OPTIS Contacts and Quick Reference Guide

Key Contacts

Contact Information	Question /Comment /Area of Concern
OPTIS Trainer - Maile Boals 503-986-3372 **Maile.boals@odot.state.or.us**	• Technical assistance for OPTIS (Immediately following training.) • Training materials or schedules
OPTIS Administrator - Ivan Presnyy 503-986-4004 **Ivan.a.presnyy@odot.state.or.us**	• Computer specs or OPTIS compatibility issues • Forgotten password, user name, or eResponse keyword • Lockout resets
PTD Ops. Manager - Robin Bjurstrom 503-986-6579 **Robin.e.bjurstrom@odot.state.or.us**	• Public Transit Division questions • High level information regarding OPTIS
Periodic Report/Payment Coordinator - **Francine Peterson 503-986-3376** **Francine.peterson@odot.state.or.us**	• Agreement or amendment execution or specifics • Payment Status (for Jean Palmateer, Matthew Barnes, or Sharon Peerenboom)
Asset/Payment Coordinator – **Jenny Erickson 503-986-3408** **Jenny.erickson@odot.state.or.us**	• OPTIS asset troubleshooting & maintenance • Other technical assistance for OPTIS • Payment Status (for Alison, Joni or Sherrin C.)
Public Transit Website (www.oregon.gov/ODOT/PT**)**	• General PTD & OPTIS Information • Training and Assistance

OPTIS Web Addresses

Name	Address
OPTIS Production Site (Prod)	• https://keiko36.odot.state.or.us/ - Click on OPTIS
OPTIS Training Site (Train)	• https://optisalt.oregon.gov/train/open_grants.dll/welcome

Key Terms & Icons

Term	Definition
Navigation Menu	• List of features; starting place for everything in OPTIS after log in. Far left of home screen.
Reimbursement Request	• Document created in OPTIS by a provider (or by PTD on their behalf) requesting reimbursement of expenditures made under a grant agreement.
Payment Request	• Document created in OPTIS which authorizes ODOT accounting to pay a provider for project costs. Contains detailed payment funding information.
Document Status Terms (Used to refine searches)	• *Currently Active* – Documents needing attention by the agency or person listed. (Searching by your name w/ this selected shows docs that will stay incomplete unless acted on by you.) • *Complete* – Finished document with no further activities to be performed. • *In Progress* – Documents with outstanding activities left to be done, but not necessarily by the organization or person listed; some parts may be complete. • *All* – Every document regardless of status.
Issue	• Stage/step indicating document is *in the process* of being completed or "issued". Finishing the "Issue" step finalizes a document. Does not mean there is a problem with the document.
Overview/Master	• Screen showing a summary or "snapshot" of the progression of documents in OPTIS. Exists for each biennium, each provider and each sub-recipient agreement.
Periodic Report	• OPTIS version of PTD's quarterly report.
Privileges	• Conditions which define what you can do in OPTIS (browse, create, approve, etc.)
X	• Incomplete document icon. (X marks the spot where more work needs to be done.)
	• Completed document icon. (The document has been published and is ready to read.)
	• Agreement routed for signature - not yet executed.
	• Closed document icon. (Used for grant agreements which have expired or been closed.)
or	• View additional details icons.
Help for OPTIS	• Screen-specific help entry icon/title - applies to that screen; area still under construction.