

**CTE Consolidated Application Instructions and Technical Assistance  
Career and Technical Education Improvement (CTEI) Section**

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# CTE Consolidated Application Instructions and Technical Assistance

## CTEI Section

*Application located in IWAS – System Listings – CTE Consolidated Application*

Question	Instructions	Assistance/Examples
<b>Helpful Tips Throughout the Application</b>	<ul style="list-style-type: none"> <li>• Refer to the application <a href="#">Presentation</a> and <a href="#">Webinar</a> for additional information.</li> <li>• <b><i>Save changes</i></b> on each page before moving to the next page.</li> <li>• Avoid using special characters (e.g., &amp;, &gt;)!                                <li>• Required fields are marked with an asterisk.</li>    <li>• When you create an amendment, you must unlock the <i>Locked</i> pages where changes are needed on the Page Lock Control page.</li> <li>• To navigate between the sections of the grant, use the dropdown menu in the upper right.</li> <li>• To access subgrants (<i>Multi-District Member List</i>), go to the CTE Consolidated Plan – Allotment page.</li> <li>• Refer to the approved <a href="#">Illinois’ State Plan for Perkins V</a> and the <a href="#">Perkins V Definitions</a> for additional information.</li> </li></ul>	<ul style="list-style-type: none"> <li>• Located on <a href="#">ISBE’s CTE webpage</a> under Grants toolbar (near the bottom of page)</li> <li>• You will lose all changes if you do not.</li>    <li>• Adds html text with every amendment and causes issues with max character count, cutting off text at the end of the text box.</li> <li>• A red error message will appear at the top of the page after saving the page; <b><i>must complete and save this change before moving to the next page OR you will lose ALL information.</i></b></li>    <li>• If a page is marked Final, create the amendment and contact your grant principal consultant to unlock the page.</li> <li>• Sections: CTE Consolidated Plan, CTEI, Perkins, and Perkins-State Institutions (SI)</li> <li>• Only enter information and “Save Pages” if the entity has an allocation in that grant (e.g., CTEI, Perkins, Perkins-SI).</li> <li>• The Internet browser you use can impact the functionality of the grant; eGMS usually functions best in Internet Explorer or Microsoft Edge.</li> </ul>
<b>Application Select Page</b>	<ul style="list-style-type: none"> <li>• Make sure the correct fiscal year is displayed next to Year.</li> <li>• Click the “Create Application” button.</li> <li>• When returning to a created application/amendment, click the radio</li> </ul>	<ul style="list-style-type: none"> <li>• If not, click the dropdown arrow next to Year for additional fiscal years.</li> <li>• Active only when the entity has an allotment. Creates consolidated application for the local application, CTEI, and Perkins or Perkins-SI.</li> </ul>

	<p>button next to the application/amendment and then click “Open Application.”</p> <ul style="list-style-type: none"> <li>To create an amendment, click the radio button next to the application and then click Create Amendment.</li> </ul>	
Question	Instructions	Assistance/Examples
<b>CTE Consolidated Plan Overview Page</b>		
	<ul style="list-style-type: none"> <li><u>View Only</u> – No action needed</li> <li><u>To enter CTEI</u>, use the dropdown box in the upper right-hand corner of the page. Click on the arrow to expand the section selections (e.g., CTEI, Perkins, Perkins-SI).</li> </ul>	<ul style="list-style-type: none"> <li>Access program purpose, legislation, reporting requirements, application and amendment due dates, grant period, funding, <u>guidance documents</u>, and <u>CTE Consolidated Plan grant instructions</u></li> <li>Includes GATA and fiscal legislation and policies/procedures</li> </ul>
<b>CTEI Overview Page</b>		
	<ul style="list-style-type: none"> <li><u>View Only</u> – No action needed</li> <li><u>To enter other grant sections</u>, use the dropdown box in the upper right-hand corner of the page. Click on the arrow to expand the section selections (e.g., CTE Consolidated Plan, Perkins, Perkins-SI).</li> </ul>	<ul style="list-style-type: none"> <li>Access program purpose, legislation, reporting requirements, application and amendment due dates, grant period, funding, <u>guidance documents</u>, and <u>CTEI grant instructions</u></li> <li>Includes GATA and fiscal legislation and policies/procedures</li> </ul>
<b>Applicant Information Page</b>		
<b>Program Contact Person</b>	<ul style="list-style-type: none"> <li>Complete the requested information for the CTEI program and budget contact (if different than program contact).</li> </ul>	<ul style="list-style-type: none"> <li>Can be the same person. There will be an opportunity to include different program or budget contacts in the other application sections (e.g., Perkins/Perkins-SI, CTE Consolidated).</li> </ul>
<b>Area Affected by the Project</b>	<ul style="list-style-type: none"> <li>For secondary EFEs, click on the radio button next to “Multiple areas (listed).”</li> <li>In the text box to the right, type the counties and/or school districts covered by this project.</li> <li>For Department of Human Services (DHS) and Illinois Department of Juvenile Justice</li> </ul>	

(IDJJ), click on the radio button next to “State-wide.”

Question	Instructions	Assistance/Examples
<b>Activity Period and Grant Period</b>	<ul style="list-style-type: none"> <li>• Check one of the Activity Period radio buttons to indicate whether you will implement projects for the regular grant period (activities completed through June 30), or an extended grant period (activities occurring between project begin date and August 31).</li> <li>• Grant Period refers only to the main grant; the subgrant application does not include this option.</li> <li>• <b>If the main grant is extended and a subgrant(s) requires an amendment during the extension, must email your CTE grant consultant to have ISBE Funding and Disbursements open the subgrant(s).</b></li> </ul>	<ul style="list-style-type: none"> <li>• If an extended grant period is chosen, the <i>Justification for Grant Extension</i> box must be completed to explain the grant activities that will occur during the extended period.</li> <li>• <u>Grant Period</u>: The radio buttons set the correct end date automatically.</li> <li>• Funds may not be obligated prior to Illinois State Board of Education receipt of a substantially approvable application.</li> <li>• This page <i>must be re-visited</i>, and the correct radio button checked each time the application an amendment is created and submitted to ISBE.</li> </ul>
<b>Justification for Grant Extension</b>	<ul style="list-style-type: none"> <li>• 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 regard to the extension of the project year.</li> </ul>	<ul style="list-style-type: none"> <li>• This text area is limited to 3,000 characters.</li> <li>• May be used throughout the application and amendment process to communicate other pertinent information not captured on other pages.</li> </ul>
<b>Applicant Information – CTEI Amendment Page</b>		
<b>Original or Amended Application</b>	<ul style="list-style-type: none"> <li>• Select the “Original Application” radio button for an original application submission OR the “Amended Application” radio button for an amended application.</li> <li>• For an Amendment, complete the Amendment Number; <b>amendment numbers in CTEI and Perkins/Perkins – SI must match, since this is one consolidated application.</b></li> <li>• Click the “Save Page” button at the bottom of the page.</li> </ul>	<ul style="list-style-type: none"> <li>• To ensure your grants are reviewed in a timely manner, please email your CTE grant consultant that an application or amendment has been submitted.</li> <li>• Any additional amendment information in the email must also be included in the application (see below).</li> </ul>
<b>Grant Changes</b>	<ul style="list-style-type: none"> <li>• For Amendments, provide a <u>description of the changes</u> <b>AND</b> the <u>affected budget function/object codes</u>.</li> </ul>	<ul style="list-style-type: none"> <li>• For monitoring purposes, <b><u>all grant-related documents must be included in the grant</u></b> (in text boxes or Local Application – Uploads</li> </ul>

	<ul style="list-style-type: none"> <li>• <i>Include all main and subgrant budget changes</i> in the text boxes provided.</li> <li>• If amendment is only for changes in Perkins or Perkins – SI, type, “No changes in CTEI.”</li> </ul>	<p>page) by the EFE <b>and not emailed</b> to ISBE CTE Principal Consultants.</p> <ul style="list-style-type: none"> <li>• For examples of Amendment Best Practices, see slides 37 thru 38 of the <a href="#">CTE Consolidated Application webinar presentation</a>.</li> </ul>
Question	Instructions	Assistance/Examples
<b>Budget Pages</b>		
<b>Indirect Cost Calculation</b>	<ul style="list-style-type: none"> <li>• Refer to the Indirect Cost Rate Calculation Instructions linked in the upper right corner of the page for information on completing this page.</li> </ul>	<ul style="list-style-type: none"> <li>• Indirect cost rates will be loaded on the Budget Detail pages once they are available.</li> <li>• See <a href="#">ISBE’s Indirect Cost Rate Plan webpage</a> for the State Approved Indirect Cost Rate or the rate listed for the EFE’s fiscal agent. Email <a href="mailto:finance1@isbe.net">finance1@isbe.net</a> for further questions related to calculation of indirect cost rates.</li> </ul>
<b>Budget Detail</b>	<ul style="list-style-type: none"> <li>• At the bottom left of the screen is the <b>Total Allotment</b> for CTEI. This amount should be referenced when completing the budget and is a read-only cell.</li> <li>• <b>Function Codes and Object Codes</b> are the first two columns on the left. Each column contains function and object codes allowable for a specific grant. To access the available codes, <b>click</b> on the drop-down arrow and select the appropriate code for the expenditure.</li> <li>• Tab or Click into the <b>Expenditure Description and Itemization</b> textbox. Enter the appropriate level of detailed information for each function/object code selected. Appropriate items for function/object code are in the next section Function/Object Code Examples. Also, see allowable uses of funds info in the Assistance/Examples column.</li> <li>• Tab or Click into the text field for grant <b>Funds</b>. Enter the total amount requested for</li> </ul>	<ul style="list-style-type: none"> <li>• A hyperlink, “<b>Description of Function Codes and Object Codes</b>” provides descriptions of all function and object codes recognized within the Requirements for Accounting, Budgeting, Financial Reporting, and Auditing.</li> <li>• For <b>Allowable Uses of Funds</b>, refer to: <ul style="list-style-type: none"> <li>○ <a href="#">ISBE’s current State and Federal Grant Administration Policy, Fiscal Requirements, and Procedures</a></li> <li>○ EFEs – <a href="#">Perkins V Section 135 – Local Uses of Funds</a></li> <li>○ State Institutions – <a href="#">Perkins V Section 124(b) – Permissible Uses of Funds</a></li> <li>○ <i>DRAFT</i> – <a href="#">FY 2021 CTE Grants Expenditure Guidance</a></li> </ul> </li> <li>• For budget guidance, see slides 42 thru 45 of the <a href="#">CTE Consolidated Application webinar presentation</a>.</li> <li>• When an administrative agent has subgranted funds, the <b>subgrant budget detail</b> for each <b>accepted</b> subgrant is entered</li> </ul>

each function/object code. Expenditure amounts should be in whole dollar amounts only, no decimal points or commas.

- At the end of each line is a **Delete Row** check box. If you have entered a line of detail and need to remove it, click on the check box in the far-right column. Then click on the **Save Page** button.
- If you need additional lines of budget detail, click on the **Create Additional Entries** button located at the bottom of the page.
- Once you have completed the detailed budget information, click on the **Calculate Totals** button at the bottom of the page. *(Clicking on Calculate Totals does not save the information)* Please verify that all data you have entered is correct and that you have utilized the appropriate funds for each line of expenditure.
- The next section on the right of the screen is a calculation of the **Maximum Indirect Cost**. This will automatically be loaded by ISBE. After the Maximum Indirect Cost is loaded, the appropriate **Indirect Cost** can be entered in the field below it. Until that time, the indirect cost can be put in an appropriate placeholder expenditure line, denoting (Indirect Cost) in front of the expenditure description.
- The last section of the screen displays allotment information; **Total Allotment**, **Grand Total** of the budget and **Allotment Remaining**. These are calculated fields and can only be changed when detail information is changed and saved.
- Click the **Save Page** button before proceeding to other pages in the application.

by the eGMS system in a separate 4000/600 row that cannot be changed by the administrative agent. If a change is required, a subgrantee must submit an amendment to the administrative agent. Once the amendment is accepted, the changes will be reflected on the main grant budget detail page.

- Each time you click this button it will add 5 additional rows of budget detail cells.
- For more information on indirect cost, see:
  - [ISBE's Indirect Cost Rate Plan webpage](#)
  - Administrative Costs in the *DRAFT – FY 2021 CTE Grants Expenditure Guidance*
  - Indirect Cost section of [ISBE's current State and Federal Grant Administration Policy, Fiscal Requirements, and Procedures](#)
- Answers to common questions CTE staff receive on allowable expenditures can be found in [ISBE's current State and Federal Grant Administration Policy, Fiscal Requirements, and Procedures](#), especially:
  - Equipment (pages 14-17)
  - Budgets/Amendments/Payment Schedules/Expenditure Reports (pages 23-29)
  - Obligations (pages 42-43)
  - Supporting Documentation for Salaries and Wages (page 63)
  - Time and Effort Reporting (pages 64-65)

### Function/Object Code Examples

- For a full list of Function and Object code descriptors, see that hyperlink **“Description of Function Codes and Object Codes”** on the Budget Detail page. This provides descriptions of all function and object codes recognized within the Requirements for Accounting, Budgeting, Financial Reporting, and Auditing found within [ISBE’s current State and Federal Grant Administration Policy, Fiscal Requirements, and Procedures](#).

1000/100	(Instruction) Salary for teachers, aides/paraprofessionals, tutors, note-takers, interpreters, temporary/substitute, overtime <i>Provide teacher/aide/paraprofessional’s title, percent of time paid from the grant and rate of pay (base salary) – e.g., Welding Technology Instructor, 25% of \$50,000 (expenditure total \$12,500). Each salary component and corresponding dollar amount should be entered separately in the budget detail textbox.</i>
1000/200	(Instruction) Benefit amounts paid by LEA on behalf of employees: TRS, life insurance, FICA, IMRF, medical insurance, Medicare. <i>Each benefit and dollar amount should be entered separately in the budget detail textbox.</i>
1000/300	(Instruction) Worker's/Unemployment Compensation, equipment repair & maintenance, in-district travel, other transportation services, equipment rentals, software license, online subscriptions, other purchased services transportation for special populations students enrolled in an approved CTE program, including dual or concurrent enrollment programs or early college high school programs
1000/400	(Instruction) Software, consumable supplies, curriculum/supplemental materials, student supplies/materials for special populations, equipment <\$500/unit housed in classroom for student instruction
1000/500	(Instruction) Equipment > \$500/unit, housed in classroom for student instruction, special adapted equipment/devices <i>Provide the approved program and what equipment will be purchased.</i>
1000/700	(Instruction) Non-Capitalized Equipment – items that would be classified as capital assets except that they cost less than the capitalization threshold, but more than the \$500 minimum value established for purposes of calculating per capita costs. <i>Provide the approved programs and what equipment will be purchased. <b>Include the adopted capitalization threshold amount and the date of adoption by the purchasing entity</b> (e.g., EFE, area career center, or school board). Keep evidence on file of the capitalization threshold adoption.</i>
2120/100	(Career Guidance) Salary for school counselor (career guidance portion of position), coordinator, secretary, temporary/substitute, overtime <i>Provide coordinator/secretary’s title, percent of time paid from the grant and rate of pay (base salary) – e.g., School Counselor, 33% of \$50,000 (expenditure total \$16,500). Each salary component and corresponding dollar amount should be entered separately in the budget detail textbox.</i>
2120/200	(Career Guidance) Benefit amounts paid by LEA on behalf of employees: TRS, life insurance, FICA, IMRF, medical insurance, Medicare. <i>Each benefit and dollar amount should be entered separately in the budget detail textbox.</i>



2120/300	<p>(Career Guidance) Professional and technical services, consultants, repairs and maintenance services, rentals, travel, communication/telephone, postage, printing, Worker's/Unemployment Compensation, photocopying, other transportation services, food related (must follow <a href="#">expenditure guidance</a> conditions), software license, online subscriptions, other purchased services (e.g., online career exploration/guidance software, purchased services to develop program of study materials, hands-on or virtual career focused events)</p> <p><i>For out-of-state travel, include function attending, location, number of travelers, projected cost, date(s) of travel, and benefit to project.</i></p>
2120/400	(Career Guidance) Software, consumable supplies and materials, equipment <\$500
2120/500	(Career Guidance) Office equipment > \$500/unit
2120/700	<p>(Career Guidance) Non-Capitalized Equipment – items that would be classified as capital assets except that they cost less than the capitalization threshold, but more than the \$500 minimum value established for purposes of calculating per capita costs.</p> <p><b><i>Include the adopted capitalization threshold amount and the date of adoption by the purchasing entity (e.g., EFE, area career center, or school board). Keep evidence on file of the capitalization threshold adoption.</i></b></p>
2210/100	<p>(Improvement of Instruction) Salary for temporary/substitute, overtime, coordinator, substitute costs for teacher trainings, stipends for professional learning activities, planning time for staff (curriculum development and enhancement)</p> <p><i>Provide title (e.g., Work-Based Learning Coordinator), percent of time paid from the grant and rate of pay (base salary). Include amount rate of pay for substitutes and CTE teacher stipends for professional learning or curriculum development/enhancement. Each salary component and corresponding dollar amount should be entered separately in the budget detail textbox.</i></p>
2210/200	<p>(Improvement of Instruction) Benefit amounts paid by LEA on behalf of employees: TRS, life insurance, FICA, IMRF, medical insurance, Medicare, for substitutes and stipends</p> <p><i>Each benefit and dollar amount should be entered separately in the budget detail textbox.</i></p>
2210/300	<p>(Improvement of Instruction) Professional and technical services, consultants, repairs and maintenance services, rentals, travel, communication/telephone, postage, printing, Worker's/Unemployment Compensation, photocopying, other transportation services, food related (must follow <a href="#">expenditure guidance</a> conditions), other purchased services</p> <p><i>For out-of-state travel, include function attending, location, number of travelers, projected cost, date(s) of travel and benefit to project.</i></p>
2210/400	(Improvement of Instruction) Consumable supplies and materials, and equipment < \$500
2230/300	<p>(Assessment and Testing, including credentials and certifications) Professional and technical services, software license, online subscriptions and other purchased services</p> <p><i>The expenditure description must itemize the specific name and total cost of the assessment or testing for each credential, certification, or license paid for by the grant.</i></p>

2230/400	(Assessment and Testing, including credentials and certifications) Software, supplies and materials, equipment < \$500/unit <i>The expenditure description must itemize the specific name and total cost of the assessment or testing for each credential, certification, or license paid for by the grant.</i>
2300/100	(Administration) Salary for Education for Employment (EFE) System director, secretary. <i>Provide director/secretary's title, percent of time paid from the grant and rate of pay. Each salary component and corresponding dollar amount should be entered separately in the budget detail textbox.</i>
2300/200	(Administration) Benefit amounts paid by LEA on behalf of employees: TRS, life insurance, FICA, IMRF, medical insurance, Medicare. <i>Each benefit and dollar amount should be entered separately in the budget detail textbox.</i>
2300/300	(Administration) Audit, legal, data processing, professional and technical services, software license, online subscription, consultants, repairs and maintenance services, rentals, travel, communication/telephone, postage, printing, Worker's/Unemployment Compensation, photocopying, other transportation services, other purchased services, out-of-state travel <i>For out-of-state travel, include function attending, location, number of travelers, projected cost, date(s) of travel and benefit to project.</i>
2300/400	(Administration) Software, consumable supplies and materials, office equipment < \$500
2300/500	(Administration) Equipment > \$500/unit
2300/700	(Administration) Non-Capitalized Equipment – items that would be classified as capital assets except that they cost less than the capitalization threshold, but more than the \$500 minimum value established for purposes of calculating per capita costs. <i>Include the adopted capitalization threshold amount and the date of adoption by the purchasing entity (e.g., EFE, area career center, or school board). Keep evidence on file of the capitalization threshold adoption.</i>
2520/100	(Fiscal Services) Bookkeeper, temporary, overtime <i>Provide bookkeeper's title, percent of time paid from the grant and rate of pay. Each salary component and corresponding dollar amount should be entered separately in the budget detail textbox.</i>
2520/200	(Fiscal Services) Amounts paid by LEA on behalf of employees: TRS, life insurance, FICA, IMRF, medical insurance, Medicare. <i>Each benefit and dollar amount should be entered separately in the budget detail textbox.</i>
2520/300	(Fiscal Services) Worker's/Unemployment Compensation, other purchased services
2520/400	(Fiscal Services) Software, consumable supplies and materials, office equipment < \$500/unit

2540/300	(Operation and Maintenance of Building/Grounds) Repair and maintenance services, rentals, water/sewer services, other purchased services
2540/400	(Operation and Maintenance of Building/Grounds) Energy
2620/100	(Planning, Research, Development, and Evaluation Services) Salary for EFE System director or secretary for activities associated with conducting and managing programs of planning, research, development, and evaluation for a system-wide basis related to Perkins V (e.g., CLNA and program improvement plans). <i>Provide director/secretary's title, percent of time paid from the grant and rate of pay. Each salary component and corresponding dollar amount should be entered separately in the budget detail textbox.</i>
2620/200	(Planning, Research, Development, and Evaluation Services) Benefit amounts paid by LEA on behalf of employees: TRS, life insurance, FICA, IMRF, medical insurance, Medicare. <i>Each benefit and dollar amount should be entered separately in the budget detail textbox.</i>
2620/300	(Planning, Research, Development, and Evaluation Services) Purchased services for activities associated with conducting and managing programs of planning, research, development, and evaluation for a system-wide basis related to Perkins V (e.g., professional and technical services, travel, Worker's/Unemployment Compensation, software license fee) <i>For out-of-state travel, include function attending, location, number of travelers, projected cost, date(s) of travel and benefit to project.</i>
2620/400	(Planning, Research, Development, and Evaluation Services) Software, consumable supplies and materials, office equipment < \$500 for activities associated with conducting and managing programs of planning, research, development, and evaluation for a system-wide basis related to Perkins V
2900/100	(Direct Support to Districts that is not professional learning, career guidance, or instruction) Salary for EFE System director or secretary <i>Provide director/secretary's title, percent of time paid from the grant and rate of pay. Each salary component and corresponding dollar amount should be entered separately in the budget detail textbox.</i>
2900/200	(Direct Support to Districts that is not professional learning, career guidance, or instruction) Benefit amounts paid by LEA on behalf of employees: TRS, life insurance, FICA, IMRF, medical insurance, Medicare. <i>Each benefit and dollar amount should be entered separately in the budget detail textbox.</i>
2900/300	(Direct Support to Districts that is not professional learning, career guidance, or instruction) Purchased services (e.g., professional and technical services, travel, Worker's/Unemployment Compensation, software license fee) <i>For out-of-state travel, include function attending, location, number of travelers, projected cost, date(s) of travel and benefit to project.</i>

2900/400	(Direct Support to Districts that is not professional learning, career guidance, or instruction) Software, consumable supplies and materials, office equipment < \$500
3000/300	Dependent child care through a community service for special populations students enrolled in an approved CTE program, including dual or concurrent enrollment programs or early college high school programs (Use community resources first.)
4000/300	(Payments to Other Districts and Governmental Units) Consultants, professional and technical services, audit, data, dependent child care through another governmental unit for special populations enrolled in an approved CTE Secondary program (Use community resources first.), and other professional services
4000/600	Transfers/sub-budgets to Other Districts and Governmental Units and Student Tuition and Lab Fees—support the cost of special population students enrolled in approved CTE programs offered through another district or governmental unit, including dual or concurrent enrollment programs or early college high school programs

***Stipulations for CTEI Grant Expenditures***

- See the [DRAFT – FY 2021 CTE Grants Expenditure Guidance](#). This guidance covers maximum administration costs, required CTEI Allotment, required CTEI Work-Based Learning Allotment, expenditures that are not allowable, and many other common allowable questions.
- [Area Career Centers](#) (ACC) must receive, at a minimum, the portion of the CTEI grant allocation they generated.
- All equipment with a cost equal to or greater than \$500 must be recorded and inventoried; all technology with a useful life of more than one year should be inventoried regardless of cost. See page 14 of [ISBE’s current State and Federal Grant Administration Policy, Fiscal Requirements, and Procedures](#) for the definition of equipment.

Question	Instructions	Assistance/Examples
<b><i>Budget Summary</i></b>	<ul style="list-style-type: none"> <li>• This is a “Read-Only” page that displays a summary of all the detail entered on the Budget Detail page.</li> <li>• To change these numbers return to the Budget Detail tab, make changes, and save the page.</li> </ul>	<ul style="list-style-type: none"> <li>• Two summaries will appear on this page. <ul style="list-style-type: none"> <li>○ The top one reflects exactly what is entered on the main grant budget detail; any subgranted funds appear in 4000/600.</li> <li>○ The bottom summary displays funds from both the administrative agent and member subgrants, summed by function and object as they were entered. No subgrant funds will be displayed in 4000/600 in this bottom summary.</li> </ul> </li> </ul>

Question	Instructions	Assistance/Examples
<p><b>Payment Schedule</b></p>	<ul style="list-style-type: none"> <li>• To enter payment requests, <b>click</b> into the first full month of anticipated expenditure and enter the dollar amount requested.</li> <li>• Use the <b>Tab</b> key to enter amounts in the remaining cells through the last full month of the project.</li> <li>• <b>Note:</b> <ul style="list-style-type: none"> <li>○ Salaries and fringe benefits are expended in equal intervals; they should be projected in this manner.</li> <li>○ Equipment, supplies, contracted services, and in-service activities should have the payment requested in the month for which the expenditure is anticipated.</li> </ul> </li> <li>• Complete the payment schedule to reflect actual cash needs in order to avoid cash on hand and frozen payments.</li> <li>• When the payment schedule is complete, move to the bottom of the page and <b>click</b> on the <b>Calculate Total</b> button.</li> <li>• Review the calculation and verify that payments have been calculated correctly based on the allotment available.</li> <li>• Click the <b>Save Page</b> button before proceeding to other pages in the application.</li> </ul>	<ul style="list-style-type: none"> <li>• Payments should not be requested before the project begins or after the project ends.</li> <li>• <b>Amounts should be entered in whole dollars only and should not contain decimal points or commas.</b></li> <li>• When teachers are paid on a twelve-month salary basis and the project period is for nine months, the three months' salaries and related fringe benefits paid after the project ends should be included in the last project payment.</li> <li>• <b>Monthly</b> payment requests are expected if <b>Salaries/Benefits</b> are being requested. Lump sum, semi-annual or quarterly payments <b>are not</b> appropriate unless a unique expenditure obligation warrants such disbursement.</li> <li>• The <b>Amount Remaining</b> field should be zero indicating that the Payment Schedule request equals the Budget.</li> </ul>
<p><b>Programmatic Risk Page</b></p>	<ul style="list-style-type: none"> <li>• The Programmatic Risk Assessment (PRA) is required for all main grant recipients of state or federal grant funding.</li> <li>• Once per fiscal year, must complete the appropriate fiscal year's Organizational Risk Assessment (ORA) in a separate IWAS application.</li> </ul>	<ul style="list-style-type: none"> <li>• A separate PRA is included in Perkins/Perkins-SI.</li> <li>• If a PRA has already been completed for the fiscal year, the answers will prepopulate into all other PRAs, except questions 2.2-2.4 and any required text boxes. If prepopulated, <u>must still click the "Save</u></li> </ul>

	<ul style="list-style-type: none"> <li>Once per fiscal year, must also complete a Fiscal and Administrative Risk Assessment via an Internal Controls Questionnaire (ICQ; accessed at <a href="https://grants.illinois.gov/portal/">https://grants.illinois.gov/portal/</a>).</li> </ul>	<p><u>Page” button before continuing to the next page.</u></p> <ul style="list-style-type: none"> <li>A combination of the PRA and ORA results will generate the Programmatic Risk Conditions in CTEI.</li> <li>For additional info about Grantee Prequalification Requirements (EFEs only), see slide 9 of the <a href="#">application webinar</a>.</li> </ul>
<b>Question</b>	<b>Instructions</b>	<b>Assistance/Examples</b>
<b>GATA – Notice of State Award (NOSA) Pages</b>		
<b><i>CTEI NOSA Grant Information</i></b>	<ul style="list-style-type: none"> <li>Ensure the Announcement Type and Grantee Information prepopulated correctly from the CTEI Applicant Information pages.</li> <li>Ensure the entity’s DUNS # and Funding Amount are correct.</li> <li>If all information is correct, click the checkbox and then the “Save Page” button at the bottom of the page.</li> </ul>	<ul style="list-style-type: none"> <li>If information is incorrect, email your CTE grant consultant.</li> </ul>
<b><i>CTEI ICQ Conditions</i></b>	<ul style="list-style-type: none"> <li>If the ICQ has been completed in the <a href="#">GATA Grantee Portal</a> for the appropriate fiscal year, the ICQ risk conditions and a checkbox will populate on this page.</li> <li>Must click the checkbox and then the “Save Page” button at the bottom of the page.</li> </ul>	<ul style="list-style-type: none"> <li>If the ICQ has been completed and there are no risk conditions and/or checkbox, email your CTE grant consultant.</li> </ul>
<b><i>CTEI Program Risk Conditions</i></b>	<ul style="list-style-type: none"> <li>If the PRA has been completed in the CTEI section of this application and the appropriate fiscal year’s ORA in a separate IWAS application, the PRA risk conditions and a checkbox will populate on this page.</li> <li>Must click the checkbox and then the “Save Page” button at the bottom of the page.</li> </ul>	<ul style="list-style-type: none"> <li>If both the PRA and ORA have been completed and there are no risk conditions and/or checkbox, ensure you saved the Programmatic Risk page (even if prepopulated).</li> <li>If either is still not populating, then email your CTE grant consultant.</li> </ul>
<b><i>CTEI Prequalification Status</i></b>	<ul style="list-style-type: none"> <li>A checkbox will populate on this page after completing: <ul style="list-style-type: none"> <li>All Grantee Prequalification Requirements (see Programmatic Risk Page info) and</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>If all items have been completed and a checkbox is not appearing, email your CTE grant consultant.</li> </ul>

	<ul style="list-style-type: none"> <li>○ The other 3 GATA NOSA pages.</li> <li>• Must click the checkbox and then the “Save Page” button at the bottom of the page.</li> </ul>	
Question	Instructions	Assistance/Examples
<b>GATA – UGA/IGA Pages</b>		
<b>CTEI UGA/IGA Overview</b>	<ul style="list-style-type: none"> <li>• <u>View Only</u></li> </ul>	
<b>CTEI UGA/IGA Parts One, Two and Three</b>	<ul style="list-style-type: none"> <li>• Ensure the Grantee Information (prepopulated from CTEI Applicant Information page), the entity’s DUNS #, and Funding Amount are correct.</li> <li>• Mark the radio button next to Governmental Unit for 1.1.</li> <li>• If all information is correct, click the checkboxes for 1.6 and Part Two and then the “Save Page” button at the bottom of the page.</li> </ul>	<ul style="list-style-type: none"> <li>• If information is incorrect, email your CTE grant consultant.</li> </ul>
<b>CTEI Exhibits</b>	<ul style="list-style-type: none"> <li>• Read the Exhibits.</li> <li>• Must click the checkbox that you agree and then the “Save Page” button at the bottom of the page.</li> </ul>	<ul style="list-style-type: none"> <li>• Required for all main grant recipients</li> </ul>
<b>CTEI UGA/IGA Summary</b>	After you have completed the previous 2 pages, must click the checkbox and then the “Save Page” button at the bottom of the page.	If previous pages are not completed or saved, you will not be able to click the bottom checkbox and save this page.
<b>Page Lock Control Page</b>		
<b>Goal of Page Locking Process</b>	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.
<b>What Happens When a Page Is Locked?</b>	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.
<b>When Will Applicants Need to Unlock Pages?</b>	<ul style="list-style-type: none"> <li>• If initial application is <i>returned for changes</i> by an ISBE reviewer, some or all of the pages may be locked. The applicant should read the comments on the review checklist.</li> </ul>	<ul style="list-style-type: none"> <li>• When an applicant creates a <i>new application</i> each year, all of the pages will be unlocked because all of the pages need to be completed.</li> </ul>

	<ul style="list-style-type: none"> <li>When an <i>amendment</i> 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.</li> </ul>	<ul style="list-style-type: none"> <li>In both cases, only unlock those pages needing revisions.</li> <li><b>Make it a habit to make sure a save button is available before completing or revising a page.</b></li> <li>Unlocking pages that will not be modified circumvents the purpose of page locking and slows the review process.</li> </ul>
Question	Instructions	Assistance/Examples
<b>Goal of Page Locking Process</b>	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.
<b>Expand All and List of Application Pages</b>	<ul style="list-style-type: none"> <li>Click the <i>Expand All</i> checkbox to see the list of application pages that may be locked or unlocked (first column under the Expand All checkbox).</li> <li>The list of application pages will have two or more indented levels. <ul style="list-style-type: none"> <li>The first item on the list is the name of the grant program.</li> <li>The first indent under the grant program is the list of pages that appear on the main tab strip.</li> <li>The second indent contains pages that appear in a subtab strip.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Any application page with data that users enter or revise will appear in the list. <ul style="list-style-type: none"> <li>View only pages won't appear (e.g., Overview; Vision, Mission, and Goals).</li> <li>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.</li> </ul> </li> <li>For example, <i>Assurance Pages</i> is on the main tab strip and is in the group indented at the first level. The various assurance pages (e.g., <i>Program Assurances</i>, <i>Lobbying</i>) are indented under <i>Assurance Pages</i>.</li> </ul>
<b>Page Status Column</b>	<ul style="list-style-type: none"> <li>For <i>applicants</i>, this column displays the current status of the various pages in the application/amendment.</li> <li>For <i>ISBE reviewers</i>, this column reflects the status of the page when the applicant submitted it.</li> </ul>	<ul style="list-style-type: none"> <li><i>Open</i> – Page is unlocked and can be modified and saved by the applicant.</li> <li><i>Locked</i> – The page is locked and cannot be modified by the applicant until it is unlocked. There will not be a save button on the page, and a message will appear indicating the page has been locked by the agency review.</li> <li><i>Final</i> – The page has been locked and should not be unlocked by the applicant. Only ISBE staff can unlock a page designated “Final.”</li> </ul>



Question	Instructions	Assistance/Examples
<b><i>Open Page for Editing Column (Applicant Only Column)</i></b>	<ul style="list-style-type: none"> <li>• Check the appropriate box in this column to unlock a page that requires modification.</li> <li>• Save the <i>Page Lock Control</i> page after check boxes have been selected.</li> </ul>	
<b><i>Review Status of Page Columns (ISBE Only Column)</i></b>	<ul style="list-style-type: none"> <li>• During the review, ISBE staff will use these columns to unlock pages that require modification or to mark pages “Final.”</li> <li>• After selecting the appropriate radio buttons, ISBE staff must save the page.</li> </ul>	<ul style="list-style-type: none"> <li>• <i>OK</i> – Default radio button unless the page was final locked in a previous round. Modifications are not required for this page.</li> <li>• <i>Needs Updates</i> – 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.</li> <li>• <i>Mark Final</i> – 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.</li> </ul>
<b><i>Unlocking a Page Marked Final</i></b>	<ul style="list-style-type: none"> <li>• Applicant must contact ISBE program staff and explain why the page requires modification.</li> <li>• On the <i>Application Select</i> page, applicant marks the application in “Consult.”</li> <li>• ISBE program staff unlocks the page by checking the “Open Page for editing” checkbox on the <i>Page Lock Control</i> page and saving the page.</li> </ul>	<ul style="list-style-type: none"> <li>• Pages marked “Final” can only be changed when an amendment is started but not submitted to ISBE.</li> </ul>