CTE Consolidated Application Instructions and Technical Assistance
CTE Consolidated Section

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CTE Consolidated Application Instructions and Technical Assistance

CTE Consolidated Section

Application located in IWAS – System Listings – CTE Consolidated Application

Question	Instructions	Assistance/Examples
Helpful Tips Throughout the Application	• Refer to the application Presentation and Webinar for additional information. • ***Save changes*** on each page before moving to the next page. • Avoid using special characters (e.g., &, >)! • Required fields are marked with an asterisk. • When you create an amendment, you must unlock the *Locked* pages where changes are needed on the Page Lock Control page. • To navigate between the sections of the grant, use the dropdown menu in the upper right. • Refer to the approved Illinois' State Plan for Perkins V and the Perkins V Definitions for additional information.	• Located on ISBE's CTE webpage under Grants toolbar (near the bottom of page) • You will lose all changes if you do not. • Adds html text with every amendment and causes issues with max character count, cutting off text at the end of the text box. • A red error message will appear at the top of the page after saving the page; ***must complete and save this change before moving to the next page OR you will lose ALL information.*** • If a page is marked Final, create the amendment and contact your grant principal consultant to unlock the page. • Sections: CTE Consolidated Plan, CTEI, Perkins, and Perkins-State Institutions (SI) • Only enter information and "Save Pages" if the entity has an allocation in that grant (e.g., CTEI, Perkins, Perkins-SI). • The Internet browser you use can impact the functionality of the grant; eGMS usually functions best in Internet Explorer of Microsoft Edge.
Application Select Page		
	• Make sure the correct fiscal year is displayed next to Year. • Click the "Create Application" button. • When returning to a created application/amendment, click the radio button next to the application/amendment and then click "Open Application."	• If not, click the dropdown arrow next to Year for additional fiscal years. • Active only when the entity has an allotment. Creates consolidated application for the local application, CTEI, and Perkins or Perkins-SI.

	• To create an amendment, click the radio button next to the application and then click Create Amendment.	
Question	**Instructions**	**Assistance/Examples**
CTE Consolidated Plan Overview Page		
	• View Only – No action needed	• Access program purpose, legislation, reporting requirements, application and amendment due dates, grant period, funding, guidance documents, and grant instructions • Includes GATA and fiscal legislation and policies/procedures
Vision, Mission, and Goals Page		
	• View Only – No action needed	• Includes Illinois' CTE vision, mission, foundational tent, and goals from the approved State Plan for Perkins V
Applicant Information Page		
Program Contact Person	• Complete the requested information for the program contact and overall budget contact (if different than program contact).	• Can be the same person. There will be an opportunity to include different program or budget contacts in the other application sections (e.g., CTEI, Perkins, Perkins-SI).
Applicant Comments	• Use this box to record any explanations, responses, or other information you want to communicate to the ISBE staff who will review this application. • In FY 2021, this box should be used when submitting an amendment to record changes to the Local Application pages.	• This text area is limited to 3,000 characters. • May be used throughout the application and amendment process to communicate other pertinent information not captured on other pages.
Approval Status Page		
	• View Only • Prepopulated from a conditional approval on a previous Review Checklist when an amendment is created. • Lists issues that need to be addressed in a timely manner through an amendment	• Includes issues from all sections of the CTE Consolidated Application • If issues addressed and approved in an amendment, ignore this page.

Question	Instructions	Assistance/Examples
Allotment Page (Access CTEI and Perkins Subgrants)		
Current Year Allotments	• The Allotment page provides "view only" access to project information, as well as a navigational link between the main grant and any subgrants in CTEI and Perkins.	• CTEIc-3220 = CTEI • PerkinsCons-4745 = Perkins (Secondary) • PerkSI-4740 = Perkins-State Institutions (SI)
Reallotted Funds, Released Funds, Carryover, and PrePayment	• Does not apply to CTEI, Perkins, or Perkins-SI	• In Chrome browser, the Transfer Funds may appear active. No action should be taken.
Multi-District Transfer In	*In CTEI and Perkins Secondary:* The green **0** link next to *Transfer In* allows the administrative agent (AA) to make allotments to subgrantees and to navigate to subgrant applications. Clicking this link brings up the *Multi-District Member List* in a second browser where the AA enters allotment amounts for any subgrantees. This page must be saved after making allotments. Members will not be able to create subgrant applications until the AA has assigned allotments. Regions that do not flow money through to members should not assign allotments.	• N/A for single-district Education for Employment (EFE) Systems • N/A for Perkins-SI
Multi-District Member List Page: Navigation between Main Grant and Subgrant	• Once a subgrantee has created and completed a subgrant application, the RCDT code on the left becomes a green underlined link that, if clicked, will take you to the subgrant application. The link selected opens to the *Application Select* page of the RCDT selected and is displayed in the first browser that is already open. • Use the blue "Return to Application Select" link in the upper right of the screen to go back to the main grant *Application Select* page and select the desired application. • Close the *Multi-District Member List* window when all subgrant operations are completed.	• Used by AA's and ISBE reviewers in CTEI and Perkins • N/A for single-district EFEs or Perkins-SI • Internet processing requires that you open each application, including the main grant, as you navigate among the main grant and subgrant applications. • The *Multi-District Member List* will be in one browser and the currently opened application will be in the other. • If you close the browser with the open subgrant application, you will no longer be able to navigate from the *Multi-District Member List* without going back to IWAS and reopening the main grant.

Question	Instructions	Assistance/Examples
Multi-District Member List Page: AA Review and Acceptance of Subgrants	• Once a member district has completed a subgrant application, the administrative agent (AA) will review it and either accept it or return it for changes. • The AA should go to the main grant Allotment page and click on the green *Transfer In* link to open the *Multi-District Member List*. • Once the list opens in another browser, the AA should use the active green RCDT link to select a subgrant application with the status Submitted to AA. This will open that member's *Application Select* page in the original browser window for the AA to select the appropriate application or amendment. • After reviewing this application, the AA should go to the subgrant Submit page where the AA can type and Save comments in the provided text box. • Based on the review, the AA can Accept or Return the application to the subgrantee. • A textbox is provided on the subgrant Submit page for the AA to use in explaining what needs to be corrected on a returned subgrant application or providing positive feedback.	• N/A for single-district EFEs or Perkins-SI • Once a subgrant application is accepted by the AA, the member district will not be able to change it except by submitting another amendment. • If an AA makes subgrant allotments, *at least one subgrant must be completed and accepted by the AA* before the main grant can be submitted for ISBE review. • Once the AA (main) grant is approved by ISBE, amendments made in the subgrant applications require creation of an AA amendment and acceptance of subgrant changes. This AA amendment must then be submitted to ISBE for approval. • The AA should review the subgrant application using the budget guidance throughout these instructions and the CTE Consolidated Application Subgrant Instructions. • Returning a subgrant that requires changes eliminates the need for the subgrant to create another amendment. • If a subgrant has CTEI and Perkins allocations, an AA **should not Accept** a subgrant until both CTEI and Perkins sections are approvable.
Multi-District Member List Page: Subgrant Amounts Entered on the Main Grant Budget Detail Page	• The administrative agent (AA) should not create budget lines for their subgrants since eGMS automatically adds to the *Budget Detail* page when the AA accepts the subgrant application.	• N/A for single-district EFEs or Perkins-SI • Once the AA accepts a subgrant application, the total from that subgrantee budget will be entered by the system in a separate 4000/600 row that cannot be changed by the AA.

		• Once the amendment is approved, the changes will be reflected on the main grant *Budget Detail*.
Question	**Instructions**	**Assistance/Examples**
Multi-District Member List Page: ISBE Review of Subgrant Applications	• ISBE reviewers navigate to subgrant applications by clicking on the *Allotment* page of the main grant application, selecting the green **0** link, and selecting the green RCDT link on the *Multi-District Member List* for the subgrant to be reviewed. • Any revisions of a subgrant required by ISBE must be made by ISBE returning the application to the AA, who in turn will require the subgrantee to create another subgrant amendment. • After accepting the revised subgrant application, the AA will resubmit the main grant application to ISBE.	• N/A for single-district EFEs or Perkins-SI
Multi-District Member List Page: Timing of Subgrant Amendments	• Once a subgrant application has been accepted by the AA, each subgrantee can be amend at any time. Follow the instructions on creating an amendment in the Application Select Page section of the CTE Consolidated Application Subgrant Instructions.	• N/A for single-district EFEs or Perkins-SI • However, if the AA has submitted the main grant application for ISBE review, the subgrant amendment cannot be accepted until the main grant is either approved or returned by ISBE. • The subgrant amendment may be returned for changes at any time, regardless of the status of the main grant.
Administrative Agent	• RCDT number for the grantee displays in the cells to the right.	
Multi-District Transfer Out	• Does not apply to CTEI, Perkins, or Perkins-SI	
Transfer Funds	• Does not apply to CTEI, Perkins, or Perkins-SI	

Question	Instructions	Assistance/Examples
Local Application – Levels of Performance Page		
Levels of Performance	• All EFEs, except DHS and IDJJ, must click the first radio button. • DHS and IDJJ must click the second radio button.	• According to the approved Illinois' State Plan for Perkins V, all local recipients must agree to the State determined levels of performance in order to receive state and federal CTE funding. • Guidance on Local Program Improvement Plans is forthcoming later in fiscal year (FY) 2021.
Local Application – Needs Assessment Page		
Needs Assessment: 1. Overview of CLNA Process	• Required • In the textbox, provide a summary of the process to complete the CLNA.	• Refer to CLNA Section 1. • At minimum, include how the EFE and Postsecondary Perkins Administrator collaborated, the number of meetings and meeting format (e.g., in-person, virtual), and the stakeholder involvement format (e.g., participation in meetings, on-line or written input). • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."

Needs Assessment: 2. Summary of Continued Stakeholder Consultation	• Required
	• In the textbox, describe how you plan to continue stakeholder consultation.
		• Use active hyperlink to access the full text of Perkins V Section 134(e).
		• Refer to answers in your CLNA Section 1.
		• Requires that local recipients consult with stakeholders on an on-going basis to:
		  ○ Provide input on annual CLNA updates;
		  ○ Ensure CTE programs of study are responsive to employment needs, aligned with employment priorities, informed by labor market, designed to meet labor market projections, and allow for employer input to meet the

		needs of industry (e.g., standards, curriculum, industry-recognized credentials, current technology and equipment); ○ Identify and encourage work-based learning; and ○ Ensure coordination of funding. • Define "on-going" by including how often stakeholders will meet; this should be no less than one time per year. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Question	**Instructions**	**Assistance/Examples**
Needs Assessment: 3A. Summary of Student Performance	• Required • In the textbox, summarize strengths, areas for improvement, and challenges in your evaluation of student performance compared to State determined levels of performance, including an evaluation special populations and subgroup student performance.	• Refer to answers in your CLNA Section 2. • Refer to Illinois' FY2021-2024 Secondary Performance Indicator Definitions. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Needs Assessment: 3B. Summary of Access to High-Quality CTE for All Students	• Required • In the textbox, summarize strengths, areas for improvement, and challenges in your progress toward implementation of equal access to high-quality CTE for all students.	• Refer to answers in your CLNA Section 3. • Includes strategies to overcome special populations access barriers and performance gaps. • Includes programs designed to enable special populations to meet levels of performance. • Includes activities to prepare special populations for high-skill, high-wage, or in-demand industries/occupations in

		competitive, integrated settings that will lead to self-sufficiency. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Question	**Instructions**	**Assistance/Examples**
Needs Assessment: 3C. Summary of CTE Programs Aligned to Labor Market	• Required • In the textbox, summarize strengths, areas for improvement, and challenges in your CTE program alignment to State, regional, or local in-demand industries/occupations or design to meet local industry needs.	• Refer to answers in your CLNA Section 4. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Needs Assessment: 3D. Summary of CTE Programs of Sufficient Size, Scope, and Quality	• Required • In the textbox, summarize strengths, areas for improvement, and challenges in your evaluation of CTE programs for sufficient size, scope, and quality to meet the needs of all students.	• Refer to answers in your CLNA Section 5. • Refer to Illinois' FY 2021-2024 CTE Program Size, Scope, and Quality definitions. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Needs Assessment: 3E. Summary of Implementing Quality Programs of Study	• Required • In the textbox, summarize strengths, areas for improvement, and challenges in your progress toward implementation of quality CTE programs of study.	• Refer to answers in your CLNA Section 6. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Needs Assessment: 3F. Summary of Recruitment, Retention, and Training of CTE Personnel	• Required • In the textbox, summarize strengths, areas for improvement, and challenges in your plan to improve recruitment, retention, and training of CTE teachers, specialized	• Refer to answers in your CLNA Section 7. • Include strategies for recruiting, retaining, and training individuals in groups underrepresented in such professions.

	instructional support personnel, paraprofessionals, and career guidance and academic counselors including recruitment of educators of color.	• Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Question	**Instructions**	**Assistance/Examples**
Local Application – CTE Programs Pages		
CTE Programs and Activities: 1. Current CTE Programs	• Required • In the textbox, describe how the CLNA informed which CTE programs will be funded in FY 2021.	• Refer to answers throughout CLNA Sections 2-7 that include which approved CTE programs will be funded in FY 2021. • Must mark approved programs that are eligible for funding for FY 2021 on the 7 endorsement area pages (e.g., AFNR, HST, METT). This includes existing and new programs implemented in FY 2021. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
CTE Programs and Activities: 2. New CTE Programs	• Required • In the textbox, describe how the CLNA informed which new CTE programs will be developed and submitted for State approval for FY 2021-2024, including the year of implementation.	• Refer to answers throughout CLNA Section 4, Program Information on new CTE programs that will be implemented in FY 2021-2024. • Must mark the year of implementation for new programs that are eligible for funding in FY 2022-2024 on the 7 endorsement area pages (e.g., AFNR, HST, METT). • If proposing a program not currently state-approved, please refer to Federal CIPs for guidance. ***NOTE:*** This information should match CIPS assigned in the IWAS Illinois State Course System – Federal Classification of Instructional Programs (CIPS).

		• Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Question	**Instructions**	**Assistance/Examples**

CTE Programs and Activities: 3. Student Recruitment and Retention Plan to Address Equity Gaps	• Required
	• In the textbox, describe your regional student recruitment and retention plan that extends into middle school to address equity gaps (e.g., special populations and student subgroups).
		• Refer to answer provided in CLNA Section 5.
		• Consider how:
		  ○ Students access your CTE programs;
		  ○ Students are made aware of CTE opportunities, starting in middle grades;
		  ○ You reduce barriers to students continuing in a CTE program of study (e.g., scheduling conflicts, competing with AP, etc.); and
		  ○ Your recruitment and retention strategies specifically reach special populations and all student subgroups.
		• **<u>State Institution Considerations:</u>**
		  ○ Only address middle grades if applicable (e.g., ISD, ISVI).
		  ○ For IDJJ, barriers to students continuing in a CTE program of study may also include transition services after they leave the juvenile justice facility.
		  ○ Your students are all included in special populations, but you would still include recruitment and retention strategies to reach all student subgroups in your facilities.
		• Avoid using special characters (e.g., &, >). Creates additional html text on amendments.
		• Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."

Question	Instructions	Assistance/Examples
CTE Programs – Endorsement Areas	• Required • Must click the checkbox next to approved programs that are eligible for funding for FY 2021 on the 7 endorsement area pages (e.g., AFNR, HST, METT). This includes existing and new programs implemented in FY 2021. • Must click the checkbox for the year of new program implementation, FY 2022-2024, on the 7 endorsement area pages (e.g., AFNR, HST, METT).	• Programs marked should match CIPs assigned in the Illinois State Course System (ISCS). • Programs should not be included in the main or subgrant budgets if they are not marked on the endorsement area pages. • **Select only ONE fiscal year per CIP.** It is assumed that a program is still eligible for proceeding fiscal years unless assignment changes are made in the ISCS.
Local Application – Goals and Strategies Pages		

Goals and Strategies: Describe Goal	• Required
	• Describe **SMART** Goals that include all required Local Application Components.
	  ○ **S**pecific,
	  ○ **M**easurable,
	  ○ **A**chievable/**A**ttainable,
	  ○ **R**elevant/**R**ealistic, and
	  ○ **T**ime-bound
	• You will be able to create up to seven goals (seven pages, 1 for each goal); this is a 4-year CTE plan.
		• Refer to goals and strategies in your CLNA.
		• For examples of SMART Goals related to this application, see updated slides 26 thru 28 of the CTE Consolidated Application webinar presentation.
		• Over the 4 years, all local application components must be addressed by the goals.
		• Avoid using special characters (e.g., &, >). Creates additional html text on amendments.
		• Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."

Goals and Strategies: Local Application Components included in Goal	• Required • Click the checkbox of all the local application components included in that goal (e.g., Goals 1-7).	• Over the 4 years, all local application components must be addressed by the goals. • One component must be marked and the page saved before moving to another page. • For additional info on required local application components, see Perkins V Section 134(b)(3-9).

Question	Instructions	Assistance/Examples
Goals and Strategies: Describe Strategies to Support Local Application Components	• Required • In the textbox, describe strategies that will be used to support the local application components identified for the associated goal (e.g., same page – Goal 1, Goal 4).	• Refer to goals and strategies in your CLNA. • Action oriented • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Goals and Strategies: Provide a Timeline for Goals and Strategies	• Required • In the textbox, provide a timeline from FY 2021-FY 2024 for expected completion of the goal and associated strategies.	• Refer to goals and strategies in your CLNA. • Avoid using special characters (e.g., &, >). Creates additional html text on amendments. • Before moving to another page, make sure there is at least one placeholder character in each text box and "Save Page."
Local Application – Uploads Page		

	• Click "Choose File" button.
	• Find applicable document.
	• Click "Upload" button.
	• If need to delete a file, click the checkbox next to the file and then, "Delete Selected Files" button.
	• LNA Subgrant Budget Crosswalk Guidance **Update**:
	  ○ ISBE will not be requiring the LNA Subgrant Budget Crosswalks from the districts and area career centers in FY 2021.
	  ○ ISBE expects that when the EFE approves a subgrant or sub-recipient (reimbursed for CTE expenditures) budget this year, the EFE is ensuring that the funds are being used for the district or area career center's local needs determined by the LNA.
		• Required Uploads:
		  ○ Secondary/Postsecondary CLNA Assurance Form
		  ○ EFE System's Intergovernmental Agreement (IGA)
		  ○ DHS – OMH/DD and IDJJ:
		  ▪ PDR
		  ▪ CLNA
		• Any additional uploads that apply to the application (e.g., supporting budget documents, out-of-state travel request info)
		• **Clearly name documents**, including an EFE identifier. Must convert to PDF and have no spaces or special characters in the document title. Examples:
		  ○ EFE030-Triton CLNA Assurance.pdf
		  ○ EFE450-IGA.pdf
		  ○ IDJJ-PDR.pdf
		  ○ EFE580DHS-CLNA.pdf
		• Each uploaded file has a **4 MB max**.

	○ If CTE principal consultants have subgrant/sub-recipient budget alignment concerns when reviewing the application, they will reach out to the EFE for additional information.	• For monitoring purposes, **all grant-related documents must be uploaded** by the EFE **and not emailed** to ISBE CTE Principal Consultants. • ISBE will consider reintroducing the crosswalk in FY 2022. The LNA Subgrant Budget Crosswalk has been removed from the website for this year.
Question	**Instructions**	**Assistance/Examples**
Assurances Pages		
Program Assurances	• Near the top, there is a checkbox that must be checked to agree to the assurance. • Place your mouse over the checkbox and click to signify that you agree to the detailed assurance. • Go to the bottom of the page and click on the "Save Page" button.	• Includes the items the grantee is agreeing to accomplish for both CTEI and Perkins or Perkins-SI funding. Be sure to read closely. • Includes items that may be checked in programmatic monitoring. • Assurance instructions are linked in the right corner of the page heading.
State Assurances	• Near the top, there is a checkbox that must be checked to agree to the assurance. • Place your mouse over the checkbox and click to signify that you agree to the detailed assurance. • Go to the bottom of the page and click on the "Save Page" button.	• Required assurances to receive state grant funds (CTEI) • Assurance instructions are linked in the right corner of the page heading.
Debarment, Suspension, Ineligibility, and Voluntary Exclusion Assurances	• Near the top, there is a checkbox that must be checked to agree to the assurance. • Place your mouse over the checkbox and click to signify that you agree to the detailed assurance. • Go to the bottom of the page and click on the "Save Page" button.	• Required assurances to receive federal grant funds (Perkins or Perkins-SI) • Assurance instructions are linked in the right corner of the page heading.
Lobbying Assurance	• Near the top, there is a checkbox that must be checked to agree to the assurance. • Place your mouse over the checkbox and click to signify that you agree to the detailed assurance.	• Required assurances to receive federal grant funds (Perkins or Perkins-SI) • Assurance instructions are linked in the right corner of the page heading.

	• Go to the bottom of the page and click on the "Save Page" button.	
Question	**Instructions**	**Assistance/Examples**
GEPA 442 Assurances	• Near the top, there is a checkbox that must be checked to agree to the assurance. • Place your mouse over the checkbox and click to signify that you agree to the detailed assurance. • Go to the bottom of the page and click on the "Save Page" button.	• Required assurances to receive federal grant funds (Perkins or Perkins-SI) • Assurance instructions are linked in the right corner of the page heading.
GATA Assurances	• Near the top, there is a checkbox that must be checked to agree to the assurance. • Place your mouse over the checkbox and click to signify that you agree to the detailed assurance. • Go to the bottom of the page and click on the "Save Page" button.	• Required assurances for all grants • Assurance instructions are linked in the right corner of the page heading.
Assurances Summary	• After you have agreed to the assurances on all of the assurance pages, complete the last page, *Assurances*. • The six assurance checkboxes on the last page will automatically populate with a check signifying you have agreed to all assurances because you have checked and saved your agreement for each of the other assurance pages. • At the bottom of the *Assurances* page, if you are the agency administrator (usually EFE System Director), "click" the first button to automatically insert your name for agreement.	• The *Assurances* summary page can only be completed by the agency administrator (usually EFE System Director) or a person with board-certified delegated authority. • The assurances must be completed prior to submitting the application. • Assurance instructions are linked in the right corner of the page heading.

Question	Instructions	Assistance/Examples
Submit Page		
Consistency Check Button	• Once you have completed your entire application, you must run a "Consistency Check." • Click on the "Consistency Check" button to start the process. • Once the check is complete, a message will be displayed indicating that it completed successfully (no errors were found) or providing a list of errors encountered. • Correct errors and save those pages again. • Run the check again until no errors are detected. • If no errors are found, the appropriate button will display so that you can submit the application to the next level.	***CAUTION:*** *This check may take a few minutes to run.* • Your application can not be submitted until this has been successfully run. • You may need to scroll down the page to see the button(s). • A successful "Consistency Check" will lock the application.
Lock Application & Unlock Application Buttons	• In order to lock the application, click on the "Lock Application" button. • No one can make changes to the application once locked. • Only the person who locked the application or a person with EFE administrative access (e.g., System Director) can unlock it by clicking the "Unlock Application" button.	• Anyone with data entry authority within the EFE has the ability to freeze the entire application so that no more changes can be made to it prior to submitting or amending an application. • This might be appropriate if, for example, there had been some concern about multiple people updating an application when in fact that was undesired at the EFE level. • Once a *Consistency Check* has ran, these buttons will not be active. At that point, the only way to unlock the application is to *Disapprove* it.
Approval Groups	• Dates displayed for when the: ○ *Application was created on* ○ *Assurances were agreed to on* ○ *Consistency Check was run on*	• When the Agency Administrator (usually EFE System Director) or Board Authorized Representative agreed to all assurances

	○ *District Data Entry* ○ *Business Manager* ○ *District Administrator* ○ *ISBE Program Administrator*	• Appears when "Consistency Check" successfully run (no errors) • When Data Entry "Submits to Administrator" • When Business Manager "Submits to Administrator" ○ Only valid if Agency Administrator (usually EFE) establishes this level ○ Will "Submit to Administrator" or "Disapprove" and return to Data Entry • When District Admin "Submits to ISBE" ○ Will "Submit to ISBE" or "Disapprove" for changes by Data Entry or Business Manager • When approved by ISBE ○ Will "Approve" or "Disapprove ○ If disapproved, the application is returned for changes; pages may need to be unlocked. See *Page Lock Control.*
Question	**Instructions**	**Assistance/Examples**
Application History Page		
	• View Only – Lists all of the steps that occur in the submission and approval of an application or amendment. Columns: ○ *Status Change* – status from most recent to oldest (e.g., Submitted to ISBE, Returned for Changes, Final Approved) ○ *UserId* – displays the Login Name of the person responsible for the status change (e.g., ISBE reviewer) ○ *Action Date* – Date of status change	• In the initial stage of entering the application information, this page will display a statement that the application has not been submitted. • Useful in tracking the application throughout the submission and approval process. • EFEs may use this page at any point in time to determine the approval status of their application.
Page Lock Control Page		
Goal of Page Locking Process	Expedite the review of applications and amendments by identifying which pages have been changed by a grant applicant.	Reviewers will only need to review those pages that have been unlocked since the previous review.

Question	Instructions	Assistance/Examples
What Happens When a Page Is Locked?	The save button is no longer available to the applicant, and a message indicates the page has been locked by the agency review.	The applicant must go to the Page Lock Control tab, unlock any pages needing revision, and then save the Page Lock Control page. This will cause save buttons to appear on all of the pages the applicant has unlocked.
When Will Applicants Need to Unlock Pages?	• If initial application is *returned for changes* by an ISBE reviewer, some or all of the pages may be locked. The applicant should read the comments on the review checklist. • When an *amendment* is created, all pages will be locked. The applicant should use the Page Lock Control tab to unlock only those pages that need to be revised.	• When an applicant creates a *new application* each year, all of the pages will be unlocked because all of the pages need to be completed. • In both cases, only unlock those pages needing revisions. • **Make it a habit to make sure a save button is available before completing or revising a page.** • Unlocking pages that will not be modified circumvents the purpose of page locking and slows the review process.

Expand All and List of Application Pages	• Click the *Expand All* checkbox to see the list of application pages that may be locked or unlocked (first column under the Expand All checkbox).
	• The list of application pages will have two or more indented levels.
	  ○ The first item on the list is the name of the grant program.
	  ○ The first indent under the grant program is the list of pages that appear on the main tab strip.
	  ○ The second indent contains pages that appear in a subtab strip.
		• Any application page with data that users enter or revise will appear in the list.
		  ○ View only pages won't appear (e.g., Overview; Vision, Mission, and Goals).
		  ○ If users need access to functions on pages throughout the application process (e.g., Application Information, Submit, Page Lock Control), they will not appear in the list.
		• For example, *Assurance* Pages is on the main tab strip and is in the group indented at the first level. The various assurance pages (e.g., *Program Assurances*, *Lobbying*) are indented under *Assurance* Pages.

Page Status Column	• For *applicants*, this column displays the current status of the various pages in the application/amendment.	• *Open* – Page is unlocked and can be modified and saved by the applicant. • *Locked* – The page is locked and cannot be modified by the applicant until it is unlocked. There will not be a save button

	• For *ISBE reviewers*, this column reflects the status of the page when the applicant submitted it.	on the page, and a message will appear indicating the page has been locked by the agency review. • *Final* – The page has been locked and should not be unlocked by the applicant. Only ISBE staff can unlock a page designated "Final."
Question	**Instructions**	**Assistance/Examples**
Open Page for Editing Column (Applicant Only Column)	• Check the appropriate box in this column to unlock a page that requires modification. • Save the *Page Lock Control* page after check boxes have been selected.	
Review Status of Page Columns (ISBE Only Column)	• During the review, ISBE staff will use these columns to unlock pages that require modification or to mark pages "Final." • After selecting the appropriate radio buttons, ISBE staff must save the page.	• *OK* – Default radio button unless the page was final locked in a previous round. Modifications are not required for this page. • *Needs* Updates – Select this radio button to unlock a page for the applicant and to indicate that modifications are needed for this page. The reviewer will use the review checklist to explain the required modification. • *Mark Final* – Pages marked "Final" cannot be unlocked by the applicant. Only appropriate for pages like assurances that should not be changed after completion. Only ISBE staff can unlock a page marked final.
Unlocking a Page Marked Final	• Applicant must contact ISBE program staff and explain why the page requires modification. • On the *Application Select* page, applicant marks the application in "Consult." • ISBE program staff unlocks the page by checking the "Open Page for editing" checkbox on the Page Lock Control page and saving the page.	• Pages marked "Final" can only be changed when an amendment is started but not submitted to ISBE.

Question	Instructions	Assistance/Examples
Application Print Page		
	• To print individual pages, select the checkbox next to the page or pages that you wish to print. • Next, press the “Request Print” button to generate printing of the pages.	• The pages will be generated in a PDF format and will be available on the Application Print page anywhere from several hours to a day after the request, depending on the current demand for PDFs. • For applications prior to FY 2012, the “Print All” button on the Application Select page will remain available.