

# How can I see the status of a document in OPTIS?

Search for the document by your organization (or number if you know it).

**Oregon Public Transit Information System**

Welcome Screen  
Browse Open Notices  
Asset Search  
Create Document  
**My Documents**  
• Document Search  
• Email Notices  
My Profile  
My Provider Details  
Users  
View or Generate Reports  
OPTIS Time  
Exit from OPTIS

**My Documents**  
(Prod)

**Document Search**  
Search for documents by person, organization, or Provider Registration number.

**Email Notices**  
Search a list of all opportunity notices sent to you by email.

**Document Search**

Search By: Find by Document Number  
Find by Person  
Find by Document Title  
Find by Organization Hierarchy  
Find by Organization  
Find Overviews (Masters)  
Find by Document Number  
Find by Control Number (Exact Match)

Document Number: \_\_\_\_\_

Search

Narrow the search by document type if desired.

Search By: Find by Organization

Find ABC Transit

Document Type: Periodic Report

Document Number: \_\_\_\_\_

Date Range: (mm/dd/yyyy) \_\_\_\_\_

Document Status:  Currently Active  Complete  In Progress  All

Search

Legend

Show Details

Document No	Document Type	Organization Issued By	Status
1 X APR-17-3579	Periodic Report FY2018 Qtr.1: July - September 2017	ABC Transit	Authorized

**View icons.**

Not completed  
 Completed  
 Closed agreement  
 Unexecuted agreement

**Open the document and check the work flow history.**

**OPTIS**

- View PDF
- Refresh
- Help

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**Complete Step**  
(Authorized)

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**Maintain**

**Actions**

**Work Flow History**

**Number:** APR-17-3579

**ODOT Public Transit Division  
Agency Periodic Report (APR)**

Directions: Every transit agency is required to report to ODOT Rail and Public Transit Division quarterly on all active agreements. The report requires an annual update to state or federally funded vehicles for as long as vehicles are in service. The STF agency or each STF formula recipient must also report. Certain agreements may have additional reporting requirements. Please review each project's statement of work for specifics.

**Report for: FY2018 Qtr.1: July - September 2017**

<b>Legal Name of Agency:</b> ABC Transit
<b>Mailing Address:</b> 555 Main Street
<b>City, State, Zip:</b> Salem, Oregon, 97301

**Work Flow History**

(Screenshot shows that the document was forwarded several times and is now active in Zarah Zuza's queue for her to complete the Authorized step.)

**Work Flow**

(Prod)

**Number:** APR-17-3579

Print this page

**Control #:** 10074054

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**Current Step:** Authorized

**Work Flow Method:** Periodic Reporting

**Document Created:** 06/13/2017 8:13 AM

Step		Person Responsible	Status	Date
Prepared	Mandatory	Maile Boals	Forwarded	06/13/2017 8:16 AM
Prepared	Mandatory	Sharon Peerenboom		
Prepared	Mandatory	Maile Boals	Forwarded	07/26/2017 7:46 AM
Prepared	Mandatory	Zarah Zuza	Complete	09/26/2017 4:03 PM
Authorized	Mandatory	Zarah Zuza	Active	

To verify that a document is ready to submit, use “Check Integrity”.

service. The STF agency or each STF formula recipient must report reporting requirements. Please review each project's state

Report for: FY2018 Qtr.1: July - September 2018

Legal Name of Agency: ABC Transit

Mailing Address: 559

City, State, Zip: Sale

Prepared by: Zarah Zuza

Phone No: 1 (503) 5

**Check Integrity** (Prod)

Number: APR-17-3579 Control #: 10074054

Check Integrity informs the user whether or not the document has met the minimum requirements needed in order to complete the current step. For most issues, the failure reason will also be a link to the area that needs to be modified. Not all issues will have a link.

Once the issue has been dealt with, you can click the 'Refresh' button to refresh the page. Any completed issues will then disappear.

Refresh

Current Step: Authorized

Document Integrity Ok

If you receive an Integrity Check Failed message, there will be text and usually a link that will take you to the error. If you are still having trouble identifying or correcting the problem, please contact the support analyst in your region.

## How can I find and delete a document that I started and now don't need?

In order to tell if you have incomplete or duplicative documents, use the “Find by Organization Hierarchy” search and choose the document type (APR or reimbursement request) you are looking for.

**Document Search**

Search By: Find by Organization Hierarchy

Find ABC Transit

Document Type: All

Document Number:

Federal ALI Catalog: Find Item

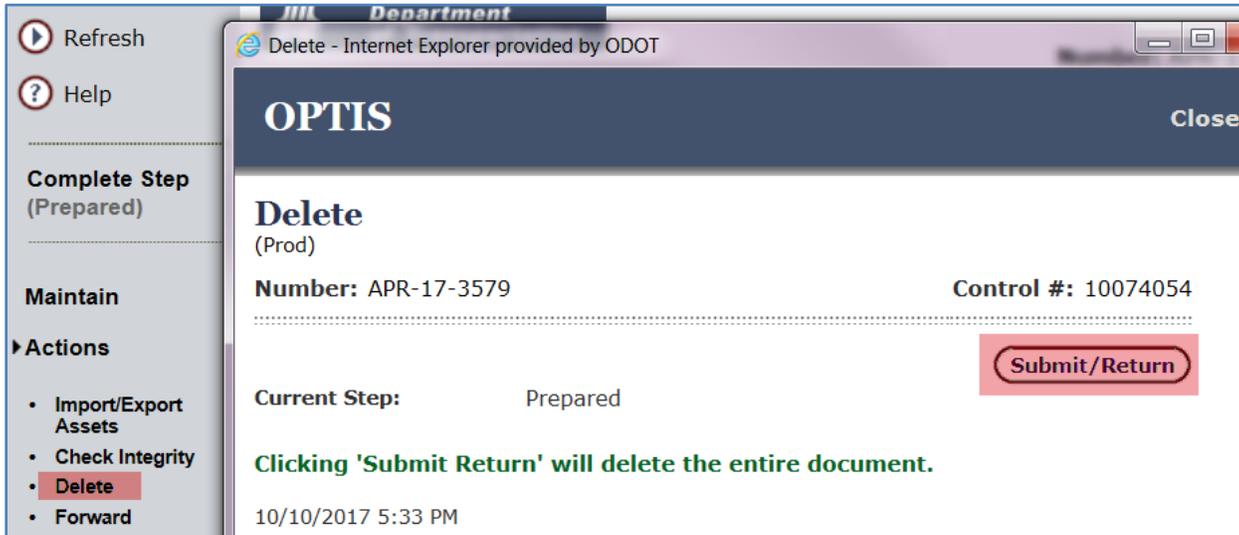
Reset

Reimbursement Request

Sub-Grant Agreement

Search

If you see several of the same document with the X icon next to them, you know those documents have been started, but not completed. Any duplicates can be deleted by opening the document, choosing “Actions” and clicking “Delete” and “Submit/Return”.



In order to delete a document, it must be in your queue. If it is not (the name of the step will be greyed out), use “Actions” / “Forward” to forward it to yourself.

