

# PRACTICE LESSON 1

## Registration, Modifying Information & Searching Training Site Only

### A. New User Registration Method 1 - *Self-Registration*

Steps done by new user:

1. Pretend you are a famous athlete who has just been hired by your agency. Your supervisor has asked you to self-register in OPTIS.
2. Make sure you are *not logged into OPTIS*. Go to the OPTIS Home Page. Using any famous athlete name you want (e.g., Olga Korbut, Arnold Palmer...), *self-register and seek affiliation* with the agency you have been using in this training. Write the newly-created athlete username and password here:

Username: \_\_\_\_\_ Password: \_\_\_\_\_

Steps done by primary user:

3. Exit from OPTIS. Log in as the primary contact for the agency. Read the "Hello" screen details. (You should see that an affiliation is pending.)
4. At *My Provider Details*, check the organization's hierarchy and note the symbol next to the new user. (Click the legend +sign to see what it means.)
5. At *Users*, select *Affiliation Maintenance* and approve the new user's affiliation request.

### B. New User Registration Method 2 - *As Primary Contact*

1. *Logged in as the primary contact*, add another new user to your agency. **Add yourself if you are not already registered OR add another fictitious user if you are already registered.**
2. Check the Authorized Personnel screen (under *Users*) to verify that you or the fictitious new person has been added.

### C. Password Practice (Optional):

1. Change your password to something new and *write it down here so you don't forget it.*

New Password: \_\_\_\_\_

2. Log out and then log back in using the new password.

#### **D. Modifying Information:**

1. Logged in as the primary contact, make the athlete user created earlier the prime contact for your agency. (Hint: start at *My Provider Details*.)
2. Log out. Log back in as the athlete prime contact (see A.2. for password if needed) and make yourself the prime contact again.
3. Find and view your office phone numbers. Add a new number (cell, fax, etc.) if you know one, if not, make a note of where you would change them if needed. Add a website address if you have one.

#### **E. Searching for Information:**

1. View your organization's hierarchy. (Remember to expand it using *View All*).
2. Search for all agreements for your organization (Hint: Do not use "Find by Person.") Notice if any are closed by looking for the closed book icon. Notice if any have been revised by looking below the number for a version number.
3. Open an older agreement and view the agreement pdf. View the Available Balance. View the Payment History.
4. View a list of reimbursement requests and note payments. Open a payment request if available and review.
5. Search for reimbursement requests for the 07-09 biennium only. (Hint: Use date range of July 1, 2007 to June 30, 2009.)
6. Search for all periodic reports for your organization . . .
  - a. . . using *Find by Document Number* and entering the first three digits of any periodic report.
  - b. . . using *Find by Organization / Document Type*.



# REGISTERING A NEW USER – TWO METHODS

## METHOD 1: SELF REGISTRATION

(New user registers him/herself and seeks affiliation with an agency.)

1. Access OPTIS log in page; DO NOT LOG IN.
2. Select *Provider Registration*
3. Click Email Notification and Electronic Response boxes; click *Next*
4. Click "I Agree" box
5. Enter all registration information including creating a password
6. Click *Next* twice.
7. Enter organization name; click *Submit*
8. Choose organization from list; click *Next* three times
9. Click *Finish*
10. Organization's primary user must then accept self-registered user.

## METHOD 2: REGISTRATION BY THE PRIMARY USER

(Primary user for the agency registers the new user.)

1. Log in as primary user
2. Select *Users* and then *Users* again
3. Click *Add a New User*
4. Enter new user's information
  - a. Title / Name
  - b. Logon Id (jsparrow)
  - c. Password (case-sensitive, at least six characters, two or more pattern characters – upper case, lower case, numeral, or symbol)
  - d. Confirm Password
  - e. Phone, fax, email
  - f. Status – Registered (View Privileges) or Validated for eResponse (Create Privileges)
  - g. Services - eNotify - Yes (Email notification of application notices) eResponse – Yes (Allows you to respond to application postings)
5. Click Organization *Find* button
6. Choose agency
7. Back at *Add User* screen, either Submit/Return to save and see Authorized Personnel screen, or Submit/Next to save and add another user.

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8. New user logs in
9. At Agreement page, new user agrees or disagrees with statement (user will not be able to proceed if he or she disagrees).
10. Message appears – "You have successfully registered."

Note: If this user needs to be able to create and/or submit documents for the agency, the primary user should select the Validated for eResponse status. If this user is the authorized representative, he or she must have PTD issue an eResponse keyword. To do this:

- Contact Maile (or Ivan) for an eResponse keyword to be emailed to you (current), or
- Send email request for eResponse keyword directly from OPTIS (future).