⟲*OPTIS*

## What's the difference between my regular password and an eResponse keyword?

Your **regular password** is used only when you log into OPTIS initially.
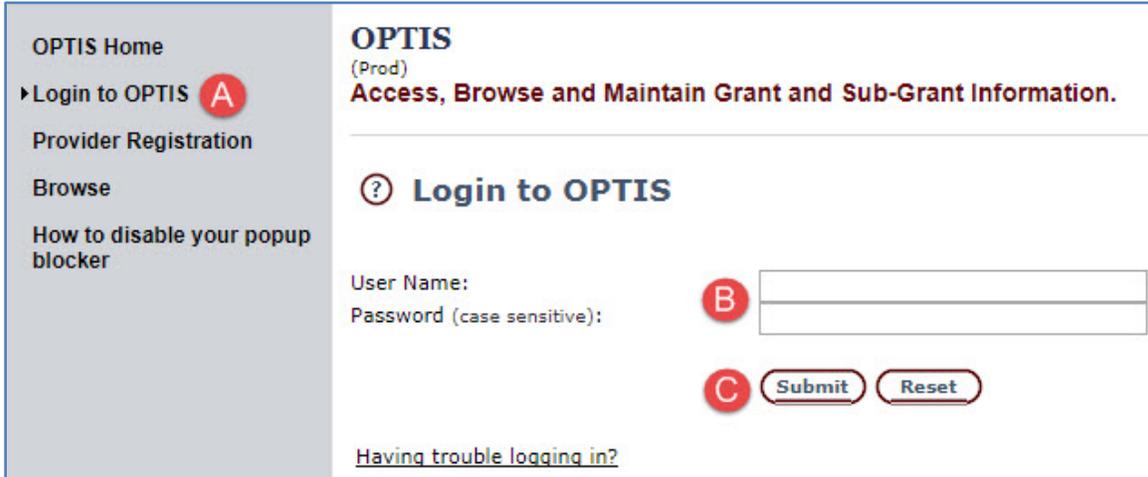


The **eResponse keyword** is used as an electronic signature when authorizing documents. It confirms that a document is correct, and that the person submitting the document for the agency is the authorized representative.
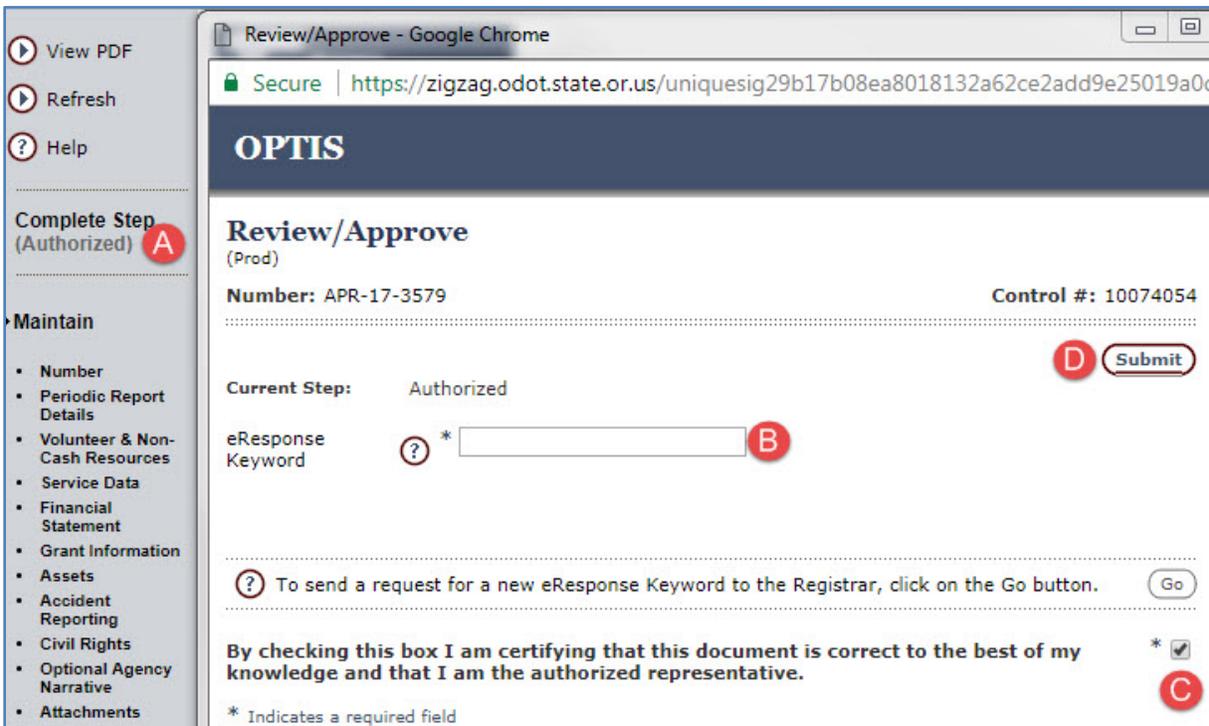
# OPTIS eResponse Keyword Policy and Process Steps

## Background

To prevent unauthorized access to ODOT Rail and Public Transit's (RPTD) Oregon Public Transit Information System (OPTIS), each agency established in the system is validated (officially recognized as a legitimate transit agency doing business with ODOT). Additionally, each OPTIS user is validated and granted privileges to view and/or create OPTIS documents.

The validation process may include the issuance of a secure "eResponse keyword" to authorized individuals. This keyword acts as an electronic "certificate" establishing the user's right to approve documents for his or her agency. Without a keyword issued by RPTD, a user cannot finalize and submit OPTIS documents for RPTD's review, but may (if given privileges) still create documents.

## Policy

With the implementation of OPTIS, electronic "signatures" have replaced ink signatures.

> *Policy Statement:  Effective February 15, 2011, only authorized agency representatives with signatory authority will be allowed to approve and electronically sign official documents such as periodic reports and reimbursement requests. To this end, the use of eResponse keywords will be restricted to authorized representatives only.*

Other users may *view and create* documents, but the *submittal* of documents from within OPTIS is restricted to authorized representative(s). This ensures that the OPTIS document submittal process includes the electronic equivalent of ink signatures for authorization.

## Requesting an eResponse Keyword

A staff member at a transit agency using OPTIS who has authorization to submit official documents for the agency must be issued an eResponse keyword by RPTD in order to perform that function in the system. To ensure this privilege is approved at the agency or board level, a formal request on agency letterhead from the staff member's supervisor, manager, or board chairperson is required.

RPTD provides a form letter template for this purpose. This template (see example below) can be found on the RPTD website: http://www.oregon.gov/ODOT/RPTD/Pages/index.aspx by clicking on the OPTIS icon an then selecting "eResponse Keyword Request" under OPTIS Permissions.

Once RPTD receives the official request for a user to be issued a keyword, RPTD staff will generate a new keyword. The user will receive an electronic notification from the system indicating that a temporary keyword has been issued. The user has 14 days to log into OPTIS and change the temporary keyword to a unique one. After 14 days, the initial keyword will expire.

If a user forgets his or her keyword, the user may ask for a new one using the request feature in OPTIS. Again, this keyword is temporary and will expire after 14 days.

September 26, 2017

Attn: OPTIS Administrator (*ODOTPTDReporting@odot.state.or.us*)
Oregon Department of Transportation
Rail and Public Transit Division
555 13th Street NE
Salem, Oregon 97301

RE: e-Response Keyword Request

This letter is to request an e-Response Keyword for the employee listed below to electronically approve requests in OPTIS for Agency Name.

| | | |
|---|---|---|
| Name: | | |
| Title: | | |
| Email: | | |
| Address: | | |
| Phone: | | Fax: |

Sincerely,

Approving Authority Name
Title

## Using an eResponse Keyword

**Document Preparer:**

Once all required fields are complete in an OPTIS document, the preparer selects "Actions" and "Check Integrity" and resolves any errors if they exist.
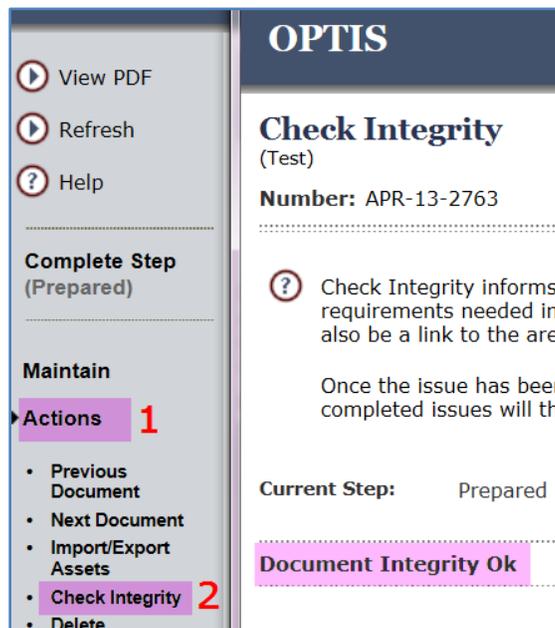


Once any errors are cleared, the preparer selects "Complete Step (Prepared)" and chooses the person responsible for the next step (Review/Approve) from the drop-down menu. Clicking "Submit" completes the Prepared step.

NOTE: *Depending on your agency roles, the preparer and authorizer may or may not be the same person. If one person has both roles, OPTIS still requires you to select a name to advance the APR to the next step.*

**Document Authorizer:**

The person responsible for submitting official documents to RPTD via OPTIS reviews and verifies all information in the document. (If errors are found, the authorizer may return to the APR Wizard by selecting "Maintain" from the Navigation Menu, make any necessary change(s), and click "Finish" on each step when complete, or he or she may forward the document back to the preparer for correction.)

Once the document is complete and accurate, the authorizer clicks "Complete Step (Authorized)". If all required fields are complete, the "Review/Approve" screen appears.

The authorizer then clicks to check the certifying statement box, enters his or her eResponse keyword, and clicks "Submit."

"Workflow Completed" will appear on the navigation menu. The document is now complete.