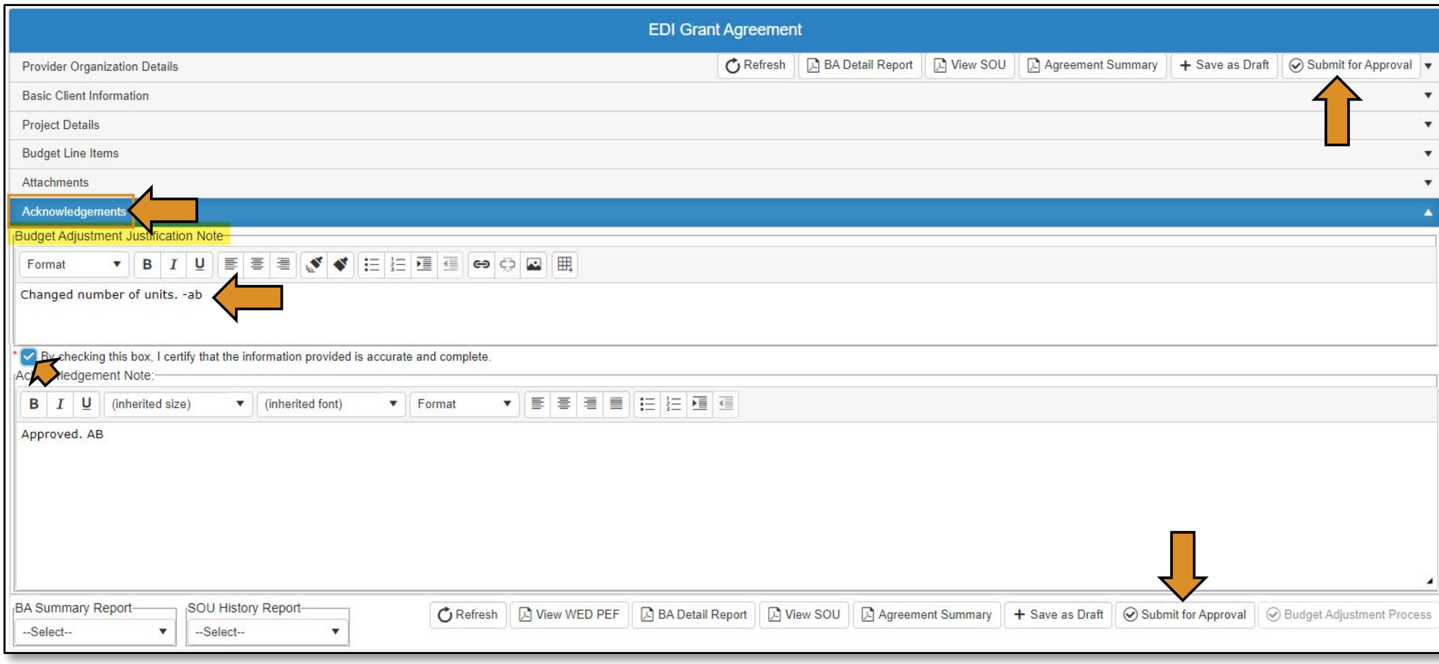


NOTE: Once the changes have been made, you can Save as Draft by clicking **Save as Draft**. This will save the changes that were just made without submitting to the next approval stage, so you can return and finish later.

*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 *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.

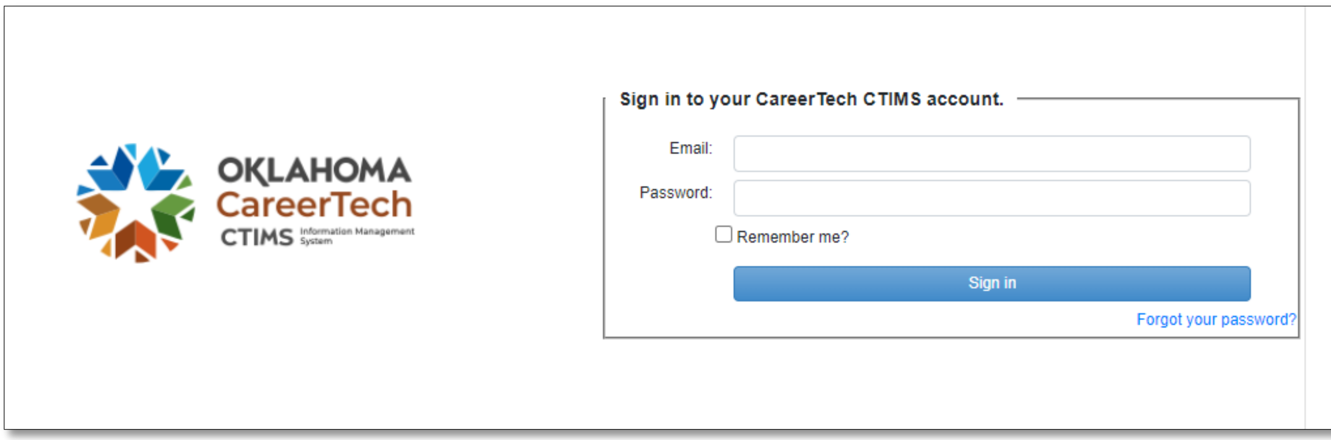
EDI – Local Coordinator (Invoice Process)

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

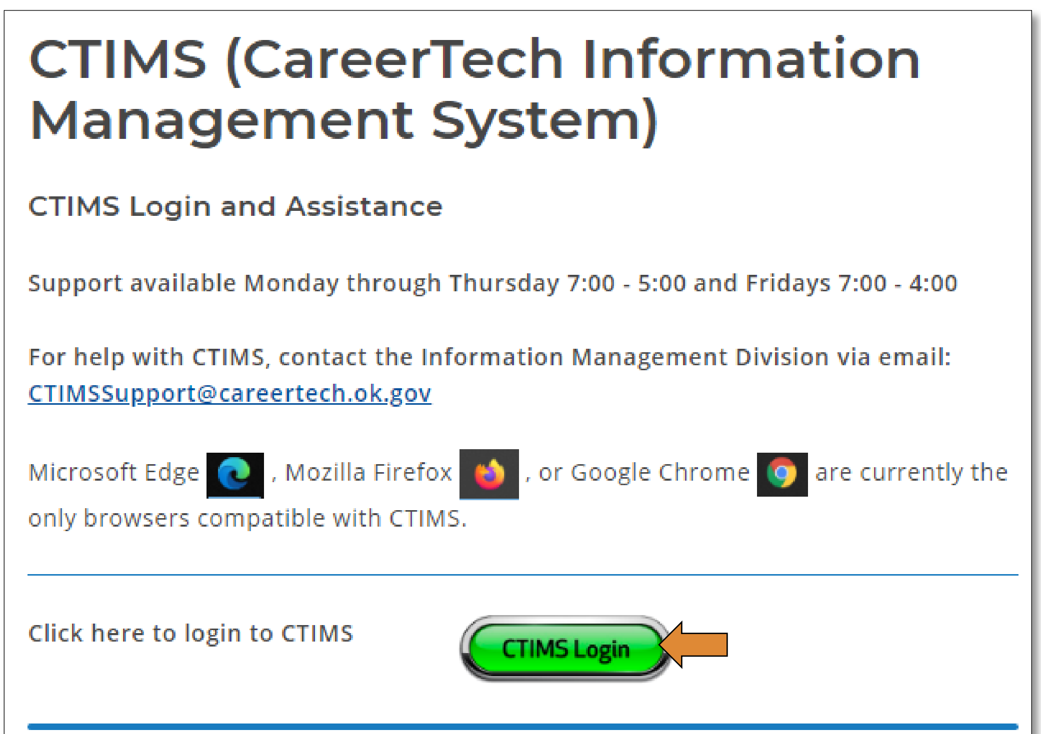
IMPORTANT: Before initiating an invoice, all budget adjustments must by fully approved.

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) and select the green **CTIMS Login** button.

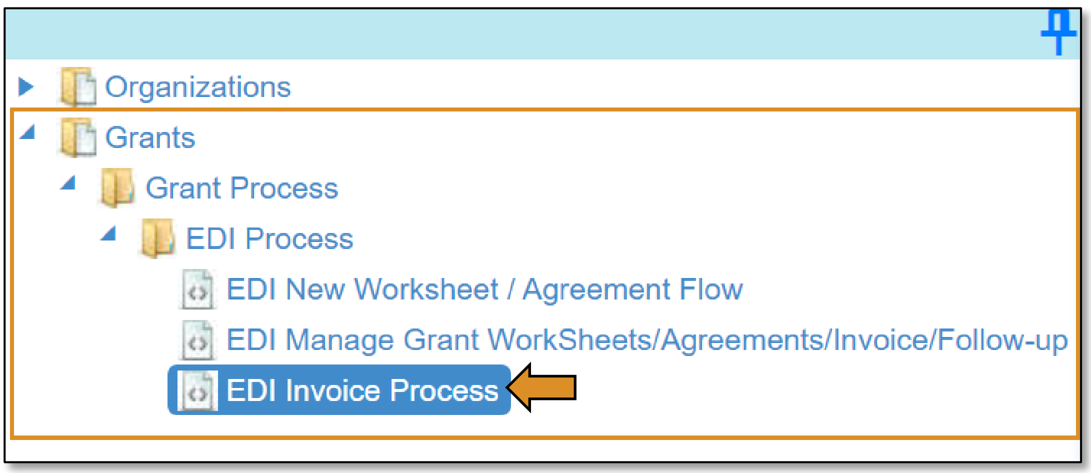


Accessing the Invoice

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.

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

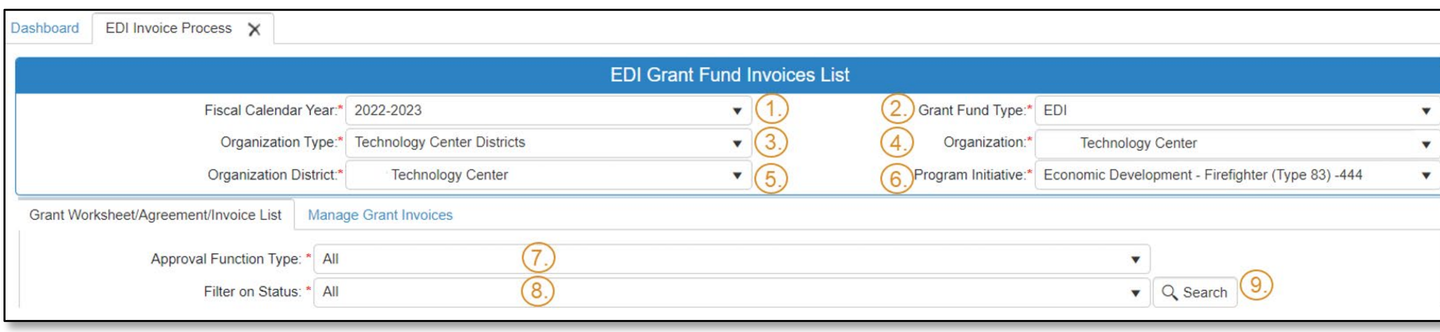


Creating a New Invoice

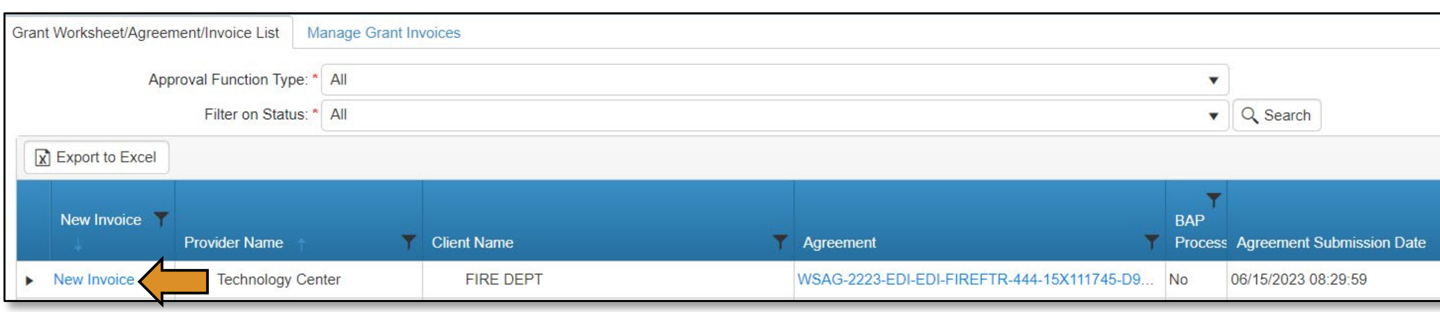
Complete the **EDI Grant Fund Invoices List** form**.** The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

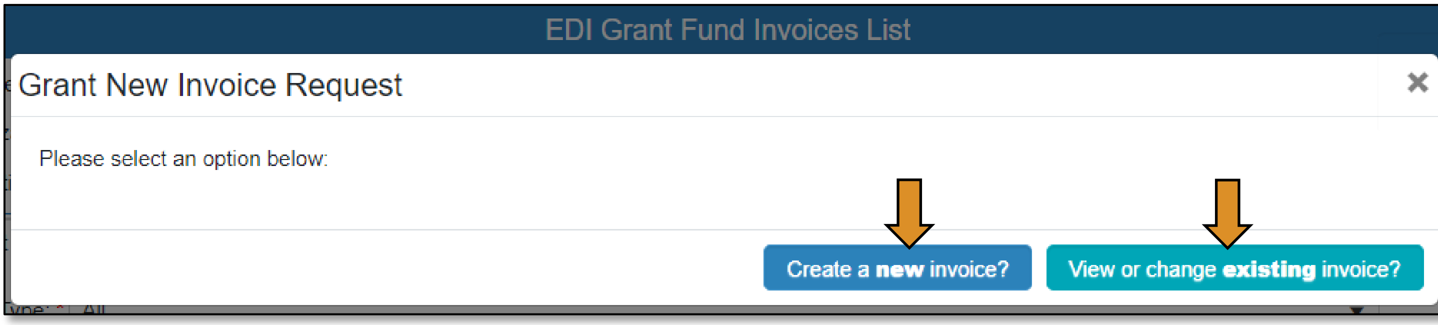


- After clicking the **Search** button, select **New Invoice** to start a new invoice.

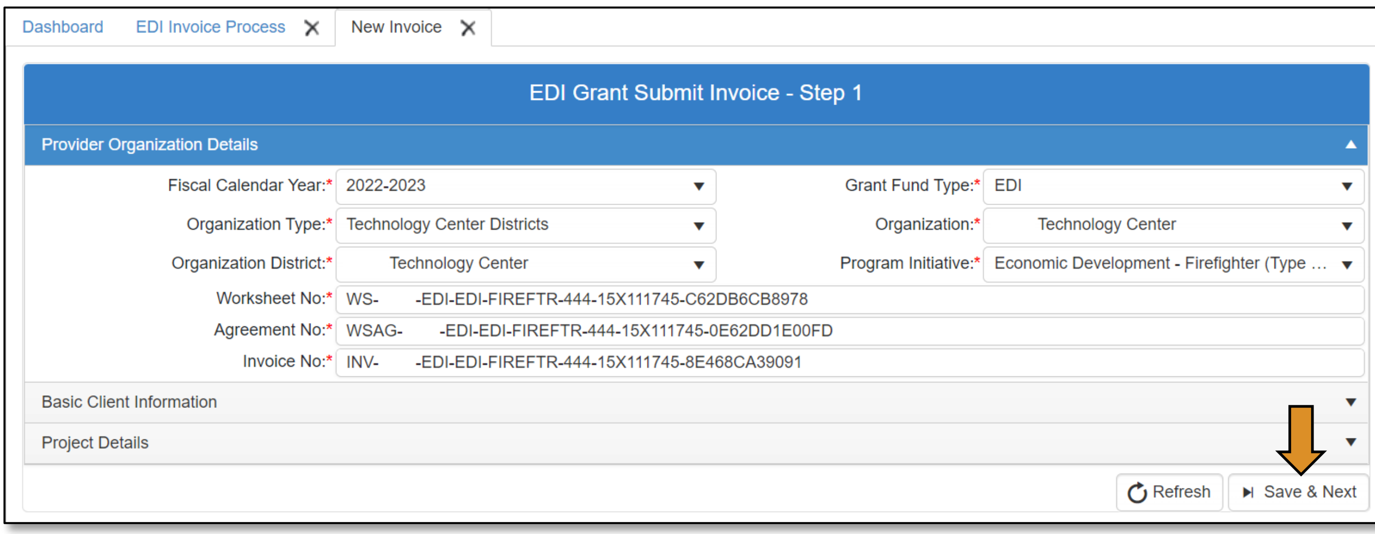


A box will pop up asking if you want to create a **new** invoice or if you would like to view or change **existing** invoice?

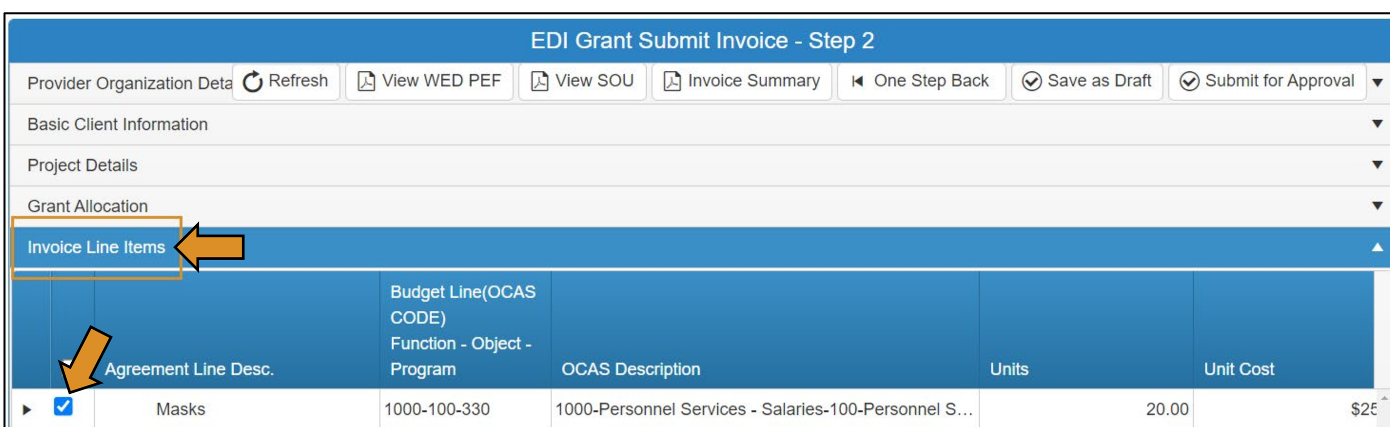
- Click on the button you need – this pop-up is to help prevent unnecessary new invoices being created.



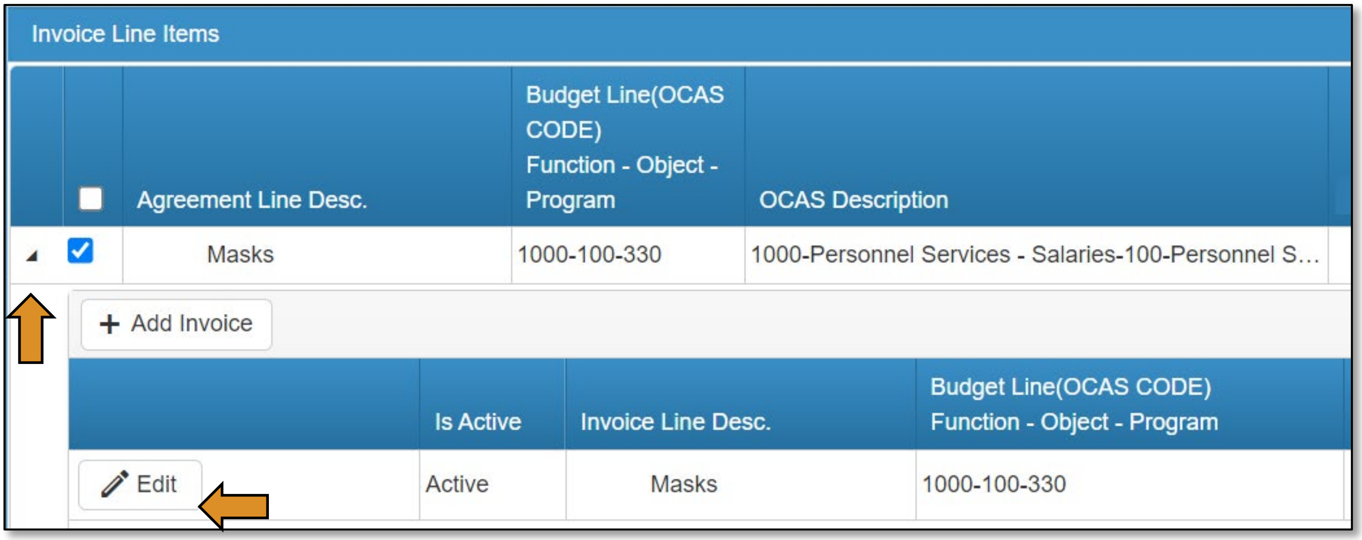
- Double check that everything is correct on the screen.
- Click **Save & Next**.



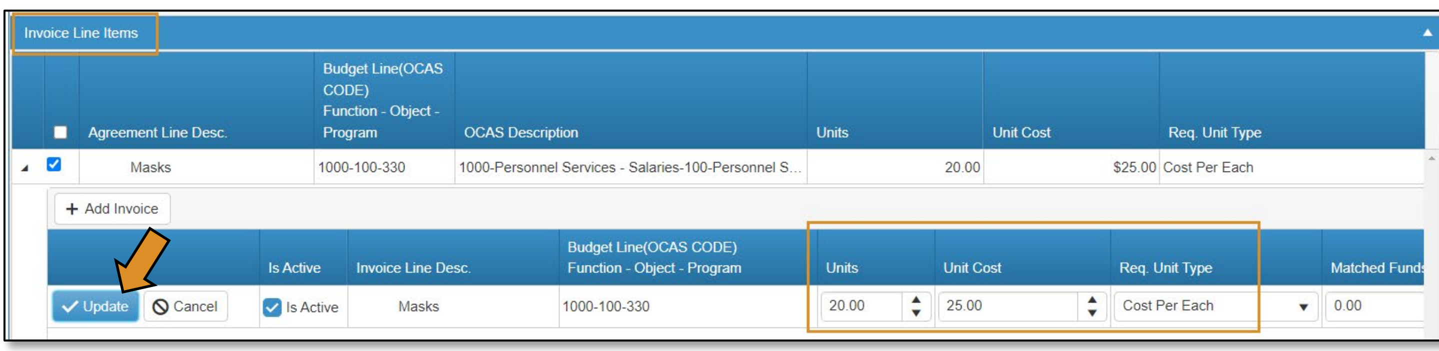
- On the **EDI Grant Submit Invoice-Step 2** screen, select the budget line item you want to invoice by clicking on the checkbox next to the line item. <u>You may select multiple line items to invoice.</u>



- 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.



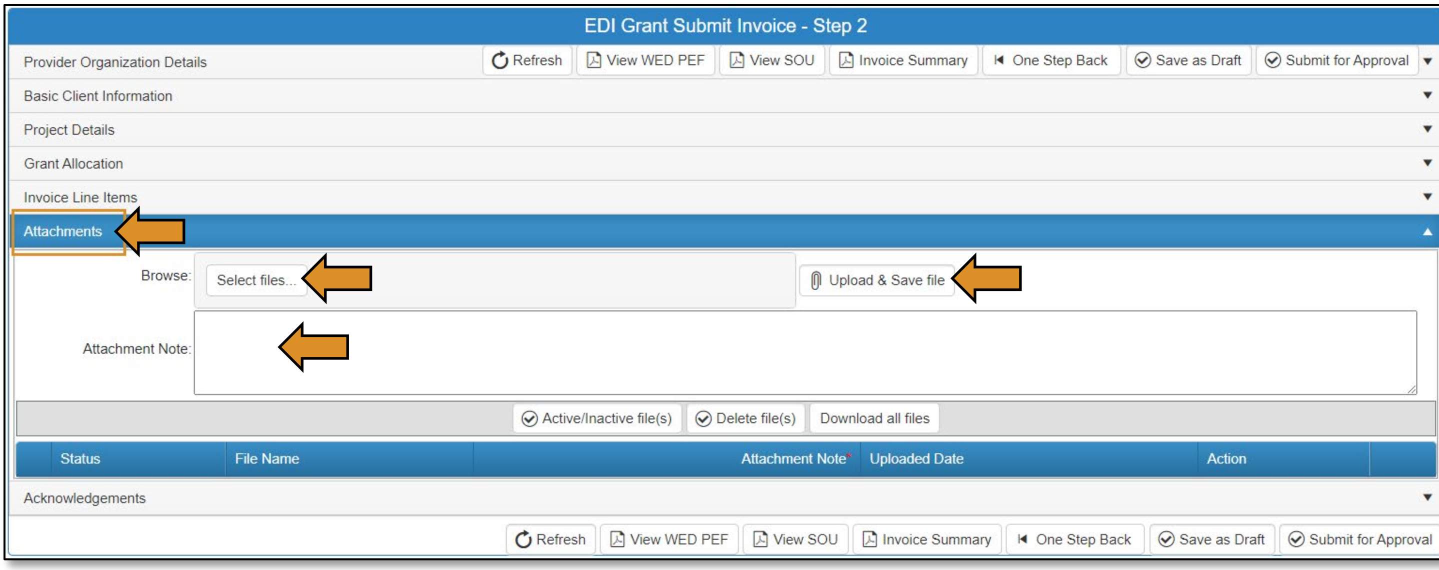
- Make the necessary changes to the **Units**, **Unit Cost**, and/or **Req. Unit Type** fields by clicking in the cell or use the arrows on each field. This will update the **Total to be Invoiced** column. Once the necessary adjustments have been made, click the **Update** button.



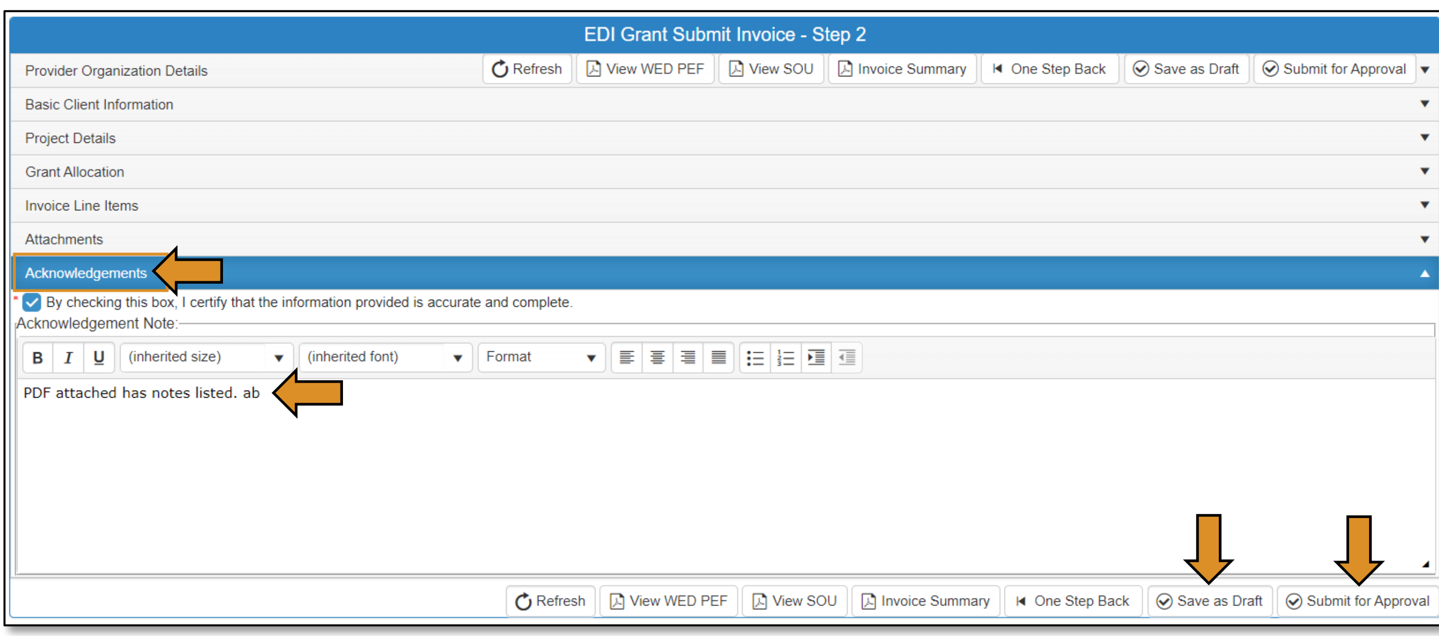
- Expand the Attachments section by clicking on the word **Attachments**. Upload required documents. *Refer to page 12 of the WED [Guidelines] for invoicing requirements.*

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

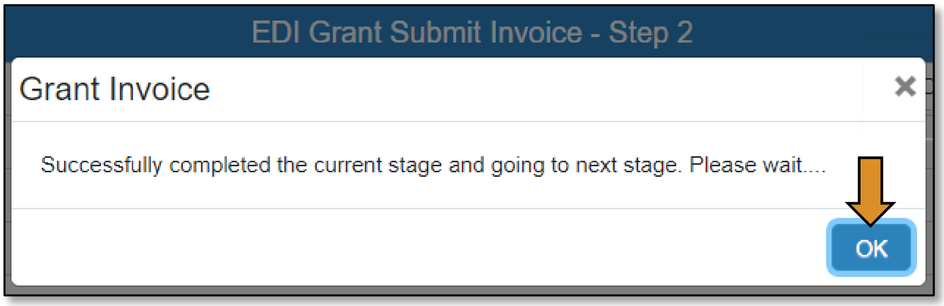
- Click **Select files…** to locate the files on your computer.
- Then, select **Upload & Save file** to attach the file.
  - A message box will say you have successfully uploaded the file. Close this box.
- Add a note in the **Attachment Note:** section for extenuating circumstances related to the line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



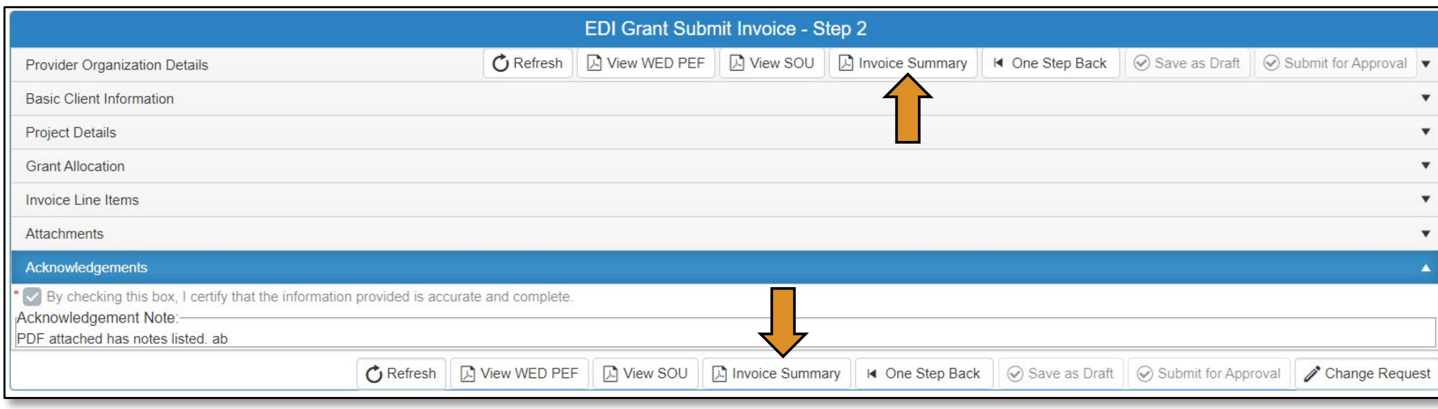
- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an Acknowledgment Note in the box.
- Click **Save as Draft**.
- Then, click the **Submit for Approval** button.



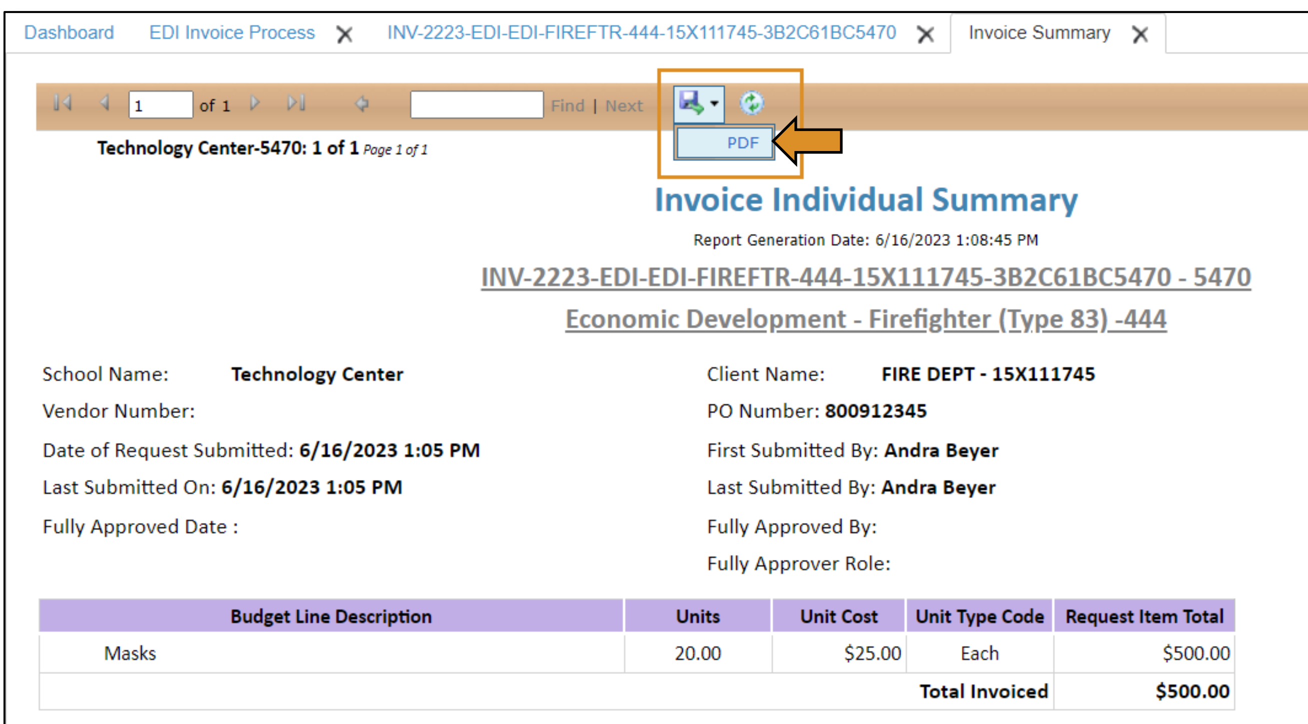
- A message will pop-up to let you know that you have submitted the invoice successfully.
- Click the **OK**.



- 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.



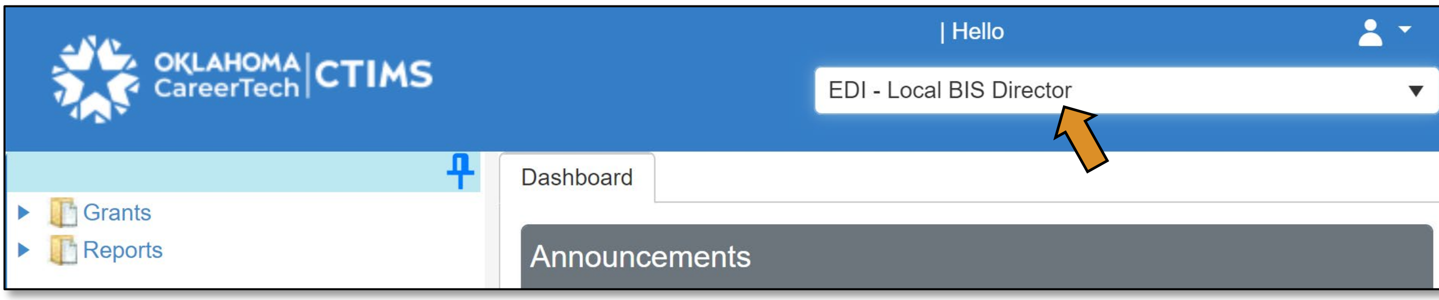
The invoice has been successfully submitted and will go to the **EDI – Local BIS Director**.

EDI – Local BIS Director (Invoice Process)

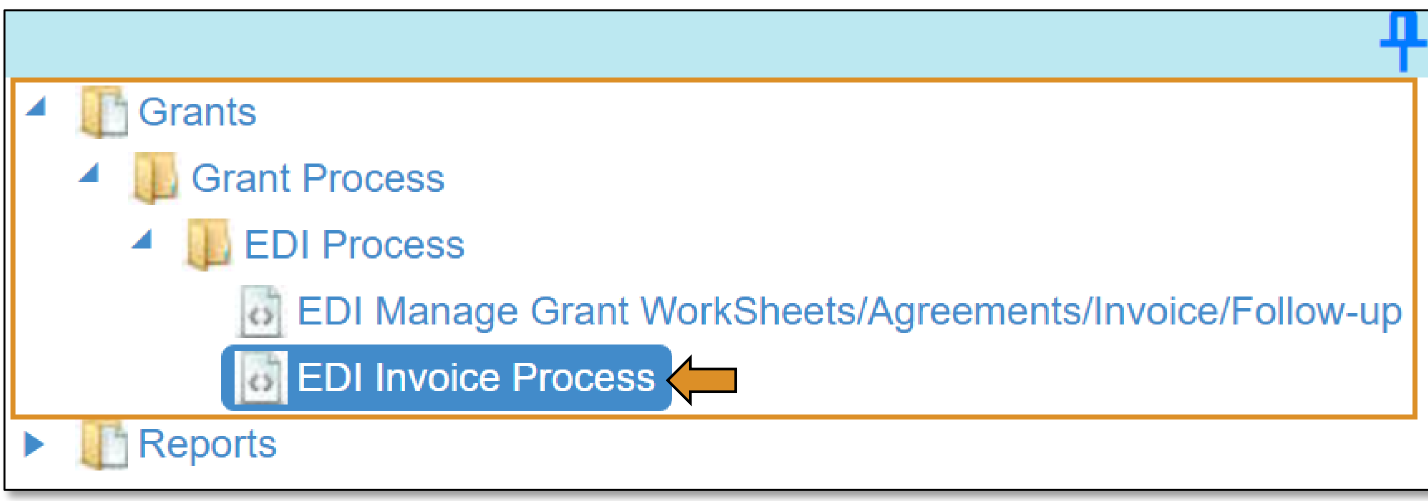
Accessing Invoice

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.



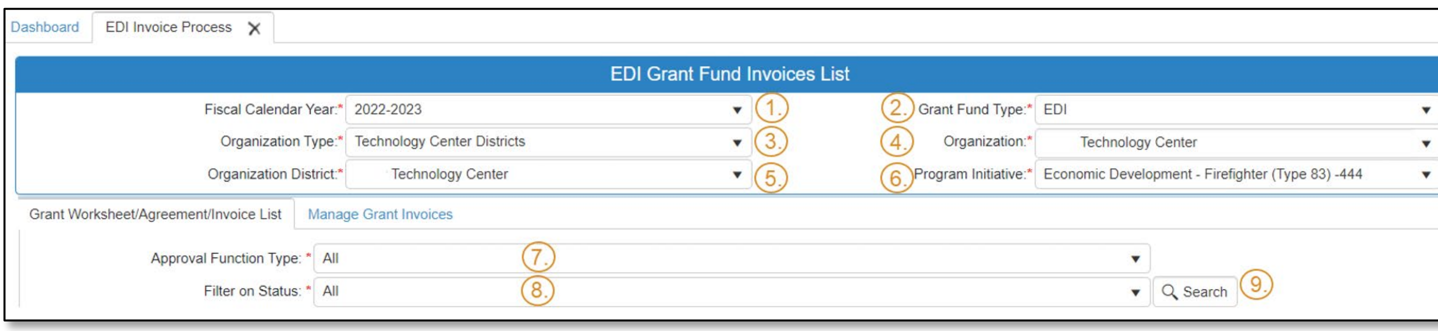
- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Invoice Process** link.



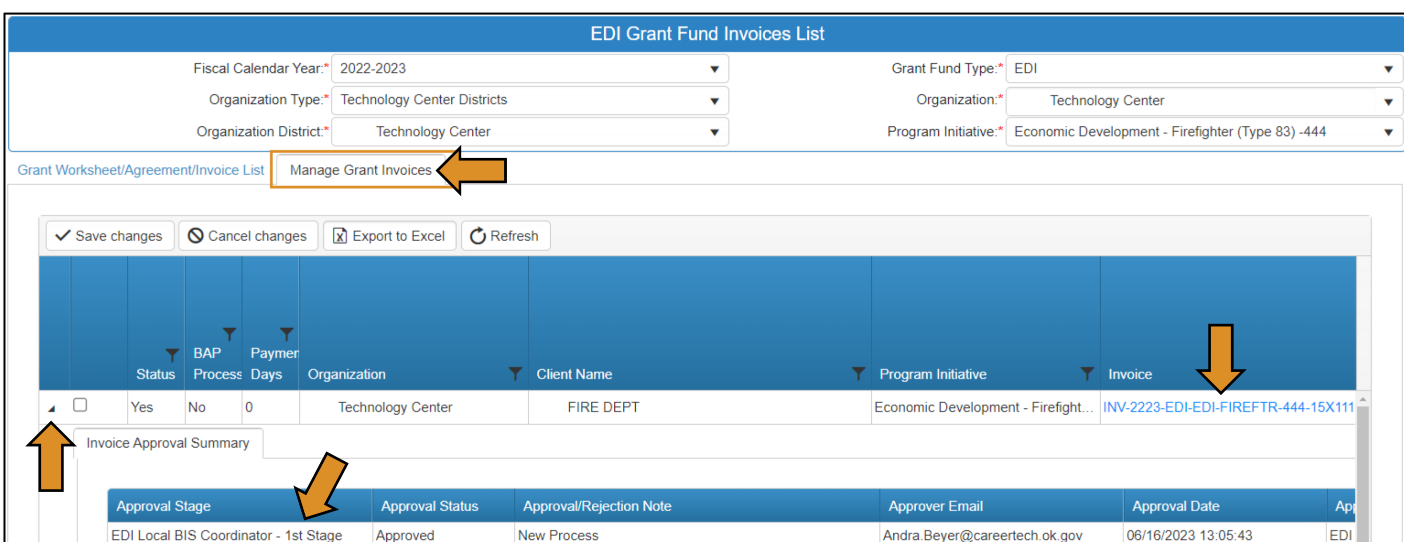
Complete the **EDI Grant Fund Invoices List** form**.** The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

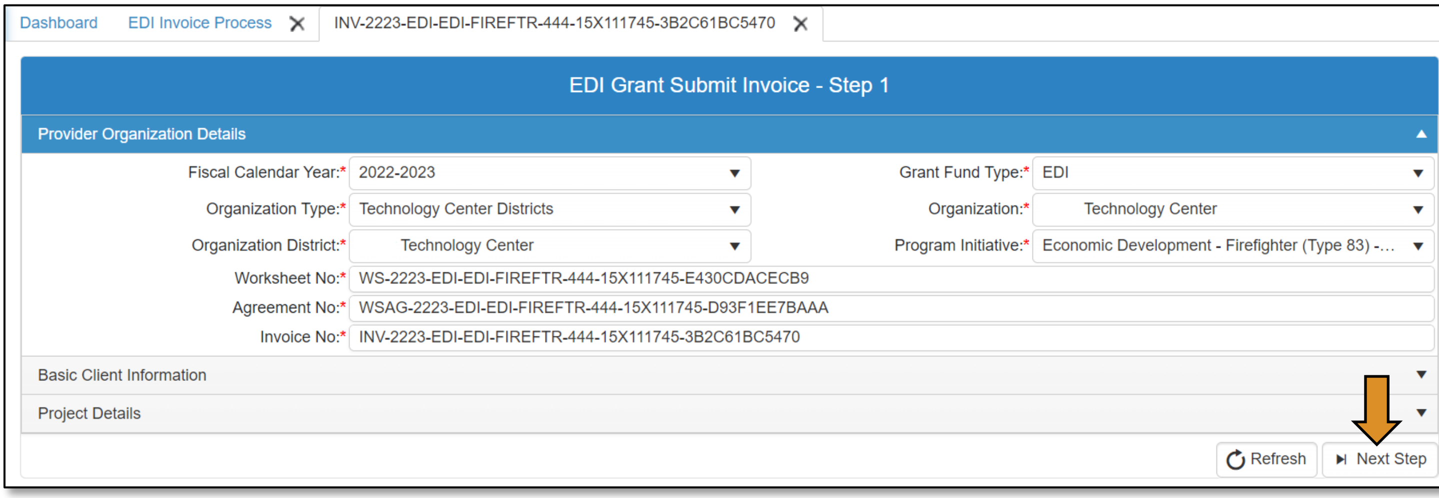


- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view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



EDI Grant Submit Invoice – Step 1

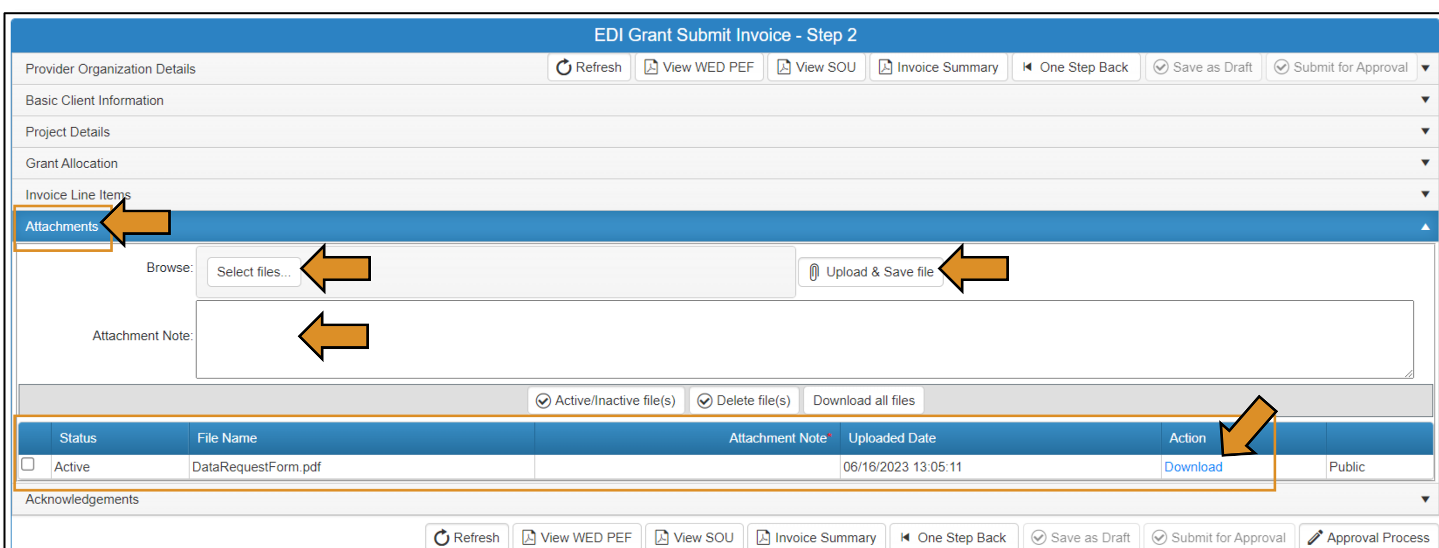
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



EDI Grant Submit Invoice – Step 2

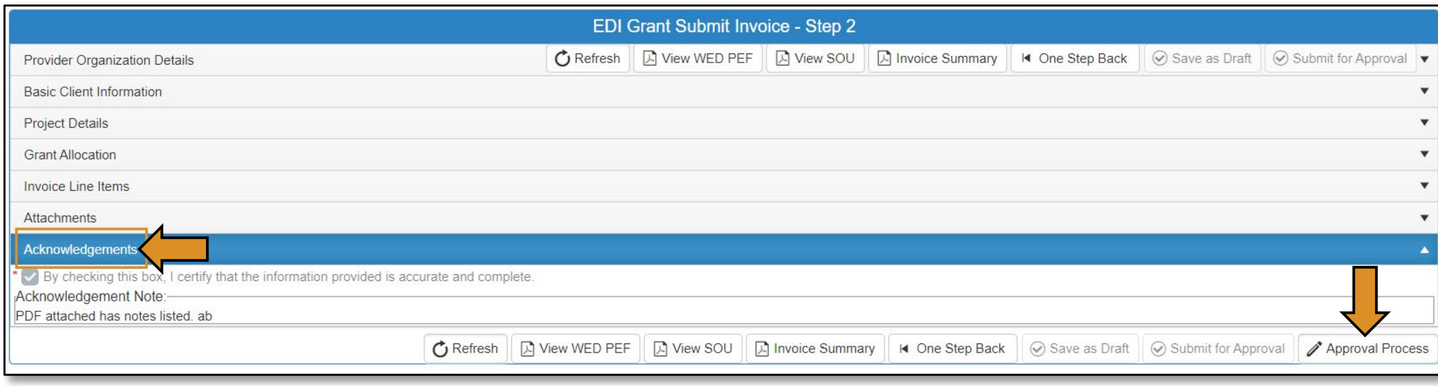
On the **EDI Grant Submit Invoice-Step 2** screen, the **Invoice Line Items** section should automatically expand.

- 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.



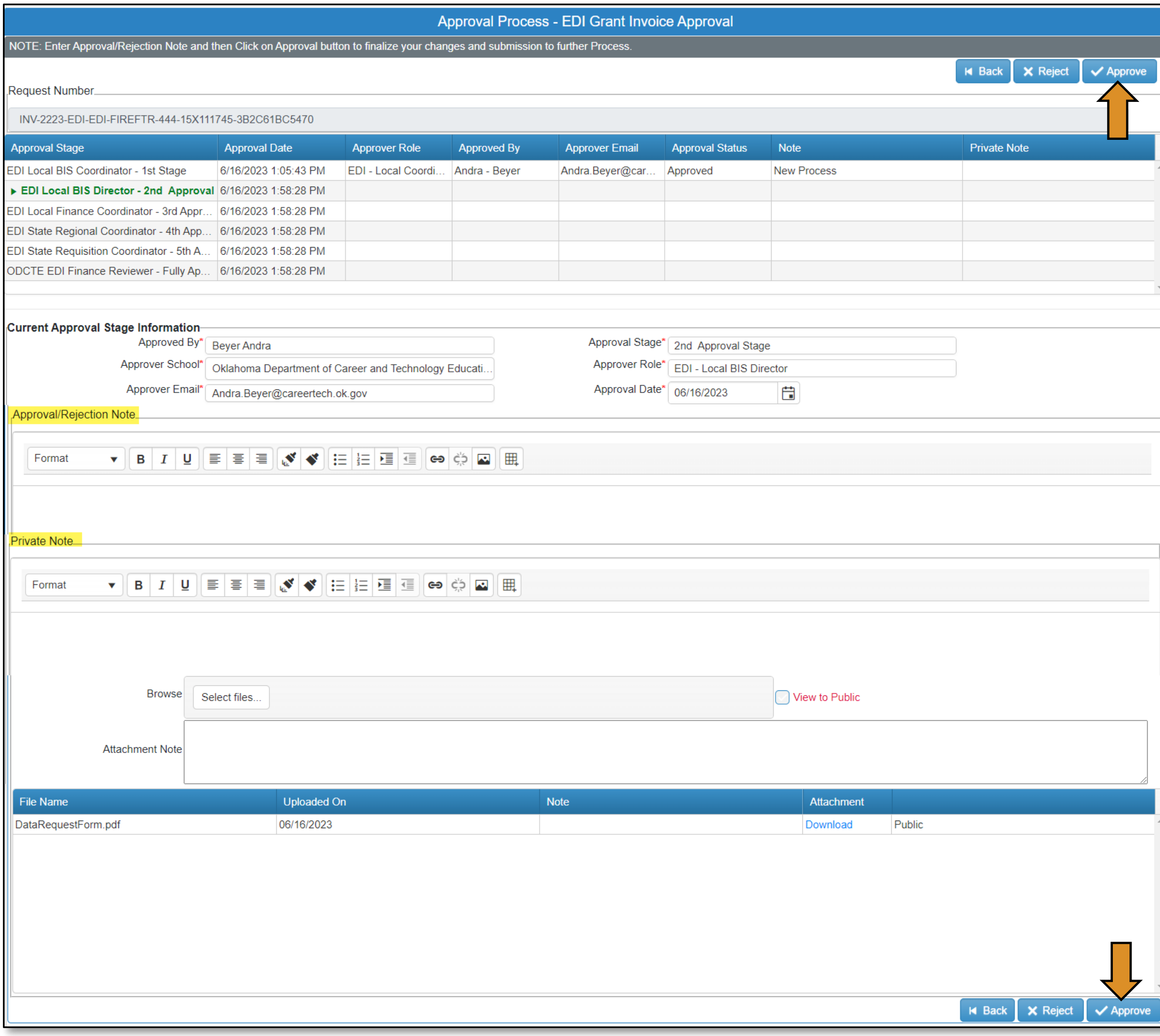
IMPORTANT: Invoice line items and the attached supporting documents must match.
All attachments must be uploaded in one PDF.

- 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.

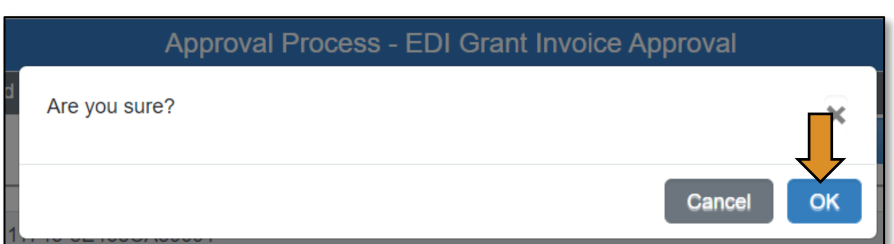


Agreement Acknowledgements and Approval

- 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.

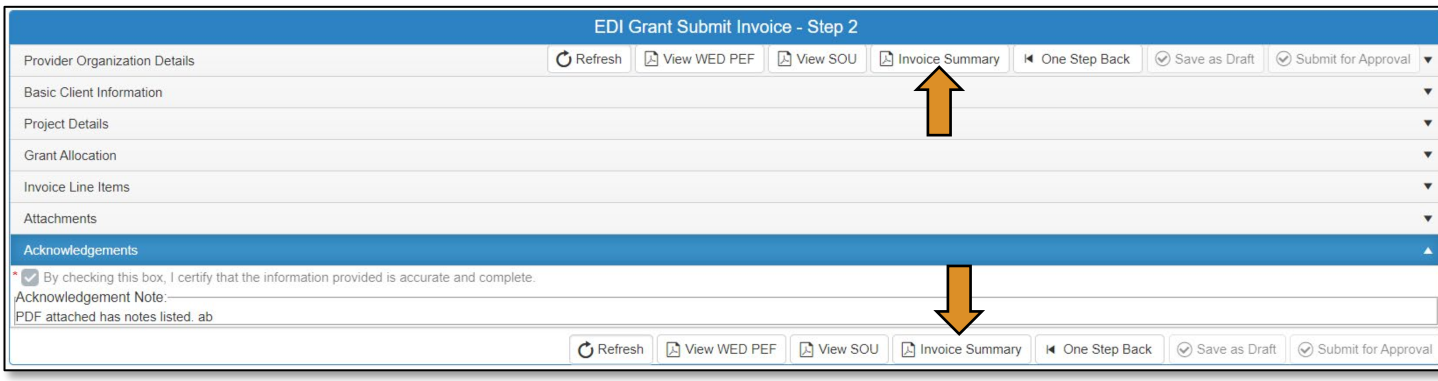


- A message will pop up asking if you are sure. Click **OK**.

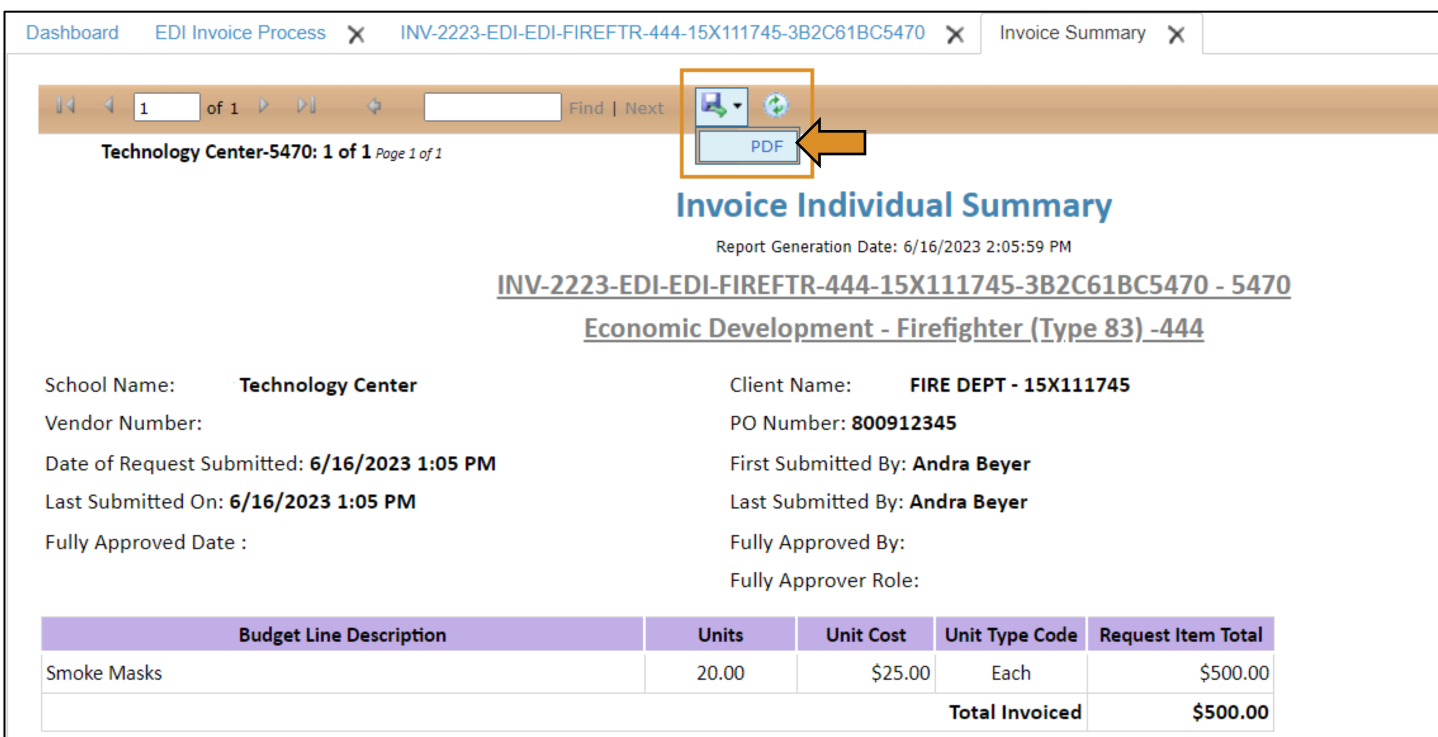


- A message will pop up saying, ‘Successfully Approved the request’. Click **OK**.

- 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 – 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.

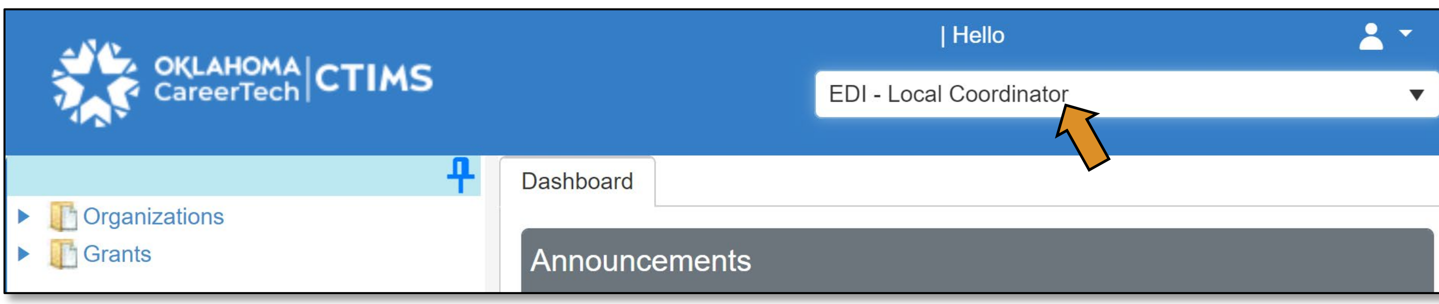
IMPORTANT: Changes to an Invoice can only be made by the EDI – Local Coordinator.

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.

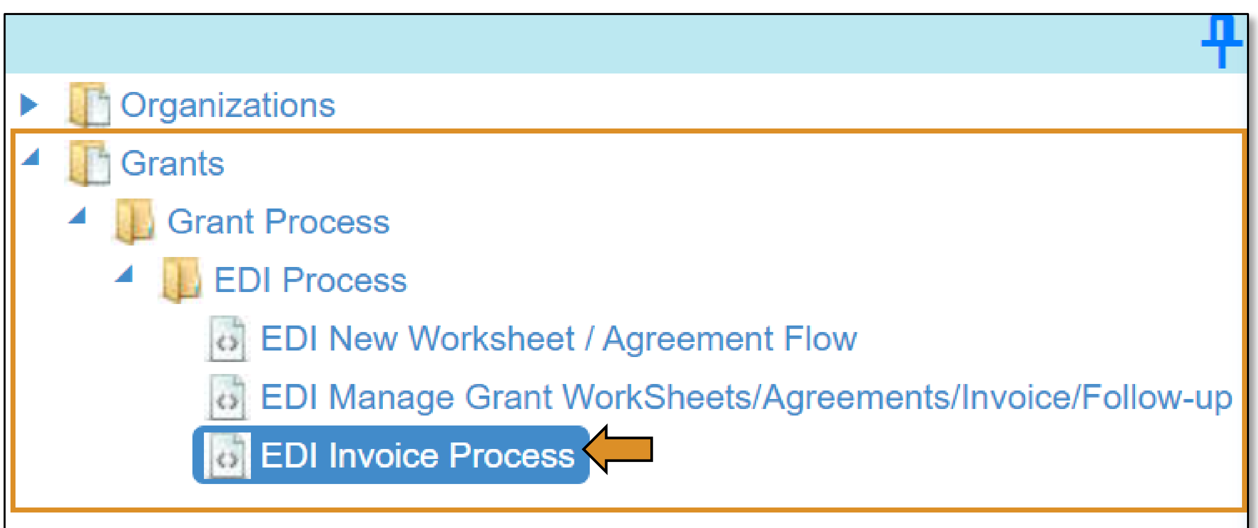
EDI – Local Coordinator (Invoice Change Request)

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.



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

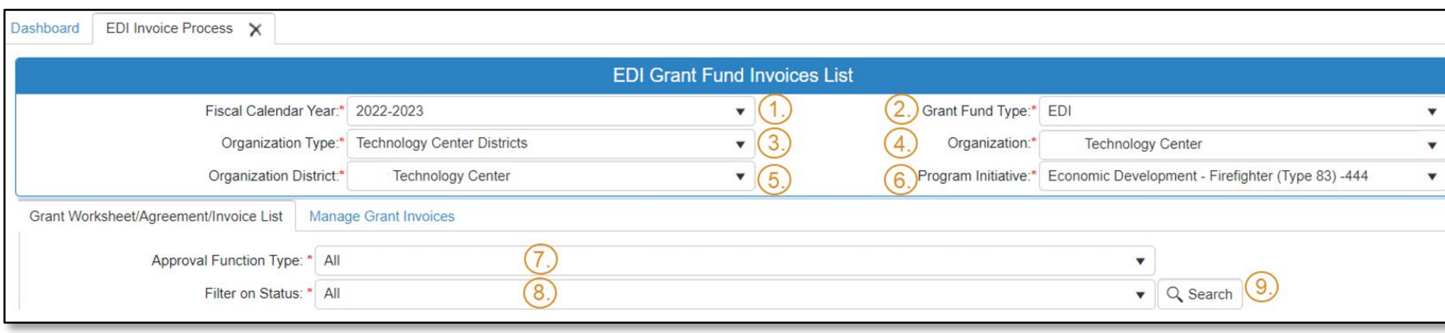


Accessing Invoice

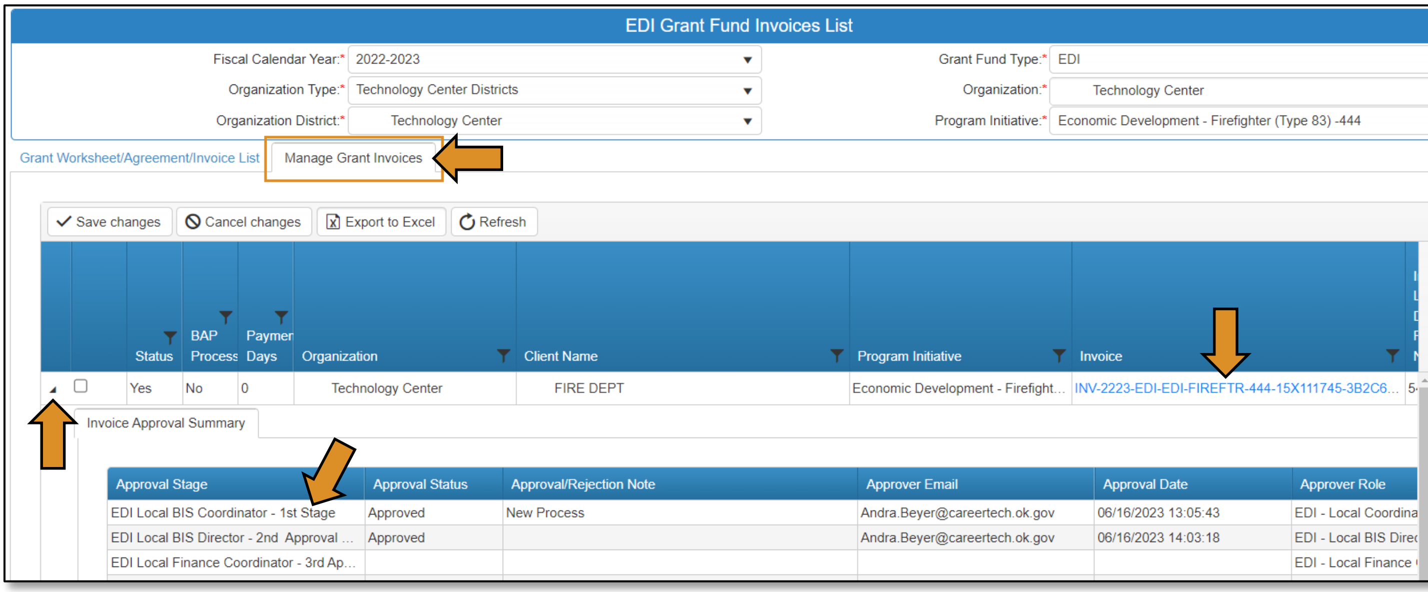
Complete the **EDI Grant Fund Invoices List** form**.** The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

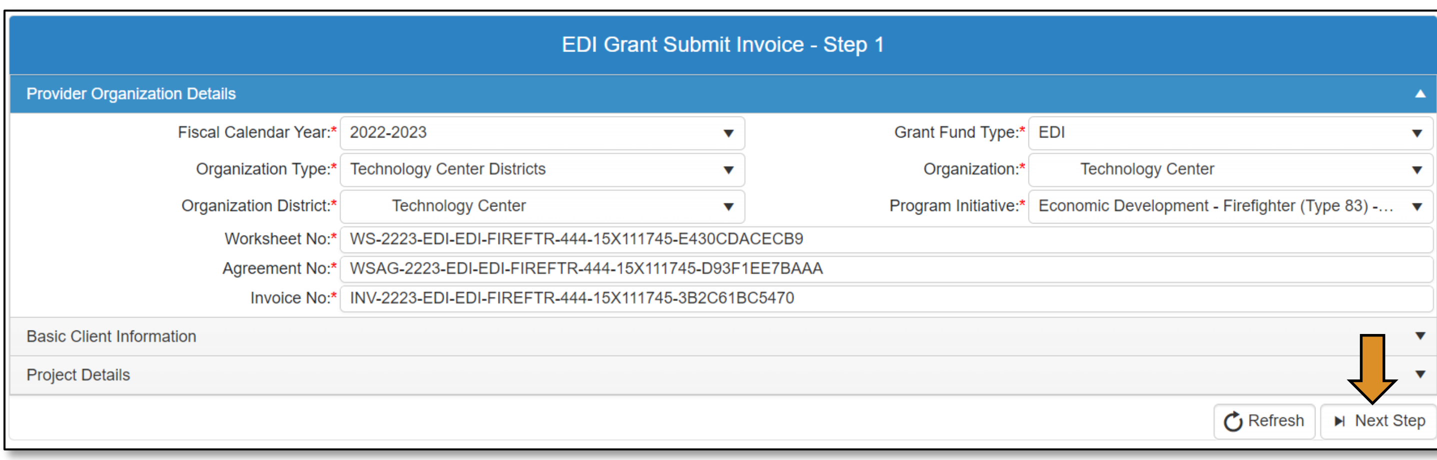


- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open the invoice that you are needing to check and approve. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view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

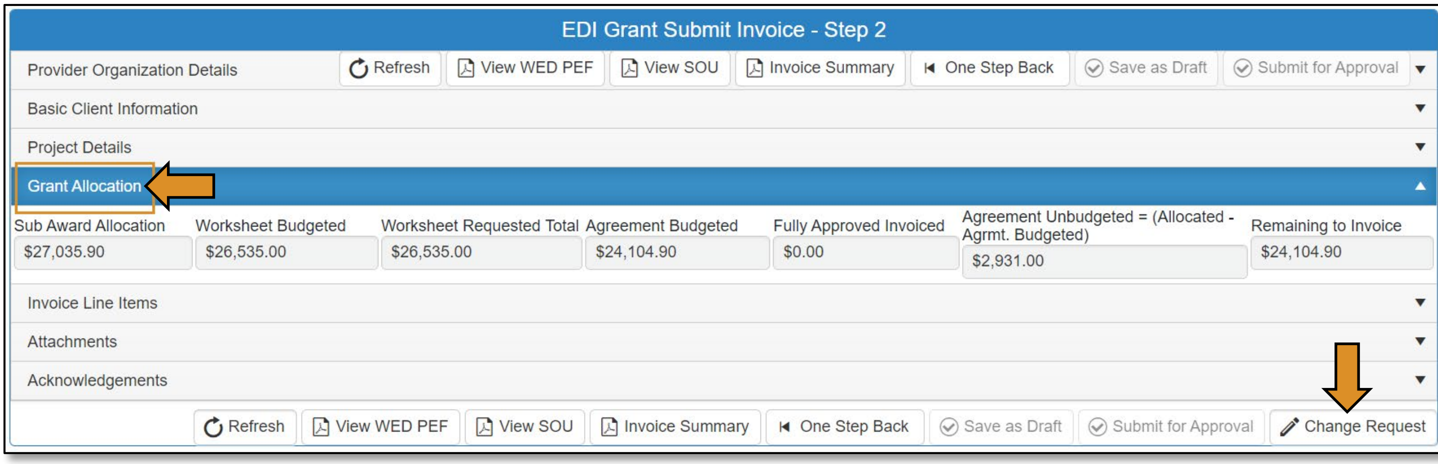


EDI Grant Submit Invoice – Step 1

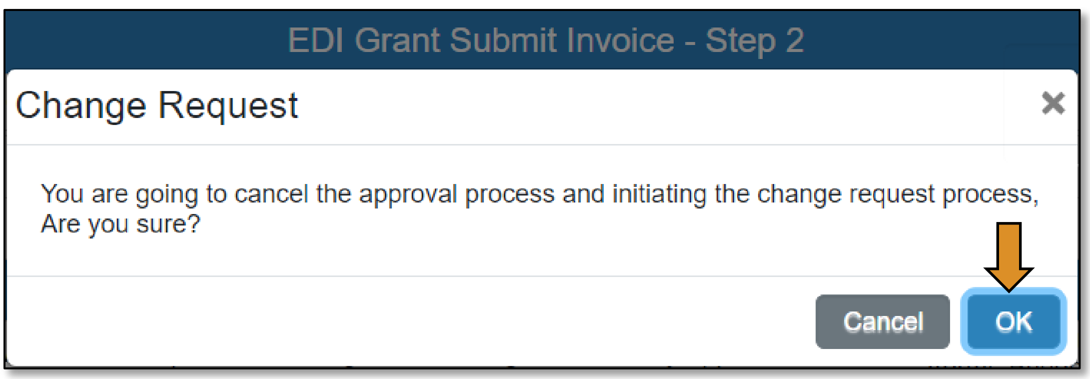
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



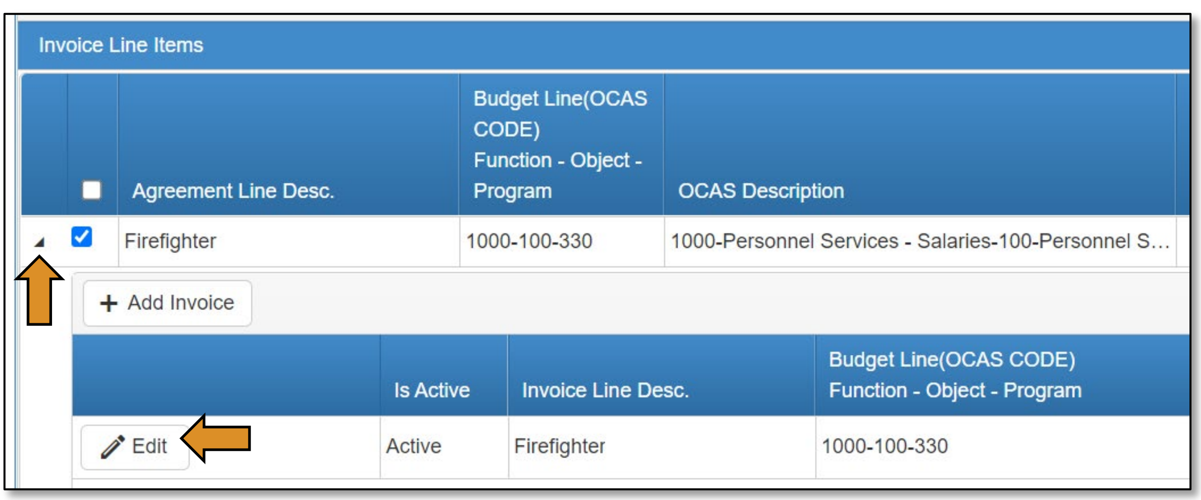
- Collapse the **Invoice Line Items** section by clicking on another row/section. For example: click on the **Grant Allocation** row. You should now see the **Change Request** button at the bottom right of the screen.



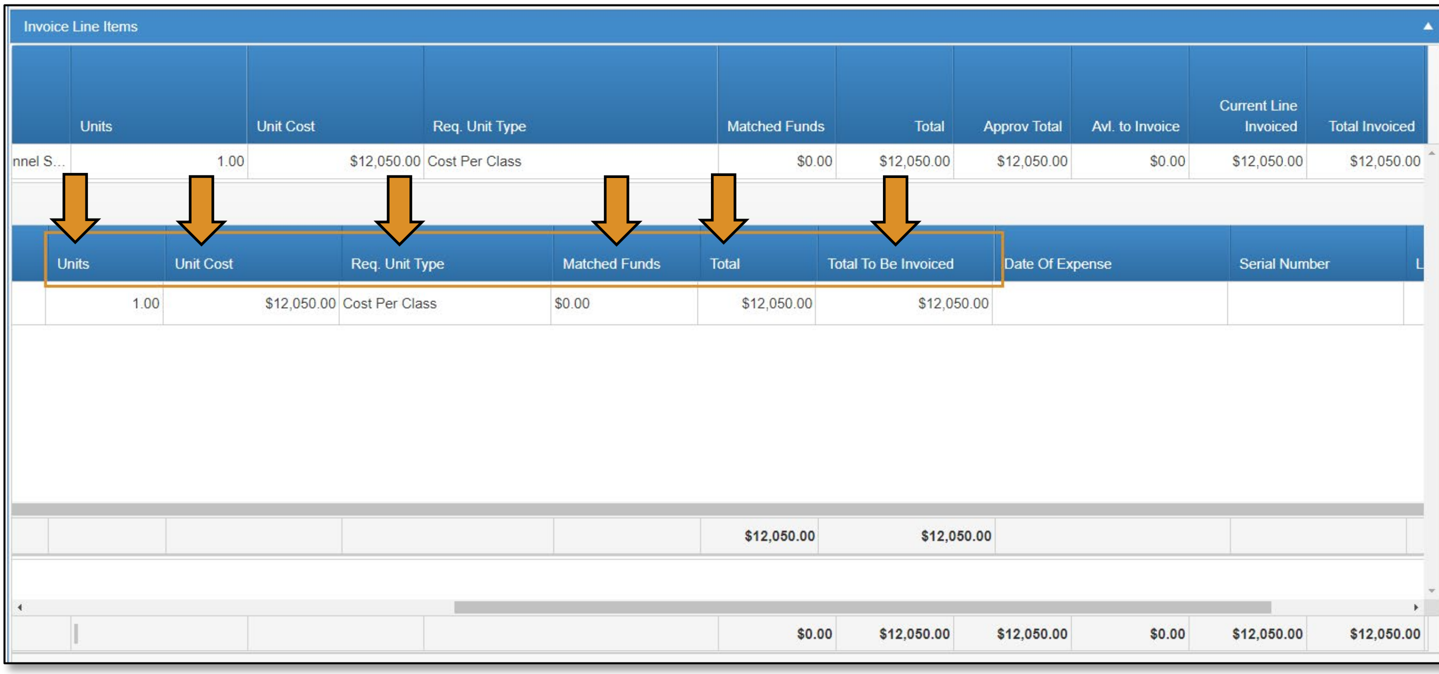
- Initiating the change request will cancel the approval process. If you are sure you would like to begin the Change Request click **OK** to confirm.



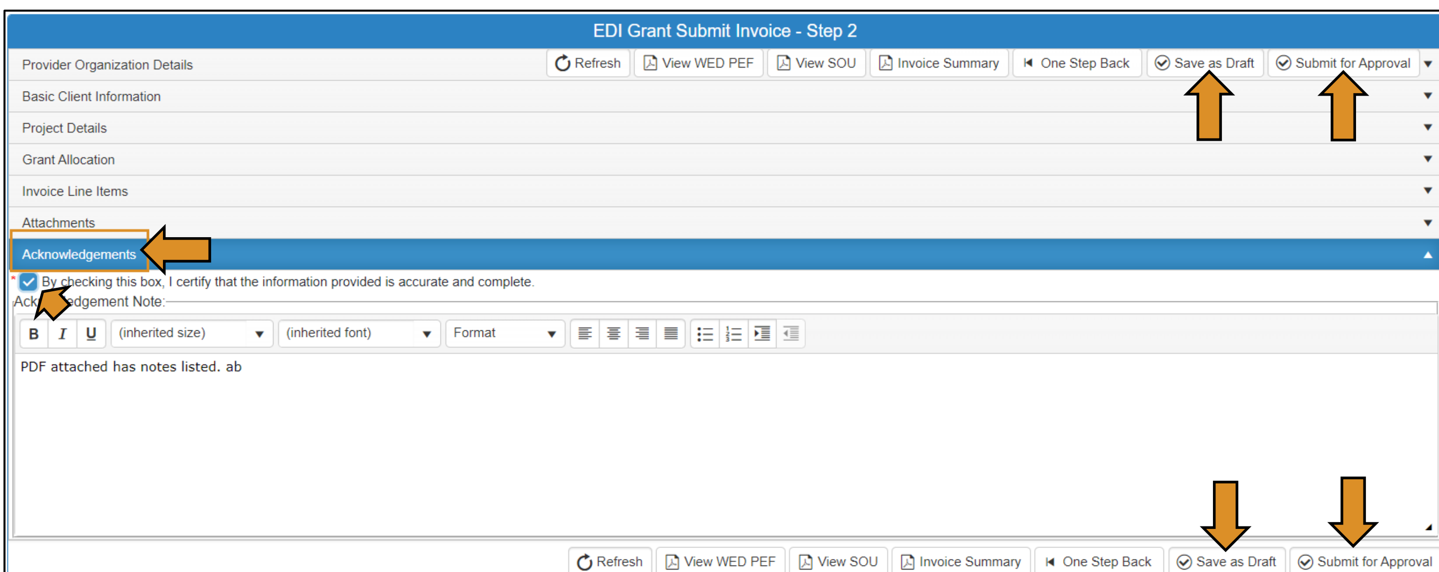
- Click the black arrow to the left of the invoice line item you need to change.
- Click the **Edit** button to make the changes.



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

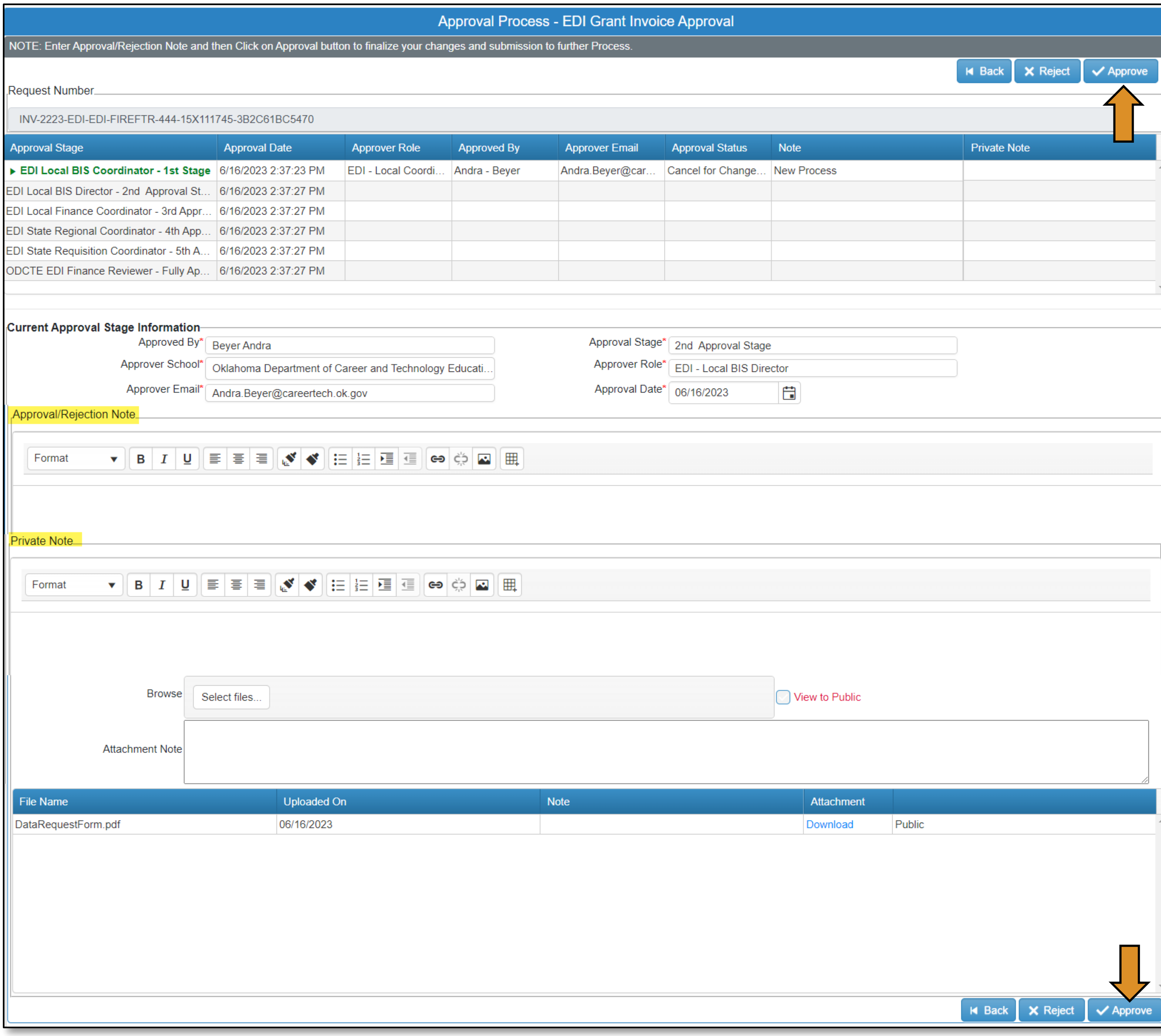


- Go to the **Acknowledgements** tab by clicking on the word *Acknowledgements* to expand this section.
- Check the required acknowledgment box.
- Type an acknowledgment note in the box explaining any changes that were made.
- At this point, you can **Save as Draft** and come back to it later or **Submit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

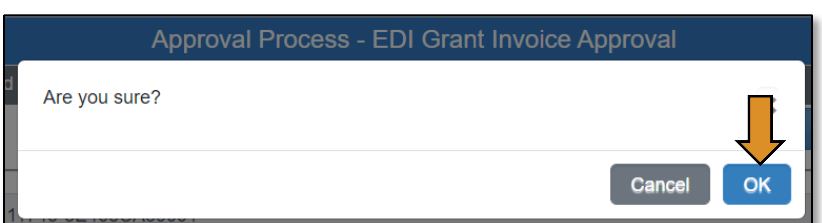


Agreement Acknowledgements and Approval

- 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.

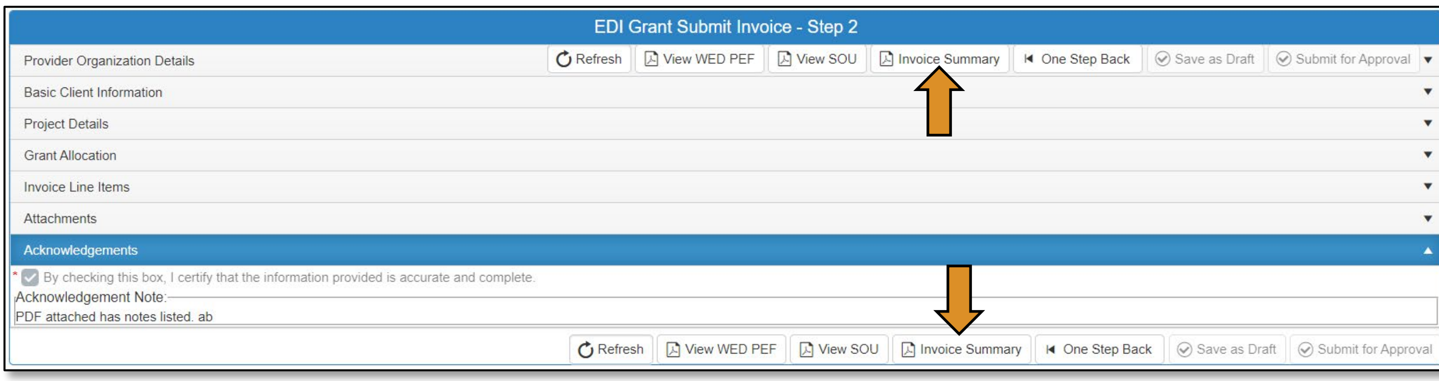


- A message will pop up asking if you are sure. Click **OK**.

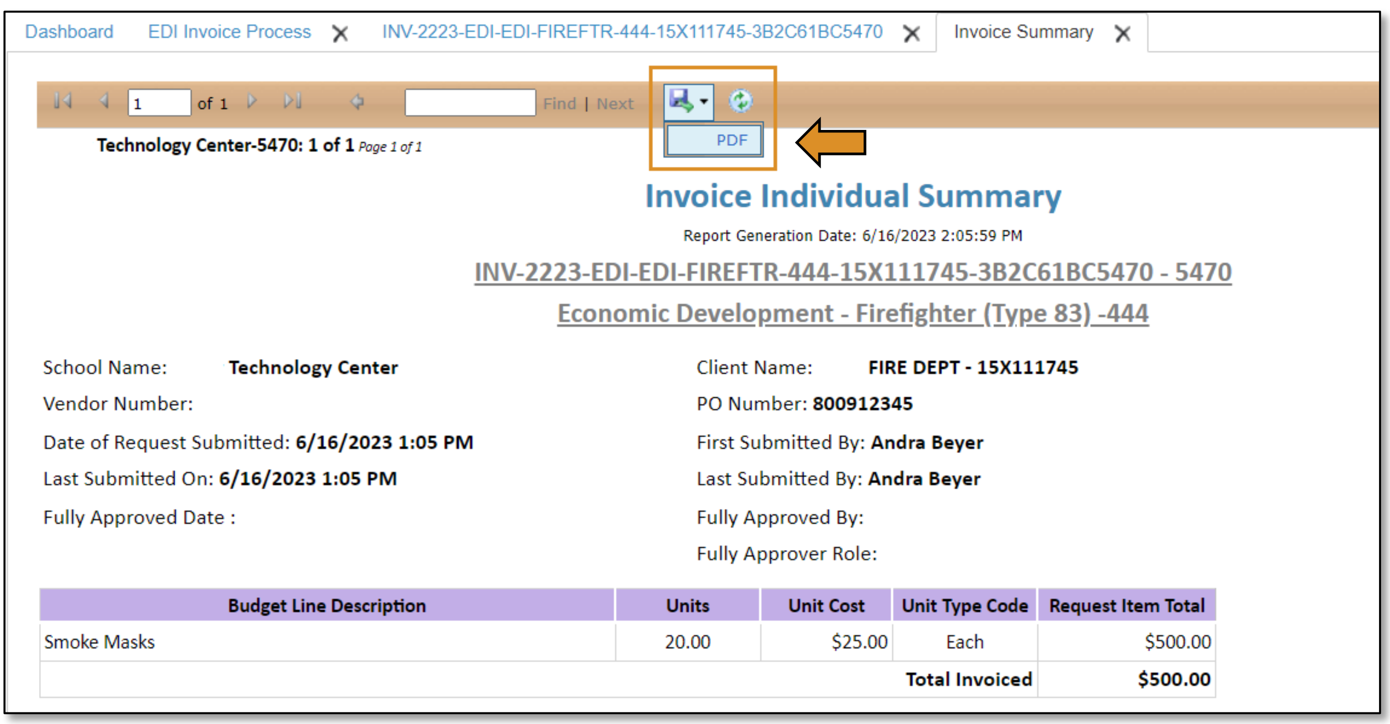


- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.

- 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.

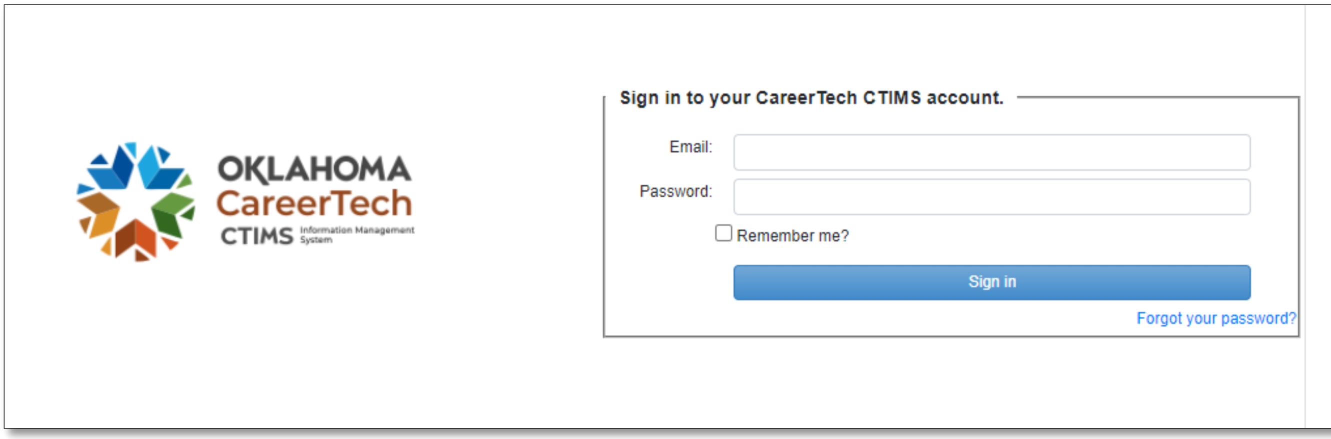


The *invoice* has been successfully submitted and will go to the **EDI – Local BIS Director.**

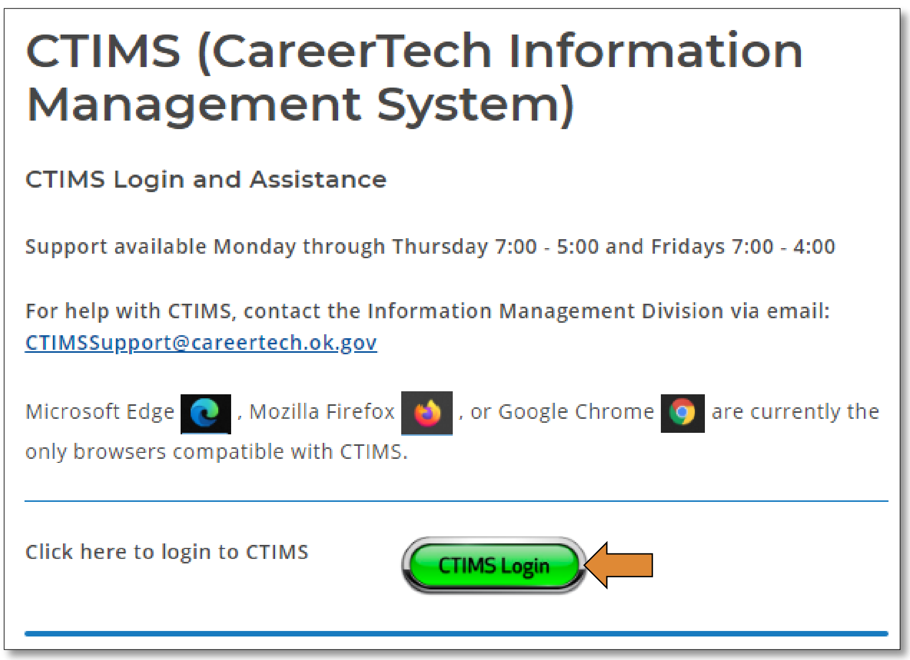
EDI – Local BIS Director (Invoice Process)

Logging into CTIMS

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



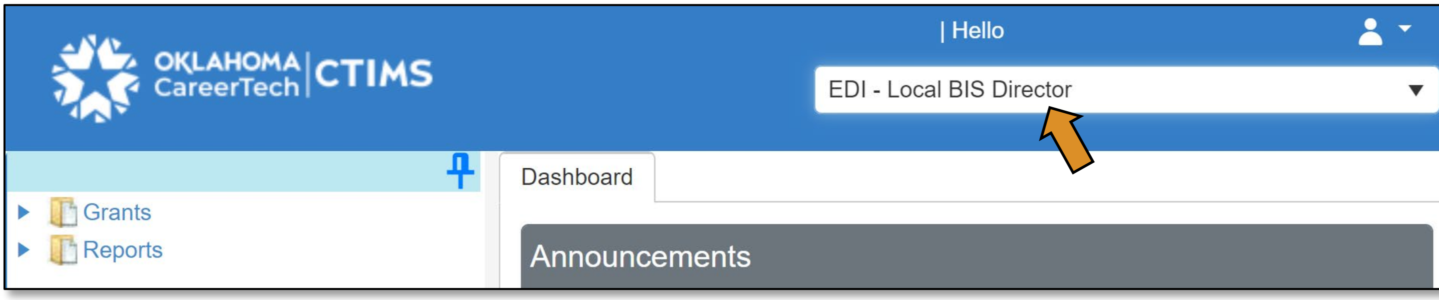
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.



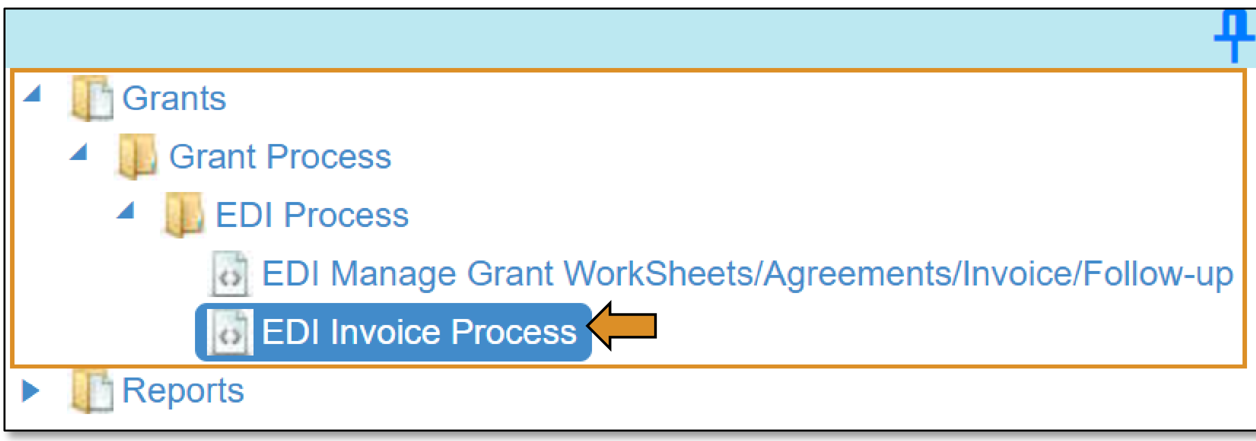
Accessing Invoice

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.



- 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.
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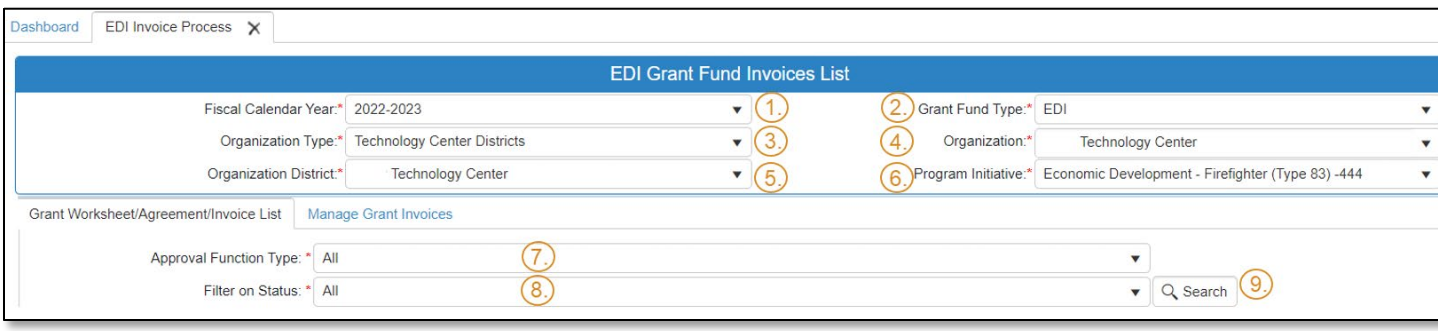
8. **Filter on Status*** - this will remain as **All**.
9. Click **Search**.

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



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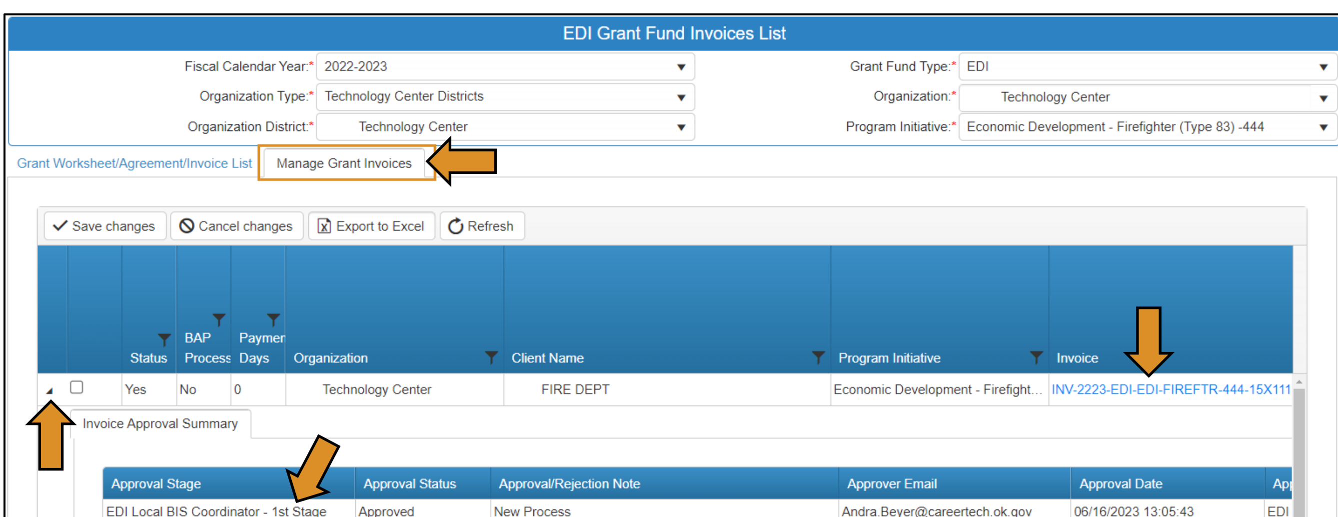
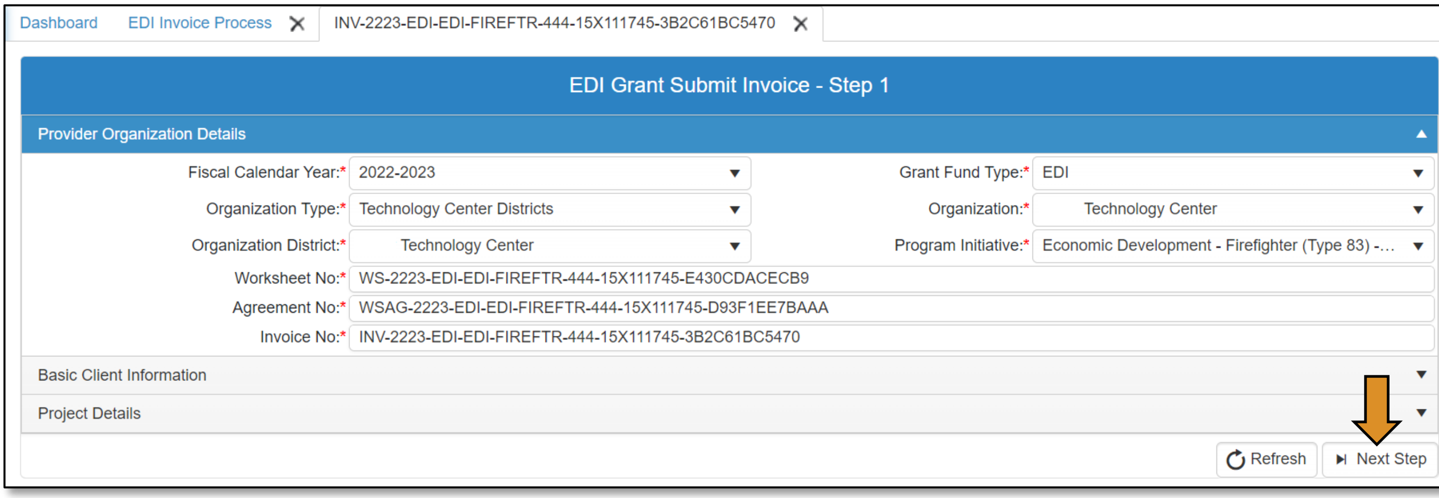


EDI Grant Submit Invoice – Step 1

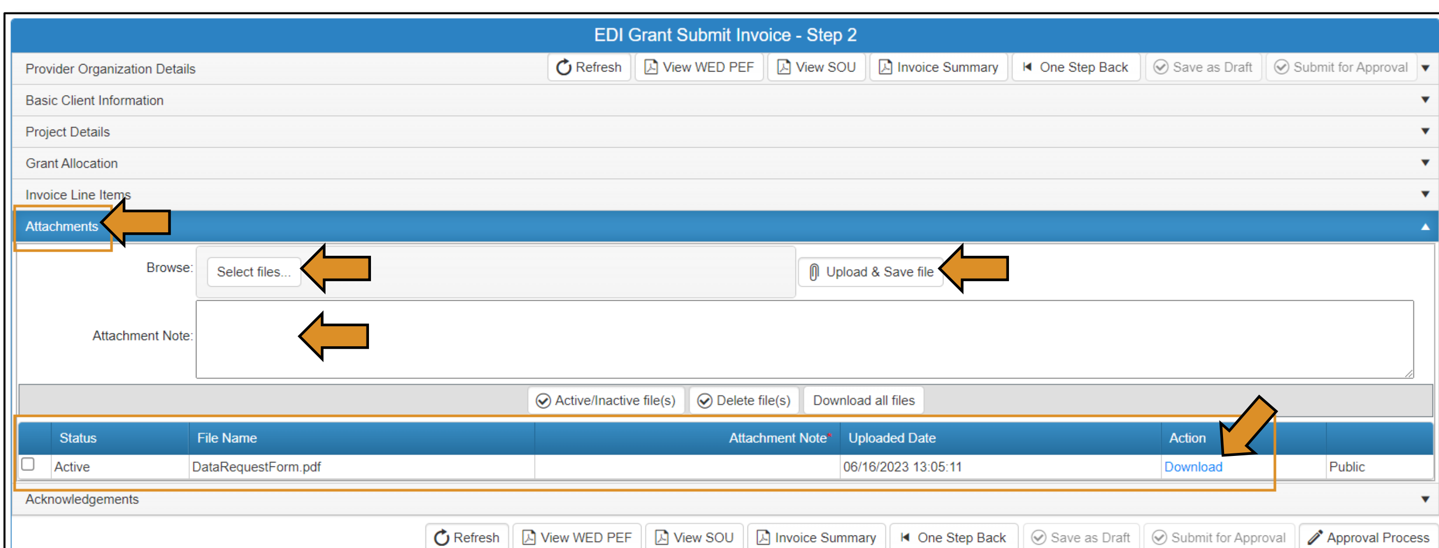
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



EDI Grant Submit Invoice – Step 2

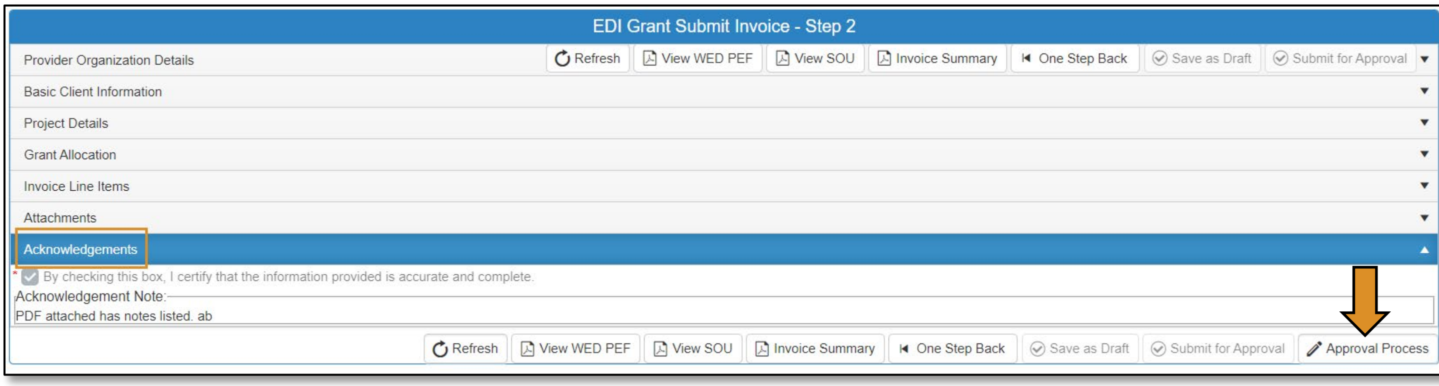
On the **EDI Grant Submit Invoice-Step 2** screen, the **Invoice Line Items** section should automatically expand.

- 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.



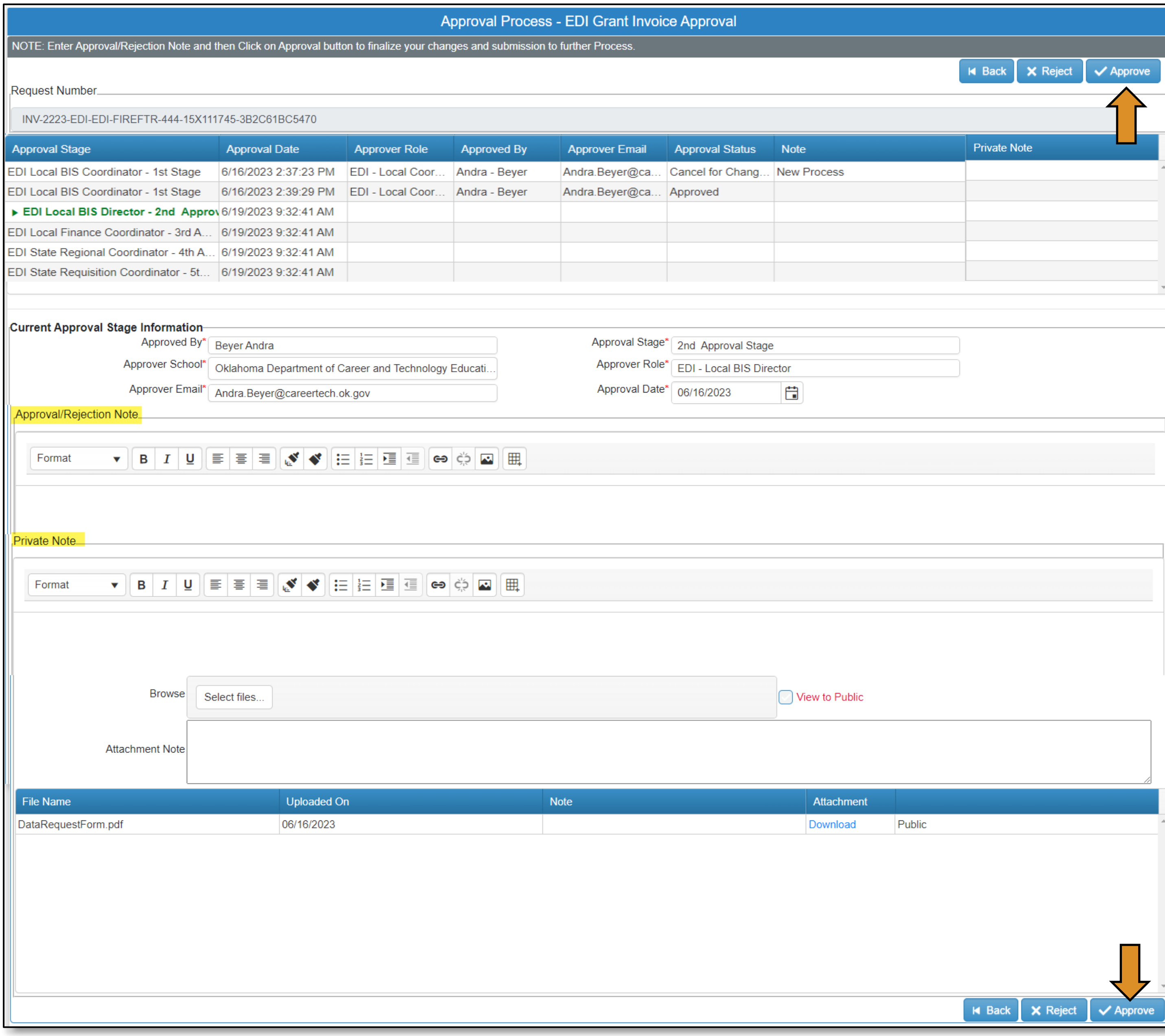
IMPORTANT: Invoice line items and the attached supporting documents must match.
All attachments must be uploaded in one PDF.

- 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.

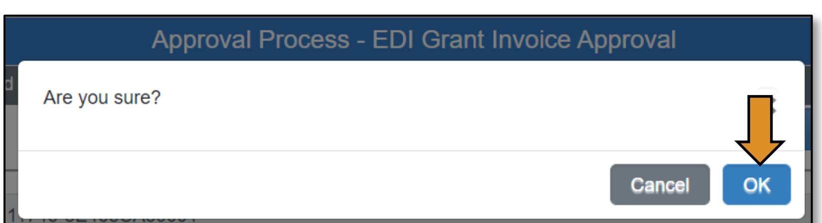


Agreement Acknowledgements and Approval

- 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.

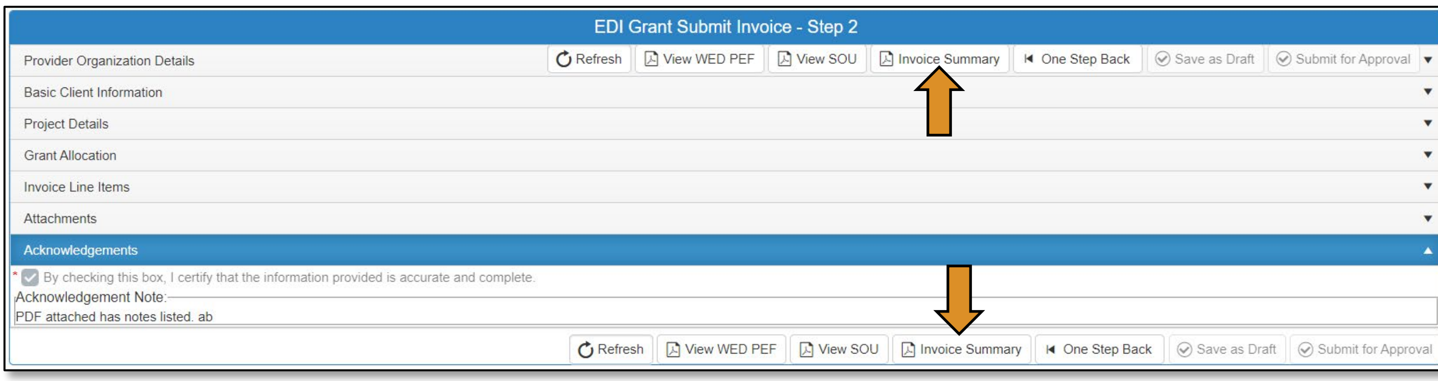


- A message will pop up asking if you are sure. Click **OK**.



- 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)



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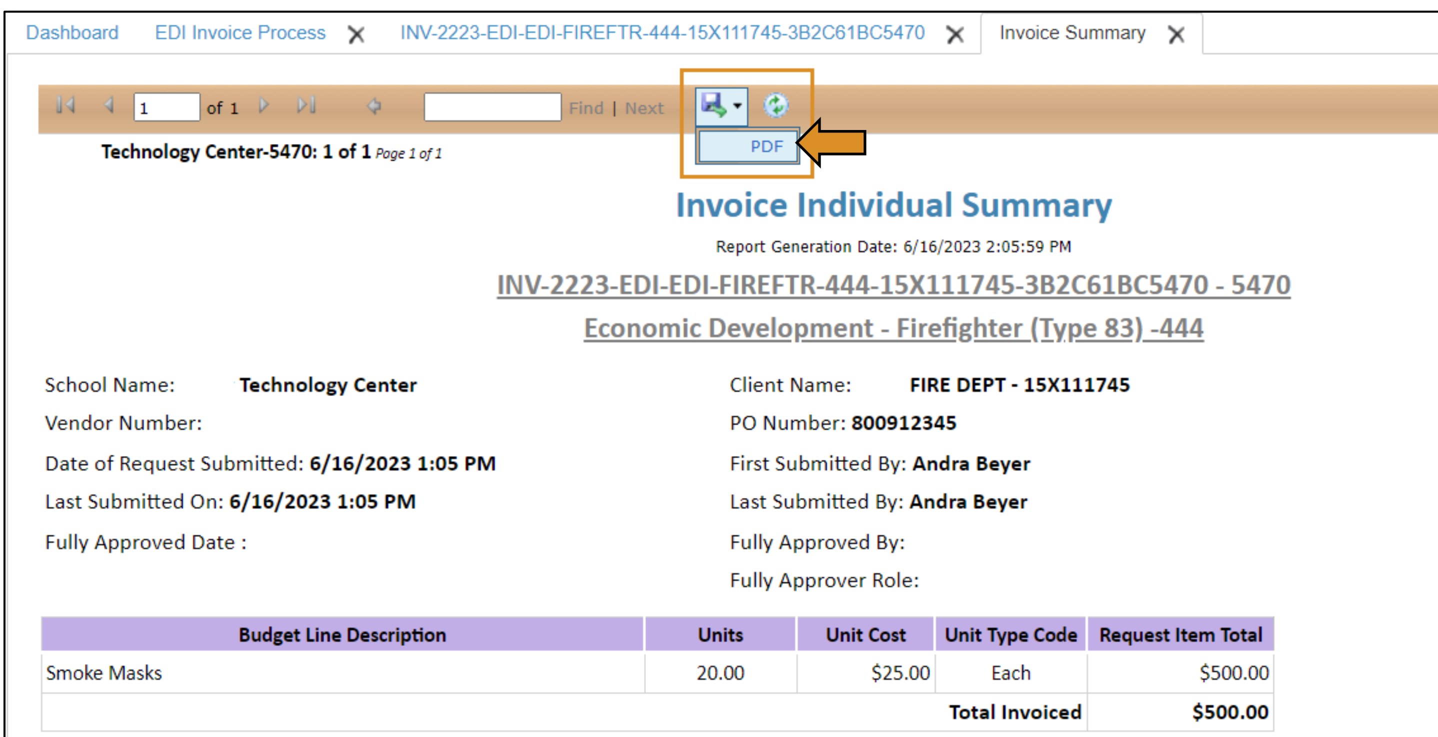

The *invoice* has been successfully submitted and will go to the **EDI – Local Finance Coordinator**.

EDI – Local Finance Coordinator (Invoice Process)

Logging into CTIMS

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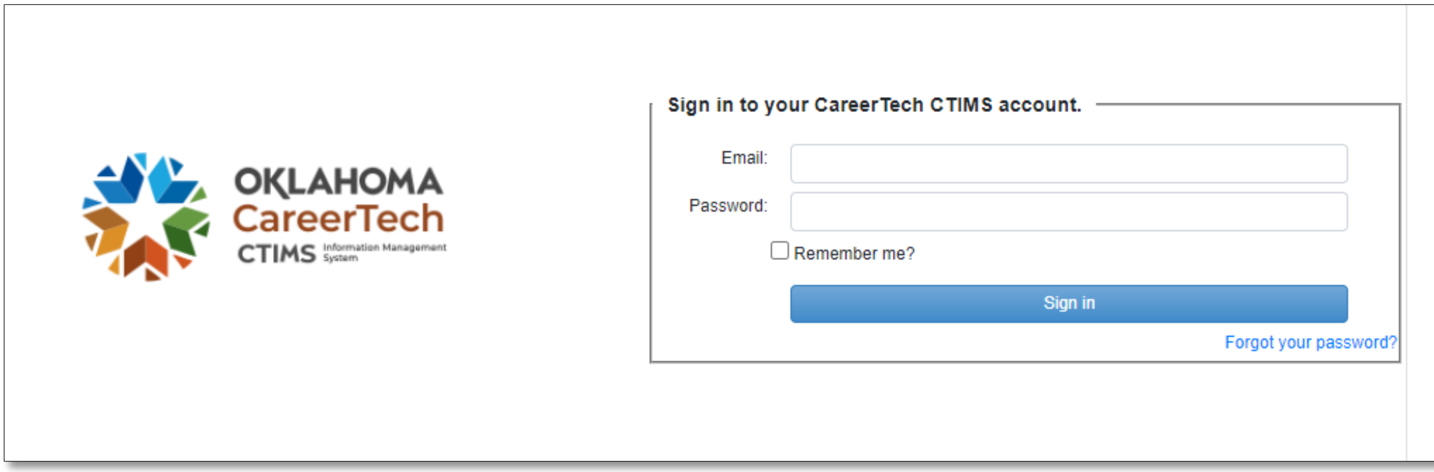

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If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **EDI – Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

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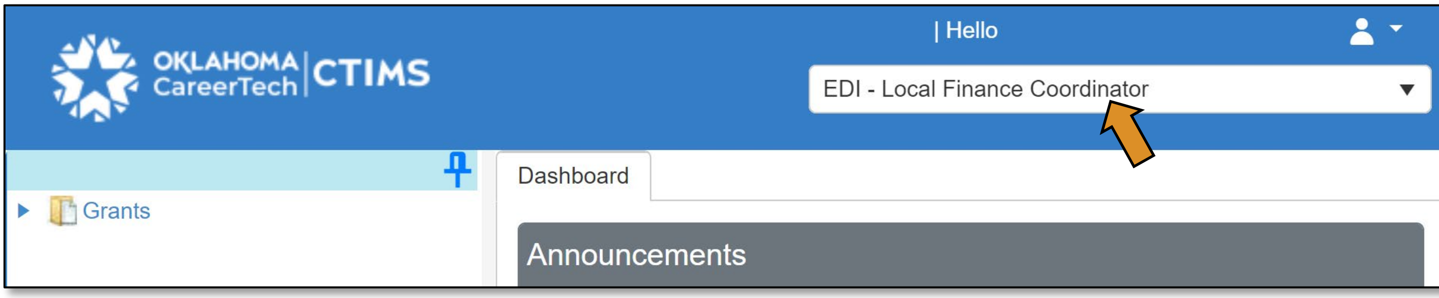
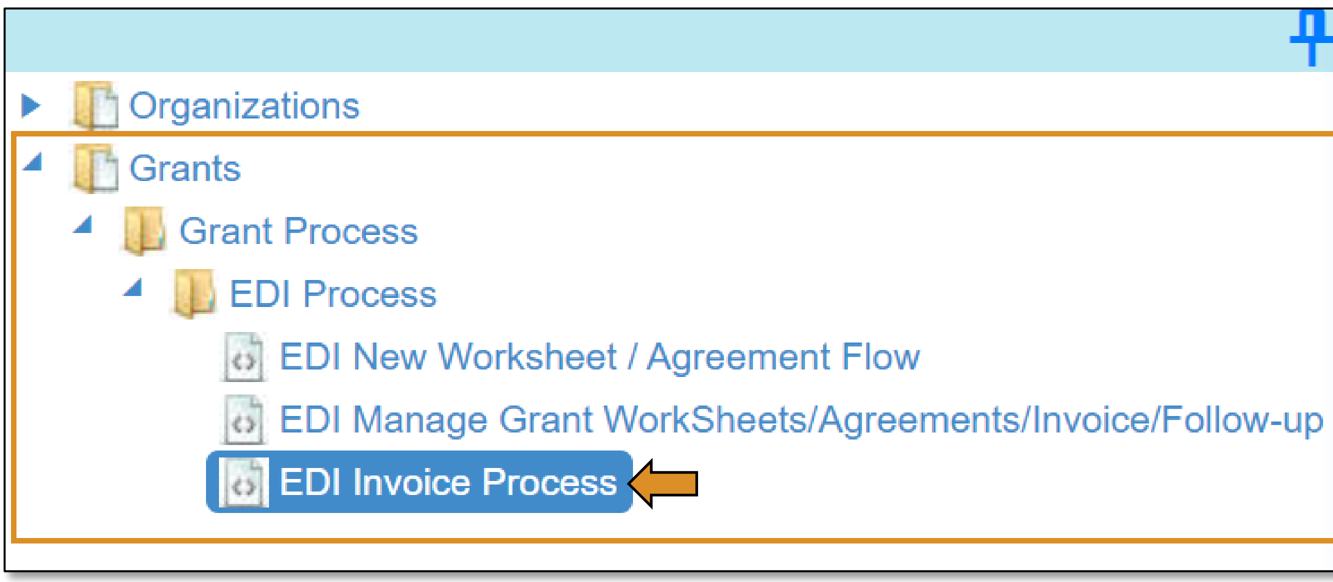


- Click the arrows next to **Grants, Grant Process** & **EDI Process**.
- Click on the **EDI Invoice Process** link.



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.

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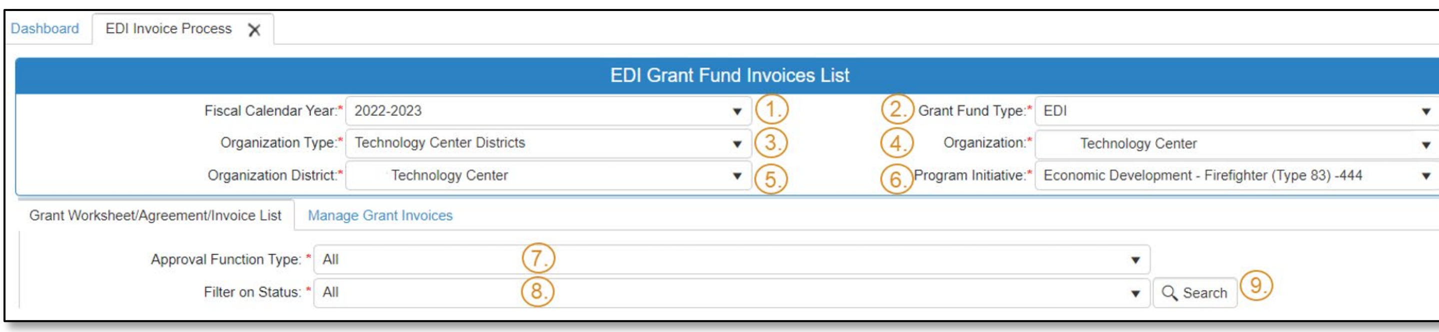
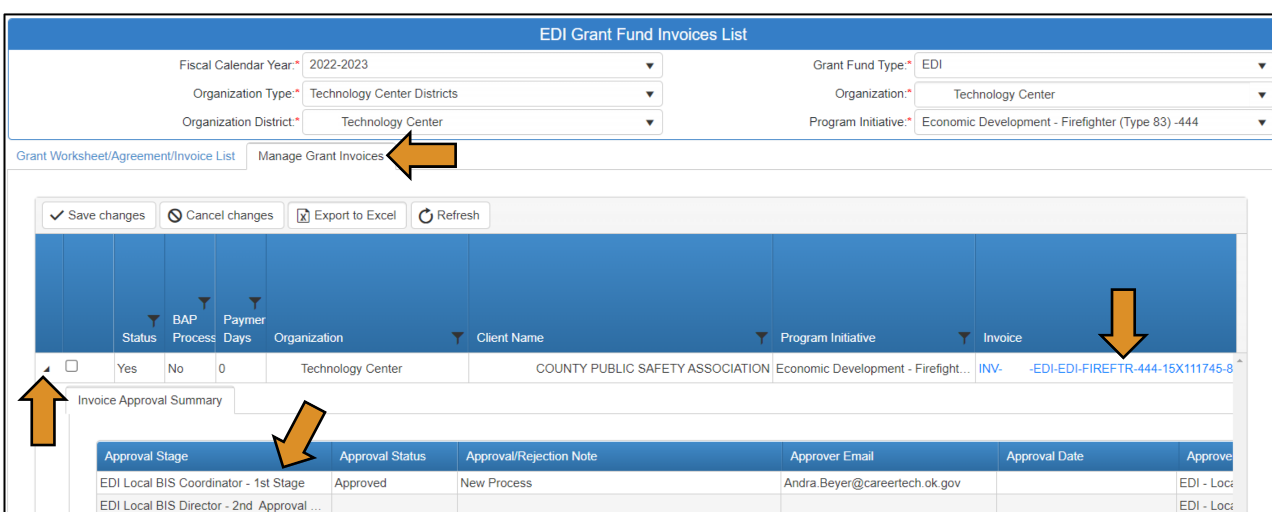
2. **Grant Fund Type*** - automatically displays based on your organization login and role credentials. Should default to *EDI*.
3. **Organization Type*** - should automatically default to *Technology Center Districts*.
4. **Organization* -** type the first three letters of your school or organization 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.

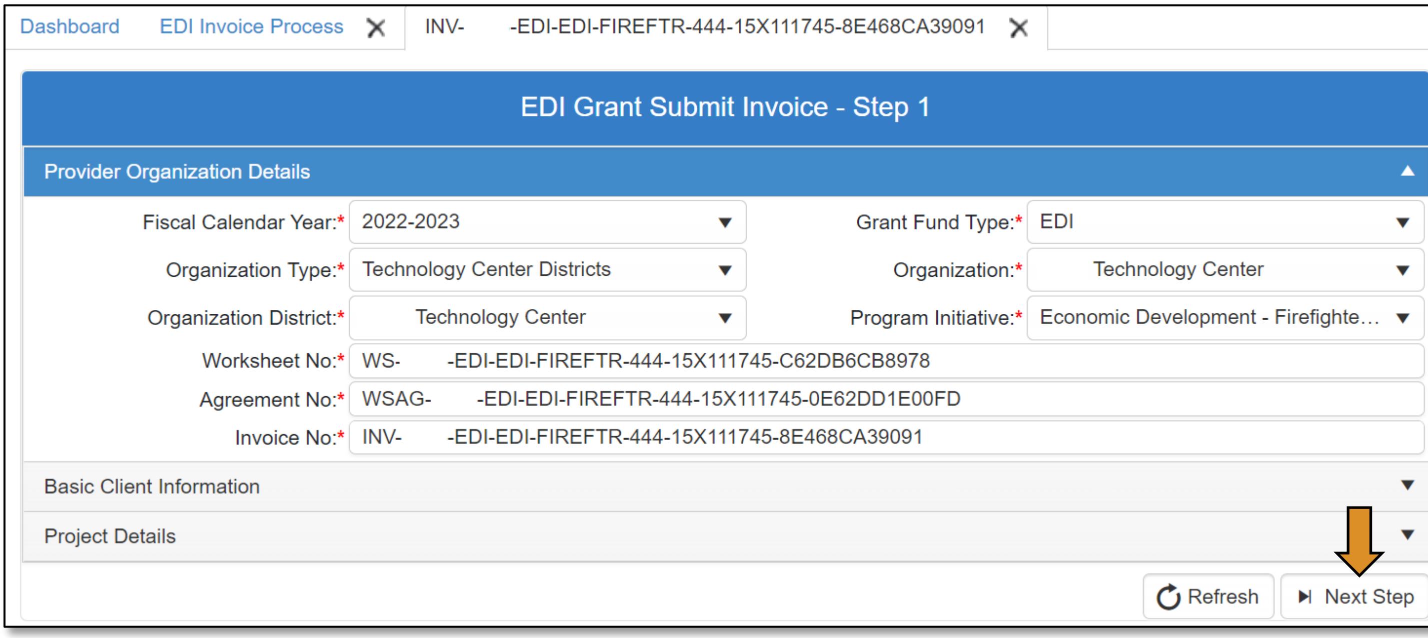


- After clicking the **Search** button, select **Manage Grant Invoices** tab to open an invoice that has already been started. **NOTE:** To view the approval status of an invoice already submitted for approval, click the black arrow next to the invoice to expand that section and view details.
- Click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



EDI Grant Submit Invoice – Step 1

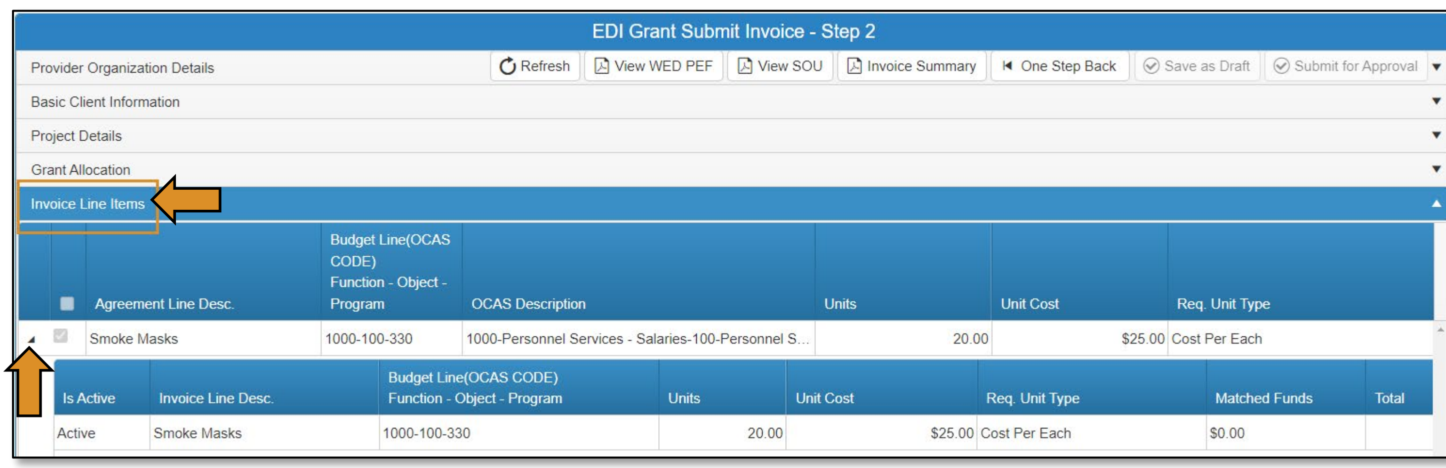
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



EDI Grant Submit Invoice Step-2

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

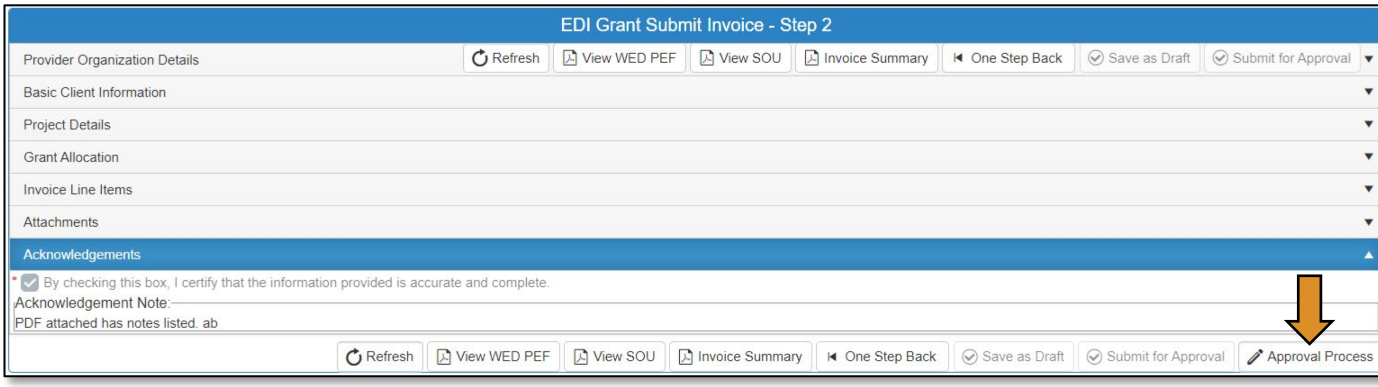
- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.



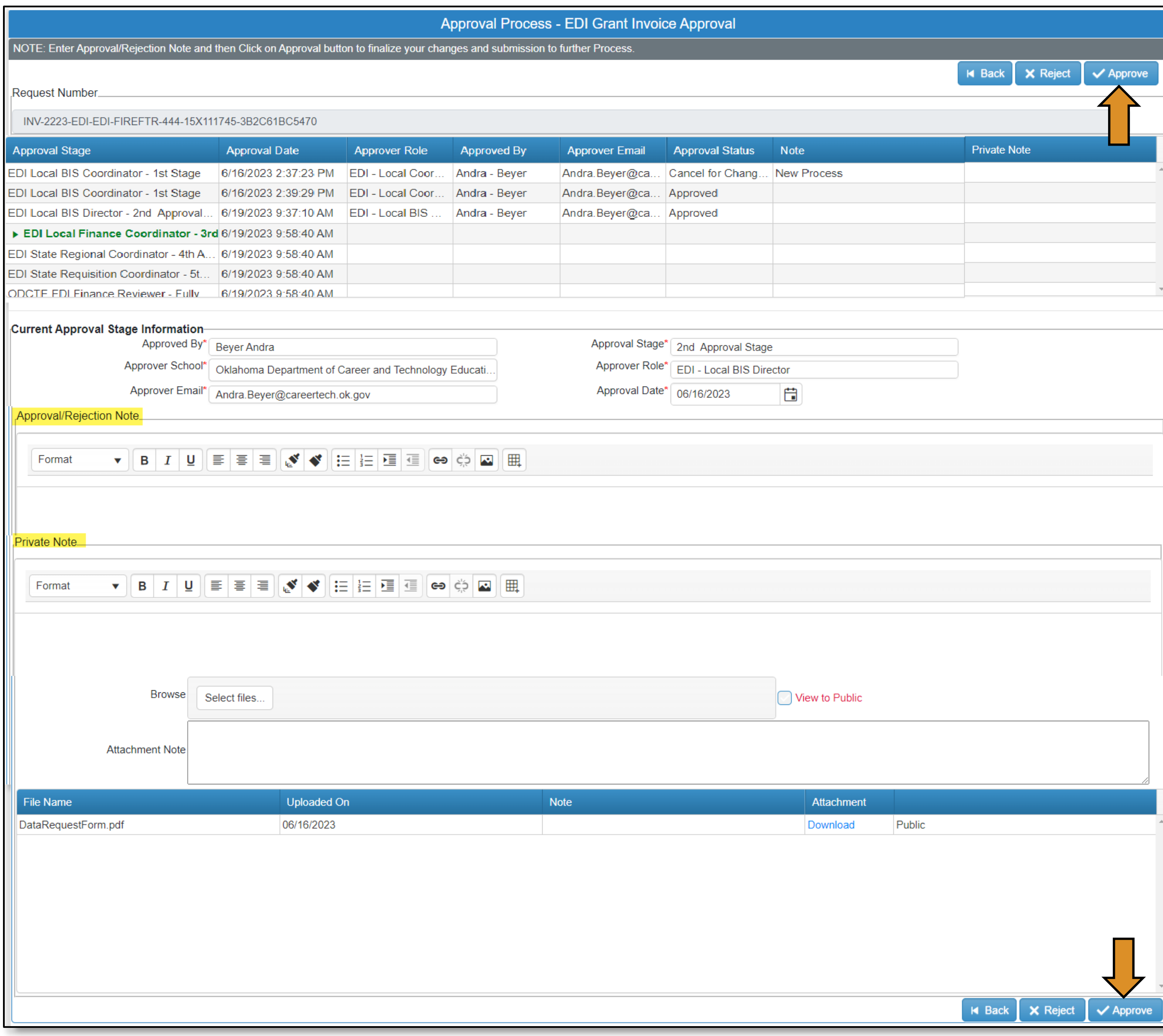
- Verify the documents that are attached match the line items by clicking on the Attachments row.

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.



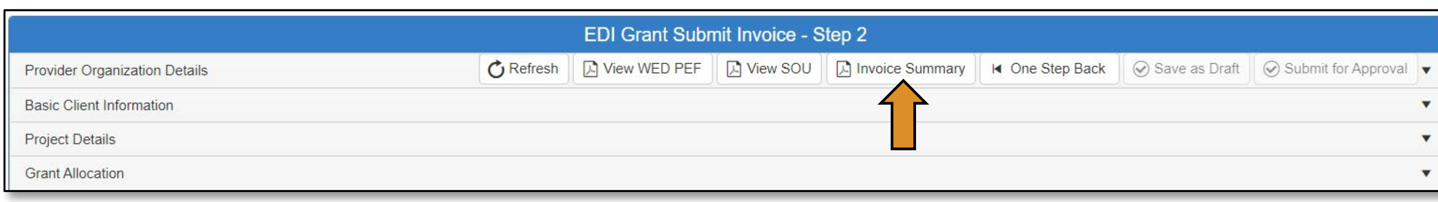
- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.



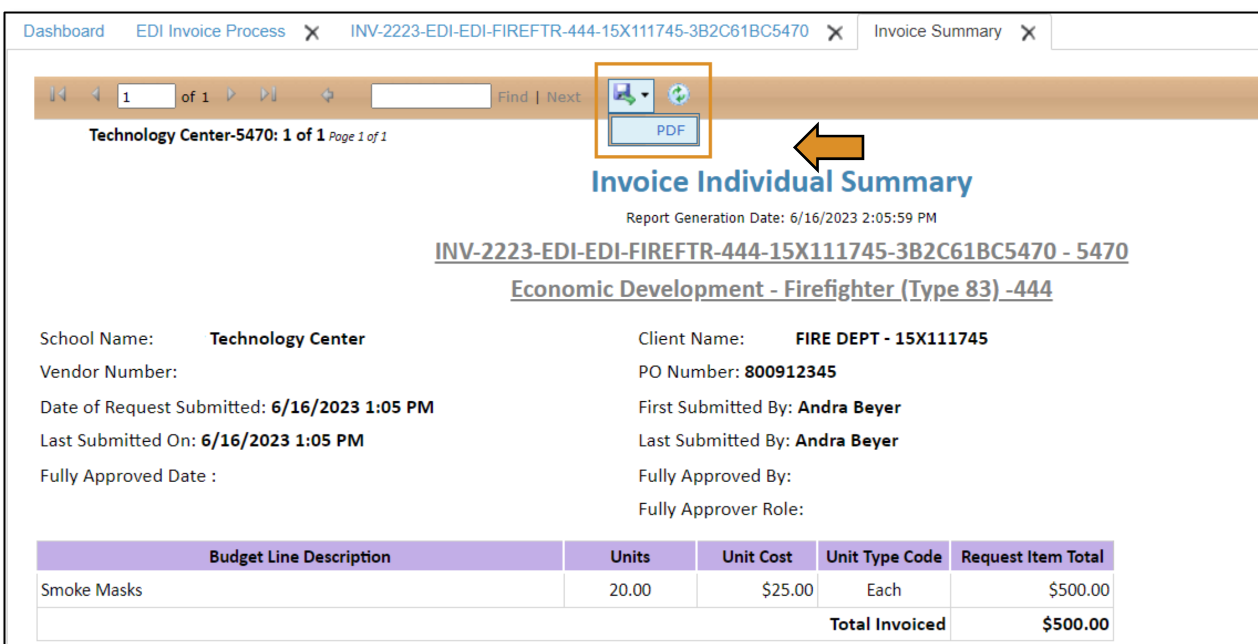
- A message will pop up asking if you are sure. Click **OK**.

- 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.



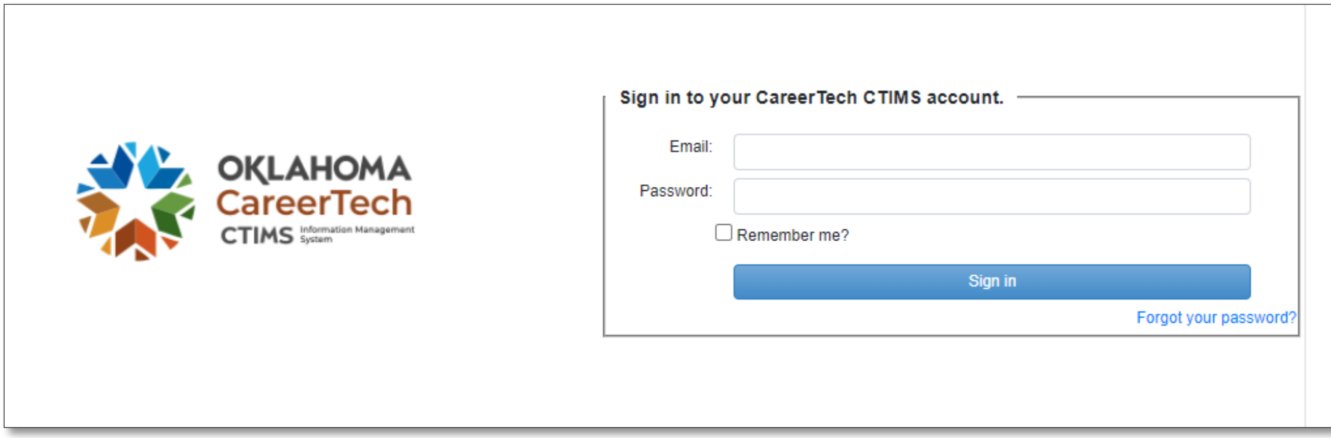
Budget Line Description	Units	Unit Cost	Unit Type Code	Request Item Total
Smoke Masks	20.00	$25.00	Each	$500.00
			Total Invoiced	$500.00

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

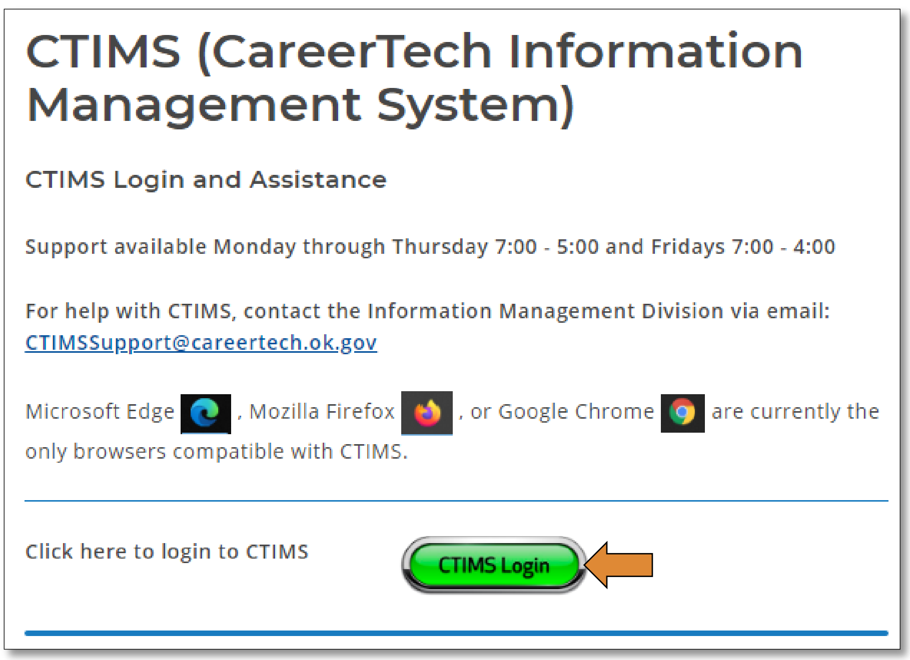
EDI – State Regional Coordinator (Invoice Process)

Logging into CTIMS

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



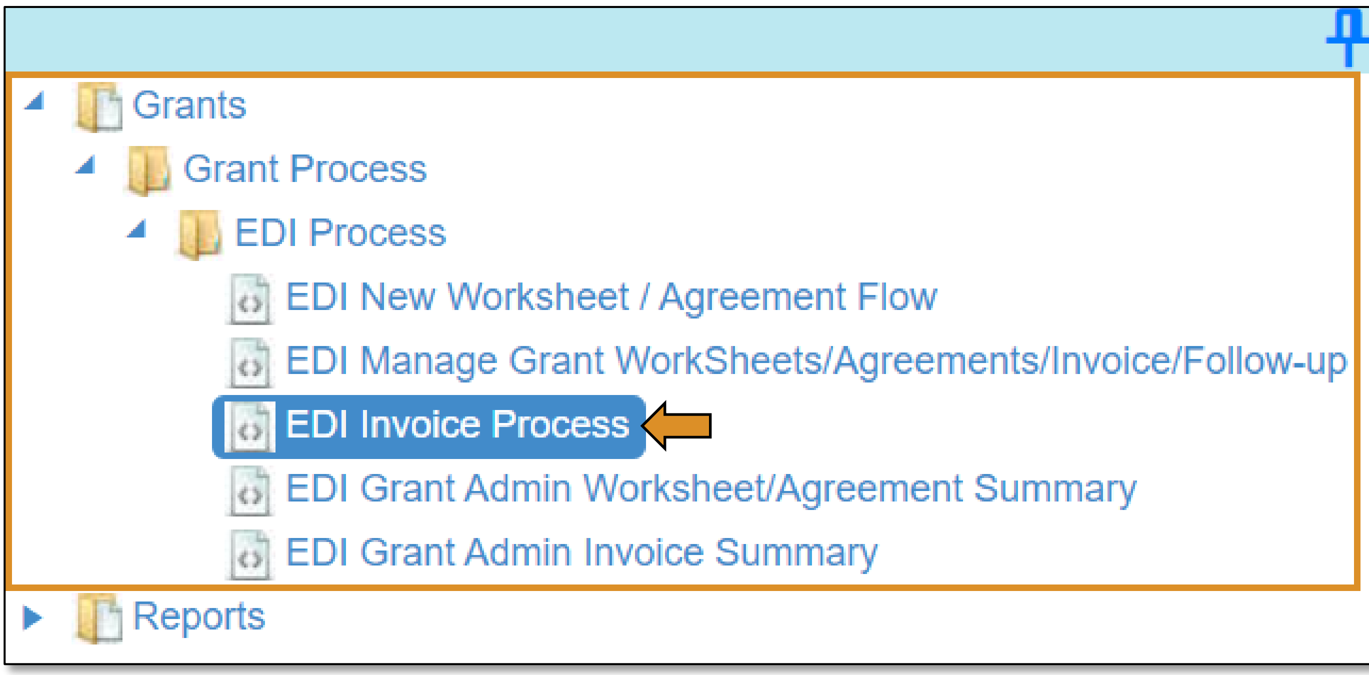
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.



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.

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

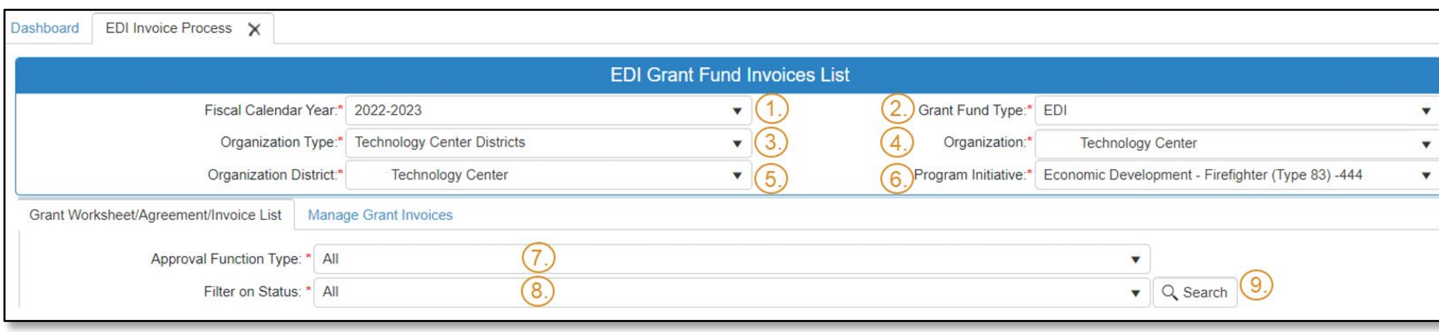


Accessing the Invoice

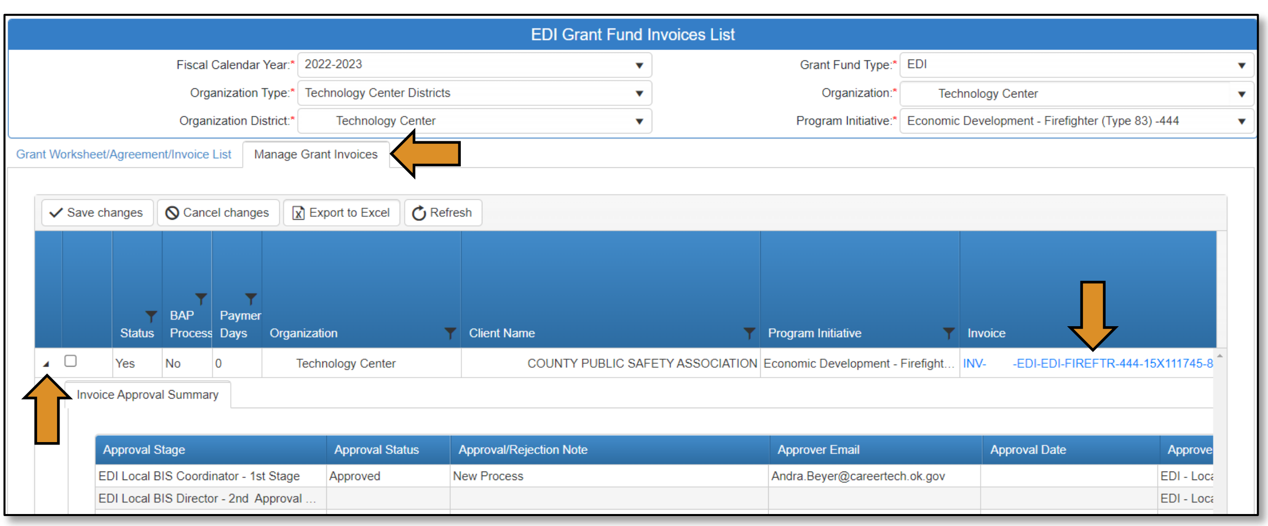
Complete the **EDI Grant Fund Invoices List** form**.** The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically populate based on your organization login credentials.

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.

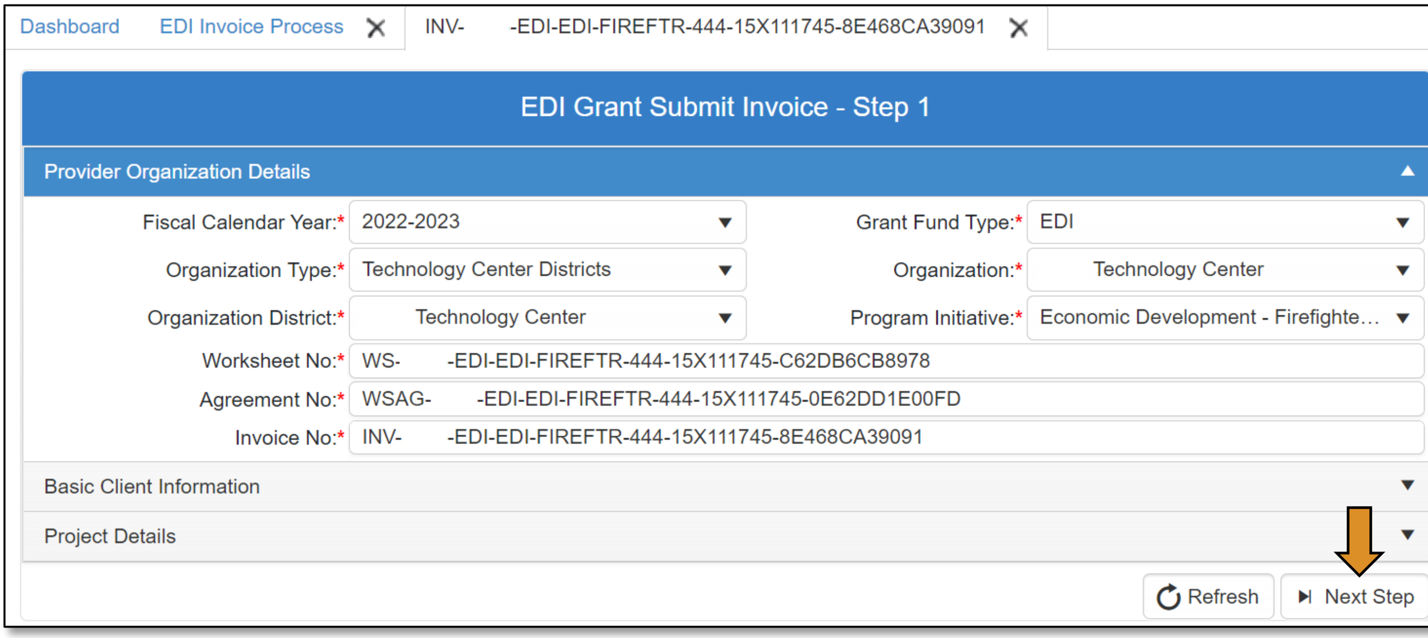


- After clicking the **Search** button, select **Manage Grant Invoices** tab to open an invoice that has already been started, but not submitted for approval.
- Click on the blue Invoice link to open the invoice.



EDI Grant Submit Invoice – Step 1

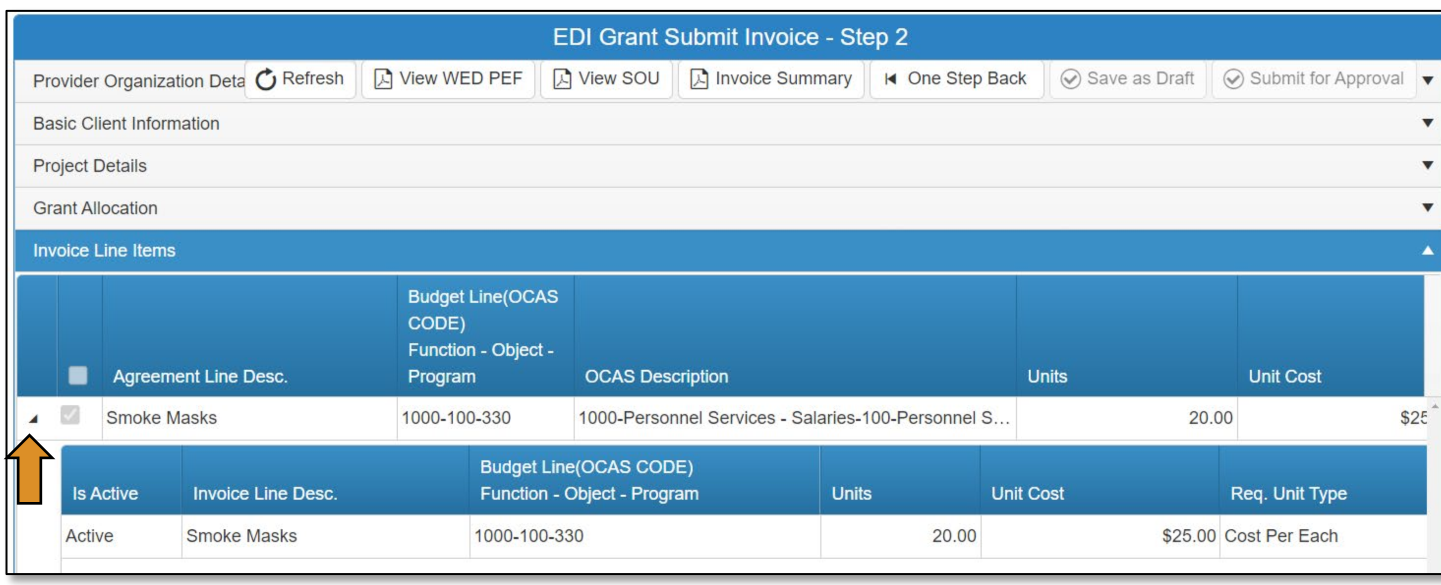
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



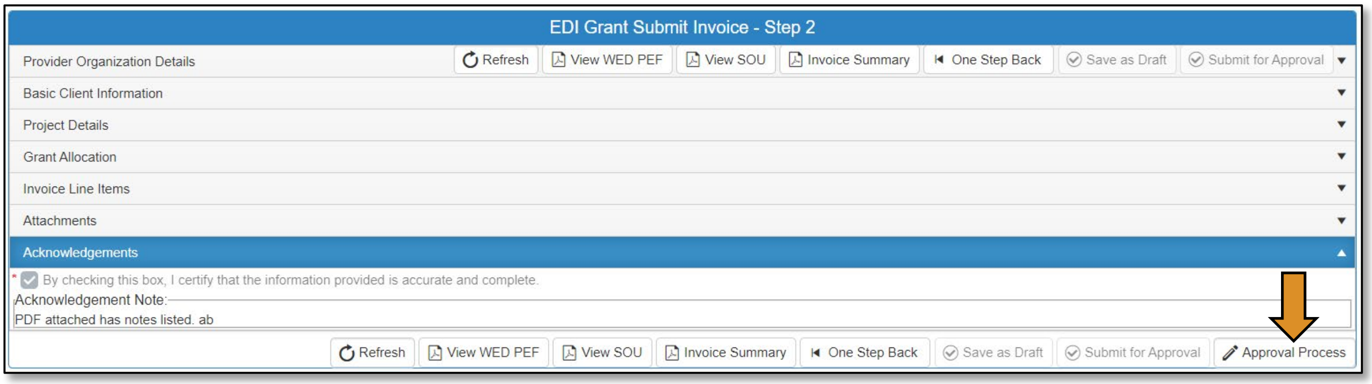
EDI Grant Submit Invoice – Step 2

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

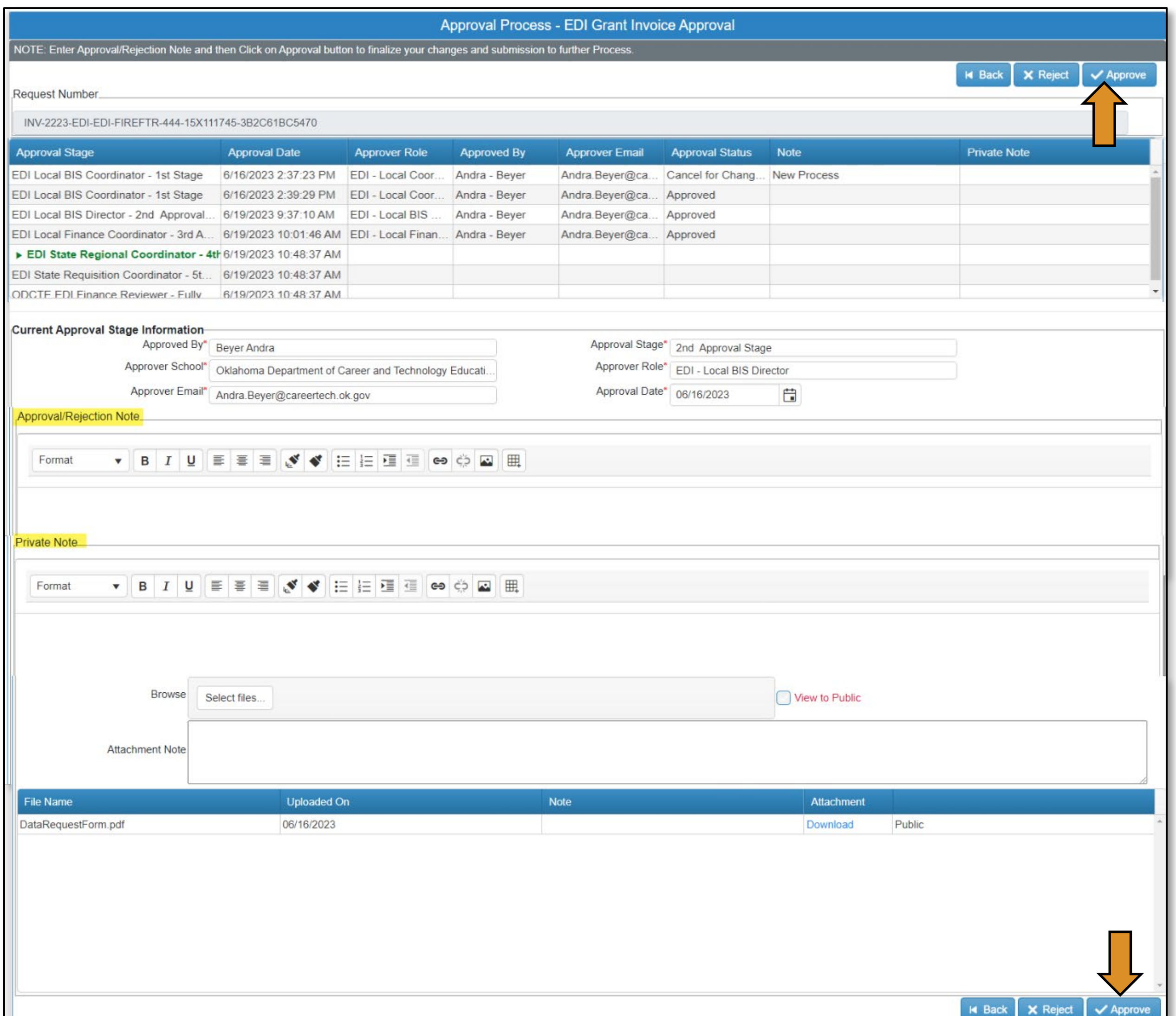
- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.



- 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.



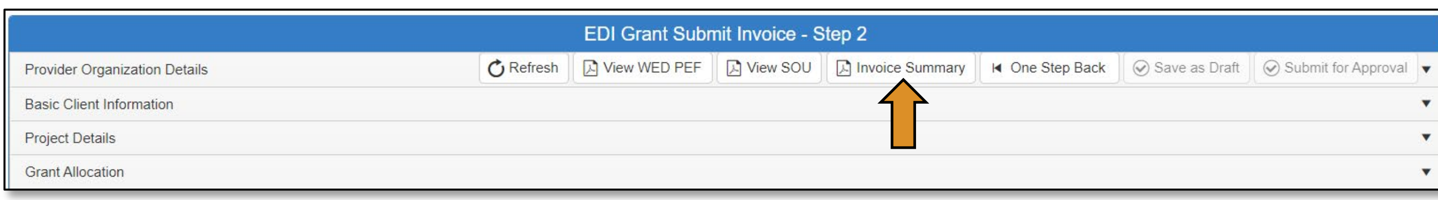
- Click the **Approve** button on the *Approval Process – EDI Grant Invoice Approval* page.



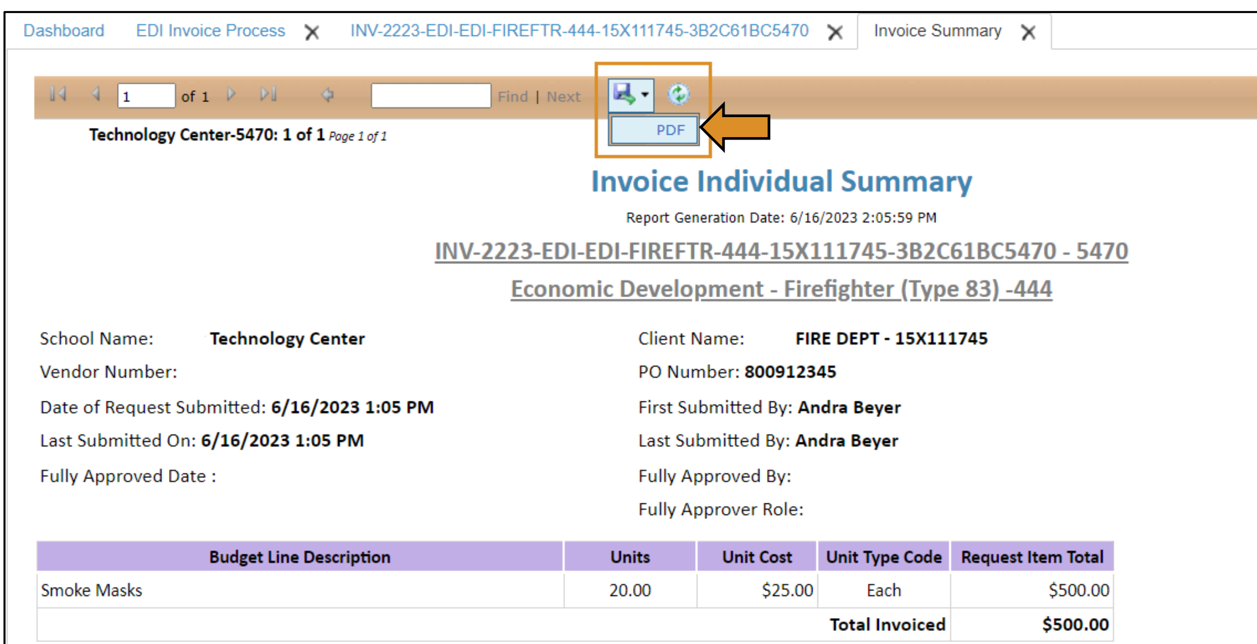
- A message will pop up asking if you are sure. Click **OK**.

- 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.

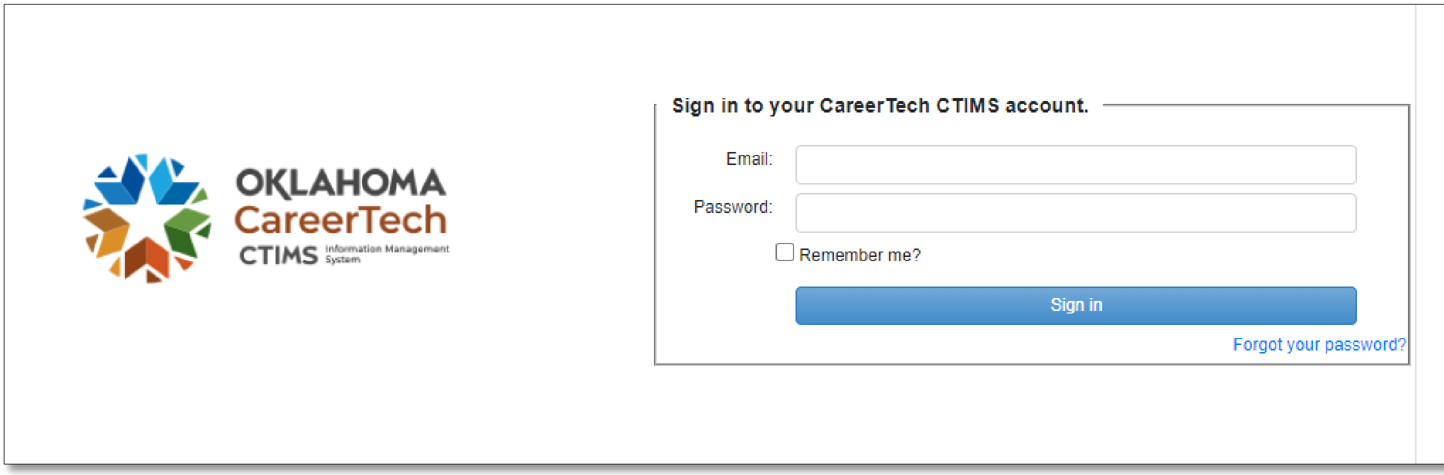


The *invoice* has been successfully submitted and will go to the **EDI – State Requisition Coordinator**.

EDI – State Requisition Coordinator (Invoice Process)

Logging into CTIMS

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

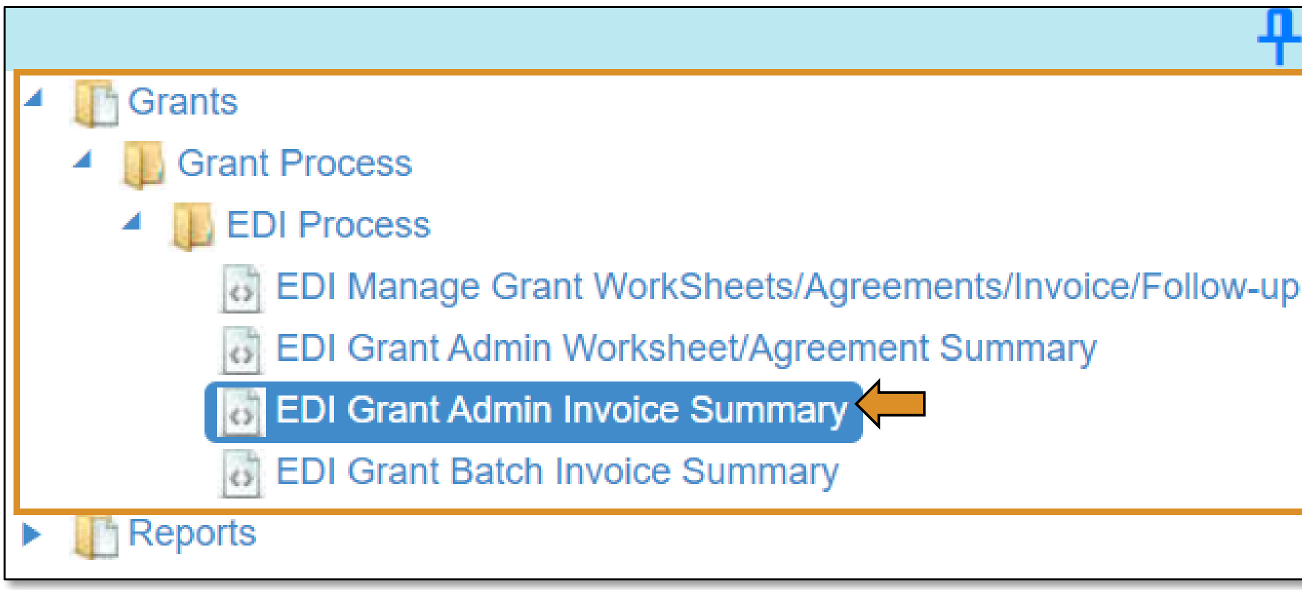


Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.

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.

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

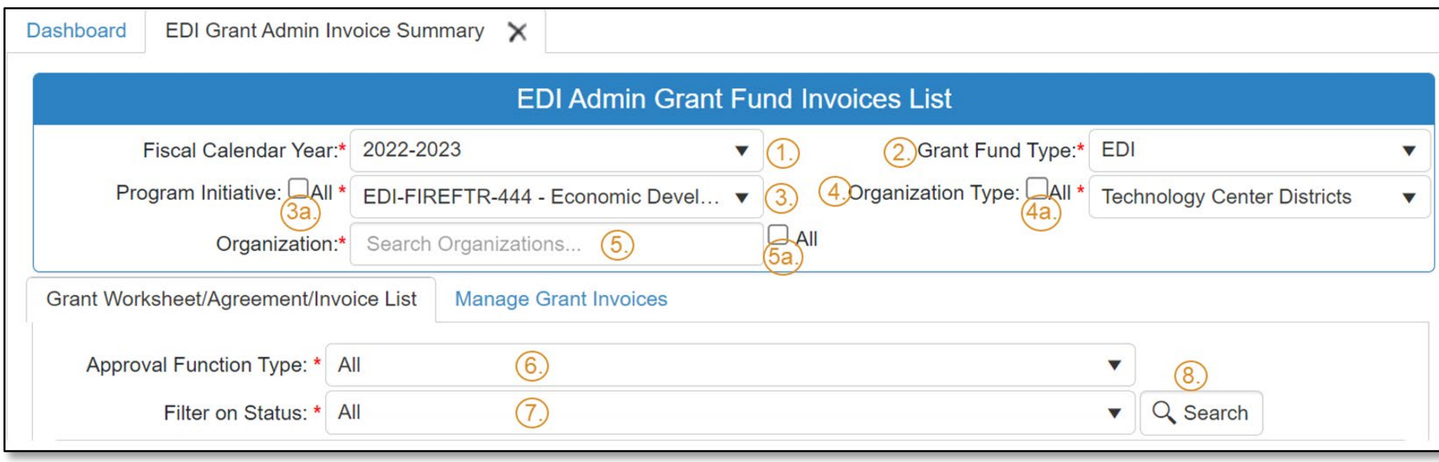


Accessing the Invoice

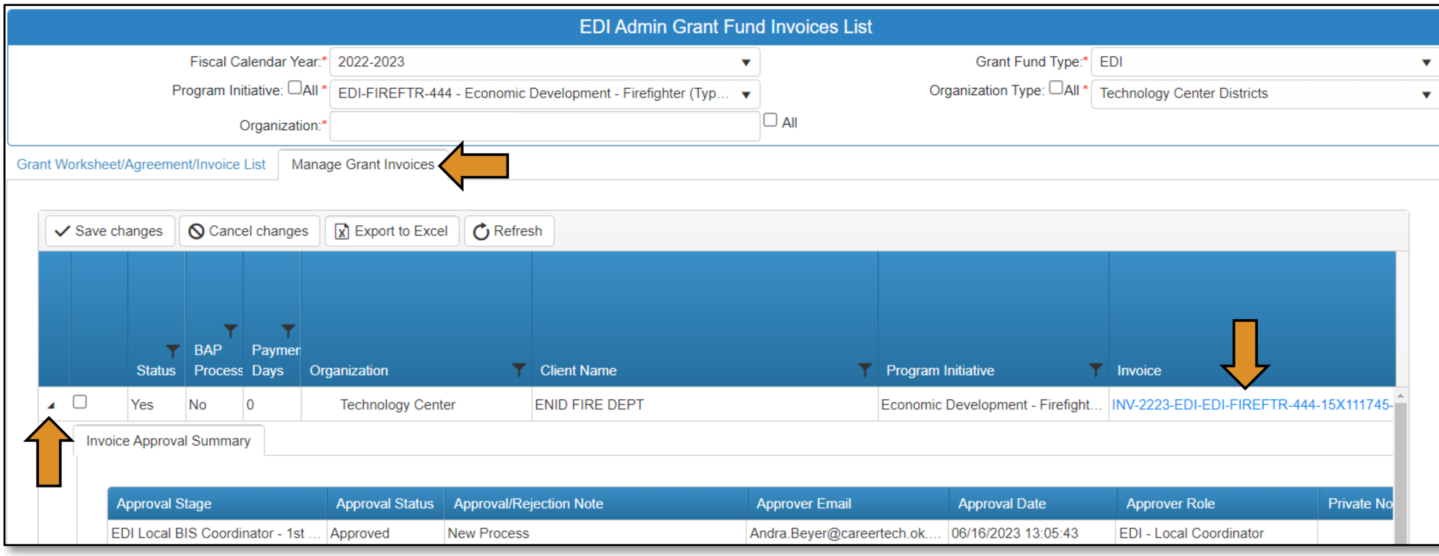
Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

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.

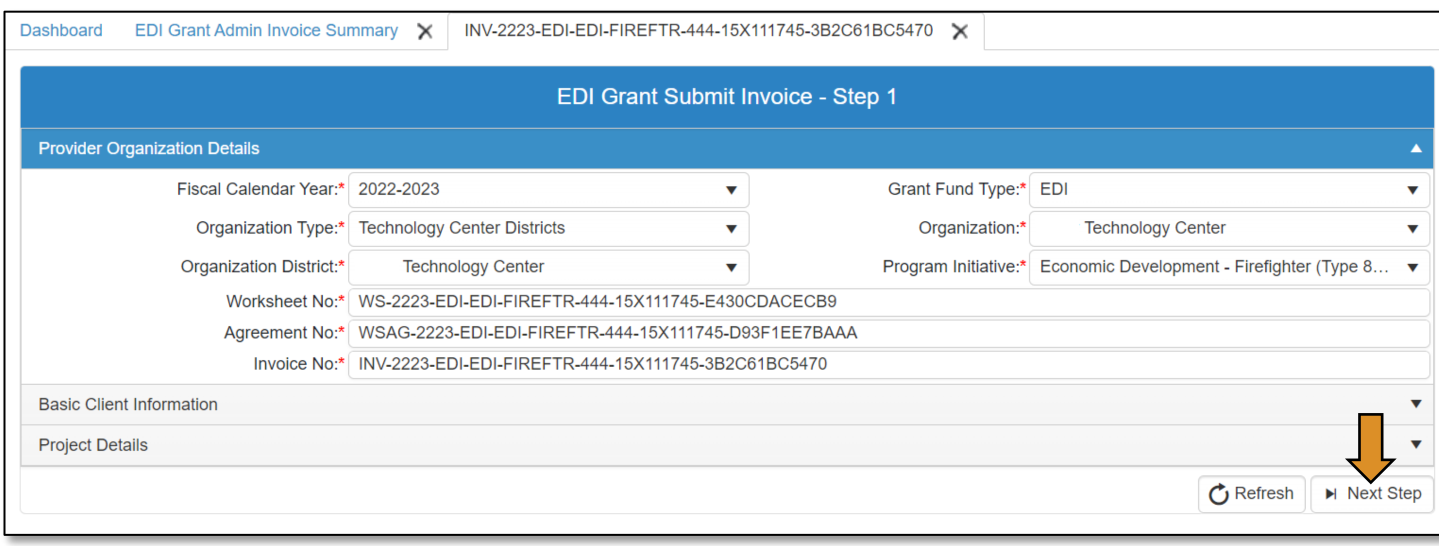


- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.



EDI Grant Submit Invoice – Step 1

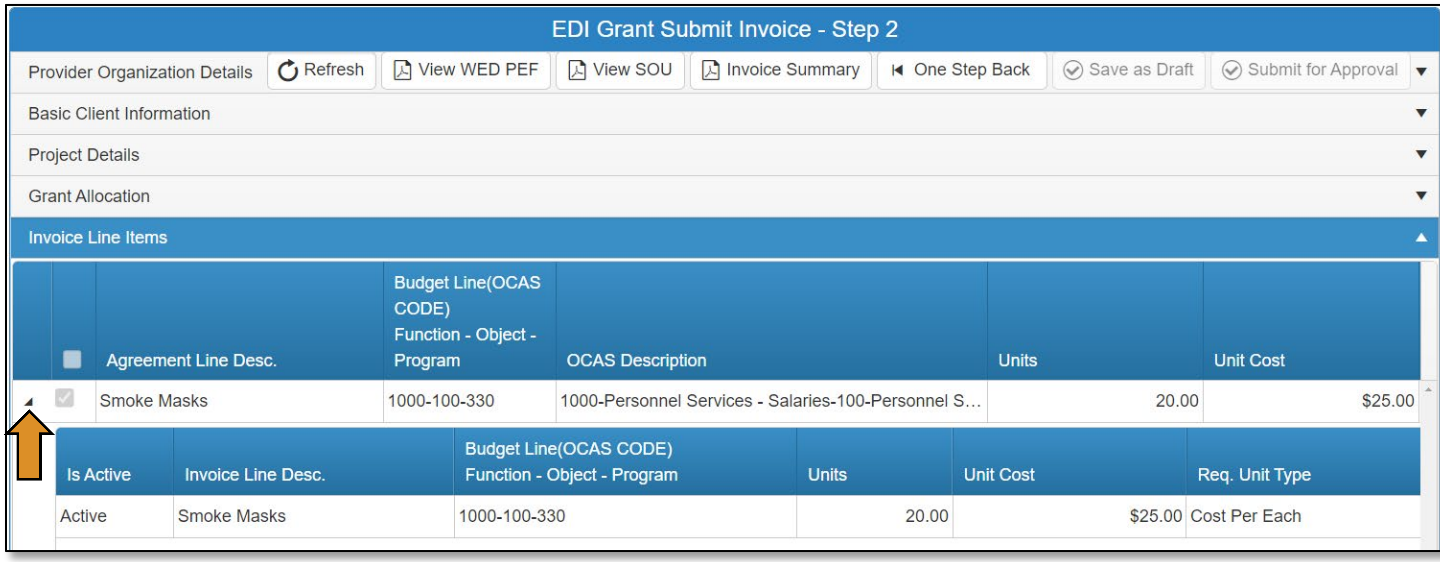
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



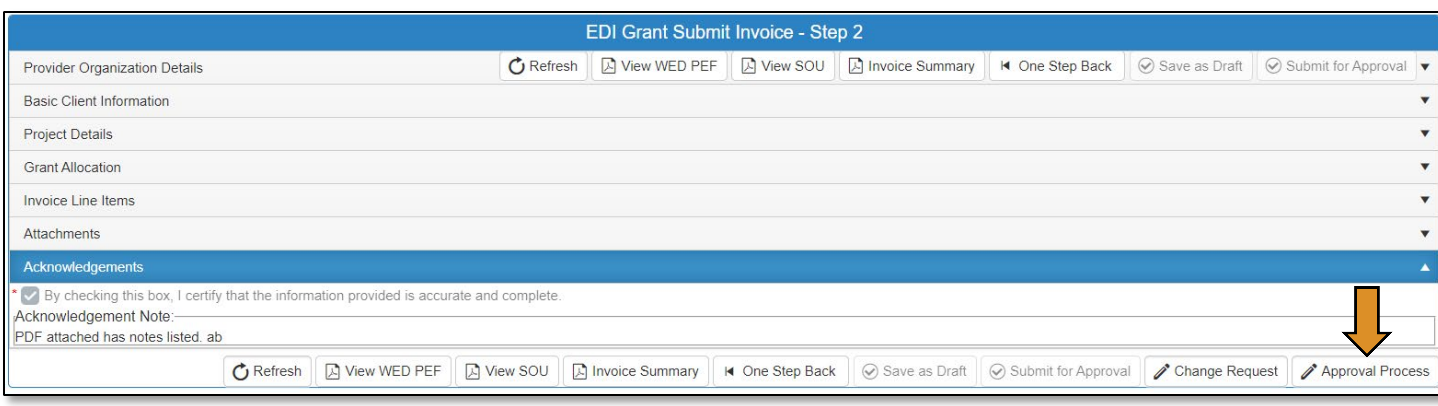
EDI Grant Submit Invoice – Step 2

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

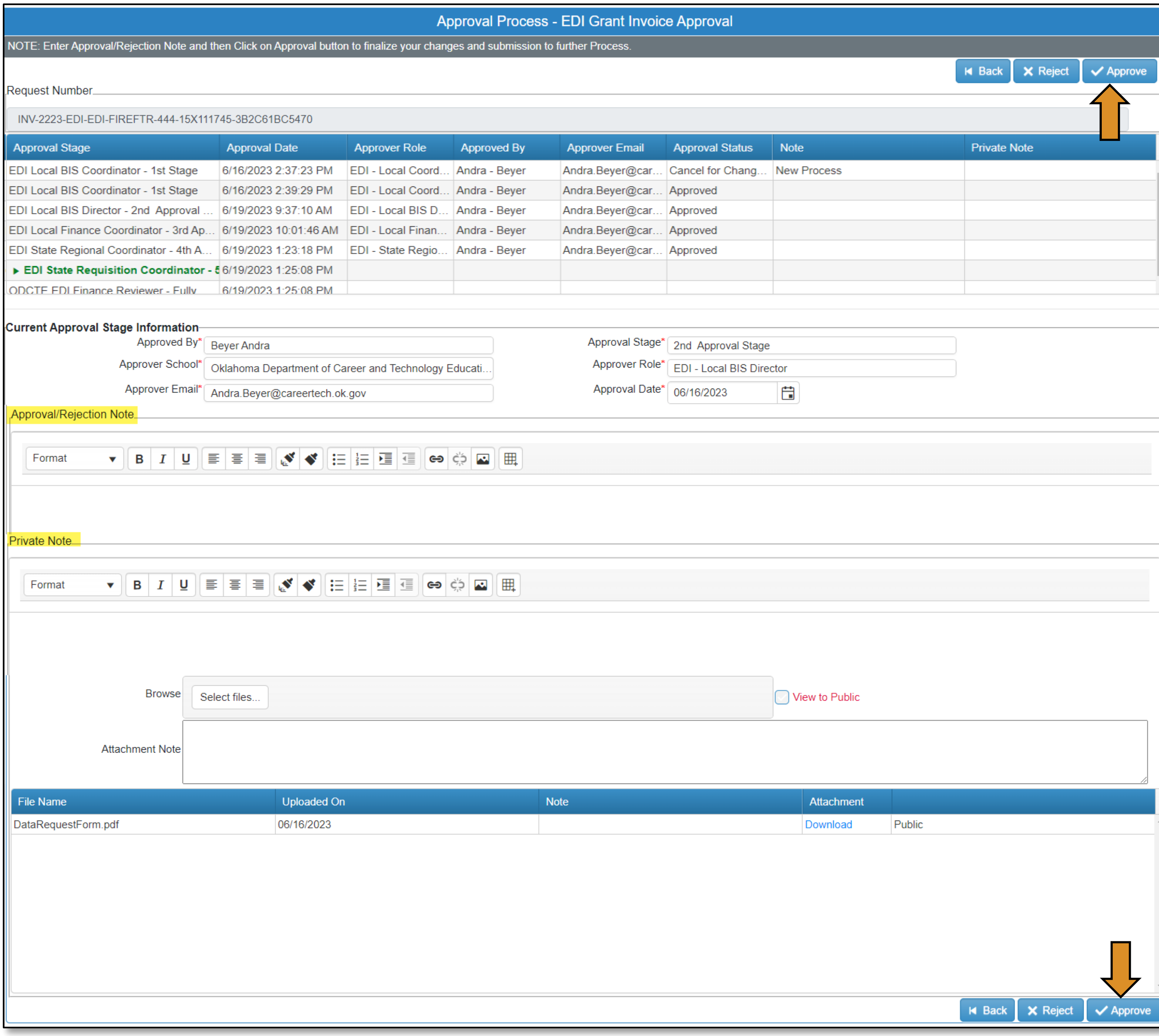
- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.



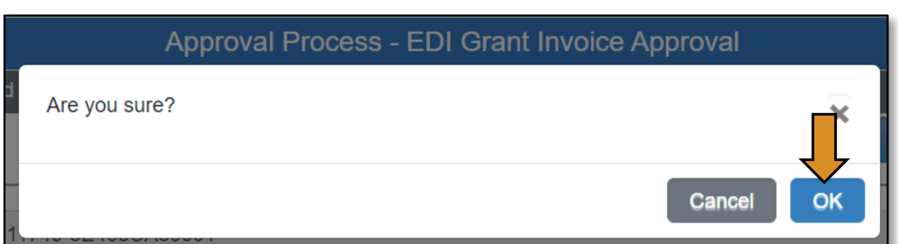
- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
  - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.
- Click the **Approval Process** button at the bottom of the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



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

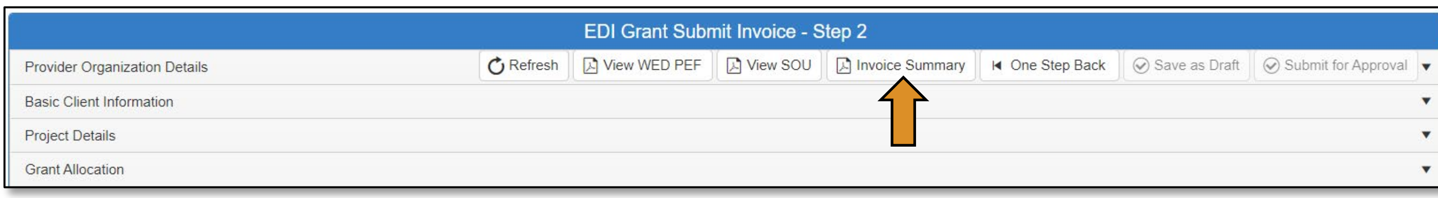


- A message will pop up asking if you are sure. Click **OK**.

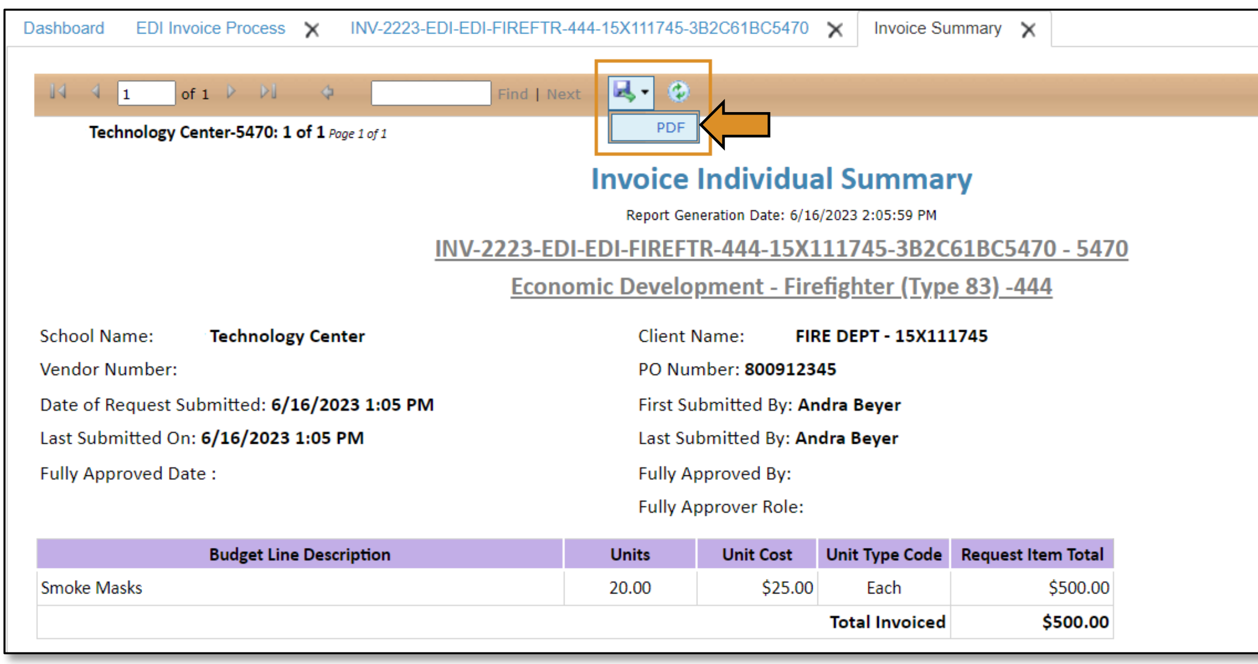


- A message will pop up saying, ‘Successfully Approved the request’. Click **OK**.

- 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.



Invoice Individual Summary

Report Generation Date: 6/16/2023 2:05:59 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:

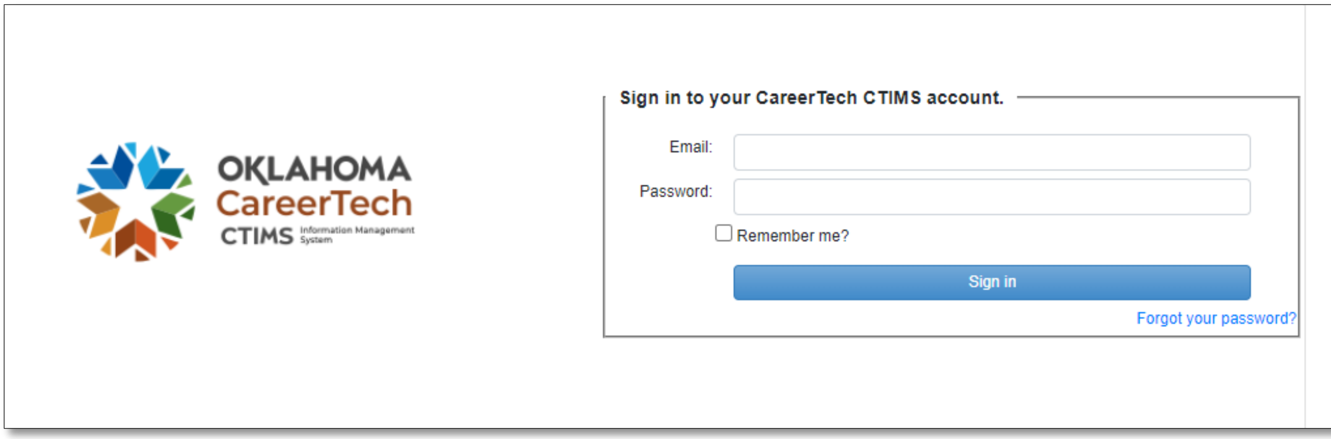
Budget Line Description	Units	Unit Cost	Unit Type Code	Request Item Total
Smoke Masks	20.00	$25.00	Each	$500.00
			Total Invoiced	**$500.00**

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

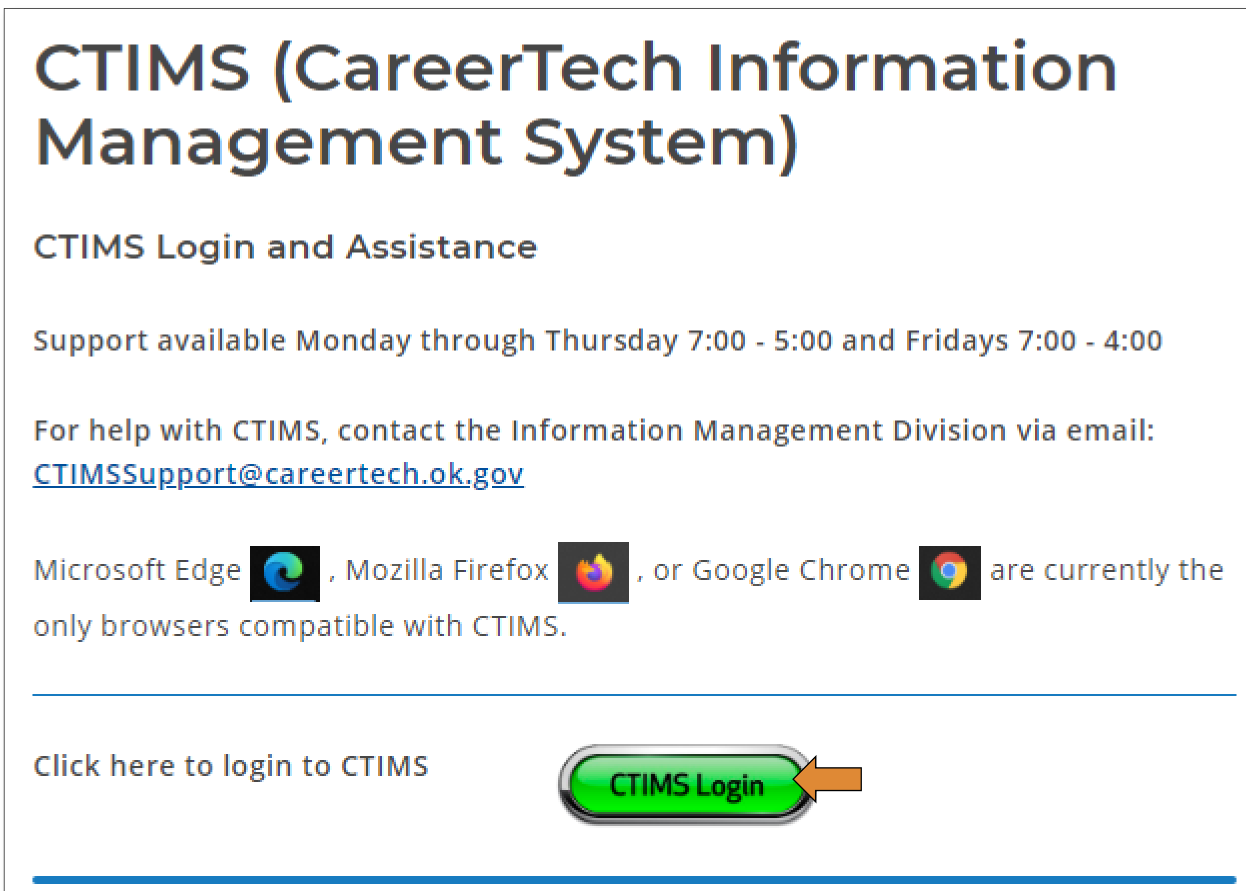
ODCTE – EDI Finance Reviewer (Invoice Process)

Logging into CTIMS

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



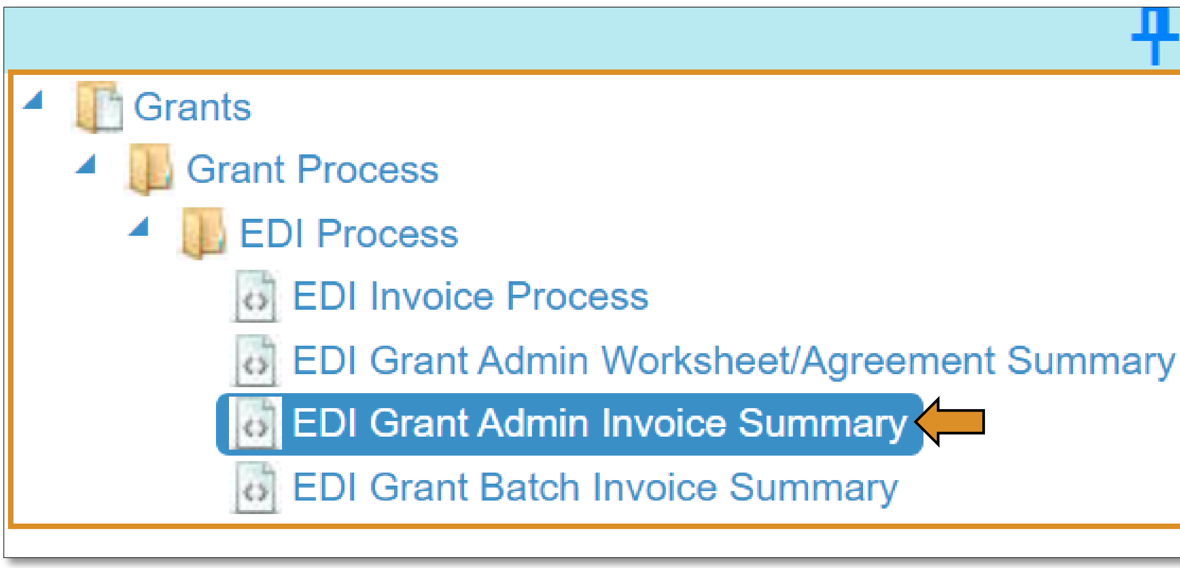
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.



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.

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

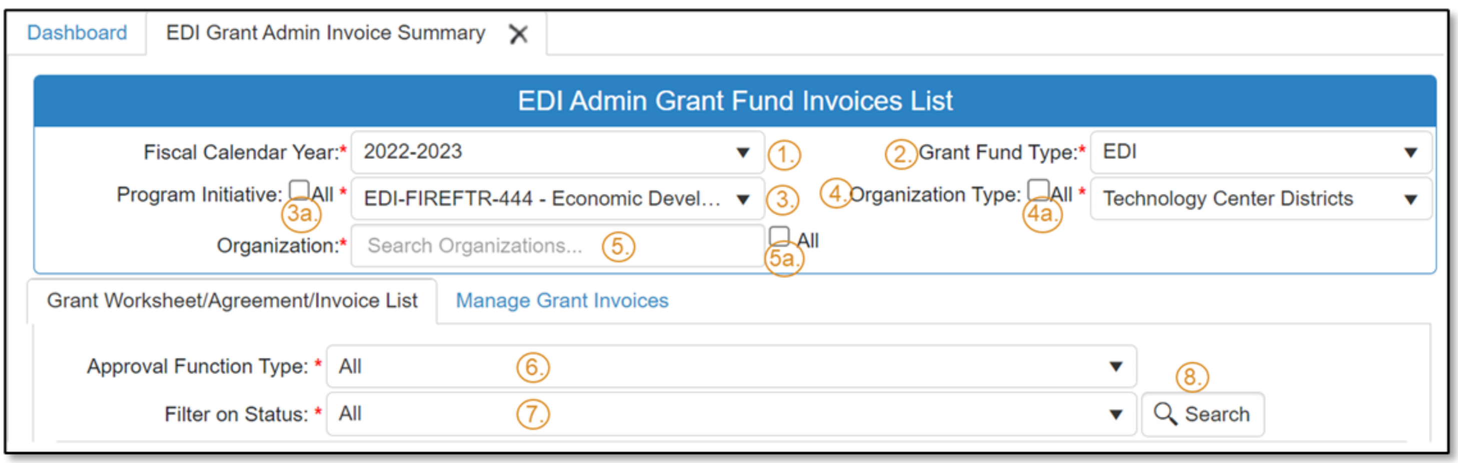


Accessing the Invoice

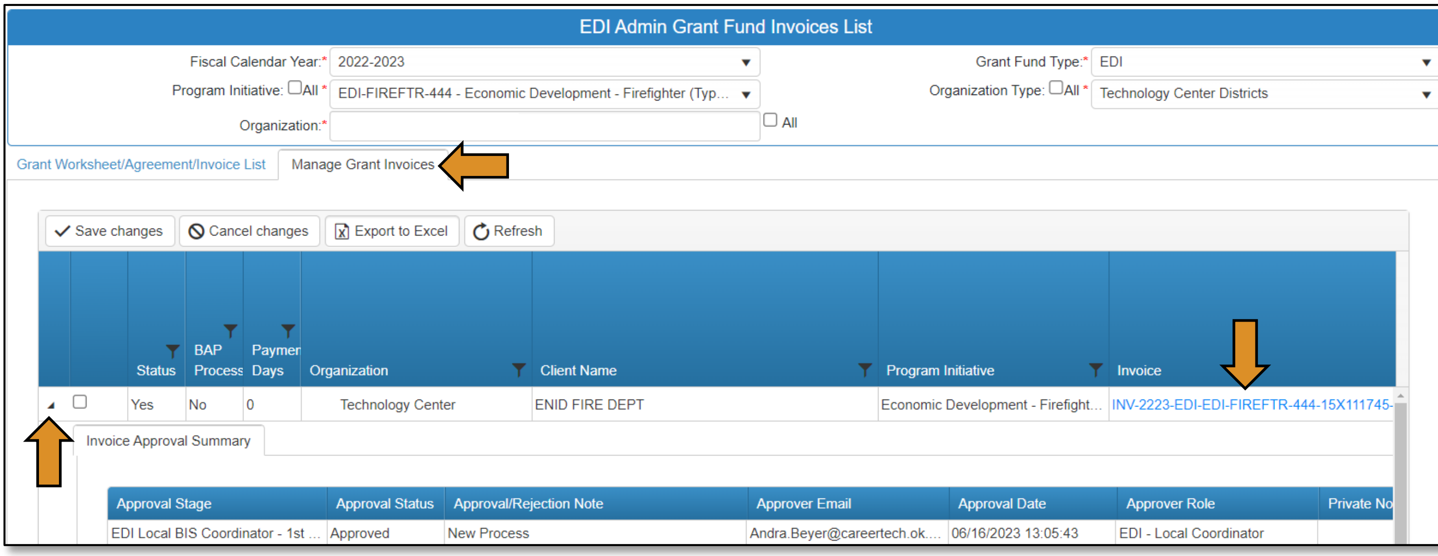
Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

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.

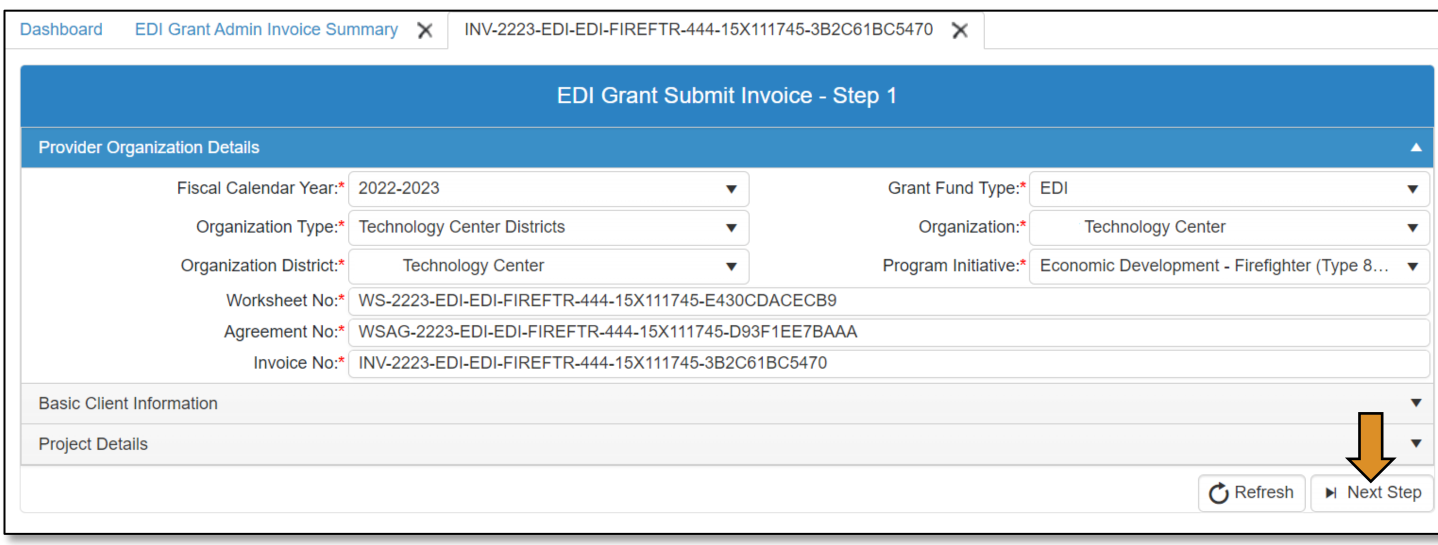


- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.



EDI Grant Submit Invoice – Step 1

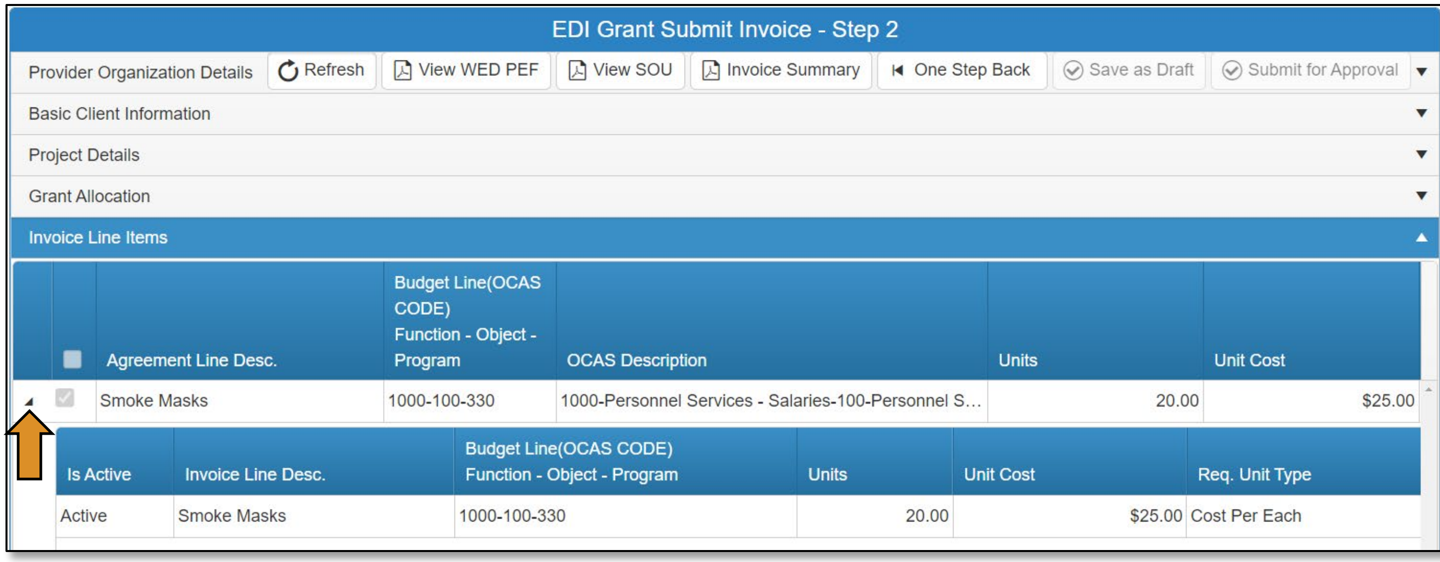
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



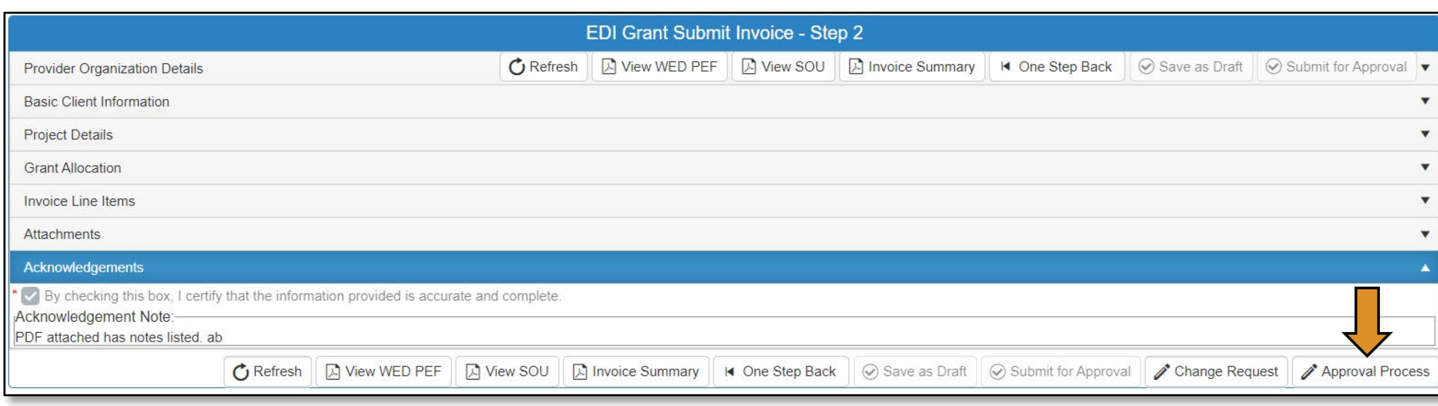
EDI Grant Submit Invoice – Step 2

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

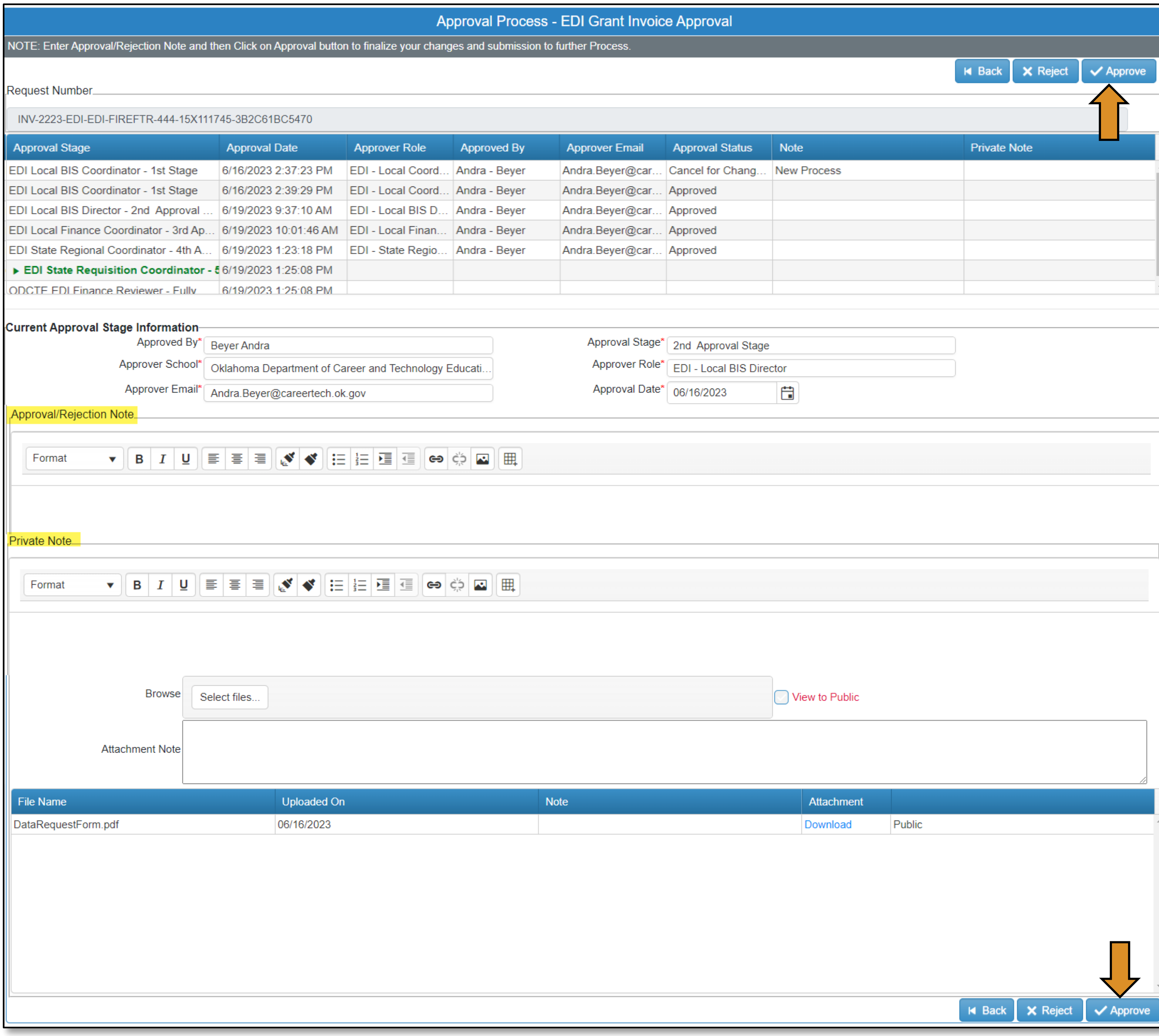
- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.



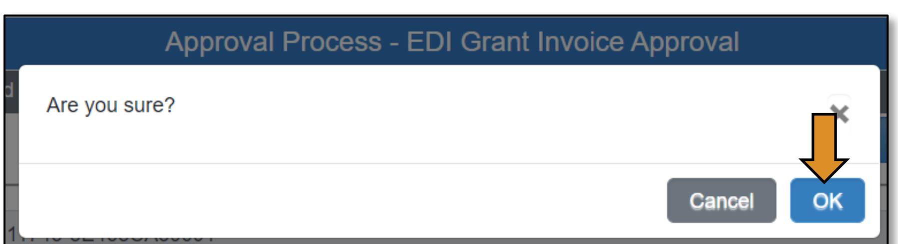
- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
  - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents <u>must</u> match.
- Click the **Approval Process** button at the bottom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



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

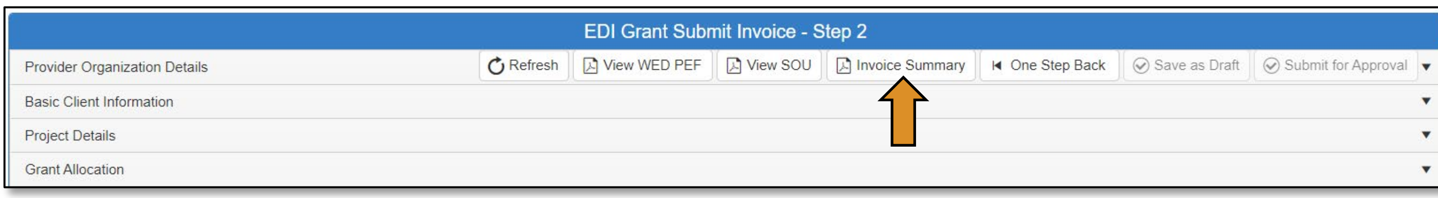


- A message will pop up asking if you are sure. Click **OK**.

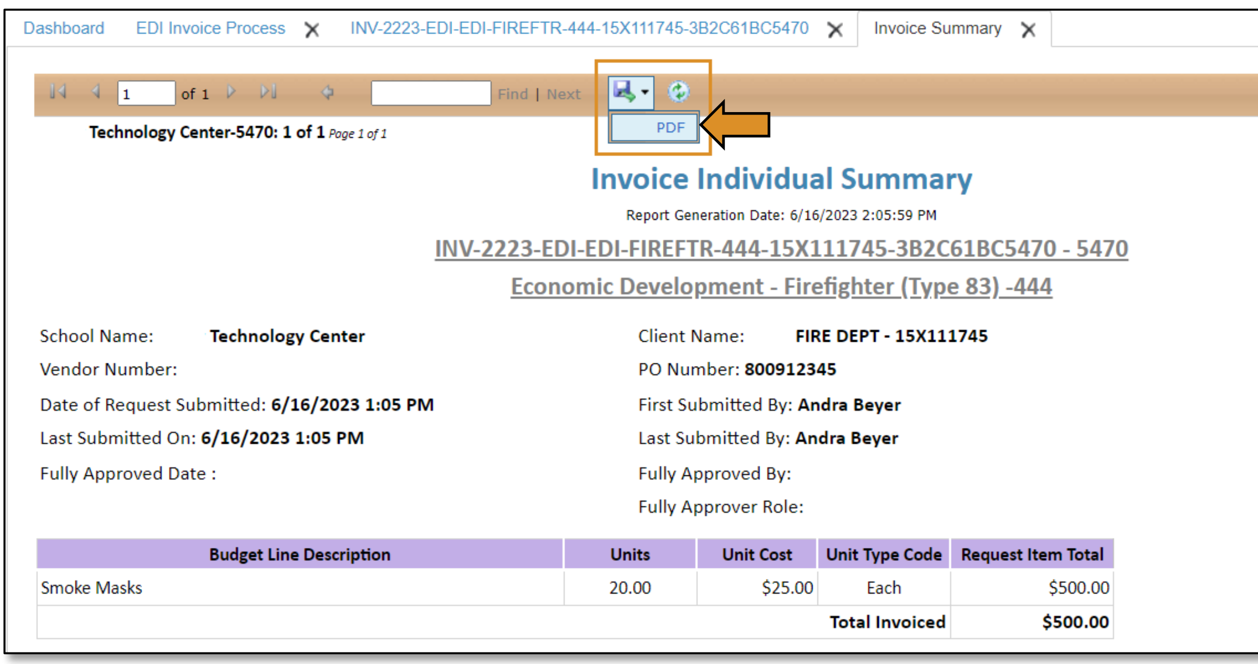


- A message will pop up saying, 'Successfully Approved the request'. Click **OK**.

- 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.

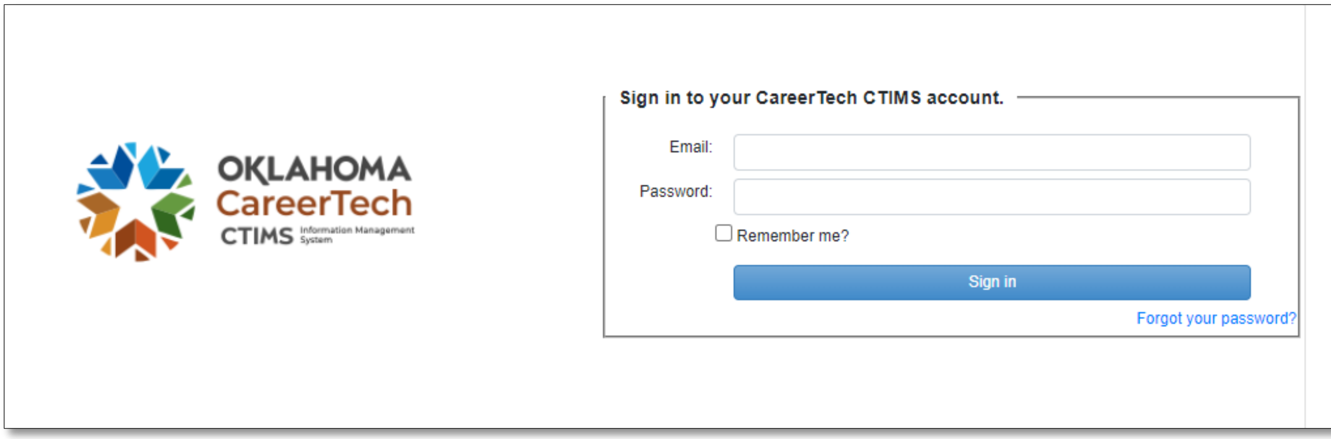


The *invoice* has been successfully submitted and will go to the **ODCTE – EDI Finance Reviewer** (final approval).

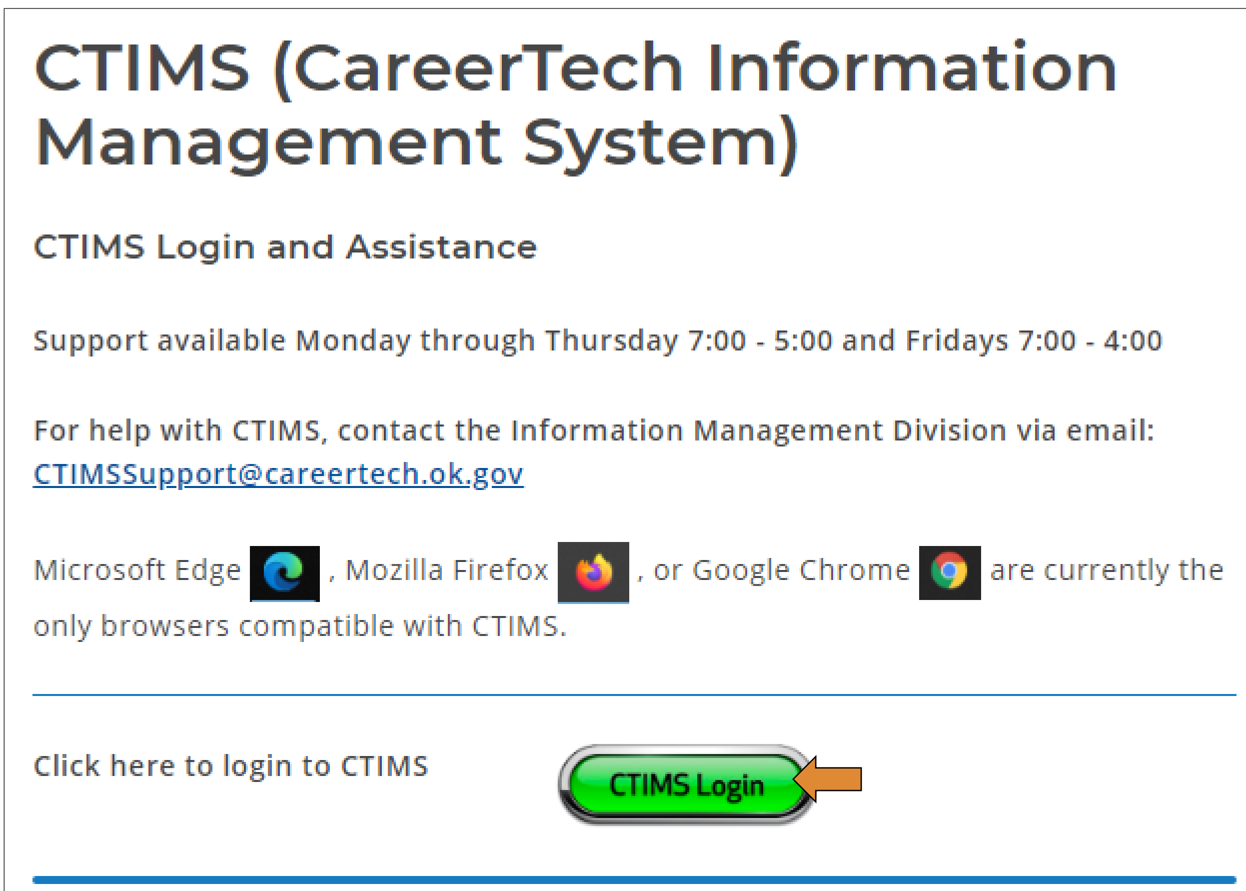
ODCTE – EDI Finance Reviewer (Invoice Process)

Logging into CTIMS

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



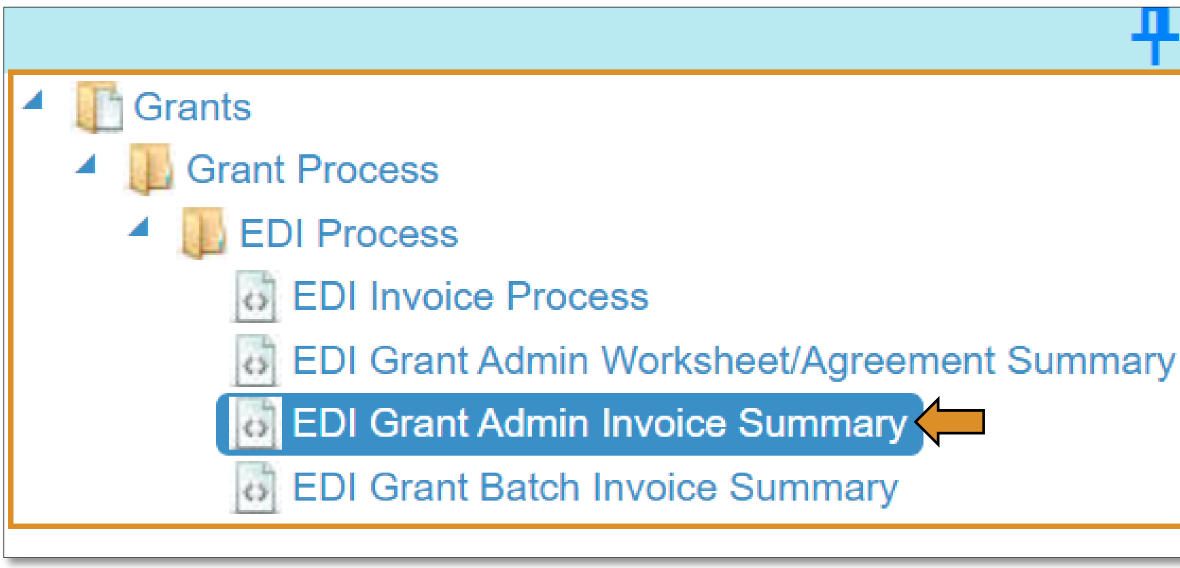
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green **CTIMS Login** button.



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.

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

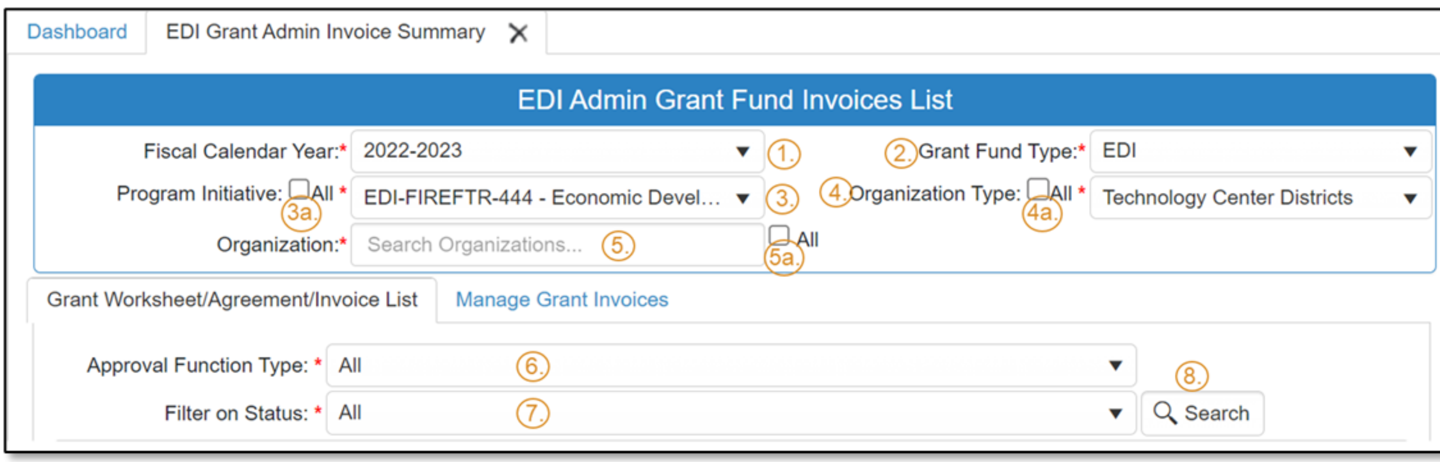


Accessing the Invoice

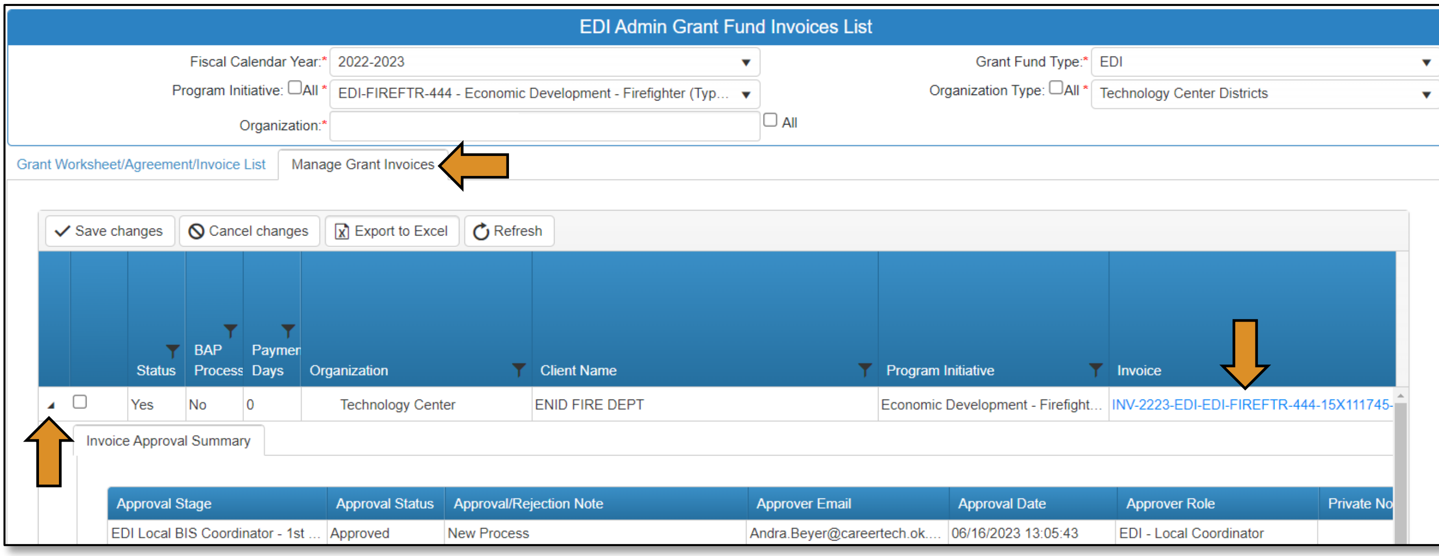
Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

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.

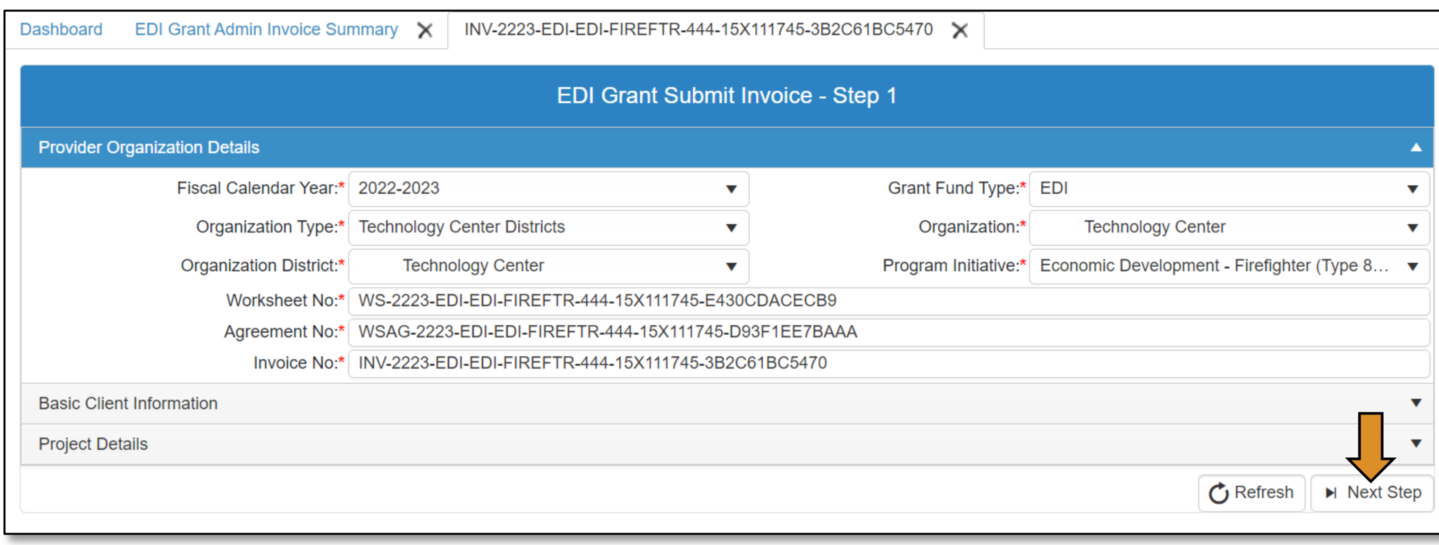


- After clicking the **Search** button, select the **Manage Grant Invoices** tab to open an invoice that has already been started.
- Click on the blue Invoice link to open the invoice.



EDI Grant Submit Invoice – Step 1

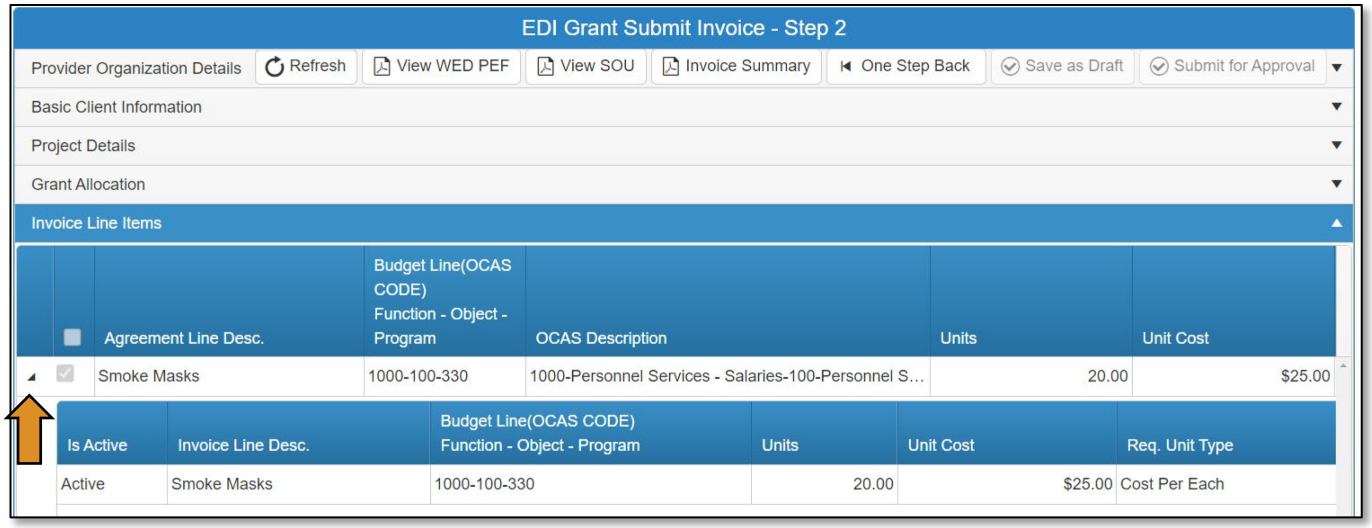
- Verify that the information is correct, then select **Next Step** to continue to the next screen.



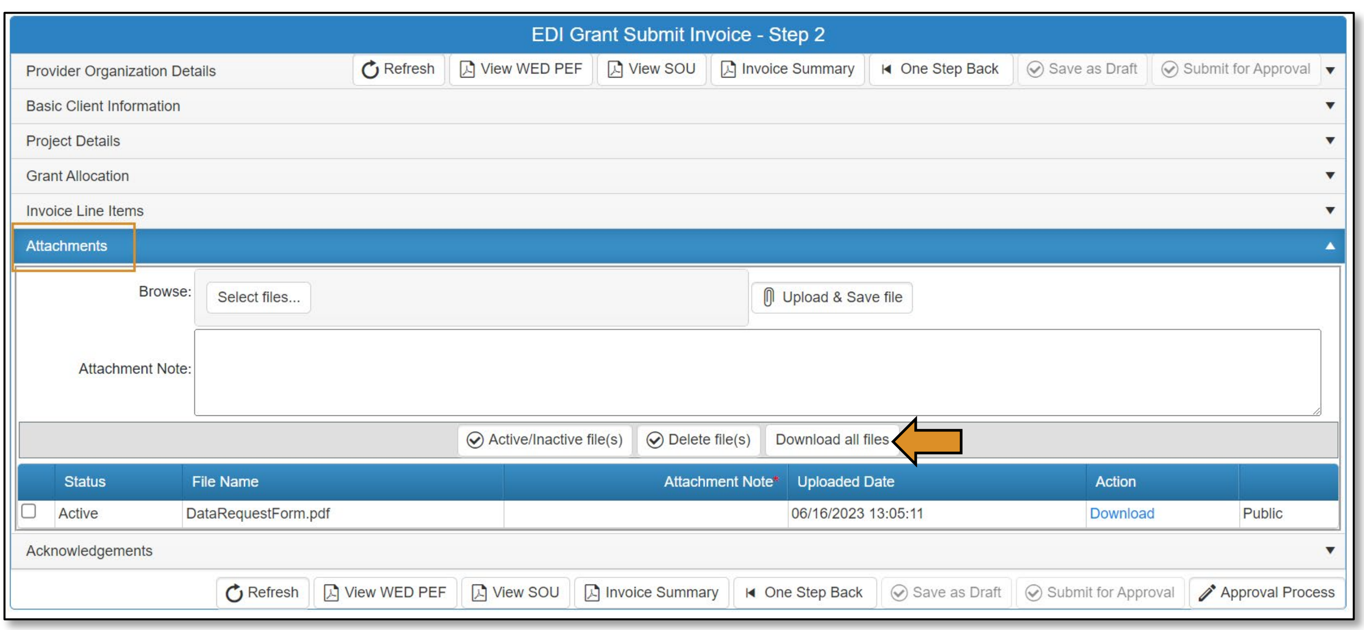
EDI Grant Submit Invoice – Step 2

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

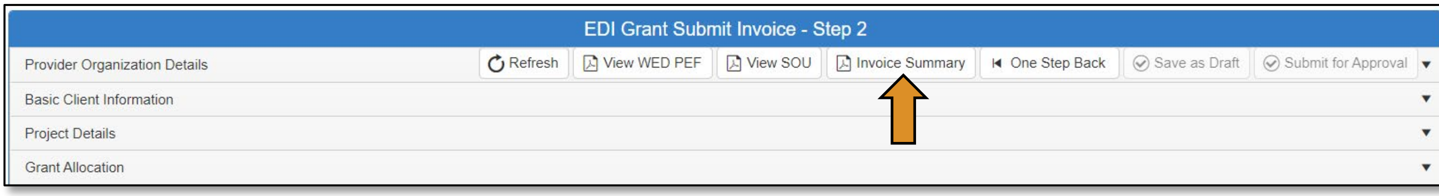
- Check to verify all line items are correct by clicking on the black arrow to the left of the line item.



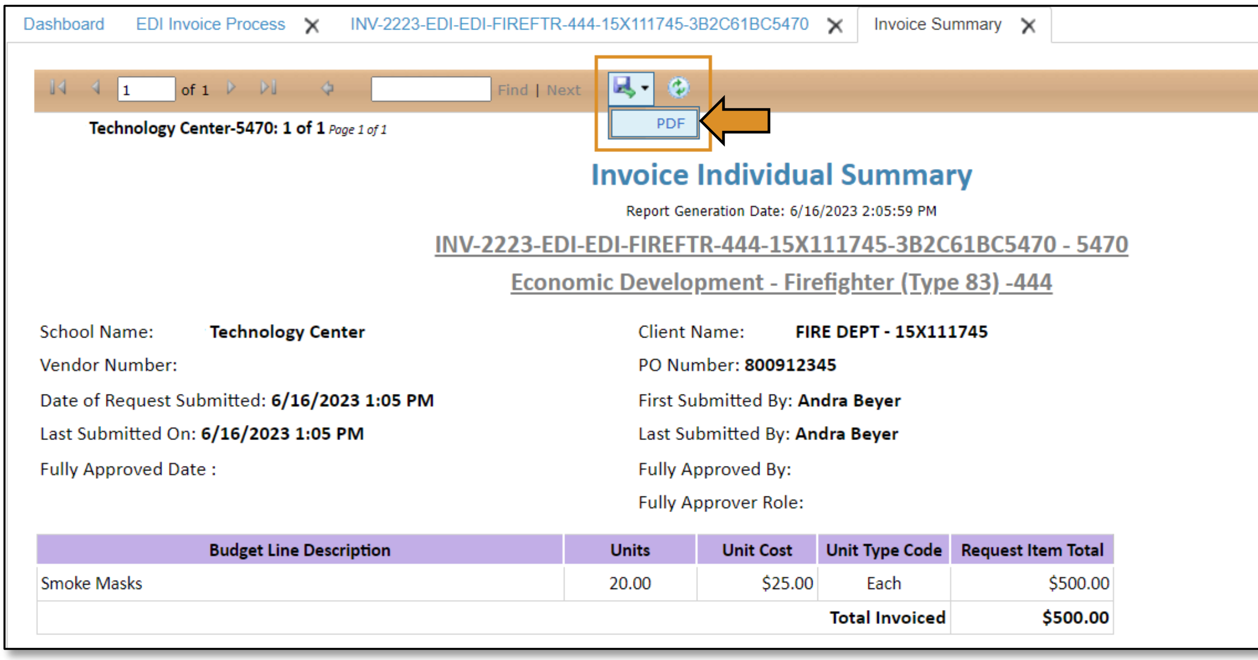
- Verify the documents that are attached match the line items by clicking on the **Attachments** row.
    - **IMPORTANT:** You must review the invoiced line items and attachments. Invoice line items and attached supporting documents <u>must</u> match.
- Verify the invoice information and print the documentation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



- 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.



Invoice Individual Summary

Report Generation Date: 6/16/2023 2:05:59 PM

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

Economic Development - Firefighter (Type 83) -444

School Name: **Technology Center**

Vendor Number:

Date of Request Submitted: **6/16/2023 1:05 PM**

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

Fully Approved Date :

Client Name: **FIRE DEPT - 15X111745**

PO Number: **800912345**

First Submitted By: **Andra Beyer**

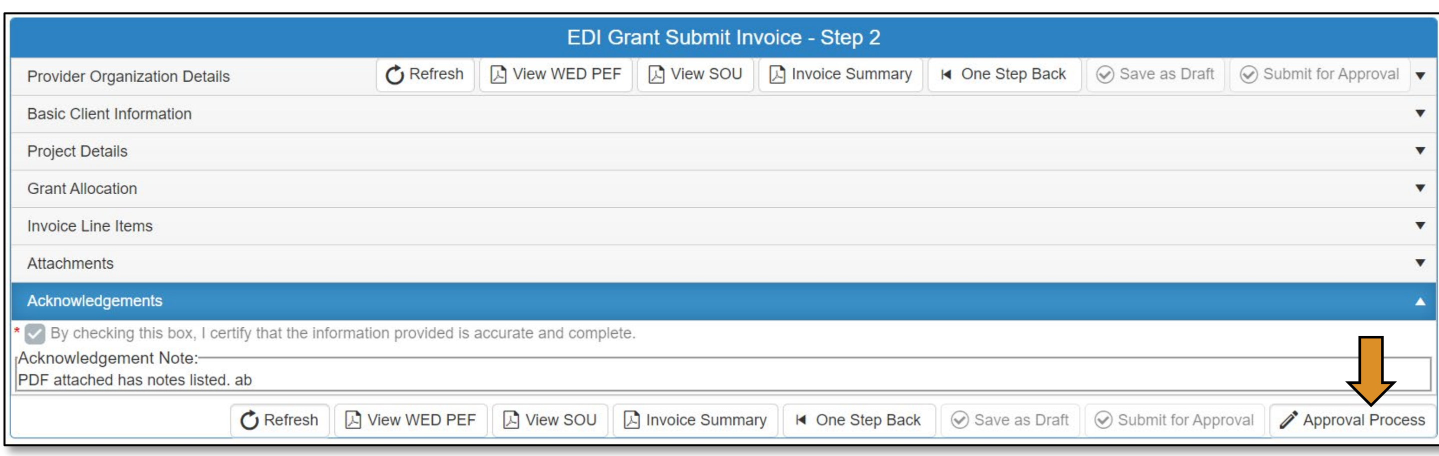
Last Submitted By: **Andra Beyer**

Fully Approved By:

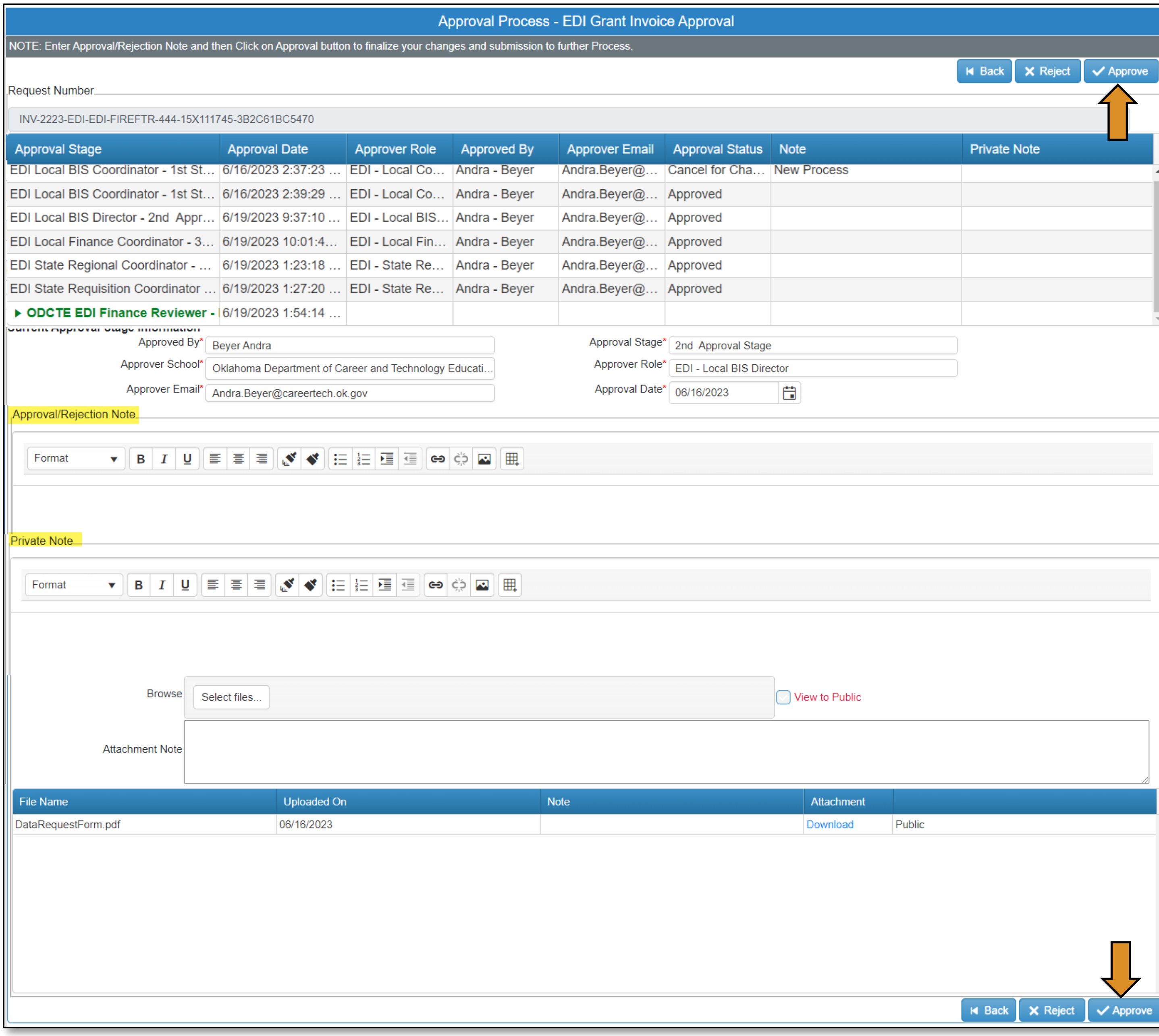
Fully Approver Role:

Budget Line Description	Units	Unit Cost	Unit Type Code	Request Item Total
Smoke Masks	20.00	$25.00	Each	$500.00
			Total Invoiced	**$500.00**

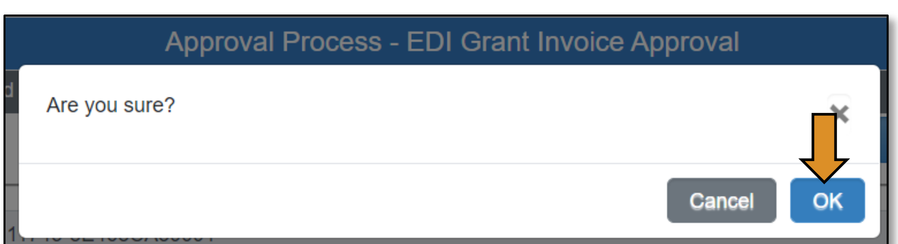
- Click the **Approval Process** button at the bottom of the screen.



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

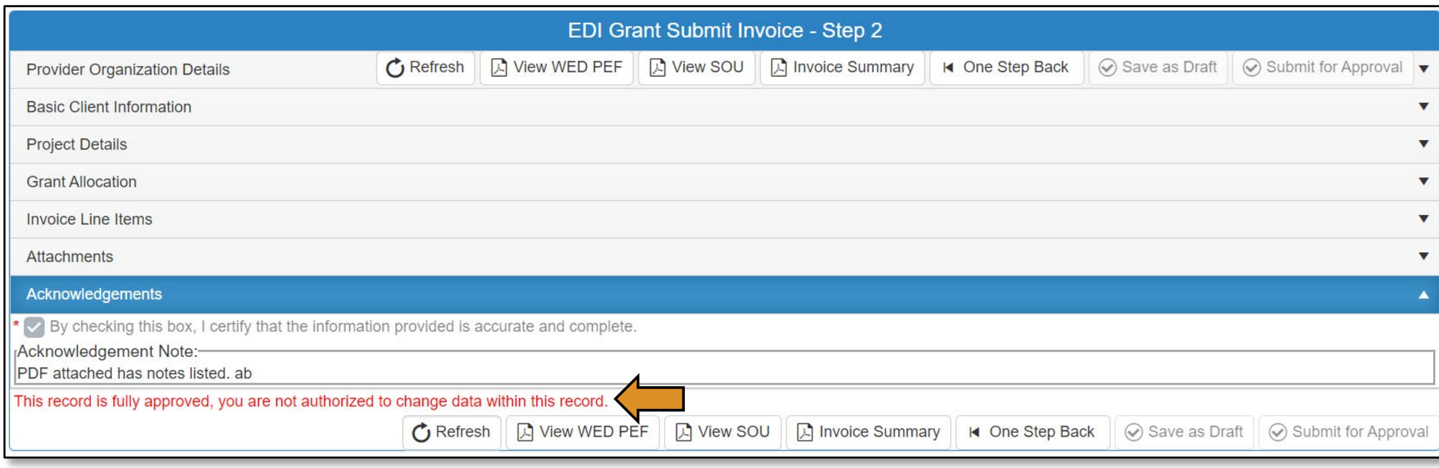


- A message will pop up asking if you are sure. Click **OK**.



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

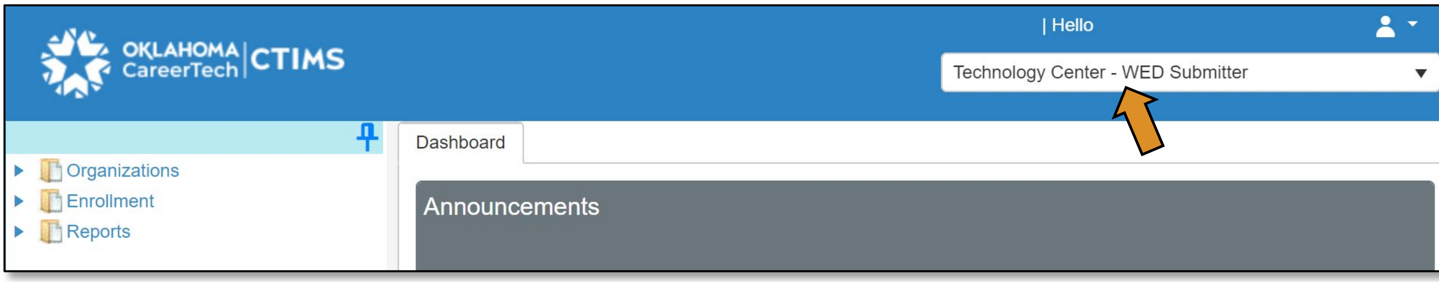
- You will now see that the record is fully approved.



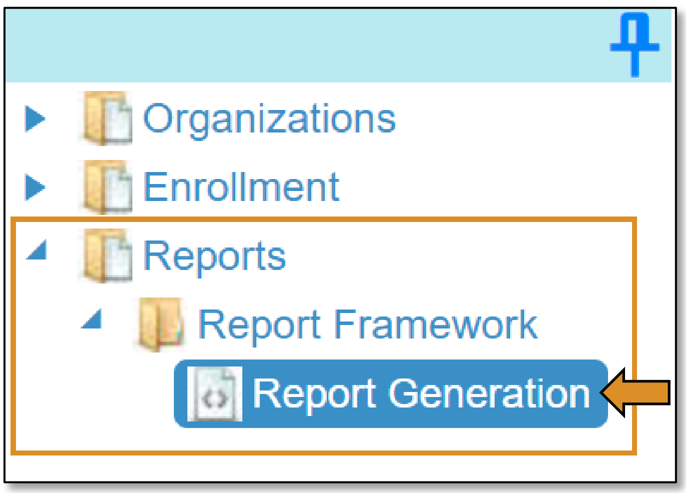
Printing a PEF

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.



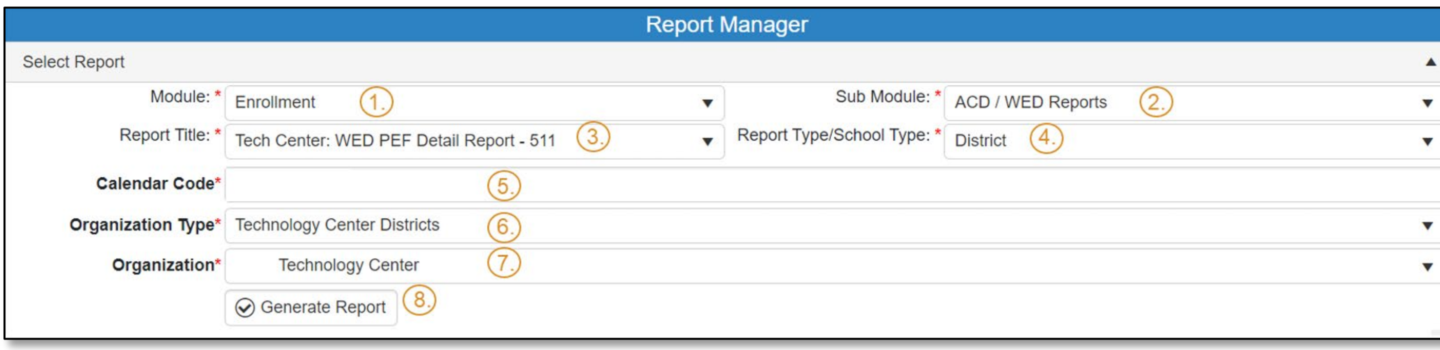
- Click the arrows next to **Reports** & **Report Framework**.
- Click on the **Report Generation** link.



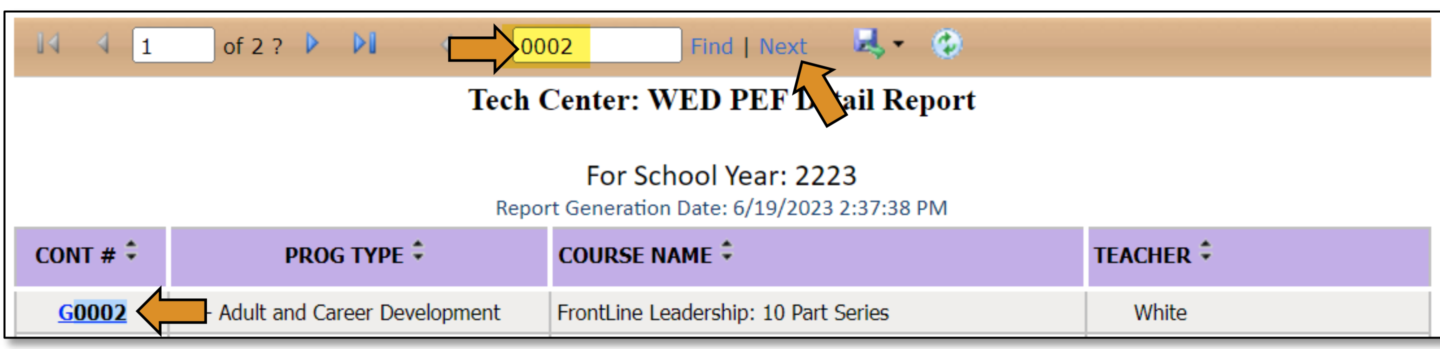
Complete the **Report Manager** form. The tagged numbers on the screenshot correspond to the instruction steps below.

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**.

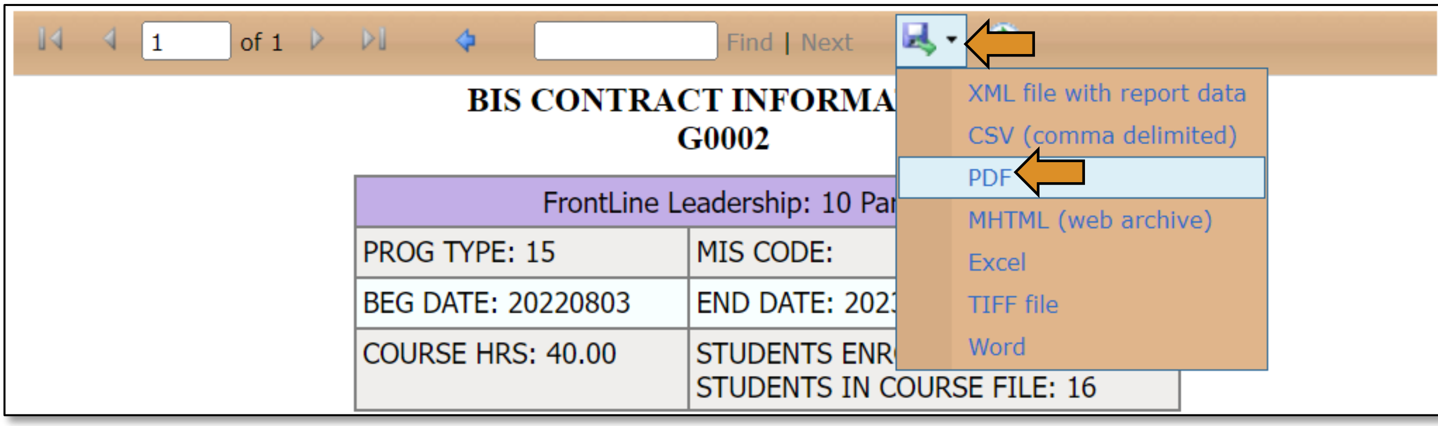
NOTE: A red asterisk (*) indicates a required field.



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

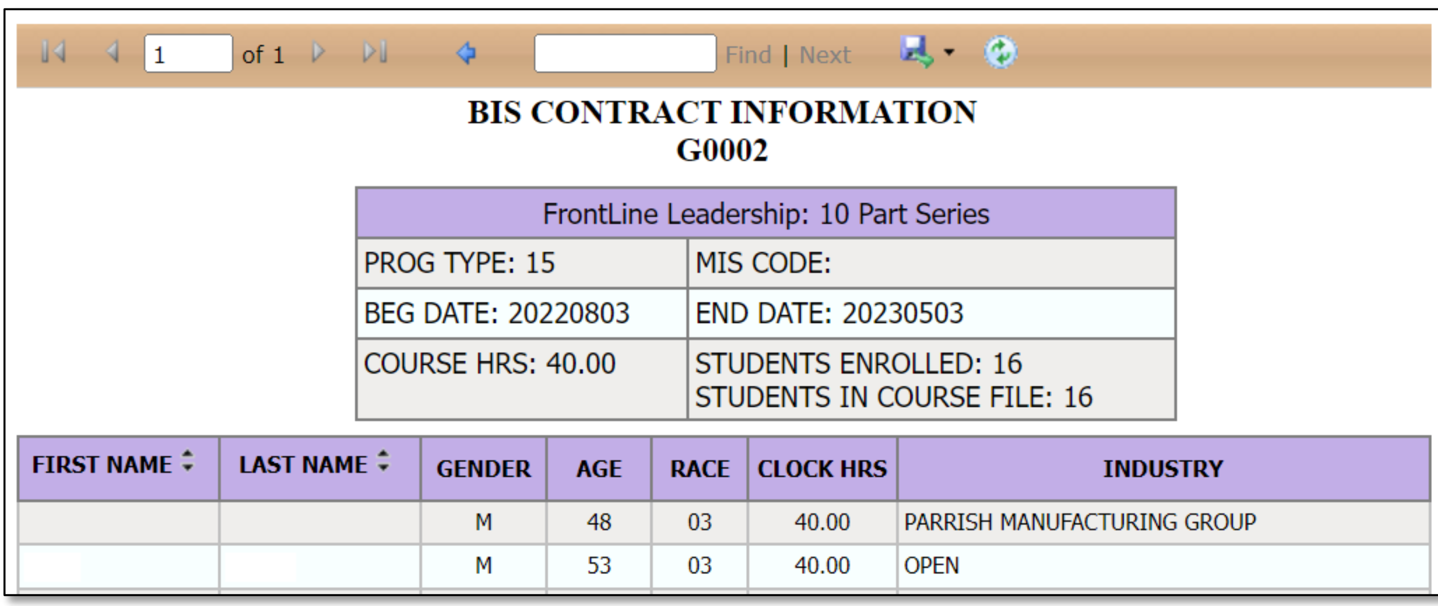


- Click the contract number link to open the PEF. The PEF information will display.
- Click on the blue disc to download a PDF. You can save it for your records or print it after exporting.



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:


1 of 1 Find | Next

BIS CONTRACT INFORMATION
G0002

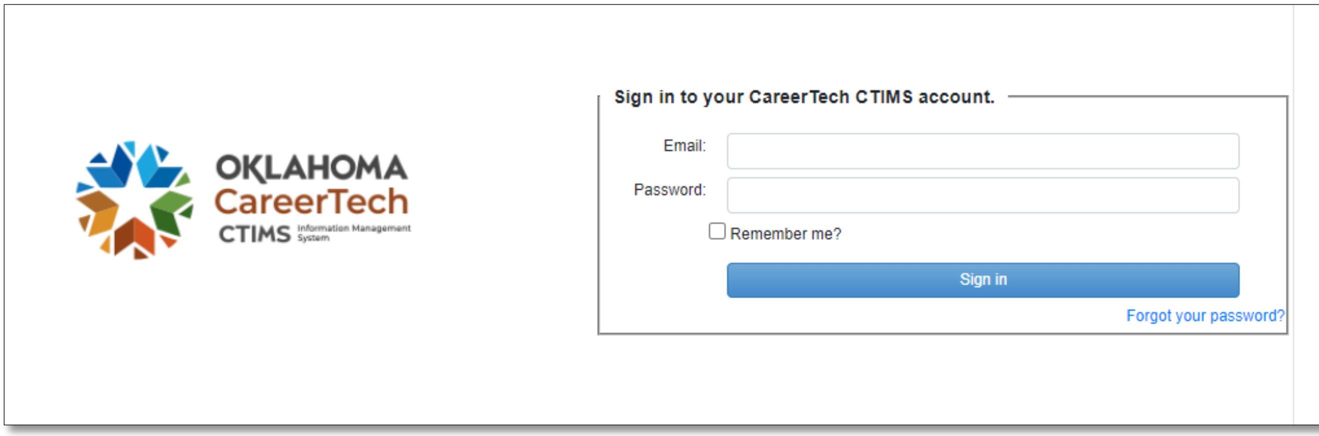
FrontLine Leadership: 10 Part Series	
PROG TYPE: 15	MIS CODE:
BEG DATE: 20220803	END DATE: 20230503
COURSE HRS: 40.00	STUDENTS ENROLLED: 16 STUDENTS IN COURSE FILE: 16

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

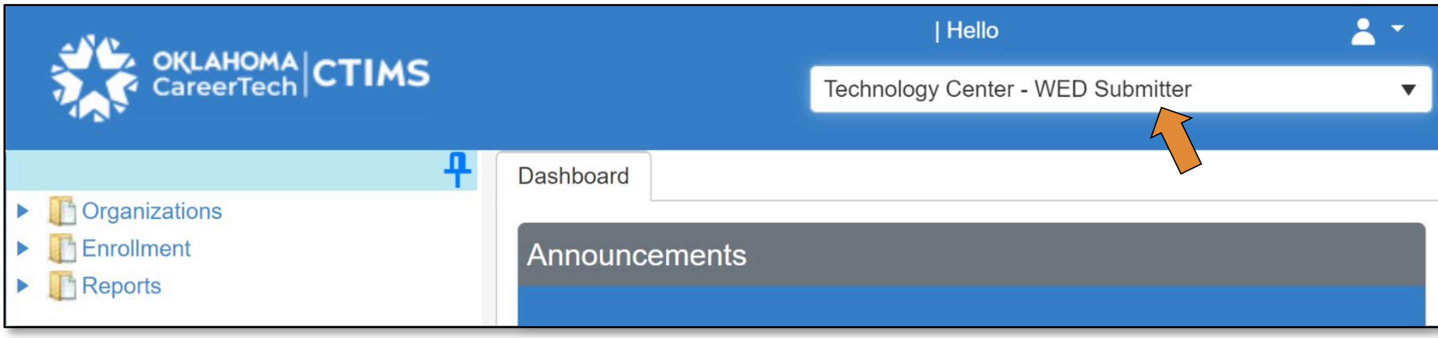
Sign in using your school email and CTIMS password at Contact — CareerTech (CT) - okcareertech.org.



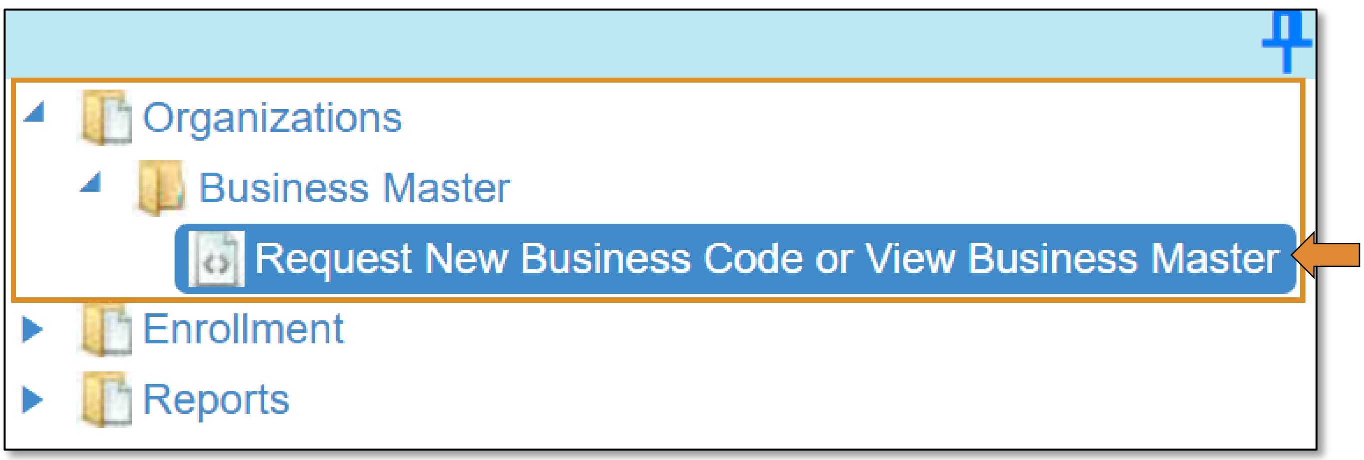
Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the green CTIMS login button.

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.



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

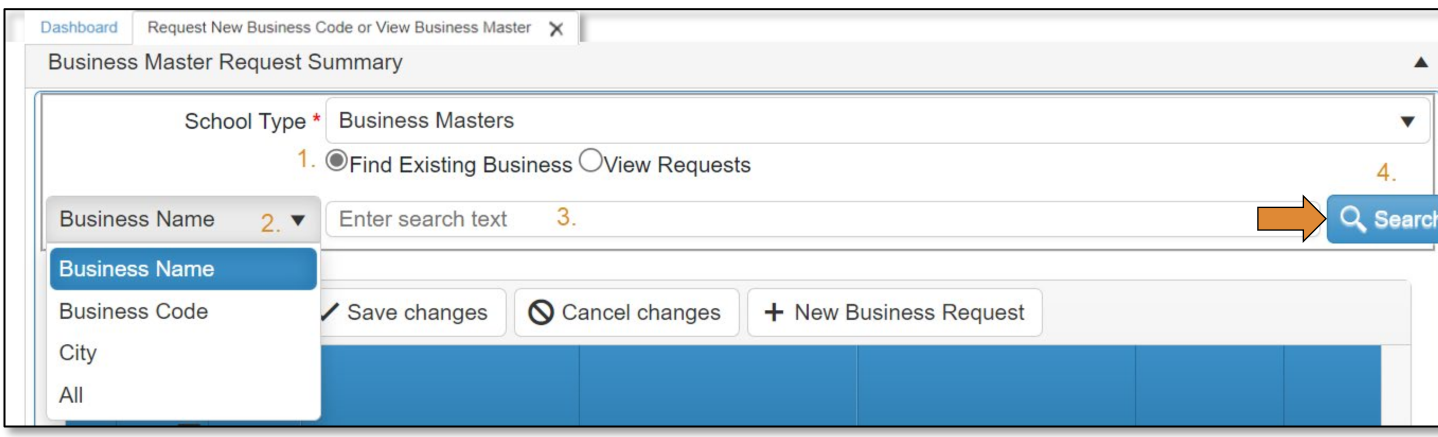


NOTE: Search the Business Master before requesting a new business code to verify that the business does not already have a code in CTIMS. If you find a business code that is inactive, please email CTIMSSupport@careertech.ok.gov, we will make it active for you.

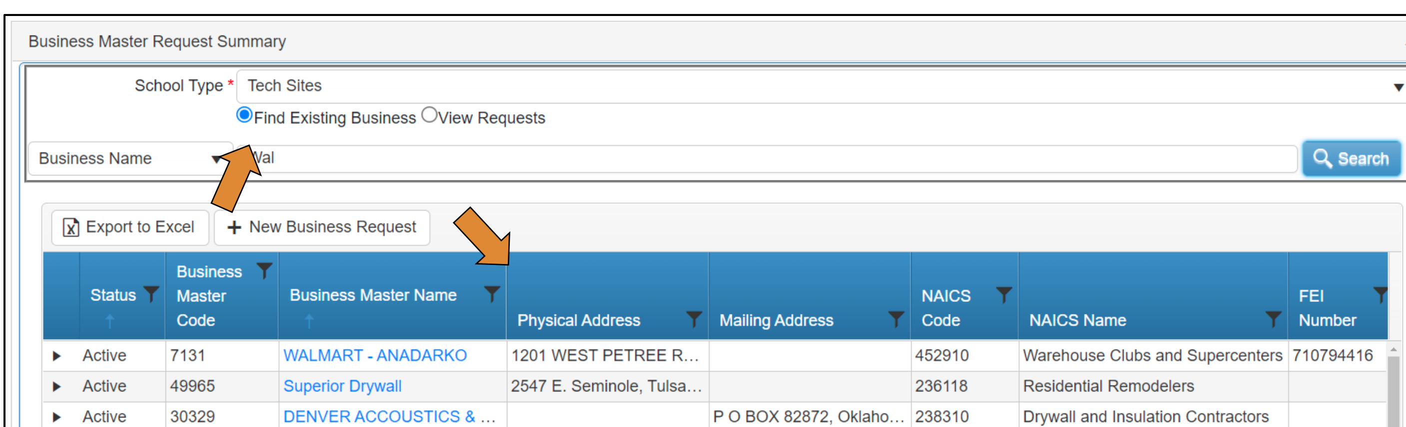
The tagged numbers in the screenshot correspond to the instruction steps below.

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**.



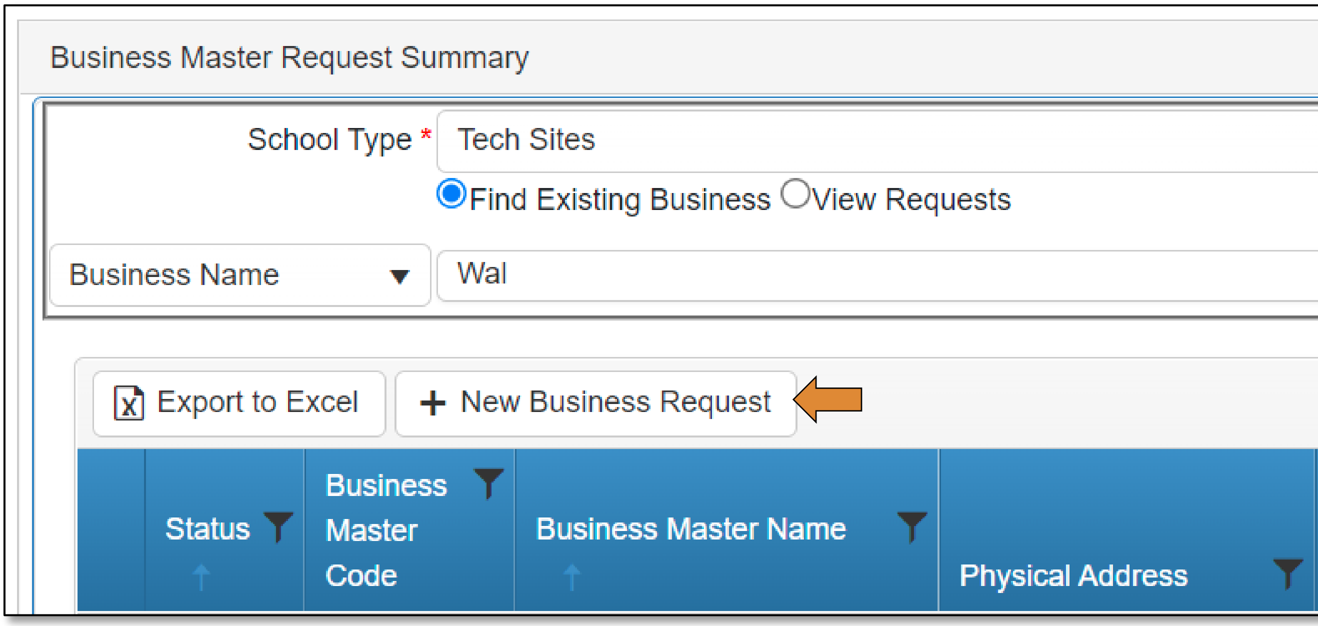
There may be more than one business with the same name. Match your business name with the address. Also, the same business name could have hyphens or could have been entered as one word. If a business name has hyphens, try searching with and without the hyphens. **NOTE:** You can expand columns by hovering 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.



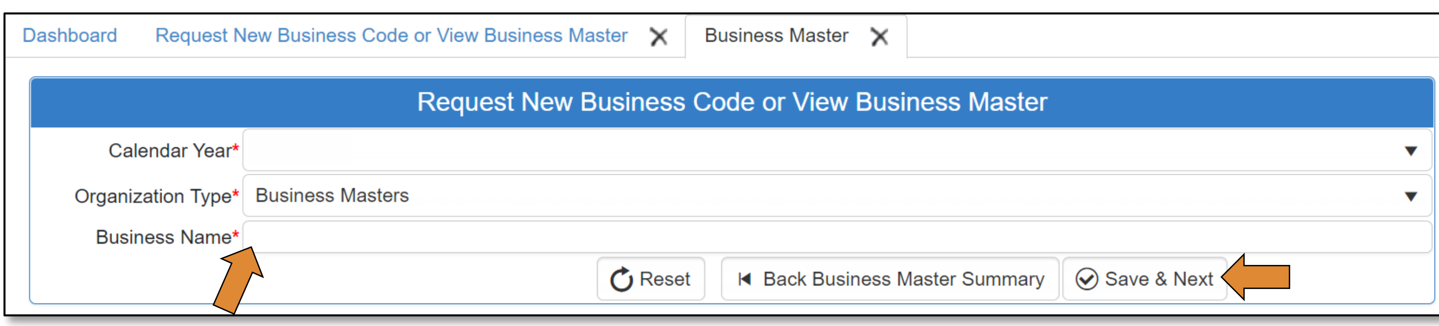
Requesting a New Business Code

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.

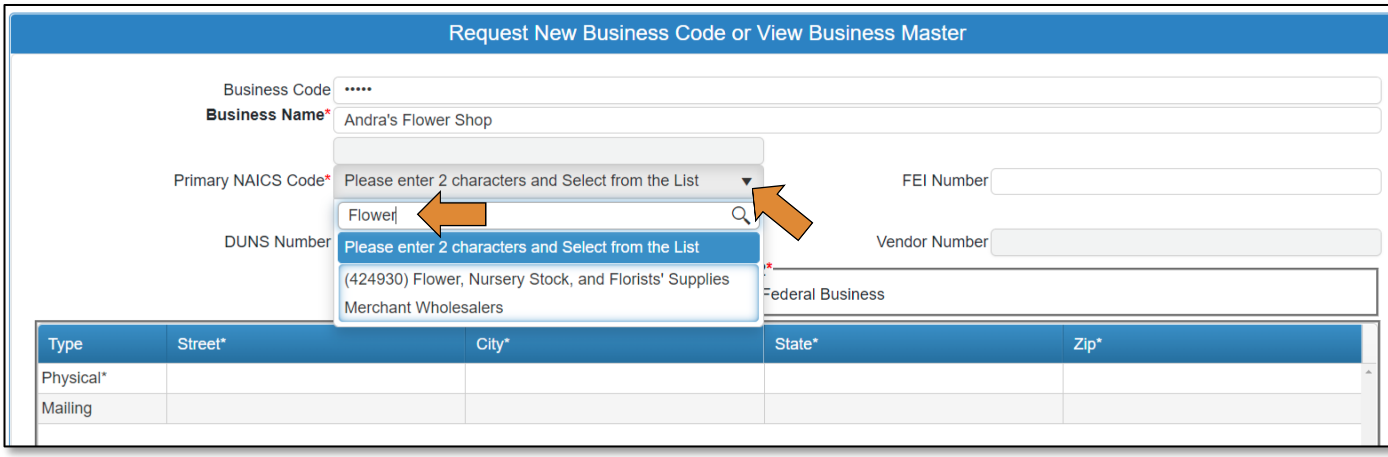


- In the box next to **Business Name**, enter the name of the business. The business name must be unique. If the business is a chain or the name already exists, you will need to add a unique identifier, such as a town name or store number to define it.
- Click **Save & Next.**
    - You will be directed to a new screen.

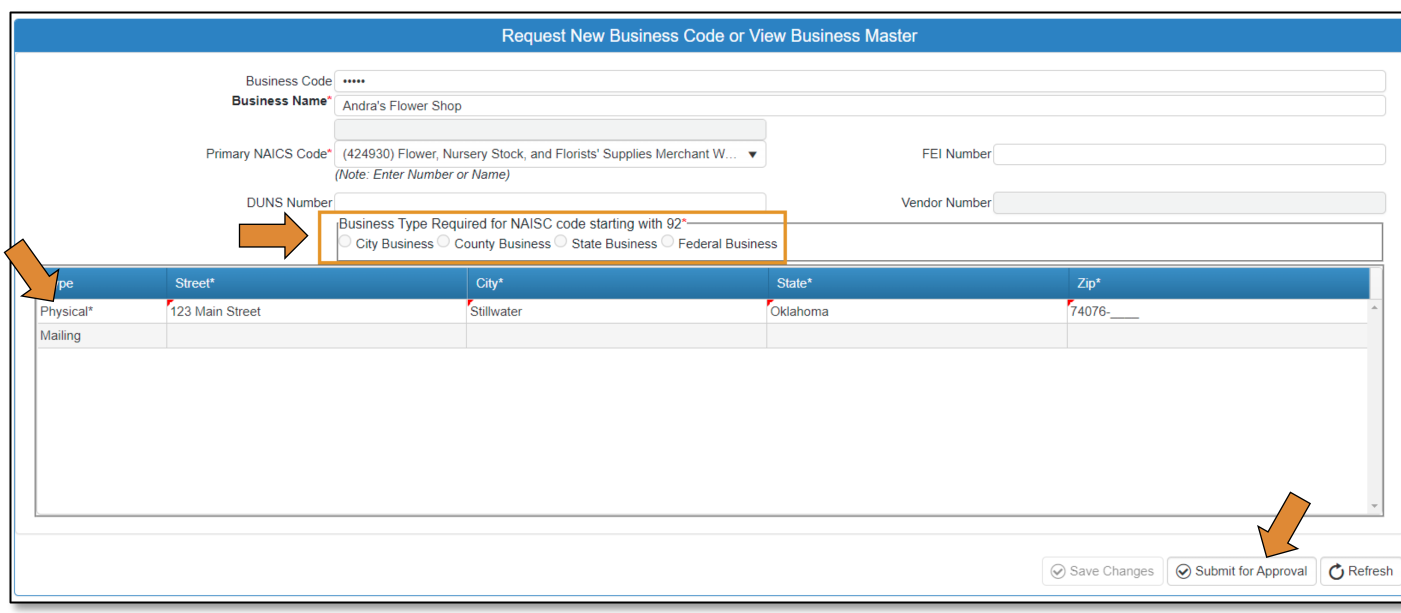


Entering Information for New Business

- 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.)

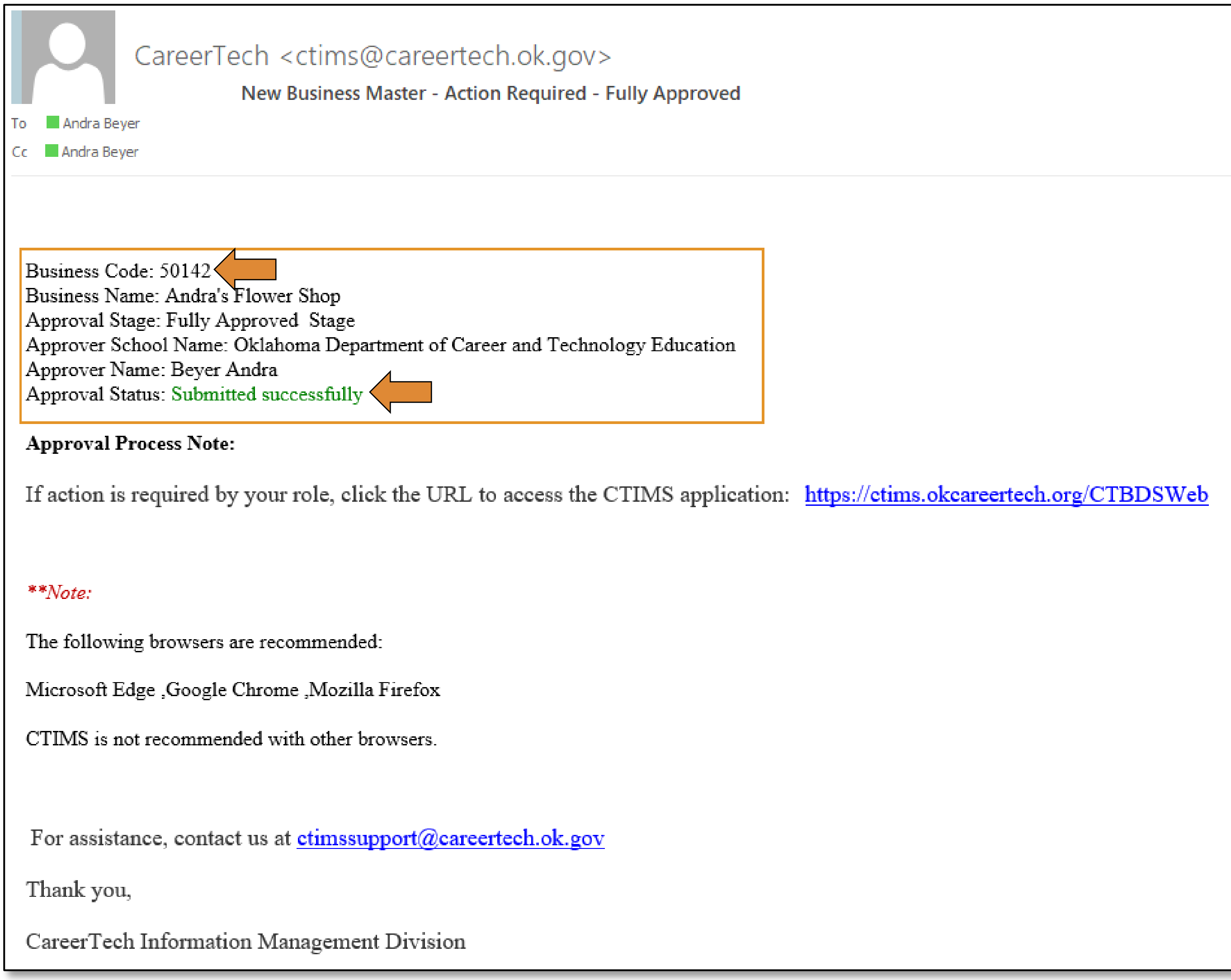


- Complete the **Physical** and **Mailing** addresses. The Physical address is mandatory. Enter the mailing address if it is different than the physical address. **NOTE:** When information is entered in the address fields, a red triangle will appear in the upper left corner of the box; this does not 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.



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

Feel free to email 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 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

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
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

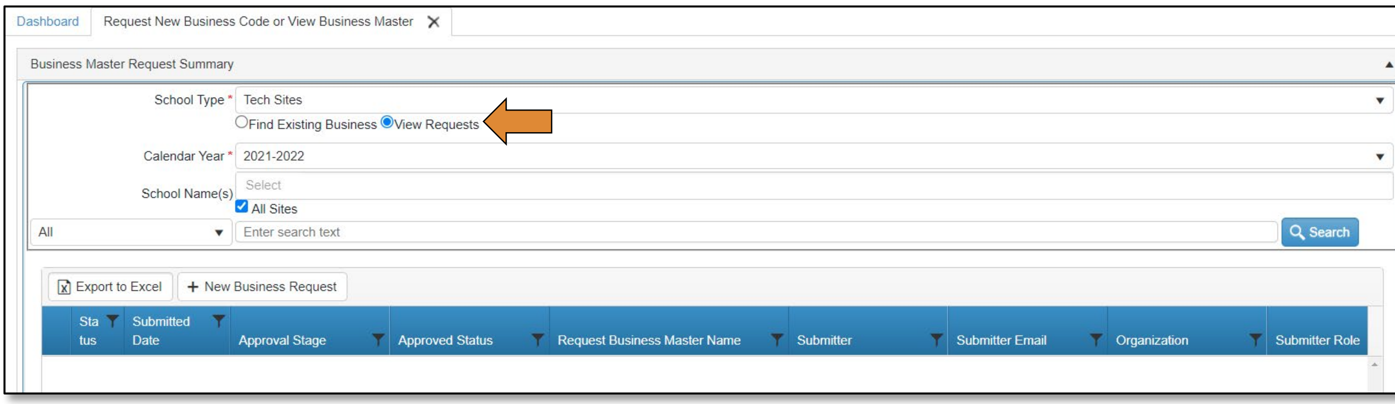
Thank you,

CareerTech Information Management Division

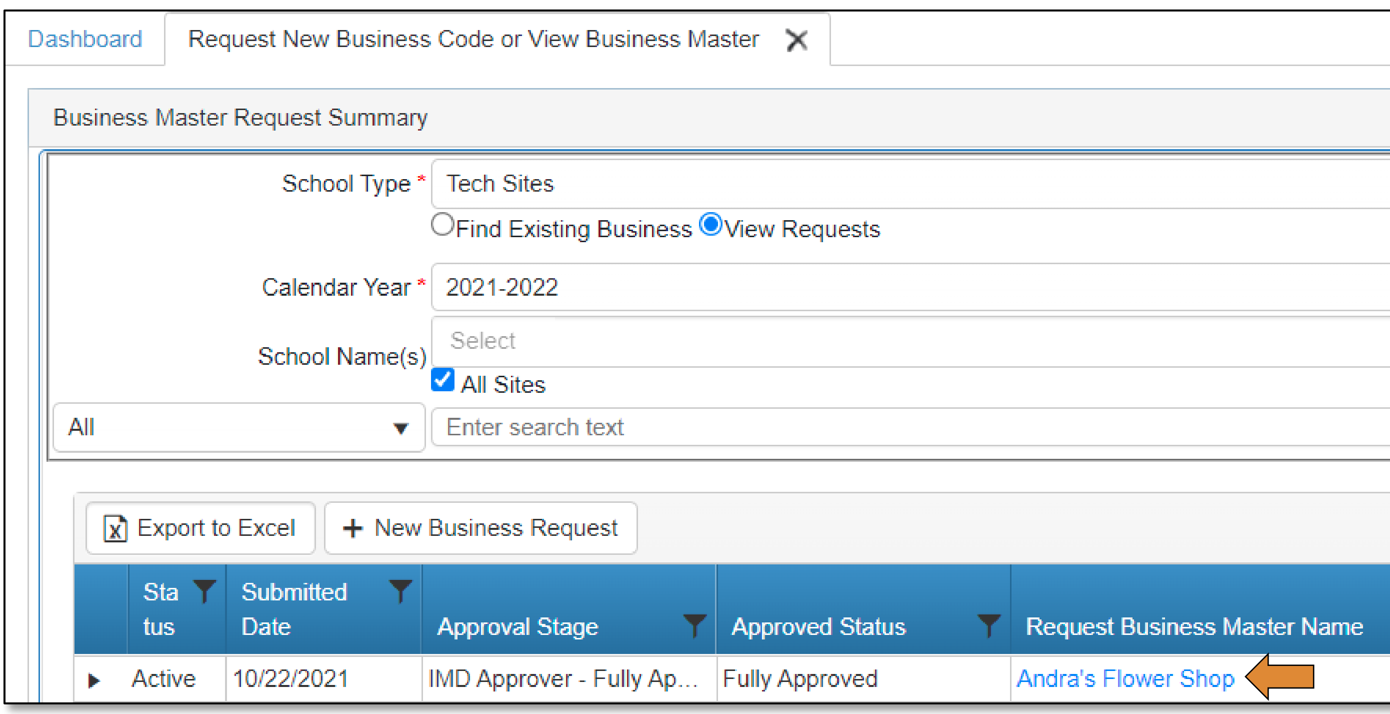
Change Request (Business Code Process)

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.

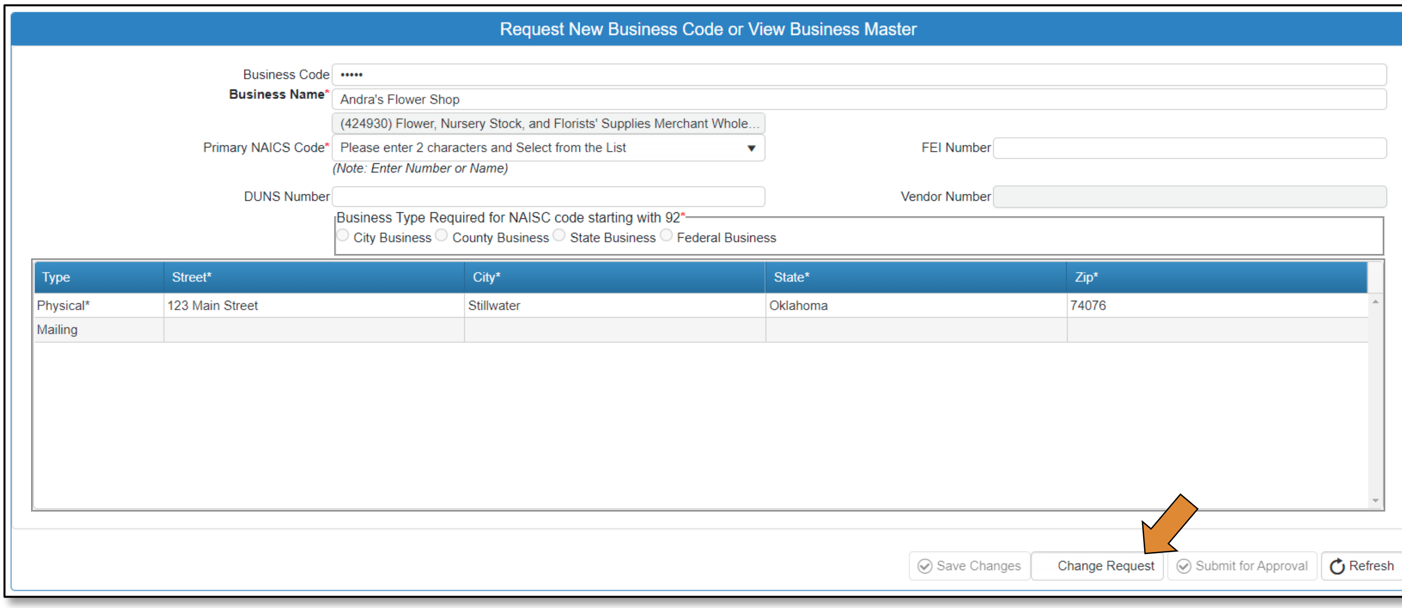
- Select the **View Requests** radio button.
    - To see only the requests submitted by your site, uncheck the box next to **All Sites**.
- Type the first 3 letters of your school name in the **School Name(s)** box and select your school.
- Click on the **Search** button.



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

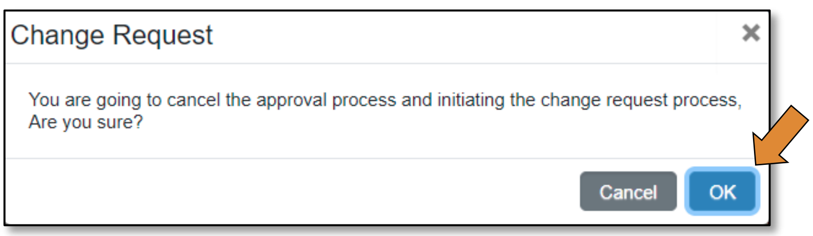


- Click the **Change Request** button.

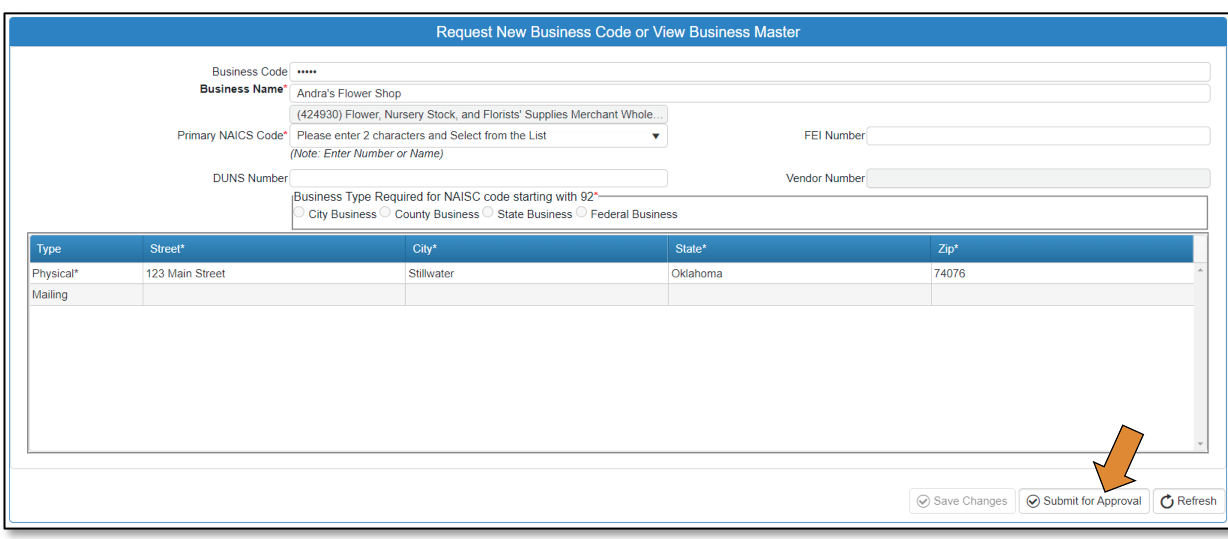


You will get a popup indicating you are going to cancel the approval process and initiate the change request process.

- Click **OK**.

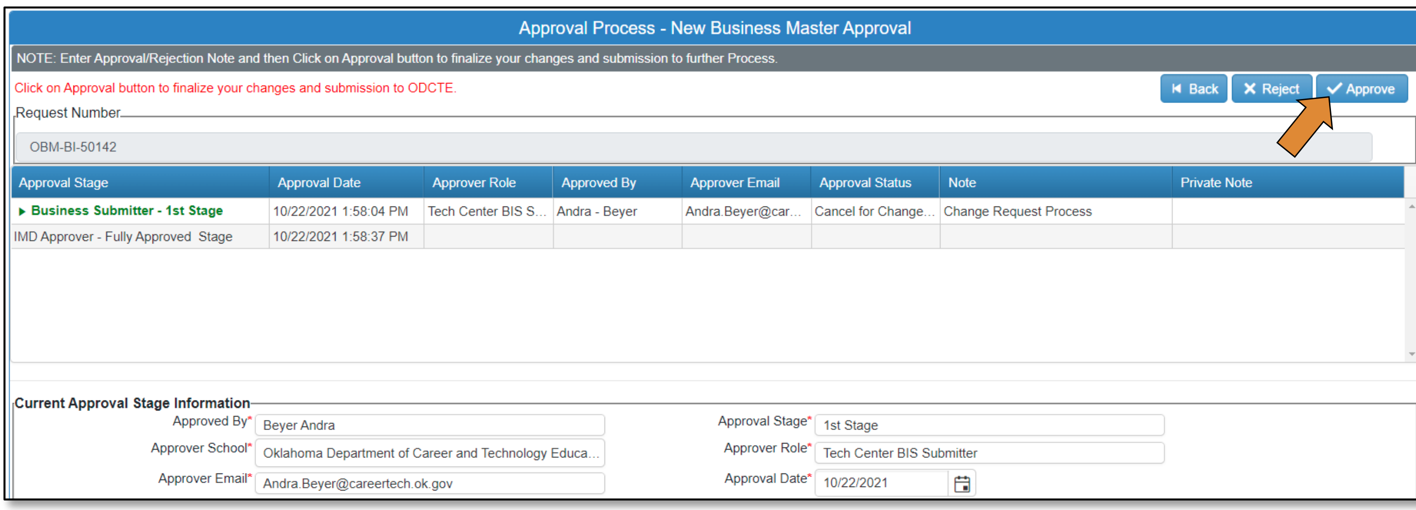


- Make the necessary changes to your request.
- Click on **Submit for Approval**.



- 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.

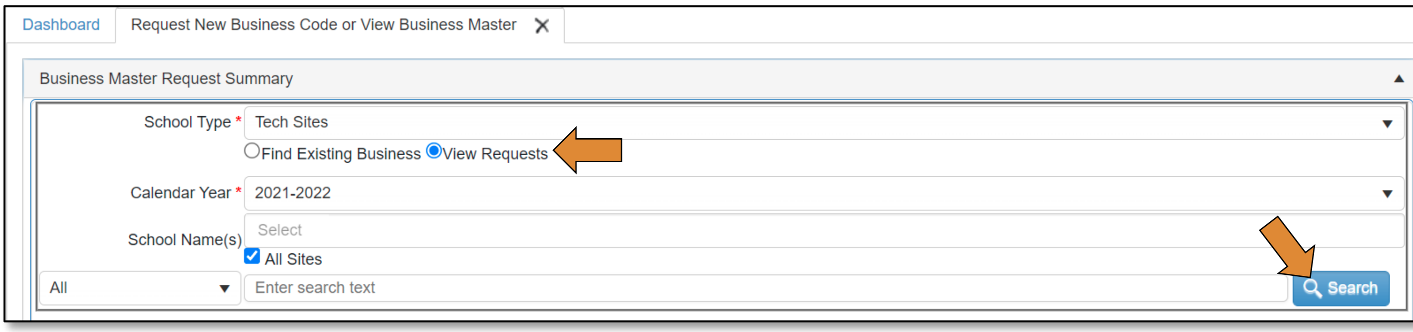


- Click **Ok**.
- Click **Ok**, again.

View Requests

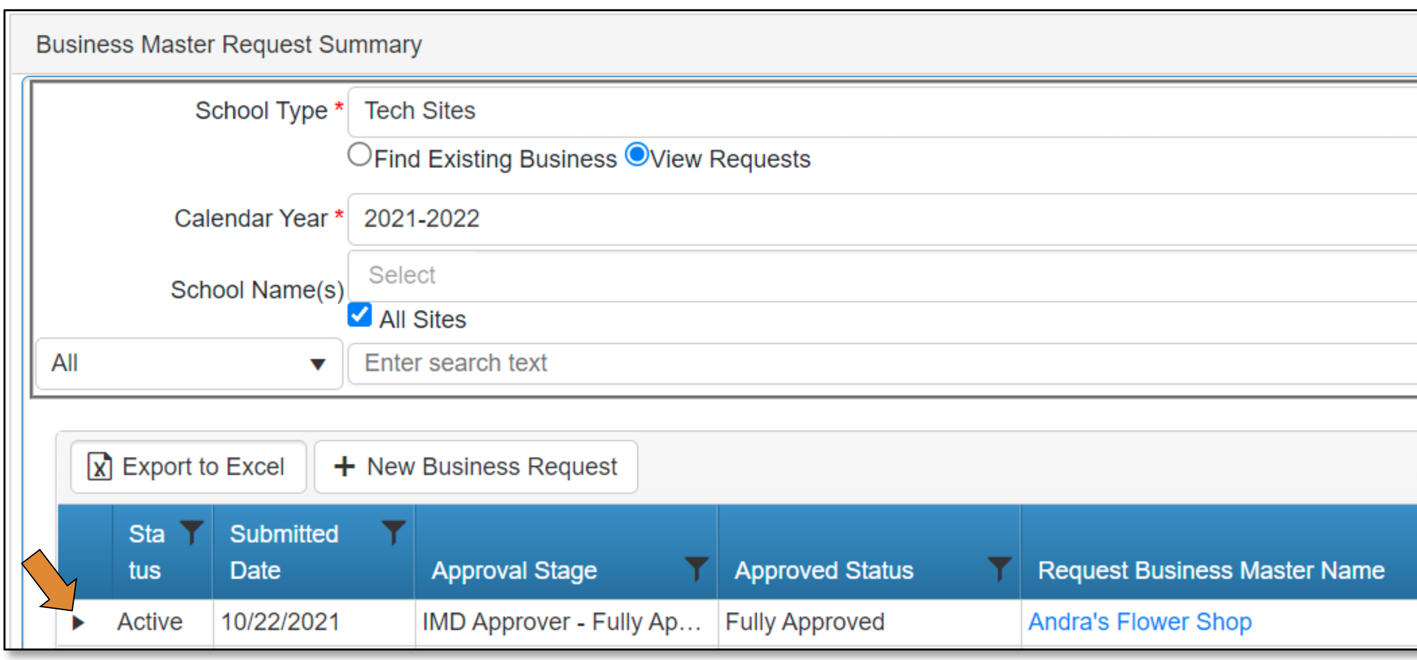
View the business requests that you have submitted by returning to the screen with the tab entitled **Request New Business Code or View Business Master**.

- 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.

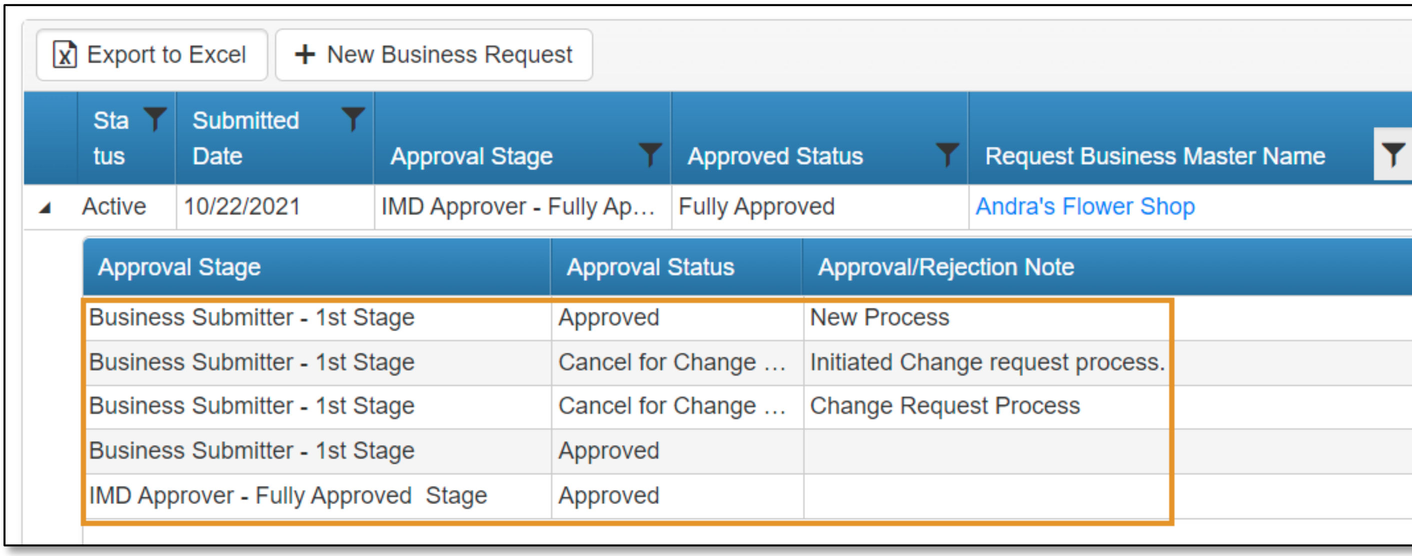


This will bring up the list of requests.

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



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



	Status	Submitted Date	Approval Stage	Approved Status	Request Business Master Name
◢	Active	10/22/2021	IMD Approver - Fully Ap…	Fully Approved	Andra's Flower Shop

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.

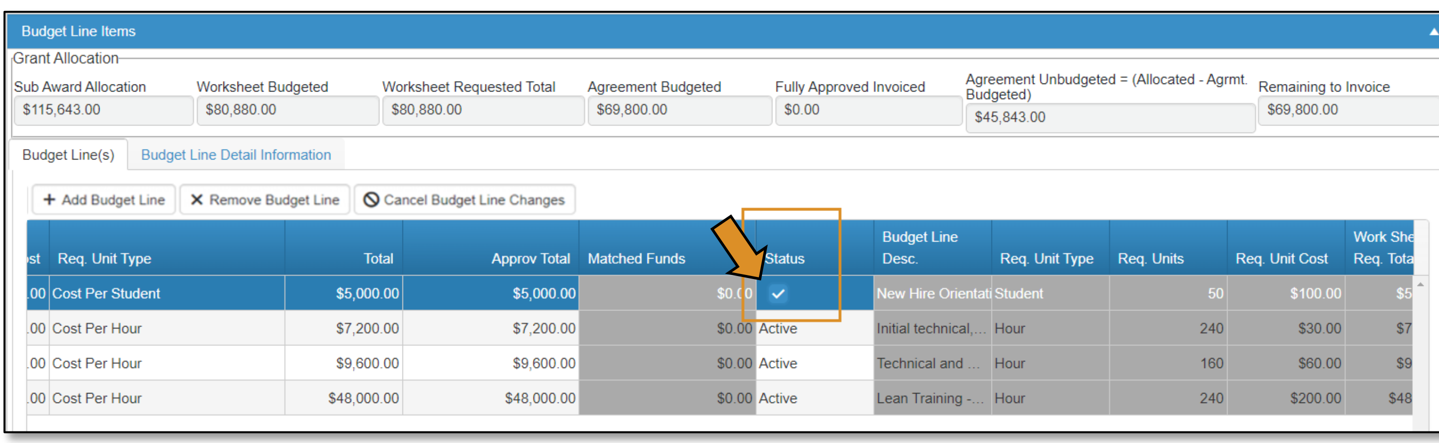
Releasing Funds to be used for the Same Program Type

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**.



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