MANAGER APPROVAL STEPS

1. Obtain your OPTIS user name and password from PTD or a user trained for your agency.
2. Log in to OPTIS:
   a. https://keiko36.odot.state.or.us/ (If asked to install *Whale Communications' client components*, click "Install" and "Continue with Limited Functionality".)
   b. Select OPTIS from the list of available applications.
   c. If a Security Alert message appears, check "Trust this site", select "Always" and "Trust" (These steps may vary depending on your operating system.)
   d. Click "Login to OPTIS" and enter your User Name and Password. Click "Submit"
3. At the Welcome Screen, select "My Documents" from the grey bar on the left.
4. Click on "Document Search."
5. Choose one of the options below to find the document needing your review/approval.
   a. **If you know the doc number**:
      i. At the "Search By" drop down menu, select Find by Document Number;
      ii. Enter the document number in the Document Number box;
      iii. Click "Search" and open the document which appears.
   b. **If the document has been forwarded to you by the preparer, you can also search by yourself**:
      i. Leave the search criterion at the default (Find by Person). Your name displays.
      ii. At Document Type, select Periodic Report or Reimbursement Request from the drop down menu;
      iii. Click "Search" and select the document from the list which appears.
   c. **If you don't know the doc number nor if the document has been forwarded to you:**
      i. At the "Search By" drop down menu, select Find by Organization;
      ii. If your agency does not appear, click Find and enter keywords to locate and open it;
      iii. Once the correct organization is displayed, at Document Type, select Periodic Report or Reimbursement Request from the drop down menu;
      iv. Leave all other search criteria blank;
      v. Click "Search" and then select the document from the list which appears.
6. Review the document. When satisfied that the document is accurate, click on "Complete Step." If the words "Complete Step" are grayed out, the document is not in your queue; you cannot take action on it. Contact the preparer and ask that he or she forward it to you. ("Actions" / "Forward" / Choose name from the "Forward To" drop down menu / Click "Submit/Return.") Once the document is in your queue, the words "Complete Step" will be black and you may act upon the document.
7. At the “Review/Approve” screen, enter your eResponse Keyword in the box. (NOTE: If any required fields are incomplete, you will receive an "Integrity Check Failed" message. For most issues, the failure reason will also be a link to the area that needs to be modified. Once the issue is resolved, click "Refresh" to reload the page and continue.)
8. Click the box near the statement “By checking this box I am certifying that this document is correct to the best of my knowledge and that I am the authorized representative."
9. Click “Submit."

The document has now been approved and finalized within OPTIS; it will be processed as if you had signed it in ink and mailed, emailed, or faxed it to PTD. The electronic submittal of the document, using your eResponse Keyword, functions as a valid authorizing signature.