OPTIS Contacts and Quick Reference Guide

Key Contacts

Contact Information	Question /Comment /Area of Concern
OPTIS Administrator Maile Boals 503-986-3372 Maile.boals@odot.state.or.us	• General OPTIS information • Password or eResponse keyword help • Lockout resets • All OPTIS questions if you can't reach your support analyst
Support Analysts Amanda Mathis - Regions 1 and 3 Amanda.Mathis@odot.state.or.us 503-856-3376 Joe Heberlein - Regions 2A and 2B Joseph.K.Heberlein@odot.state.or.us 503-986-3408 Maggie Charles - Regions 4 and 5 Maggie.Charles@odot.state.or.us 503-986-3411 Patty McNeil - Contracts, Assets, NTD Patricia.C.McNeil@odot.state.or.us 503-986-4222	• Agreements or amendments execution or specifics • Payment status questions • Agency periodic report questions • Asset questions • Password or eResponse keyword help • OPTIS troubleshooting and questions
Transit Manager Marsha Hoskins 503-986-3266, Marsha.a.hoskins@odot.state.or.us	• General Transit Section questions • Policy questions
Rail and Public Transit Division Website (https://www.oregon.gov/odot/rptd/pages/index.aspx)	• OPTIS Links • General RPTD information • Training and assistance resources

OPTIS Web Addresses

Name	Address
OPTIS Production Site (Prod)	• OPTIS Portal (https://zigzag.odot.state.or.us/) Click on green **OPTIS Production** monitor icon
OPTIS Training Site (Train)	• OPTIS Portal (https://zigzag.odot.state.or.us/) Click on red **OPTIS Training** monitor icon

Key Terms and Icons

Term	Definition
Agency Periodic Report (APR)	OPTIS quarterly report created by agency with an active grant agreement or assets.
Complete Step (Issue)	Action button to complete a step ("Issue" step in this example). The name of the step is in parenthesis. The bolded words "Complete Step" show that the document is in your queue for action.
Complete Step (Issue)	Action button to complete a step ("Issue" step in this example). The name of the step is in parenthesis. The greyed out words "Complete Step" show that the document is not in your queue for action.
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 documents 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.
Navigation Menu	List of features; starting place for everything in OPTIS after log in. Far left of home screen.
Payment Request	Document created in OPTIS which authorizes ODOT accounting to pay an agency for project costs. Contains detailed payment funding information.
Privileges	Conditions which define what you can do in OPTIS (browse, create, approve, etc.)
Reimbursement Request	Document created in OPTIS by an agency requesting reimbursement for expenditures made under a grant agreement. Backup documentation attached here.
Submit/Remain	Action that completes the current step in a document, saves information, and leaves the document open. Can be used to "refresh" the document.
Submit/Return	Action that completes the current step in a document, saves information, and closes the document.
Overview/Master	Screen showing a summary or "snapshot" of all documents in OPTIS in each biennium. Includes lists of agreements and reimbursements . Each document title is a link that opens the document.
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 icon. (Document not yet executed.)
📕	Closed document icon. (Used for grant agreements which have been closed.)
🔭 **or** 🔍	View additional details icons.
ⓘ **Help for OPTIS**	Screen-specific help entry icon/title - applies to that screen; most areas still under construction.