

CareerTech Information Management System (CTIMS)

FLA Grants Complete User Guidebook



OKLAHOMA
CareerTech

IMD Information Management Division

June 2023

Table of Contents

FLA Contacts.....	3
CTIMS Support.....	3
Help & Troubleshooting	4
Approval Process Overview	5
Logging into CTIMS.....	6
Worksheet Process Flow	7
New Worksheet.....	8
Local Coordinator	8
FLA Local Finance Coordinator	13
FLA Local Superintendent/President	16
FLA State Initiative Coordinator.....	16
FLA State Initiative Supervisor	16
ODCTE Contract Reviewer	16
Agreement Process Flow	17
Accessing the Agreement.....	17
FLA Local Finance Coordinator	17
FLA – State Initiative Coordinator.....	21
FLA – State Initiative Supervisor	23
Invoice Process Flow	23
Accessing the Invoice	24
FLA – Local Finance Coordinator	24
CTIMS Helpful Tips.....	29

FLA Contacts

Debbie Hamble*Northeast Area Perkins Coordinator*

Office: 405-743-6881

Email: Debbie.Hamble@careertech.ok.gov**Jordan Duck***Innovative & SE Area Perkins Coordinator*

Office: 405-743-6401

Email: Jordan.Duck@careertech.ok.gov**Steve Robison***Western Area Perkins Coordinator*

Office: 405-743-5523

Email: Steve.Robison@careertech.ok.gov**Denise Bethke***Perkins Financial Analyst*

Office: 405-743-6431

Email: Denise.Bethke@careertech.ok.gov

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

CTIMS Support

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 & 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's 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)

FLA Role	Process
FLA Local Initiative Coordinator	Creates, completes, saves, and submits the requests.
FLA Local Finance Coordinator	1 st approval. Reviews & approves/rejects requests.
FLA Local Superintendent/President	2 nd approval. Reviews & approves/rejects requests.
FLA State Initiative Coordinator	3 rd approval. Reviews & approves/rejects requests.
FLA State Initiative Supervisor	4 th approval. Reviews & approves/rejects requests.
ODCTE Contract Reviewer	Final approval. Reviews & approves/rejects requests.

Agreement Approval Stage (Stage 2)

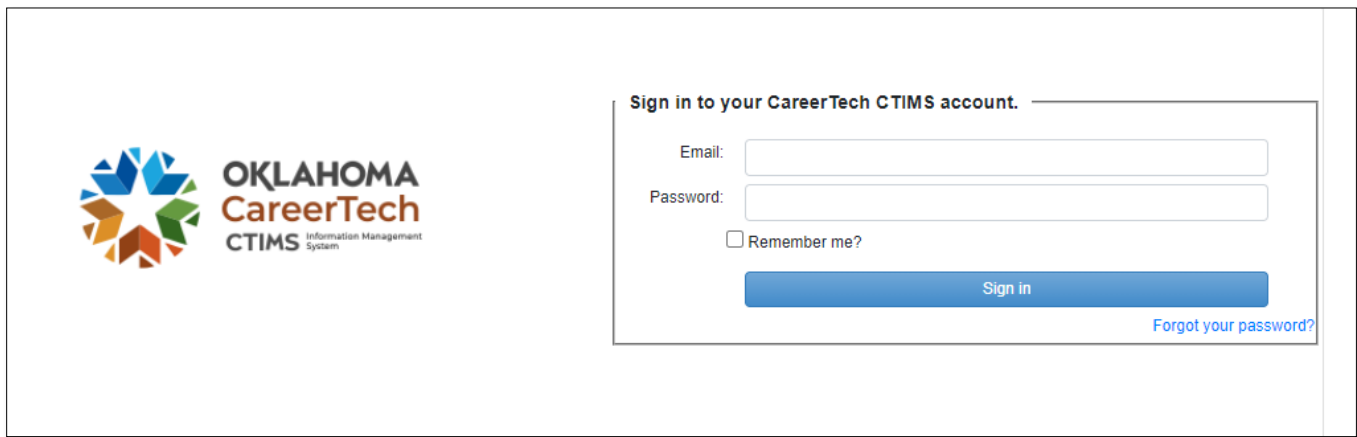
FLA Role	Process
FLA Local Finance Coordinator	1 st approval. Reviews & approves/rejects requests.
FLA State Initiative Coordinator	2 nd approval. Reviews & approves/rejects requests.
FLA State Supervisor	Final approval. Reviews & approves/rejects requests.

Invoice Approval Stage (Stage 3)

FLA Role	Process
FLA Local Finance Coordinator	1 st approval. Reviews & approves/rejects requests.
ODCTE Finance Document Coordinator	2 nd approval. Reviews & approves/rejects requests.
ODCTE Finance Reviewer	Final approval. Reviews & approves/rejects requests.

[Logging into CTIMS](#)

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



Sign in to your CareerTech CTIMS account.

Email:

Password:

Remember me?

[Sign in](#)

[Forgot your password?](#)




Or go to the CTIMS [website](#) 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



Worksheet Process Flow

The following roles represents the stages required in CTIMS for the submission of a New Worksheet (Application).

Stage 1 - FLA Local Initiative Coordinator: Creates, completes, saves, and submits new worksheet.

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

Stage 3 - FLA Local Superintendent/CEO: 2nd Approval. Reviews and approves or rejects worksheet. If approved, goes to State approval stage. If rejected, goes back to stage 1.

Stage 4 - State Initiative Coordinator: 3rd Approval. ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If rejected, goes back to stage 1.

Stage 5 - State Initiative Supervisor: 4th Approval. ODCTE State Supervisor approves or rejects the worksheet. If approved goes to the final approval stage.

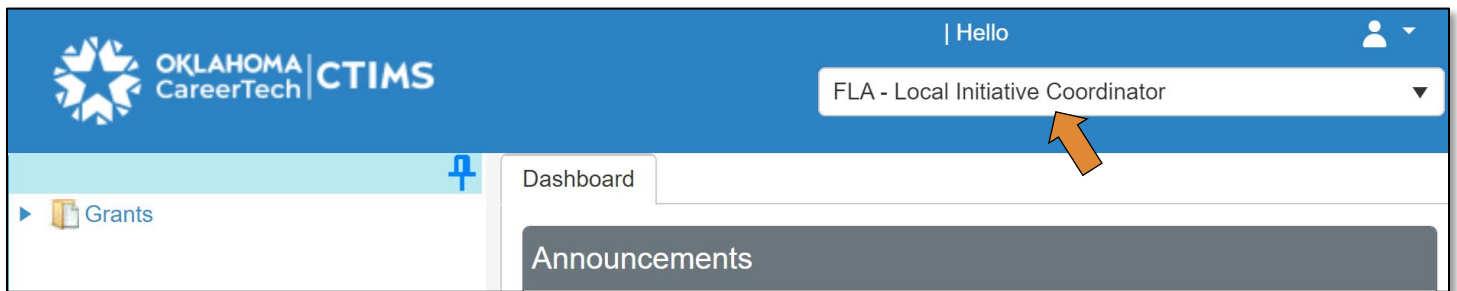
Stage 6 – ODCTE Contract Reviewer: Final Approval. After the worksheet is approved through Stage 6, the Agreement Process begins with the FLA Local Finance Coordinator.

New Worksheet

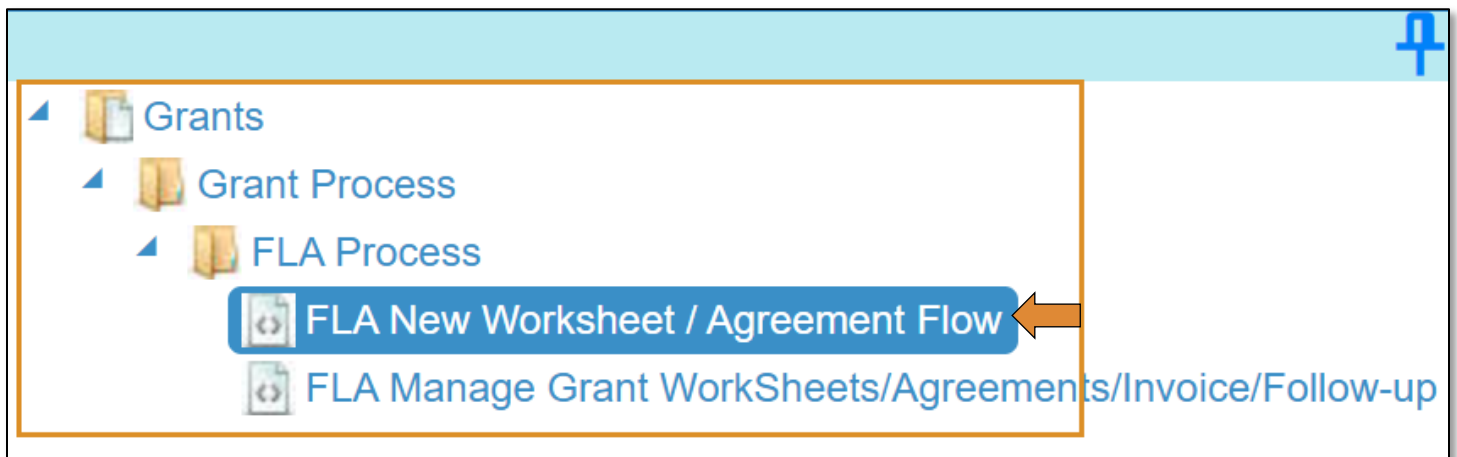
Local Coordinator

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

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



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



Complete the **FLA Grant Submit Worksheet – Step 1** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year:** * - should default to the current fiscal year.
2. **Grant Fund Type:** * - should default to FLA.
3. **Organization Type:** * - choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * - Type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * - should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * - choose the initiative you are needing from the drop-down menu.
7. **Worksheet No. :** * - automatically populates/displays after selecting the Program Initiative.
8. **Organization Type:** * - automatically populates to Business Masters.
9. **Client Type:** * - should default to Business Master (Company).
10. **Organization:** * - type the first three letters of the organization name.
11. **Business Code:** * - should default to the code assigned to the business.
12. After verifying that all information is correct, click the **Save & Next** button.

Dashboard | FLA New Worksheet / Agreement Flow X

FLA Grant Submit Worksheet - Step 1

12. Save & Next

Fiscal Calendar Year*	2023-2024	1.	2.	Grant Fund Type*	FLA
Organization Type*	College District	3.	4.	Organization*	Institute of Technology District
Organization District*	Institute of Technology District	5.	6.	Program Initiative*	Carl Perkins Innovation - Innovation in Career Exploration ...
Worksheet No.*	WS-2324-FLA-FLA-INN-INCE-424-56A001050-4F87CAF18DCA	7.			

Client Basic Information For work Sheet

Organization Type*	Business Masters	8.	9.	Client Type*	Business Master (Company)
Organization*	Allergy Partners of Oklahoma	10.	11.	Business Code*	47026

View Location(s) | View Contact(s)

Year Established		FEI Number	
Primary NAICS Code	Offices of Physicians (except Mental Health Specialists)...	Secondary NAICS Code	Agriculture, Forestry, Fishing and Hunting (11)
Years in Business		Years in Oklahoma	
No. of hourly Employees	0	No. of Salaried Employees	0
Highest Level if Employment		Client Products	
Approval Status		Vendor Number	
Year Formed		Year Joined	
Year Left		Impact District Id	
Region		DUNS Number	

12. Save & Next

- Complete each section of the form under the **Funding Request Details** tab on the **FLA Grant Submit Worksheet – Step 2** screen. This process contains several sections, so you must scroll down to access and complete all the sections.

NOTE: You must put something in each box that has a red asterisk (*). There are some small, required check boxes you must check to certify the information. There are links to other resources that will help you complete the form, as well as links to required templates and forms for you to download, complete and attach.

TIP: You can cut and paste from another document to fill in the boxes.

- Click **Save & Next**.

IMPORTANT:

- You must finish the Funding request Details section and click Save & Next for any of the information that was entered to be saved.
- If you cannot finish all fields, you can put a placeholder character in the fields (all required fields must have something in them) and click **Save & Next**.
- When you return to edit these fields, use the **FLA Manage Grant Worksheet/Agreement** to go into your worksheet or budget to update. Do not use the **FLA New Worksheet/Agreement Flow** option, as this will start a whole new worksheet.

The screenshot shows the "FLA Grant Submit Worksheet - Step 2" interface. At the top, there is a navigation menu with the following items: "Provider Organization Details", "Basic Client Information", and "Funding Request Details". The "Funding Request Details" tab is currently selected and highlighted in blue. To the right of the navigation menu, there are buttons for "Refresh", "Worksheet Summary", "Worksheet Contract", and "Save & Next". An orange arrow points to the "Save & Next" button. Below the navigation menu, the main content area displays instructions and form fields. The text reads: "Each Innovation in Career Exploration Perkins Innovation Grant Application should contain brief written responses to the following sections and will be reviewed and scored on a competitive basis to identify and fund the best proposals." followed by "Oklahoma Career and Technology Education (ODCTE) supports innovative school improvement efforts to develop middle school STEM exploratory programs that lead to increasing academic rigor and student achievement. STEM curriculum should provide project-based learning for the full range of students in grades seven and eight classrooms as well as career awareness and exploration activities for students in grades five, and six." and "Welcome to the Carl Perkins Innovation in Career Exploration Perkins Innovation Grant Application. Please follow all directions to complete the application process; submission of a grant application is not a guarantee of funding." Below this text are three input fields: "Please enter your project title: [input field]", "Please enter a funding request level for year one (\$50,000 maximum): [input field]", and "Please enter a funding request level for year two (\$25,000 maximum): [input field]". At the bottom left, there is a small asterisk symbol.

- On the FLA Grant Submit Worksheet – Step 3, under the **Budget Line Items** section, click the Add Budget Line, Remove Budget Line, or Cancel Budget Line Changes.

To add a Budget Line Item:

- Type a **Budget Line Desc** (Budget Line Description).
- Complete **Req. Units** (Required Units).
- Complete **Req. Unit Cost** (Required Unit Cost).
- Complete **Req. Unit Type** (Required Unit Type).
- Click **+Add Budget Line** to add more budget lines and repeat steps 1-4.

- Type a **Note** in the space below the line-item budget area if desired.
- Add supporting or required attachments by clicking on the **Attachments** row.
- You can **Save as Draft** at this point, and it will save all the information on the **Funding Request Details** form and the **Budget Line Items** 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.

9. After completing the Funding Request Details form expand the **Attachments** section by clicking on the word *Attachments*.
10. To attach the required documents, click the *Select files...* button and find the document on your computer.
11. Click **Upload & Save file**.

- When the worksheet is ready for submission, expand the **Acknowledgements** section by clicking on the word *Acknowledgements*.
- Check each of the acknowledgement boxes, then add an **Acknowledgement Note**.
- Click **Submit for Approval** at the top or bottom of the screen.

The worksheet will go to the **FLA – Local Finance Coordinator** approval stage.

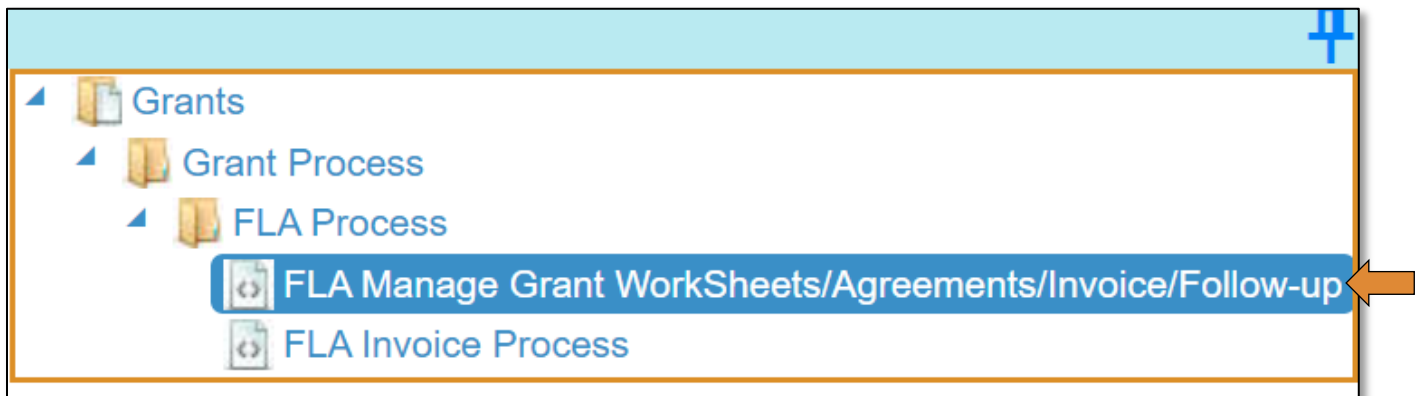
FLA Local Finance Coordinator

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **FLA – 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 **FLA – Local Finance Coordinator**, contact CTIMSSupport@careertech.ok.gov.



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



Complete the **FLA Grant Submit Worksheets List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year:** * - should default to the current fiscal year.
2. **Grant Fund Type:** * - should default to FLA.
3. **Organization Type:** * - choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * - Type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * - should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * - choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type:** * - automatically defaults to All.
8. **Filter on Status:** * - automatically defaults to All.
9. Click the **Search** button.

The screenshot shows the 'FLA Grant Fund Worksheets List' form. It includes the following fields and callouts:

- 1. Fiscal Calendar Year: 2023-2024
- 2. Grant Fund Type: FLA
- 3. Organization Type: College District
- 4. Organization: Institute of Technology District
- 5. Organization District: Institute of Technology District
- 6. Program Initiative: Carl Perkins Innovation - Innovation in C...
- 7. Approval Function Type: All
- 8. Filter on Status: All
- 9. Search button (highlighted with an orange arrow)

Buttons at the bottom: Save changes, Cancel changes, Export to Excel.

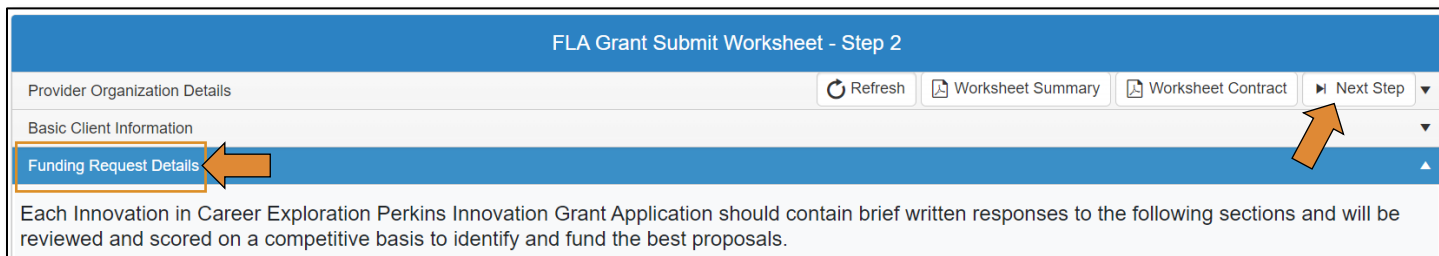
- From the list that populates, choose the worksheet to approve. Click on the Worksheet number link in the worksheet column.

The screenshot shows the 'FLA Grant Fund Worksheets List' table. The table has the following columns: Acti, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agre. The first row of data is:

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agre
<input checked="" type="checkbox"/>	Institute of Technology District	American Directional Technology, ...	Local Finance Coordinator - 2nd ...	06/27/2023 13:...	WS-2324-FLA-FLA-INN-INCE-424-56A001050-CDA...	

Buttons at the bottom: Save changes, Cancel changes, Export to Excel.

- On the **FLA Grant Submit Worksheet – Step 2**, click **Next Step**.



FLA Grant Submit Worksheet - Step 2

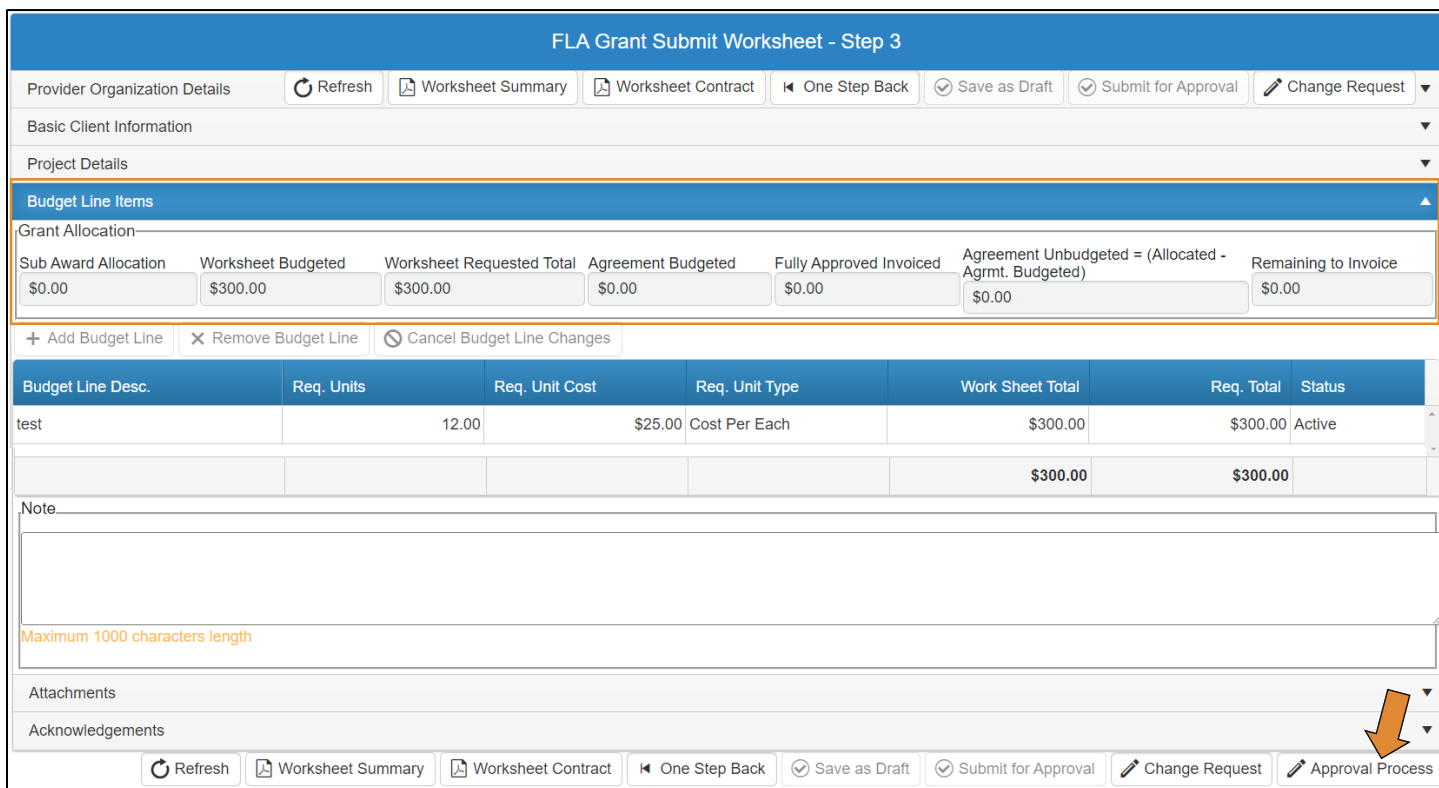
Provider Organization Details Refresh Worksheet Summary Worksheet Contract Next Step

Basic Client Information

Funding Request Details

Each Innovation in Career Exploration Perkins Innovation Grant Application should contain brief written responses to the following sections and will be reviewed and scored on a competitive basis to identify and fund the best proposals.

- On the **FLA Grant Submit Worksheet - Step 3** screen, review the budget line items.
- Click **Submit for Approval** on the bottom of the screen.



FLA Grant Submit Worksheet - Step 3

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

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$0.00	\$300.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00

+ Add Budget Line x Remove Budget Line o Cancel Budget Line Changes

Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Status
test	12.00	\$25.00	Cost Per Each	\$300.00	\$300.00	Active
				\$300.00	\$300.00	

Note

Maximum 1000 characters length

Attachments

Acknowledgements

Refresh Worksheet Summary Worksheet Contract One Step Back Save as Draft Submit for Approval Change Request Approval Process

- Click **Approve** on the **Approval Process – FLA Grant Worksheet Approval** screen.

The Worksheet will go to the **FLA – Local Superintendent** for approval stage.

Change Request

- Follow the steps for FLA – Local Coordinator. Once in the worksheet, click on the **Change Request** button.
- Make the necessary changes.
- Submit it for approval, again.

FLA Local Superintendent/President

- Follow the instructions for [FLA – Local Finance Coordinator](#) to approve the FLA Worksheet.
- The Worksheet will go to the FLA – State Initiative Coordinator for approval.

FLA State Initiative Coordinator

- Follow the instructions for [FLA – Local Finance Coordinator](#) to approve the FLA Worksheet.
- The Worksheet will go to the FLA – State Initiative Supervisor for approval.

FLA State Initiative Supervisor

- Follow the instructions for [FLA – Local Finance Coordinator](#) to approve the FLA Worksheet.
- The Worksheet will go to the FLA – State ODCTE Contract Reviewer for approval.

ODCTE Contract Reviewer

- This is the final approval stage for the FLA Worksheet.

Agreement Process Flow

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

Stage 1 – FLA Local Finance Coordinator: Creates, completes, saves and submits agreement.

Stage 2 – FLA State Initiative Coordinator: 1st Approval. Reviews and approves or rejects agreement. If approved, goes to next stage. If rejected, goes back to stage 1

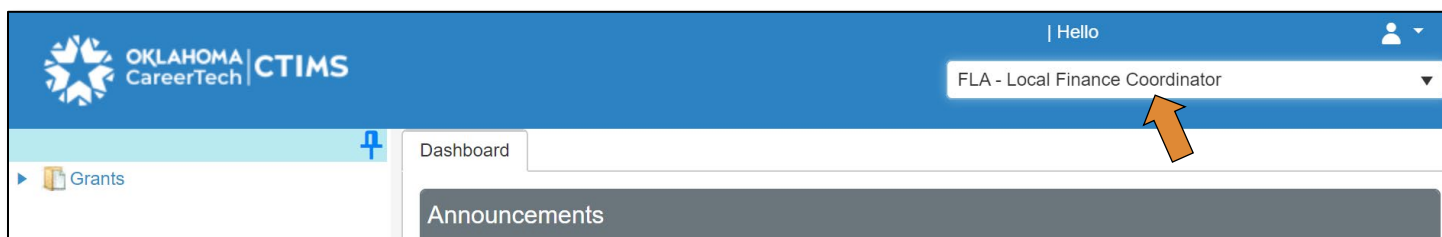
Stage 3 – FLA State Supervisor: 2nd Approval. Reviews and approves or rejects agreement. If approved, goes to State approval stage. If rejected, goes back to stage 1.

Accessing the Agreement

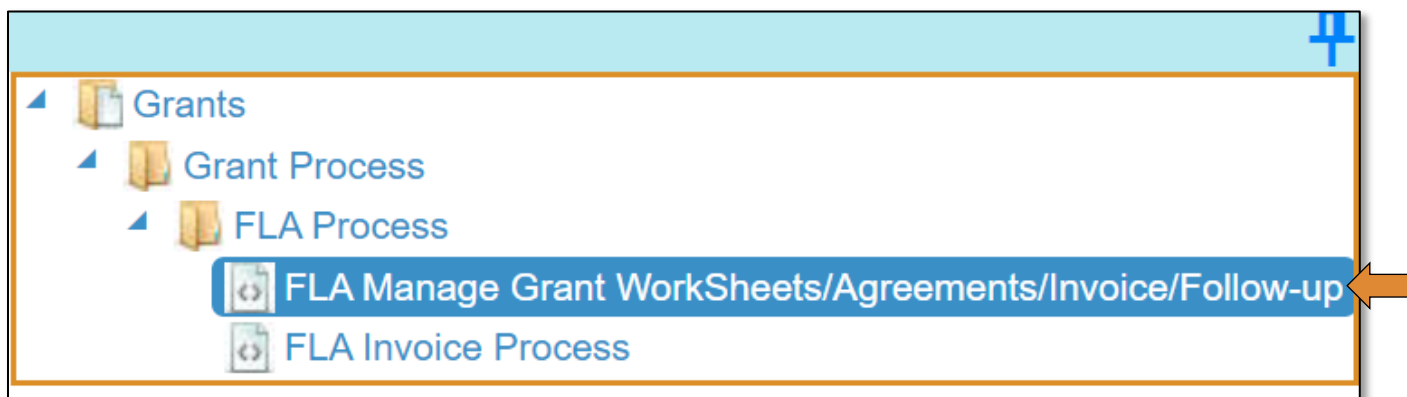
FLA Local Finance Coordinator

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **FLA – 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 **FLA – Local Finance Coordinator**, contact CTIMSSupport@careertech.ok.gov.



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



Complete the **FLA Grant Fund Worksheets List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year:** * - should default to the current fiscal year.
2. **Grant Fund Type:** * - should default to FLA.
3. **Organization Type:** * - choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * - Type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * - should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * - choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type:** * - automatically defaults to All.
8. **Filter on Status:** * - automatically defaults to All.
9. Click the **Search** button.

The screenshot shows the 'FLA Grant Fund Worksheets List' form. It includes the following fields and callouts:

- 1. Fiscal Calendar Year: 2023-2024
- 2. Grant Fund Type: FLA
- 3. Organization Type: College District
- 4. Organization: Institute of Technology District
- 5. Organization District: Institute of Technology District
- 6. Program Initiative: Carl Perkins Innovation - Innovation in C...
- 7. Approval Function Type: All
- 8. Filter on Status: All
- 9. Search button (indicated by an orange arrow)

Buttons at the bottom: Save changes, Cancel changes, Export to Excel.

- From the list that populates, find the worksheet that is needing an agreement started.
- Click on the New link in the agreement column.

The screenshot shows the 'FLA Grant Fund Worksheets List' table. The filters are the same as in the previous screenshot. The table has the following columns: Acti, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement. A row is visible with the following data:

Acti	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
<input checked="" type="checkbox"/>	Institute of Technology District	Allergy Partners of Oklahoma-Still...	This stage is approving for Contra...	06/30/2023 10:...	WS-2324-FLA-FLA-INN-INCE-424-56A001050-9FF9...	New

The 'New' link in the Agreement column is highlighted with an orange box and an orange arrow.

For each budget line item, enter the OCAS code. OCAS codes are in the following format:

Program-Function-Object Code (e.g. 330-1000-100).

For a list of codes and descriptions, go to [Frequently Used OCAS Codes](#).

- On each budget line item, enter the OCAS coding. In each field under the OCAS code column, begin typing the code, then select from the drop-down.

The screenshot shows the 'FLA Grant Agreement' interface. The 'Budget Line Items' section is active, displaying a table with columns: Budget Line(OCAS CODE), Agreement Line Desc., Units, Unit Cost, Req. Unit Type, Total, Approv Total, and Status. A dropdown menu is open for the 'Budget Line(OCAS CODE)' field, showing a list of codes from 1000-600 to 1000-600-338. An orange arrow points to the dropdown menu.

Budget Line(OCAS CODE)	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Status
1000-600	Test	1	\$25.00	Cost Per Each	\$25.00	\$25.00	Active

- Add a note in the notes field, if necessary.
- **Save as Draft.**

The screenshot shows the 'FLA Grant Agreement' interface. The 'Budget Line Items' section is active, displaying a table with columns: Budget Line(OCAS CODE), Agreement Line Desc., Units, Unit Cost, Req. Unit Type, Total, Approv Total, and Status. The 'Save as Draft' button is highlighted with an orange arrow. Below the table, the 'Note' field contains the text 'test - ab' with an orange arrow pointing to it.

Budget Line(OCAS CODE)	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Status
Select	Test	1	\$25.00	Cost Per Each	\$25.00	\$25.00	Active

Note
test - ab

Maximum 1000 characters length

- Click Acknowledgements and check the certify box(es).
- Add an **Acknowledgement note**, this is required.
- Click **Submit for Approval**.

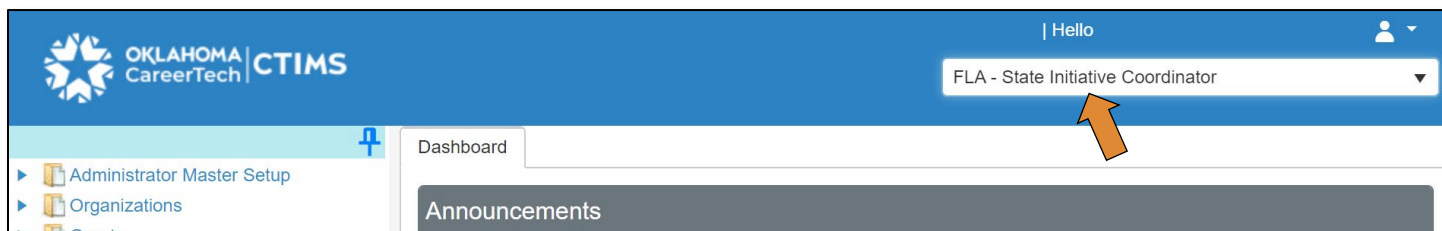
The screenshot displays the 'FLA Grant Agreement' form. At the top, there are navigation buttons: 'Refresh', 'Agreement Summary', '+ Save as Draft', and 'Submit for Approval'. Below these are sections for 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', and 'Attachments'. The 'Acknowledgements' section is highlighted in blue and contains two checked checkboxes with associated text. Below the checkboxes is a text editor with a toolbar containing 'B', 'I', 'U', font size, font, and format options. The text 'Test - ab' is entered in the editor. At the bottom of the form, there is a 'BA Summary Report' dropdown menu and another set of navigation buttons: 'Refresh', 'Agreement Summary', '+ Save as Draft', 'Submit for Approval', and 'Budget Adjustment Process'. Three orange arrows point to the 'Submit for Approval' buttons at the top, the first checkbox, and the bottom 'Submit for Approval' button.

The Agreement will go to the **FLA – State Initiative Coordinator** for approval.

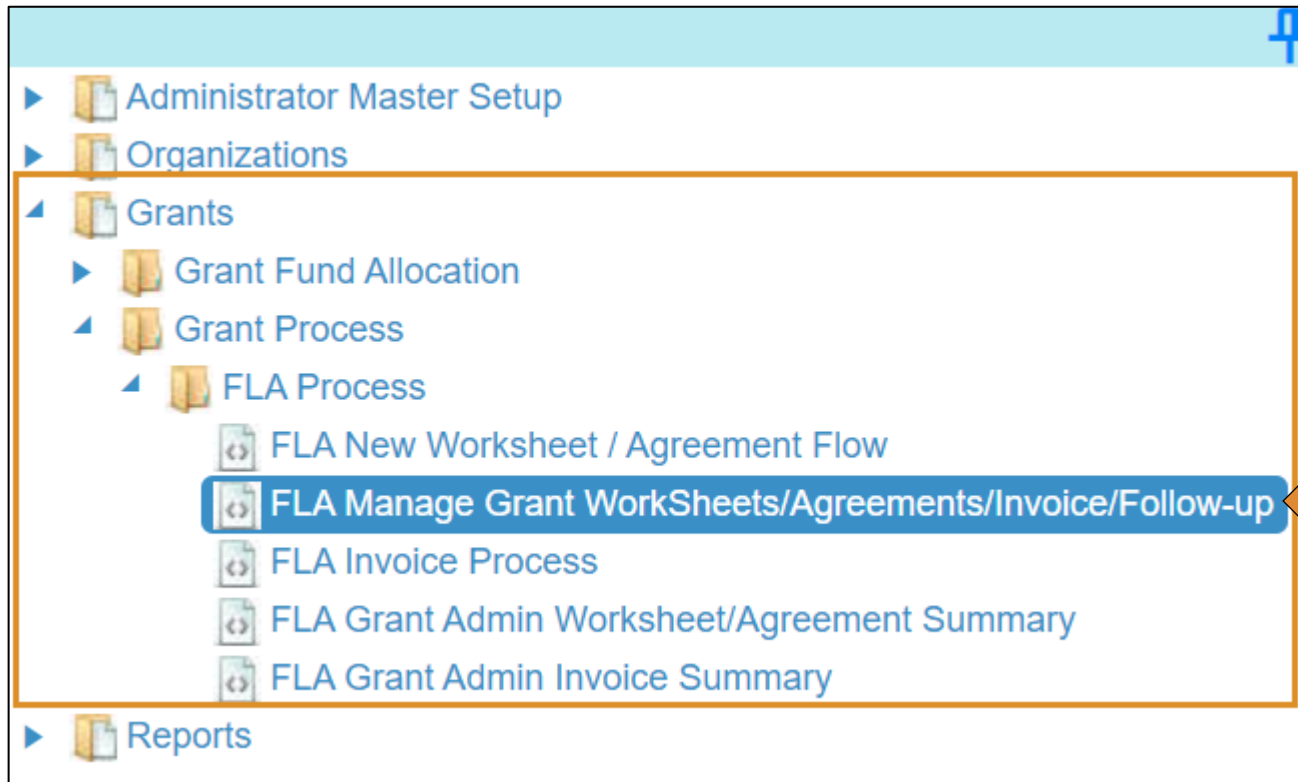
FLA – State Initiative Coordinator

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

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



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



Complete the **FLA Grant Fund Worksheets List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year:** * should default to the current fiscal year.
2. **Grant Fund Type:** * should default to FLA.
3. **Organization Type:** * choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type:** * automatically defaults to All.
8. **Filter on Status:** * automatically defaults to All.
9. Click the **Search** button.

The screenshot shows the 'FLA Grant Fund Worksheets List' form. It includes several dropdown menus and a search button. The fields are: Fiscal Calendar Year (2023-2024), Organization Type (College District), Organization District (Institute of Technology District), Grant Fund Type (FLA), Organization (Institute of Technology District), Program Initiative (Carl Perkins Innovation - Innovation in C...), Approval Function Type (All), and Filter on Status (All). A search button is located at the bottom right, with an orange arrow pointing to it. Callouts 1-9 are placed over the fields to indicate the steps.

- From the list that populates, find the agreement you need to approve.
- Click on the agreement link in the agreement column.

The screenshot shows the 'FLA Grant Fund Worksheets List' form with a table of worksheets. The table has columns for 'Actr', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', 'Worksheet', and 'Agreement'. An orange arrow points to the 'Agreement' column. The table contains one row with the following data: Institute of Technology District, Allergy Partners of Oklahoma-Still..., This stage is approving for Contra..., 06/30/2023 10:..., WS-2324-FLA-FLA-INN-INCE-424-56A001050-9FF9..., WSAG-2324-FLA-FLA-INN-INCE-424-56A001050-9...

- Review the **budget line items**.
- Approve by clicking **Submit for Approval**.
- The agreement will go to the **FLA – State Supervisor** approval stage.

NOTE: If the agreement needs to be rejected, click Reject and add a rejection note. The agreement will go back to the FLA – Local Finance Coordinator.

FLA – State Initiative Supervisor

- Follow the instructions for [FLA – State Initiative Coordinator](#) to approve the FLA Agreement.
- This is the final approval stage for the FLA Agreement.

Invoice Process Flow

The following roles represent the stages required in CTIMS for the submission of a new Invoice.

Stage 1 – FLA Local Finance Coordinator: Creates, completes, saves, and submits new invoice.

Stage 2 – ODCTE Finance Document Coordinator: ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If rejected, goes back to stage 1.

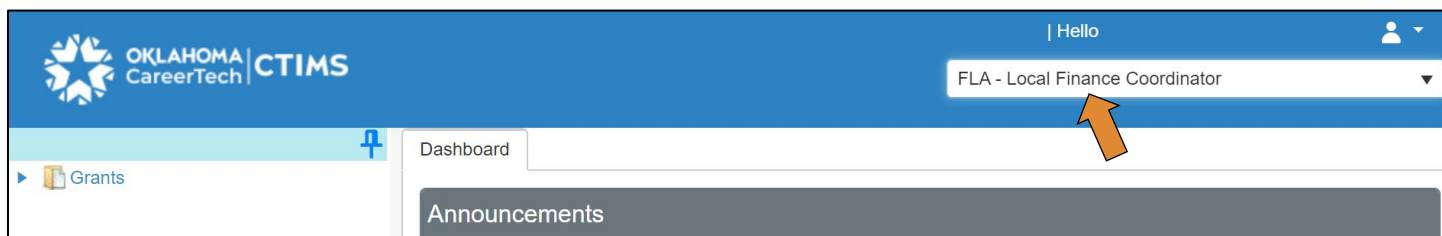
Stage 3 – ODCTE Finance Reviewer: ODCTE State Supervisor approves or rejects the worksheet. If approved goes to the final approval stage.

Accessing the Invoice

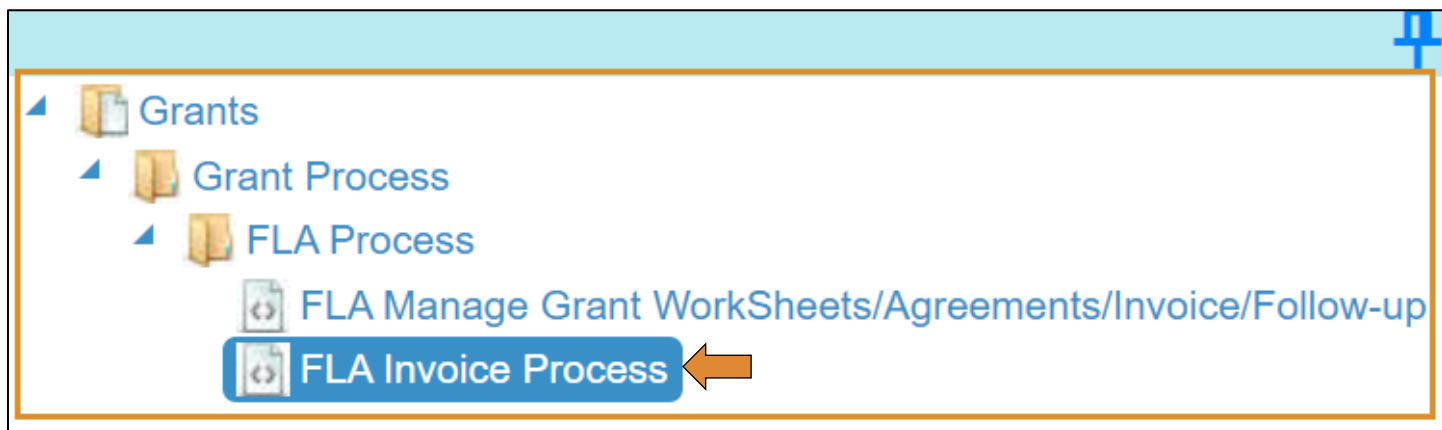
FLA – Local Finance Coordinator

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **FLA – 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 **FLA – Local Finance Coordinator**, contact CTIMSSupport@careertech.ok.gov.



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



Complete the **FLA Grant Fund Invoice List** form. The tagged numbers in the screenshot below corresponds to the instruction steps. Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

NOTE: The red asterisks* on the form represents a required field.

1. **Fiscal Calendar Year:** * should default to the current fiscal year.
2. **Grant Fund Type:** * should default to FLA.
3. **Organization Type:** * choose College District, K-12 Schools, K-12 Districts, Technology Center Districts or Technology Sites from the drop-down.
4. **Organization:** * type the first three letters of your school or organization name and select it from the drop-down menu.
5. **Organization District:** * should auto-populate with what was chosen for Organization.
6. **Program Initiative:** * choose the initiative you are needing from the drop-down menu.
7. **Approval Function Type:** * automatically defaults to All.
8. **Filter on Status:** * automatically defaults to All.
9. Click the **Search** button.

The screenshot shows the 'FLA Grant Fund Invoices List' form. It includes the following fields and callouts:

- 1. Fiscal Calendar Year: 2023-2024
- 2. Grant Fund Type: FLA
- 3. Organization Type: College District
- 4. Organization: Institute of Technology District
- 5. Organization District: Institute of Technology District
- 6. Program Initiative: Carl Perkins Innovation - Innovation in Career ...
- 7. Approval Function Type: All
- 8. Filter on Status: All
- 9. Search button (indicated by an orange arrow)

- From the list that populates, find the agreement you need to start a new invoice on.
- Click on the New Invoice link in the New Invoice column.

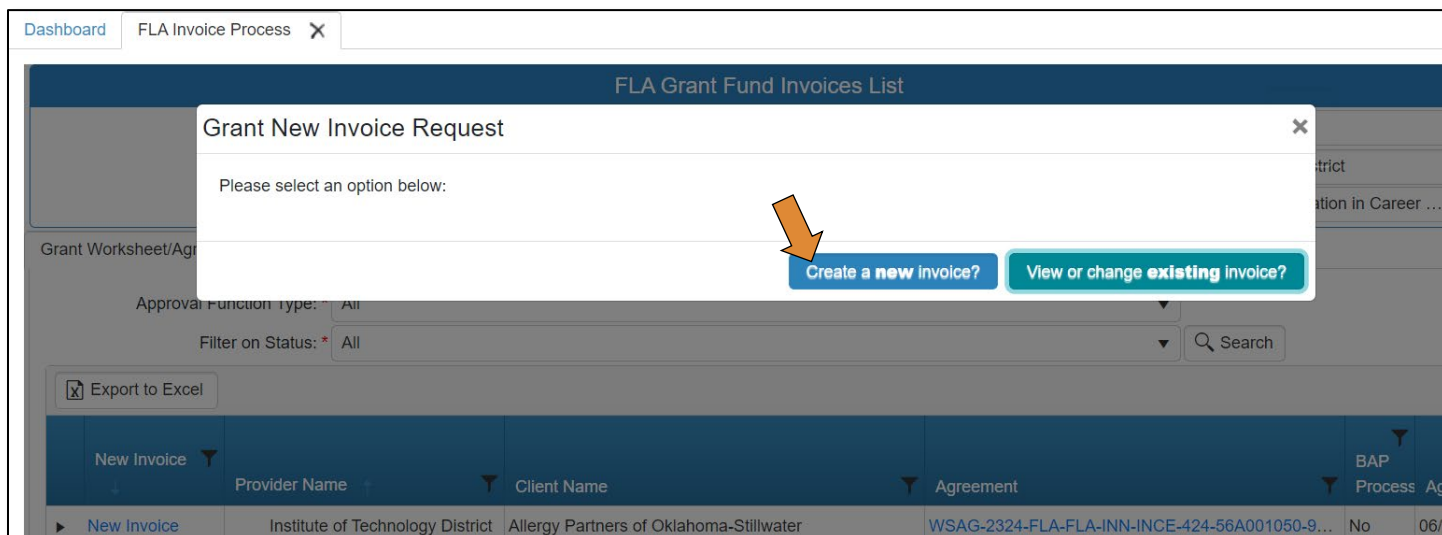
The screenshot shows the search results for the 'FLA Grant Fund Invoices List'. The search criteria are the same as in the previous screenshot. Below the search filters, there is a table with the following data:

New Invoice	Provider Name	Client Name	Agreement	BAP Process	Ag
New Invoice	Institute of Technology District	Allergy Partners of Oklahoma-Stillwater	WSAG-2324-FLA-FLA-INN-INCE-424-56A001050-9...	No	06/3

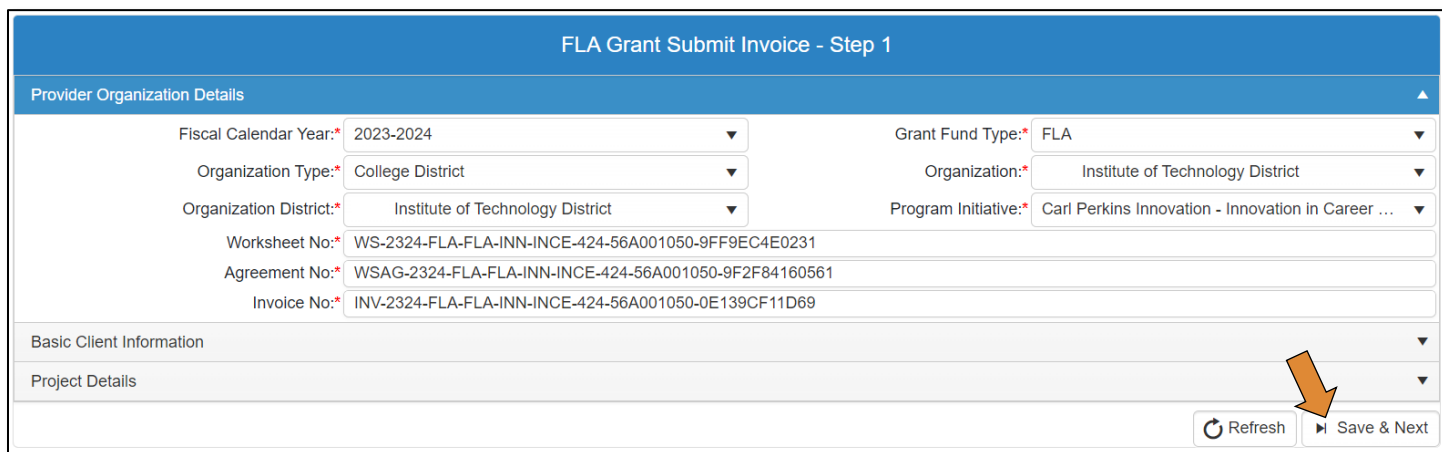
An orange arrow points to the 'New Invoice' link in the first row of the table.

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?

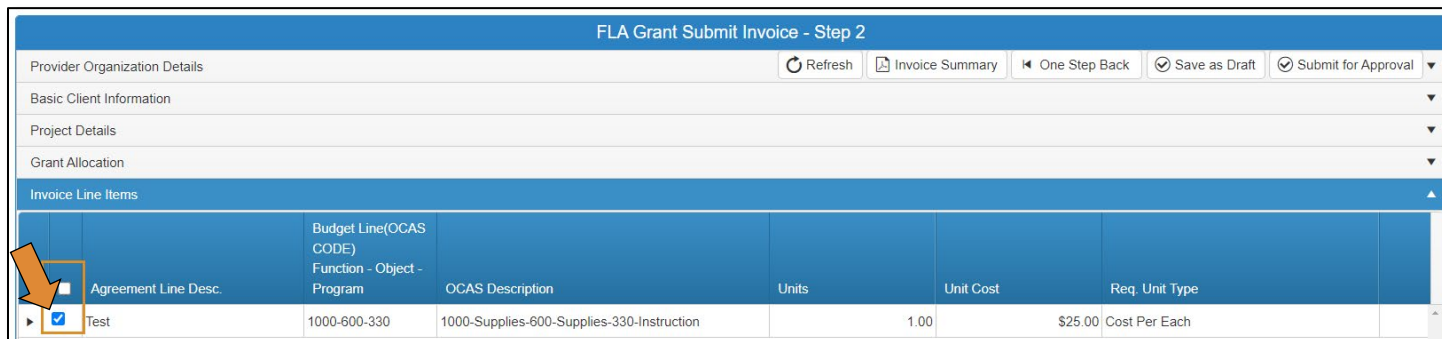
- Click on the button you need – this pop-up is to help prevent unnecessary new invoices being created.



- On the **FLA Grant Submit Invoice – Step 1** screen, click **Save & Next**.



- On the **FLA Grant Submit Invoice – Step 2** screen, check the box(es) next to the line item you need to invoice.



- If you need to make a change to the line item, click on the arrow next to the line to expand the details and click the **Edit** button.

Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description
Test	1000-600-330	1000-Supplies-600-Supplies-330-Instruction

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program
Active	Test	1000-600-330

- Once the changes have been made, click **Update**.

Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Total	Total To B
Test	1000-600-330	1.00	25.00	Cost Per Each	25	25

- After the changes have been made and the line items to invoice have been checked, click the **Save as Draft** button at the top or bottom of the screen.

FLA Grant Submit Invoice - Step 2

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

Basic Client Information

Project Details

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Worksheet Requested Total	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$25.00	\$25.00	\$25.00	\$25.00	\$0.00	\$0.00	\$25.00

Invoice Line Items

Attachments

Acknowledgements

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

- To add attachments, expand the **Attachments** section by clicking on the word Attachment.
- In the Attachments section, click the **Select Files** button to find the files on your computer.
- When your file is selected, click the **Upload & Save File** button.
- Add an **Attachment Note**.

NOTE: You can make attached files inactive/active, delete files, or download files by checking the box next to the file name and using the corresponding buttons.

The screenshot shows the 'FLA Grant Submit Invoice - Step 2' interface. The 'Attachments' section is expanded, and the 'Select files...' button, 'Upload & Save file' button, and the 'Attachment Note' text area are highlighted with orange arrows. The interface includes a navigation bar with 'Refresh', 'Invoice Summary', 'One Step Back', 'Save as Draft', and 'Submit for Approval' buttons. Below the Attachments section, there are buttons for 'Active/Inactive file(s)', 'Delete file(s)', and 'Download all files'. A table with columns 'Status', 'File Name', 'Attachment Note', 'Uploaded Date', and 'Action' is visible below the Attachments section. The 'Acknowledgements' section is partially visible at the bottom.

- Expand the **Acknowledgement** section by clicking on the word Acknowledgements.
- Check the appropriate acknowledgement boxes, add the date, and a note in the note field.
- Click the **Submit for Approval** button.

The screenshot shows the 'FLA Grant Submit Invoice - Step 2' interface. The 'Acknowledgements' section is expanded, and the 'Submit for Approval' button is highlighted with an orange arrow. The Acknowledgements section contains several checkboxes and a text area for the Acknowledgement Note. The checkboxes are:

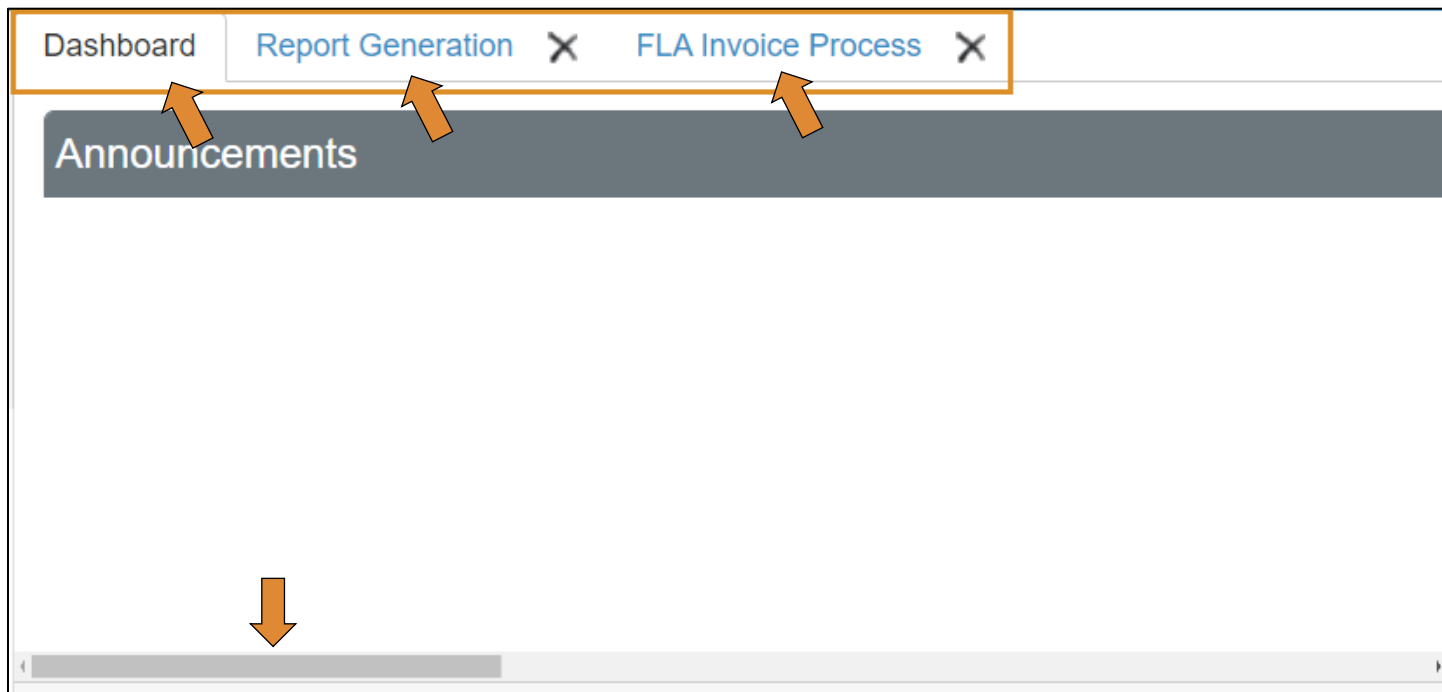
- By checking this box, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3851-3852 (2 CFR 200.415(a) (CFR 2015 ed.)
- I have attached signed federal detail and summary accounting reports that show proof of payments (OCAS reports for secondary recipients, OCAS or other accounting reports for Technology Centers and colleges. Financial Analysis reports are NOT adequate for payment and will result in the invoice to be rejected)
- I have attached LEGIBLE copies of all required vendor invoices if applicable.
- Check box if final request for reimbursement.

 The Acknowledgement Note text area is highlighted with an orange arrow. The interface includes a navigation bar with 'Refresh', 'Invoice Summary', 'One Step Back', 'Save as Draft', and 'Submit for Approval' buttons. A table with columns 'Status', 'File Name', 'Attachment Note', 'Uploaded Date', and 'Action' is visible below the Acknowledgements section. The 'Attachments' section is partially visible at the top.

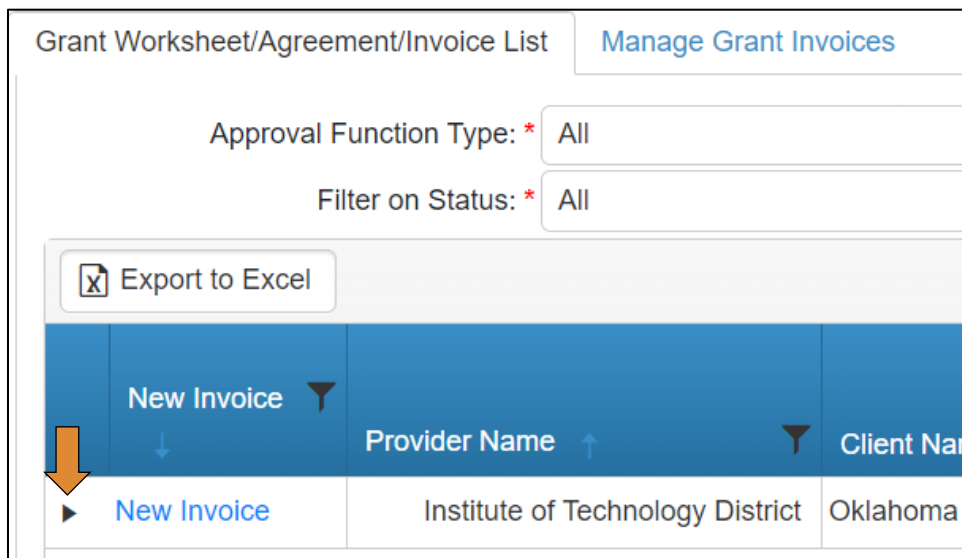
The invoice will now go to the **ODCTE – Finance Document Coordinator** and then **ODCTE – Finance Reviewer** for approval.

CTIMS Helpful Tips

- There are scroll bars located at the bottom and right of some of the screens in CTIMS. If you cannot see all of the information on a screen, go to the right or bottom of the screen and use the scroll bar to see navigate over to view additional columns and rows.
- You can flip between screens or tabs in CTIMS. Click on any open tab at the top of your screen to toggle between them.
- 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.



- Many sections in CTIMS can be expanded to view more detailed information by clicking on the black arrow next to the section header or line (row).



- Hold down the **Ctrl** key and click on the **+** or **-** keys to zoom in or out.