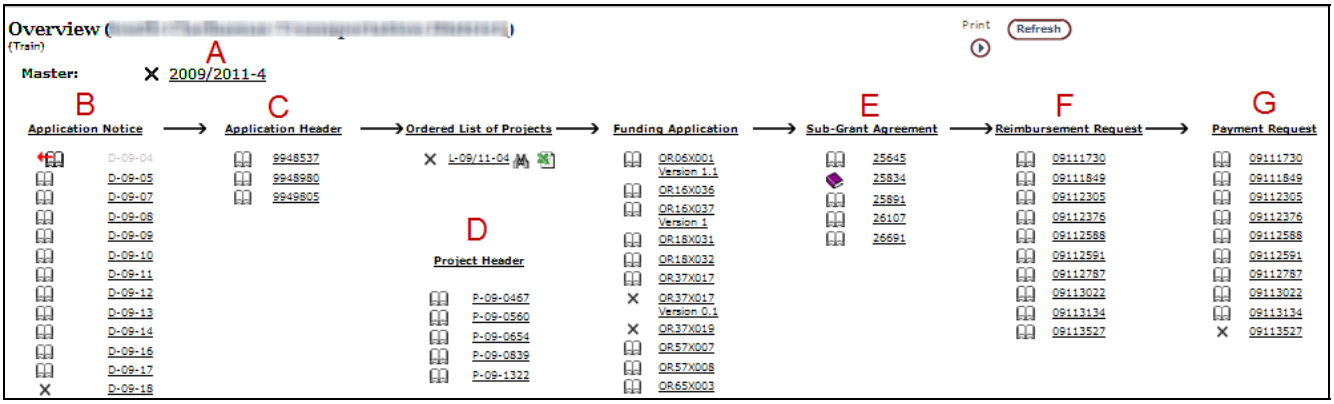
FINDING DOCUMENTS IN OPTIS
THE OVERVIEW SCREEN

OPTIS maintains a master record of all documents related to each agency. You can see a picture of this record by accessing the Overview Screen.

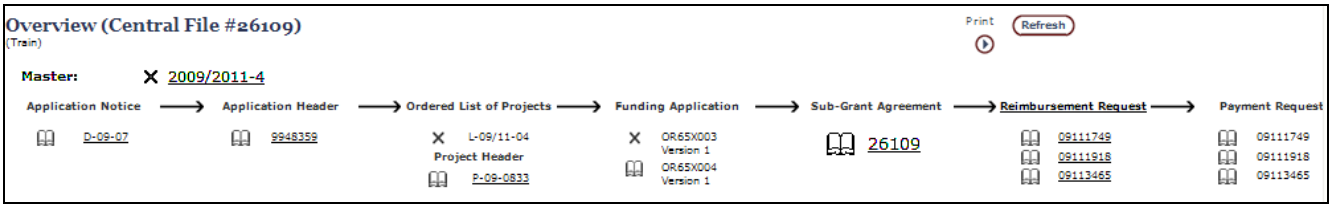
1. Open a reimbursement request or an agreement *for the biennium you are interested in.*
2. Click on "View Data"
3. Select "Overview(Provider)" to see the master record of all documents for your agency for the biennium.
4. Select "Overview(Central File)" to see the master record of all documents pertaining to that agreement for the biennium.

Provider Overview:



A. Indicates the biennium.
B. List of all application notices (grant opportunities.)
C. List of all application headers (online versions of your applications.)
D. List of all project headers (project records.)
E. List of all sub-grant agreements.
F. List of all reimbursement requests relating to all agreements.
G. List of all payment requests relating to all agreements. (Cannot be opened.)

Central File Overview (The column headers are the same, but the data is only for this agreement.):



An ✕ next to a document means it has not been completed. An 📖 (open book) next to a document means it has been completed. A 📖 (closed book) next to an agreement means the agreement is closed. A ✎ (pencil) next to an agreement means the agreement document is complete but it is being routed for signatures and has not yet been executed.

Remember, the overview screen is biennium-specific: Master: ✕ 2009/2011-4
There is no overview screen which combines all biennia.