

AdvOPD External Provider Portal Instructions

Contents

AdvOPD Portal	1
Accessing AdvOPD Portal	1
Training for AdvOPD Portal	1
Using AdvOPD Portal	2
Viewing Cases	2
Viewing Documents in Filing Cabinet	2
Entering Pre-approvals (Attorneys Only)	3
Entering Supplementals (Attorneys Only)	6
Invoices (claims)	8
Creating and Submitting Invoices - Attorneys	9
Creating and Submitting Invoices – Non-Attorneys	15
Closing Cases	15

AdvOPD Portal

You will now access your cases, pre-approvals and/or supplementals, and invoices (claims) all from within the portal. The portal will also include case closings (process TBD) and the ability to communicate with internal OPD employees and clients that access their own version of the portal.

Accessing AdvOPD Portal

Navigate to advopd.mt.gov and select Contractors & Vendors, we encourage you to bookmark this address for easy access in the future. You will be prompted to log in via Okta (formerly ePASS) to authenticate your access to the information behind the portal (i.e. client information). Refer to the AdvOPD Portal Access Instructions for step-by-step guidance on logging into the portal for the first time.

Training for AdvOPD Portal

Please watch the video for your role explaining the functionality in the portal or use the following written instructions for how to utilize the new system:

Contract Attorneys (includes instruction for submitting pre-approvals)

- <https://broadcast.mt.gov:8443/opd/media/OPDContractorAttorneyPortal.mp4>

Non-attorney Contractors and Service Providers

- <https://broadcast.mt.gov:8443/opd/media/OPDContractorNonAttorneyPortal.mp4>

Using AdvOPD Portal

Viewing Cases

Use the navigation bar at the top of the portal and select 'View My Cases', you will be brought to a list view named All Active & Inactive Cases, if you select the pin you will always be brought to this list view when selecting 'View My Cases'. Here you can also use the drop down to view Closed Matters if desired.



Tips:

- The first column is called *Name for Searching* and allows you to sort by last name if you want. Otherwise, you can sort on the *Name* column to sort matters by the client's first name, but you can sort on any column in the list view e.g. by judge or court or division
- To open a matter, click on the name of the matter to open that record

Viewing Documents in Filing Cabinet

Open a matter and you are brought to a page with various information about the case, select 'Filing Cabinet' to open the Vendor Accessible folder. **Note** – if nothing appears in the folder, please reach out to the assigning office to confirm case documents have been put in that folder for you.


Matter
Buckley Cole Russell Ackerman ~ DC-20-178 ~ Driving Under The Influence Of Alco

+ Follow Close Matter

Cause Number: DC-20-178 OPD Matter ID: 21-11888 Primary Contact: Buckley Cole Russell Ackerman Court: Twentieth Judicial District Court, Lake County Judge: James A. Manley

Details Related Activity **Filing Cabinet**

Information Filing Cabinet

Name: Buckley Cole Russell Ackerman - DC-20-178 - Driving Under The Influence Of Alco
 Type: DC - District Court
 Primary Contact: Buckley Cole Russell Ackerman
 Status: Pending
 Cause Number: DC-20-178
 Status Type: Active
 OPD Matter ID: 21-11888
 Stage: Intake
 Last Client Check In Date:
 Court: Twentieth Judicial District Court, Lake County
 Judge: James A. Manley
 Lead Defense Attorney:
 Prosecuting Agency: Lake County Attorney's Office
 Prosecuting Attorney:


Post
 Share an update... **Share**

Sort by: Most Recent Activ Search this fe...

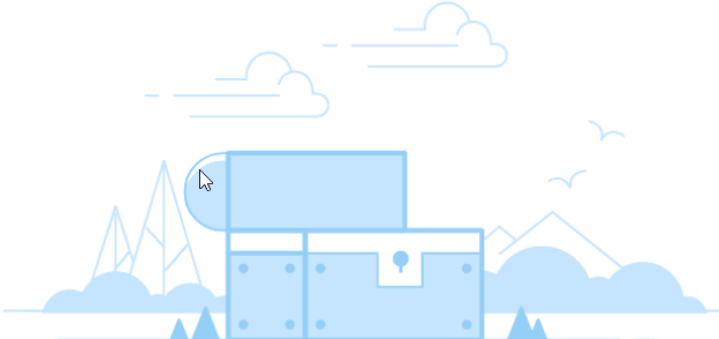
Matter
Buckley Cole Russell Ackerman ~ DC-20-178 ~ Driving Under The Influence Of Alco

Cause Number: DC-20-178 OPD Matter ID: 21-11888 Primary Contact: Buckley Cole Russell Ackerman Court: Twentieth Judicial District Court, Lake County

Details Related Activity **Filing Cabinet**

Folders

Vendor Accessible Search

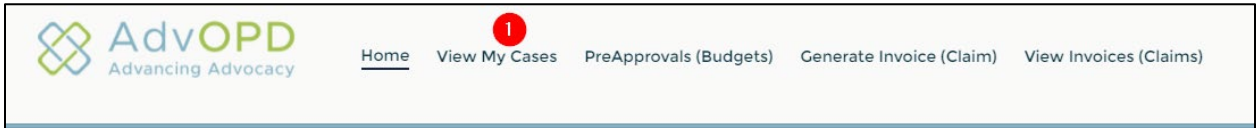

 No results found

Entering Pre-approvals (Attorneys Only)

Pre-approvals can be entered in two different but equal ways, choose whichever works best for you. The downside of using the button at the top (will be changed, unsure timeline) is you are unable to utilize the search within it at this time so unless you have a smaller caseload it may not be as efficient to

find the matter needing a pre-approval. You can also find the Budget from the Related list within a matter (shown in video also).

1. Click View My Cases at the top of the portal



2. You will be brought to a list view of all Active and Inactive cases assigned to you, use the search bar to find the matter you need to enter the pre-approval and click the 'Name' link (where the arrow is on photo below):

Name for Sear...	Name	Judge	Court	Receiv...	Divis...	Office	Sta...	OPD...	Created Date
1	[Redacted]	Chief Justice Mike M...	Montana Supreme C...	7/22/2019	Division 2		Pending		7/22/2019, 3:10 PM
2	[Redacted]	Shane Vannatta	Fourth Judicial Distri...	5/29/2020	Division 3	Region A - Missoula	Pending		6/4/2020, 11:58 AM
3	[Redacted]	John W. Larson	Fourth Judicial Distri...	6/1/2016	Division 3	Region A - Missoula	Pending		6/1/2016, 6:04 PM

3. After opening a matter by selecting the name, you will be brought to the details page of the matter. Now select 'Related' and click on the budget ID

Matter
[Redacted] - Theft - Obtain Or Exerts Unauthoriz

Cause Number: DC-20-2111 OPD Matter ID: 20-138-01 Primary Contact: [Redacted] Court: Fourth Judicial District Court, Missoula Cour

Details **Related** Activity Filing Cabinet

Information

Name: [Redacted] Type: DC - District Court

Matter
 V... - DC-20-111 ~ Theft - Obtain Or Exerts Unauthoriz

Cause Number: DC-20-111 OPD Matter ID: 20-111 Primary Contact: V... Court: Fourth Judicial District Court, Missoula County Judge: Shan...

Details **Related** Activity Filing Cabinet

Budgets (1)

Budget ID	Total Budget	Total Pending Approval
BUD-00228867		\$0.00

[View All](#)

4. Select New – PreApproval button from upper left

Budget BUD-00210496

Matter: E... - DC-20-111 - Aggravated Kidnapping Total Budget: Total Pending Approval: \$0.00

[+ Follow](#) [New - Pre Approval](#)

Budget Details (0)

5. Select the Service Provider Type and fill the required fields

- NOTE:** Timekeeper field is the individual you are requesting services from

New - Pre Approval

Details

* Service Provider Type:

* Travel Reimbursement:

* Timekeeper:

* Justification:

Budget Information

* Amount Requested:

Mental Health

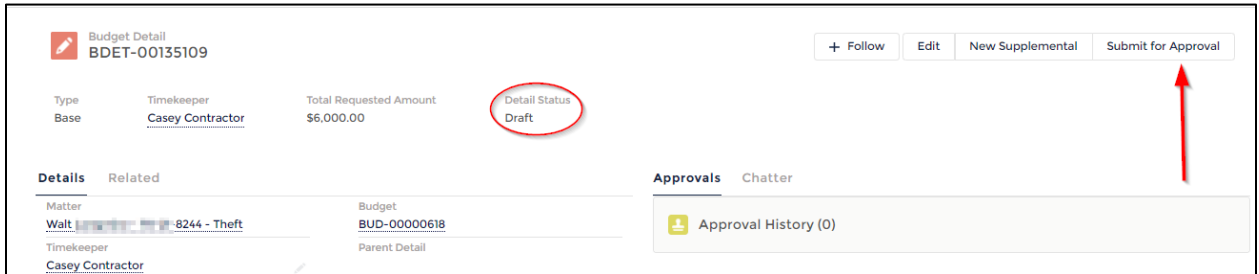
Medical Document No of Pages:

Legal Document No of Pages:

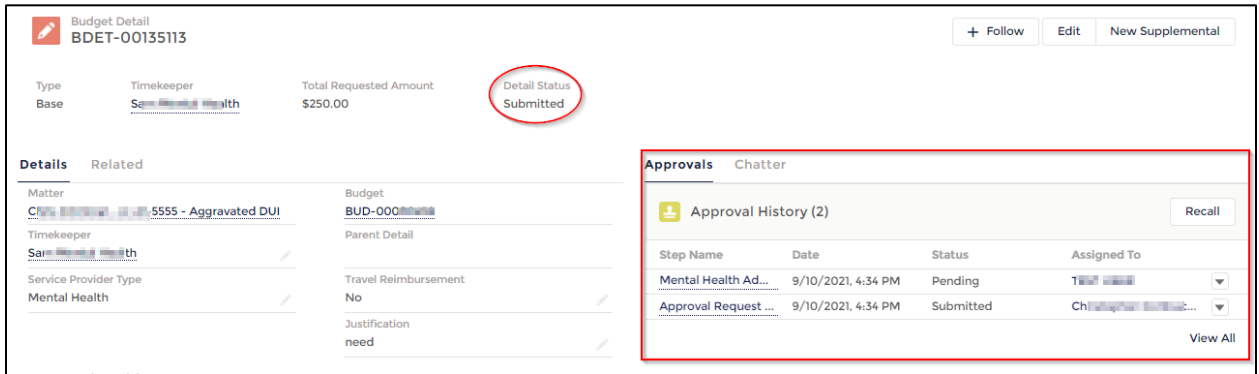
Other Document No. of Pages:

[Next](#)

- After entering the required information and clicking Next, you will be brought to your **DRAFT** pre-approval, you can edit or keep it in draft until you are ready to submit.
 - Tip: do not include a \$ (dollar sign) when entering the requested amount*
- When ready, press the Submit for Approval button in the upper right

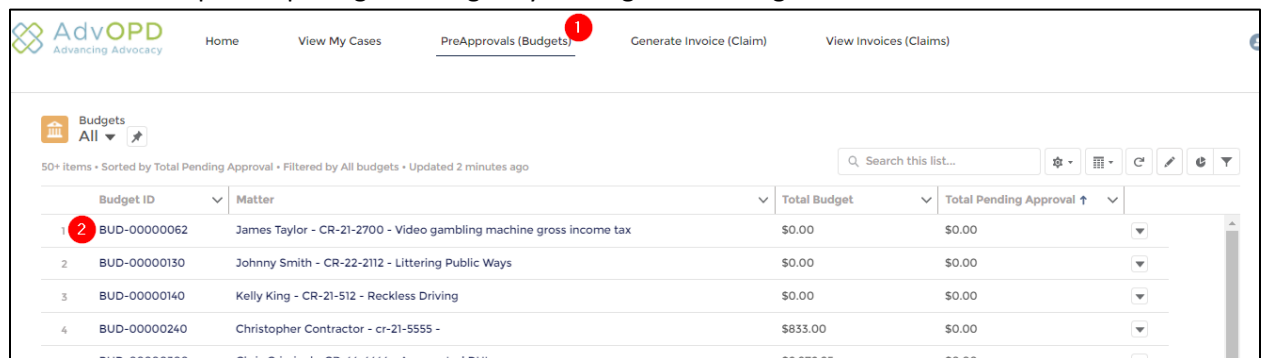


- Upon submit, you can optionally enter a comment and then **press Submit**
- You will now notice a box with Approval History appears and the Detail Status says Submitted instead of Draft



Entering Supplementals (Attorneys Only)

- Navigate to the Budget for the matter you need to enter the supplemental on by selecting the Budget ID from Related tab within a matter or by clicking on the PreApprovals (Budgets) button at the top and opening the budget by clicking on the Budget ID for that matter



- After clicking on the Budget ID, you are now in the Budget record. Find and select the Budget Detail (pre-approval) you need to enter the supplemental for. Remember the Timekeeper field is the Service Provider being requested for

Budget
BUD-00000300

+ Follow New - Pre Approval

Matter: [Chris Criminal - CR-44-4444 - Aggravated DUI](#) Total Budget: \$6,276.25 Total Pending Approval: \$0.00

Annotation: this is the matter this budget is connected to, this can be clicked on to navigate back to the matter →

Budget Details (7) Budget Detail = Pre-approval

7 items - Sorted by Service Provider Type - Updated a few seconds ago

Detail ID	Type	Service Provider T...	Timekeeper	Travel Reim...	Amount Reques...	Detail Status	Parent Detail
1 BDET-00000024	Base	Mental Health	Test Mental Health Provider	Yes	\$1,111.00	Approved	
2 BDET-00000017	Base	Expert	Sammy Service Provider	Yes	\$400.00	Approved	
3 BDET-00000018	Base	Other	Deb Timekeeper	Yes	\$600.00	Approved	BDET-00000019
4 BDET-00000019	Parent	Other	Deb Timekeeper	Yes		Parent	
5 BDET-00000020	Parent	Other	Deb Timekeeper	Yes	\$500.00	Draft	BDET-00000019
6 BDET-00000021	Base	Other	Christina Chasko	No	\$300.00	Draft	
7 BDET-00000042	Base	Audio/Video Transcript	eScribers	Yes	\$276.25	Approved	

- After opening the Detail ID for the specific pre-approval you need to enter the supplemental for, you are brought to the Budget Detail record and now you will notice a button for New Supplemental in the upper right

Budget Detail
BDET-00000024

+ Follow Edit **New Supplemental** Submit for Approval

Type: Base Timekeeper: [Test Mental Health Provider](#) Total Requested Amount: \$5,000.00 Detail Status: Approved

Details Related

Matter: [Chris Criminal - CR-44-4444 - Aggravated DUI](#) Budget: [BUD-00000300](#)

Timekeeper: [Test Mental Health Provider](#) Parent Detail:

Service Provider Type: Mental Health Travel Reimbursement: Yes

Approvals Chatter

Approval History (4)

Step Name	Date	Status	Assigned To
Division 3 - Over \$1...	7/8/2021, 4:46 AM	Approved	Division 3.- Division ...

- After clicking New Supplemental, a screen will prompt you for specific information. Fill the required fields and press Next
- Just as with the original pre-approval, after creating the supplemental you must use the Submit for Approval button in the upper right to move the record out of Draft status to Submitted

Budget Detail
BDET-00135112

+ Follow Edit New Supplemental **Submit for Approval**

Type: Supplemental Timekeeper: [Test Mental Health Provider](#) Total Requested Amount: \$5,275.00 Detail Status: Draft

Details Related

Matter: [Chris Criminal - CR-44-4444 - Aggravated DUI](#) Budget: [BUD-00000300](#)

Timekeeper: [Test Mental Health Provider](#) Parent Detail: [BDET-00135111](#)

Service Provider Type: Mental Health Travel Reimbursement: Yes

Justification: Need another evaluation

Approvals Chatter

Approval History (0)

Invoices (claims)

OPD UPDATE: New Regional structure in Division 1, Public Defender Division

Division 1 has now been restructured to better reflect Division 3, Conflict Defender Division in its regional structure by reducing the regions from 11 to 3 (Region 1, 2, 3). Please note the following:

The new Division 1 Regions:

Region 1 is now:

- Kalispell Office (previously region 1)
- Missoula Office (previously region 2)
- Butte Office (previously region 5)

Regional: Koan Mercer, kmercerc@mt.gov

Region 2 is Now:

- Great Falls Office (previously region 3)
- Helena Office (previously region 4)
- Havre Office (previously region 6)
- Bozeman Office (previously region 8)

Regional: Annie DeWolf, adewolf@mt.gov

Region 3 is Now:

- Lewistown Office (previously region 7)
- Billings Office (previously region 9)
- Glendive Office (previously region 10)
- Miles City Office (previously region 11)

Regional: Eldena Bear Dont Walk,
ebeardontwalk@mt.gov

Division 3, Conflict Defender Division Regions:

Region A:

- Kalispell Office (previously region 1)
- Missoula Office (previously region 2)
- Butte Office (previously region 5)

Regional: Alisha Rapkoch, alisha.rapkoch@mt.gov

Region B:

- Great Falls Office (previously region 3)
- Helena Office (previously region 4)
- Havre Office (previously region 6)
- Bozeman Office (previously region 8)

Regional: Melissa Edwards-Smith,
melissa.edwards-smith@mt.gov

Region C:

- Lewistown Office (previously region 7)
- Billings Office (previously region 9)
- Glendive Office (previously region 10)
- Miles City Office (previously region 11)

Regional: Jim Reinstma, jim.reinstma@mt.gov

What does this mean for your invoices? Due to the reduction in regions, now when you bill for cases you will also reduce the claims you'll need to create for non-conflict cases. For cases in Division 1 (non-conflict cases), you can now group together all cases in Kalispell office, Missoula office, Butte office (*what would have been three separate claims before for Region 1, non-conflict; Region 2, non-conflict; Region 5, non-conflict*) into one claim and upload the documentation for all offices into that claim. The same concept follows for the new Region 2 and new Region 3 based on the information above.

For Division 3 (conflict cases) the indication of 'conflict' when billing is now defined by the Region A, B, or C such as this (*rather than what would have previously been Region 4, Conflict and Region 2, Conflict*):

Division 3	Region B - Helena
Division 3	Region A - Missoula

No changes to Division 2, Appellate Defender Division or Division 4, Central – Sentence Review

Creating and Submitting Invoices - Attorneys

1. After logging into the AdvOPD Contractor and Vendor Portal, **click the ‘Generate Invoice (claim)’** from the top navigation bar.

You are brought to a ‘Select Cases’ page – **only select ONE case from one region you need to create the shell invoice for that you will then add each claim line to (line item).**

Tip: at this time, search is not enabled on the select cases screen so you can click on any of the columns to sort the information to better find what you are looking for:

Court	Invoice Group
Montana Supreme Court	Division 2
Montana Supreme Court	Division 2
Montana Supreme Court	Division 2
Mineral County Justice Court	Region A

2. You will select a case from the Region and/or Division you want to submit invoices for by marking the checkboxes here (**please review highlighted part above for this step**):

The screenshot shows a 'Select Cases' window with a yellow briefcase icon. Below the title, there is a dropdown menu for 'OPD Matter Id'. The dropdown is open, showing three options: '20-18685' (which is checked with a blue checkmark), '20-6827', and an unselected option. The '20-18685' option is highlighted in grey.

3. After selecting ONE CASE from the invoice group you need to bill for, **press Next** and you are brought to a screen with the first ‘shell’ invoice being created, **select the Month of Service by selecting ANY day in the month e.g. choosing any date between August 1-31 will create an August invoice.** After selecting your month of service, then press Create/Upload – you will be

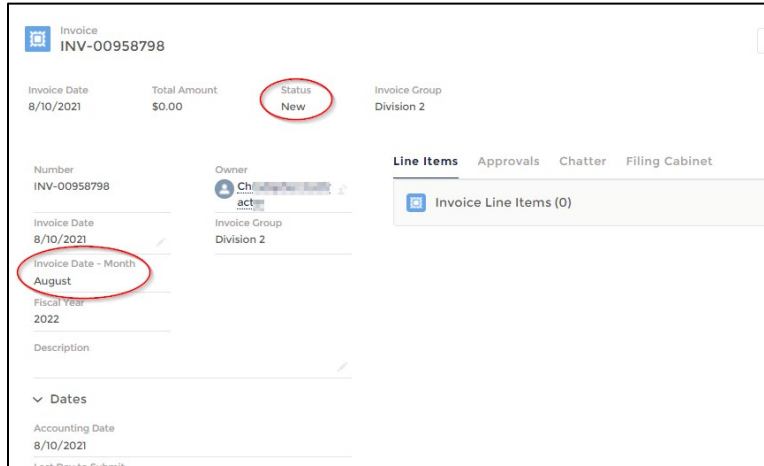
prompted to upload your supporting documentation required by policy. Note: NO CHANGES TO REQUIRED DOCUMENTATION, please continue to use the same documentation you used in the prior system or refer to the [OPD Pre-Approval and Claims Procedure 3\(a\)](#) for details on invoice expectations.

then press **Next**

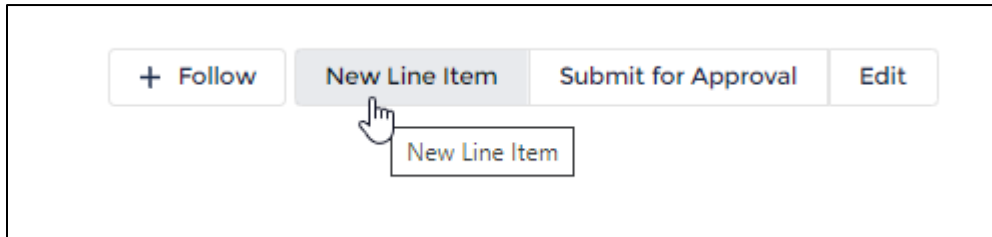
- After the shell has been created, you are brought to your Invoices list of Recently Viewed (you can change this list by selecting the down arrow). Open the NEW shell by clicking on the INV-#: c

Number	Invoice Date	Due Date	Total Amount	Status	Invoice Group
1 INV-00958798	8/10/2021	9/9/2021	\$0.00	New	Division 2

When you open the invoice, you are brought to a page that looks like this, notice the Status is NEW and the Month of Service reflects the month you selected when creating the invoice:



5. What previously was called 'Claim Lines' in the Hours or Expenses section within CRM is now called 'Line Items' in AdvOPD, **press New Line Item** to add hours and/or expenses to this invoice:



A new screen appears, review the following notes below:

New Line Item

Details

* Is this for Hours Worked or Other?

Hours Worked Select One
 Travel Hours
 Other Costs

* Matter

Search Matters... Search

A value is required.

Search for the Matter/s you need to add to this invoice - note if you attempt to add a matter outside this Invoice Group you will be stopped from adding as a line item

* QTY

Please enter some valid input. Input is not optional.

Enter a Number of Hours for both Hours Worked or Travel Hours, they will be calculated based on current rates

Description

Description optional here but you MUST have supporting documentation uploaded for your invoices as required by policy

Next

NOTE: When searching for Matters you will notice as you search the system will only show 5 results based on what it thinks you are searching for, if you do not see the matter you are needing be sure to press the 'Show all Results for: xx'

Details

* Is this for Hours Worked or Other?

Hours Worked
 Travel Hours
 Other Costs

* Matter

chris Search

Q Show All Results for "chris" ←

- at6 Chris [redacted] - [redacted] - CR-21-82502
- at6 Chris [redacted] - [redacted] - CR-21-82801
- at6 [redacted], Chas Christian - [redacted] - CR-20-195
- at6 Chris [redacted] - [redacted] - CDC-21-22100
- at6 Chris [redacted] - [redacted] - Open Container / Public Drinking / Vehicles - CR-11-1111

Next

New Line Item

Details

* Is this for Hours Worked or Other?

Hours Worked
 Travel Hours
 Other Costs

* Matter

Christopher Contractor - DA-21-1 X

* QTY

4.10

Description

Reviewed transcripts, email communication, start of drafting

Next

New Line Item

This Line Item will cause a negative hours balance on the matter based off the current weight. Please provide a justification for these hours along with an amount of how many more hours you will need added to the matter.

Matter Total Weight: 0
 Total Hours Submitted/Approved: 3
 Submitting: 3.00

* Justification for Hours

trial

* Estimated Additional Hours Needed

2

Previous **Next**

6. Use the Travel Hours to enter the number of hours travelling (e.g. windshield time) for each matter.
7. If you select Other Costs, you can enter Mileage, Per Diem, Lodging, Office Stipend, etc.
8. After entering the information (example below), **press Next**. If you have exceeded the billing standard, you will be prompted to provide justification and an *estimation* of additional hours needed:

Invoice INV-00958798

+ Follow New Line Item Submit for Approval Edit

Invoice Date 8/10/2021 **Total Amount \$168.00** Status New Invoice Group Division 2

Number INV-00958798 Owner Christopher Contractor - ac Invoice Group Division 2

Invoice Date 8/10/2021 Invoice Date - Month August Fiscal Year 2022 Description

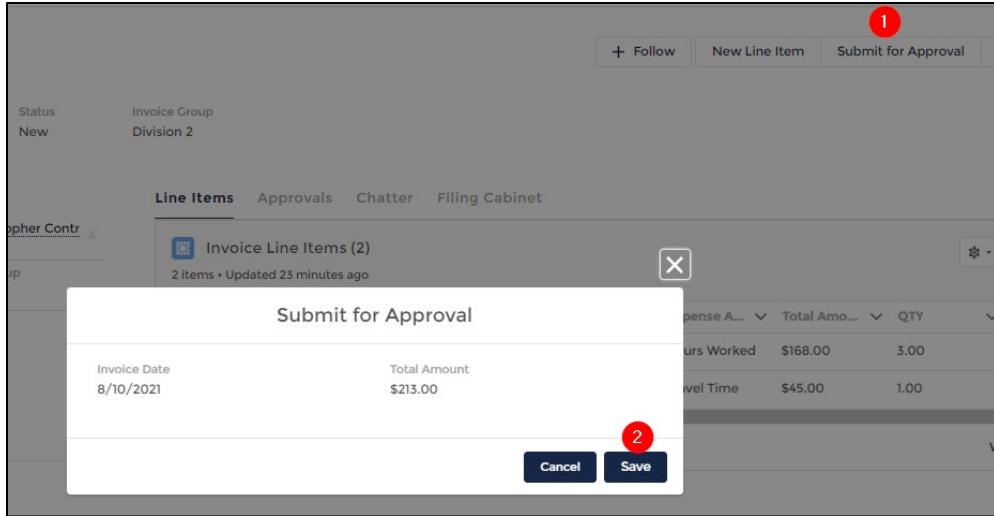
Line Items Approvals Chatter Filing Cabinet

Invoice Line Items (1)
 1 item • Updated a few seconds ago

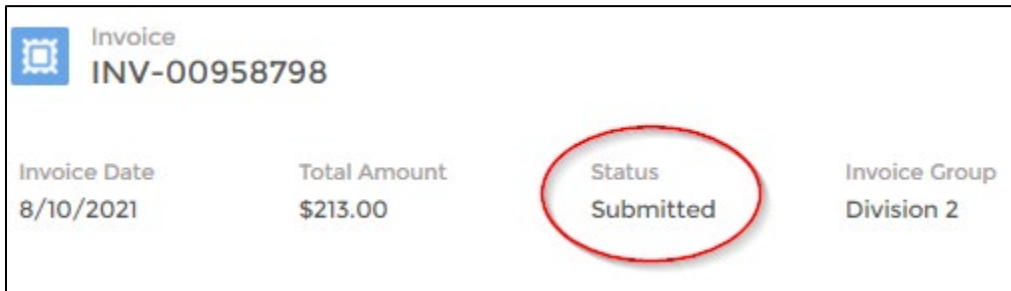
#	Matter	Expense Ty...	Expense A...	Total Amo...	QTY
1	LI-4970578 Christopher Contractor -	Hours Worked	Hours Worked	\$168.00	3.00

View All

9. Continue this process to add New Line Items for each billable item within this Invoice Group. After you have inputted all hours and costs, press the Submit for Approval button, and then Save:



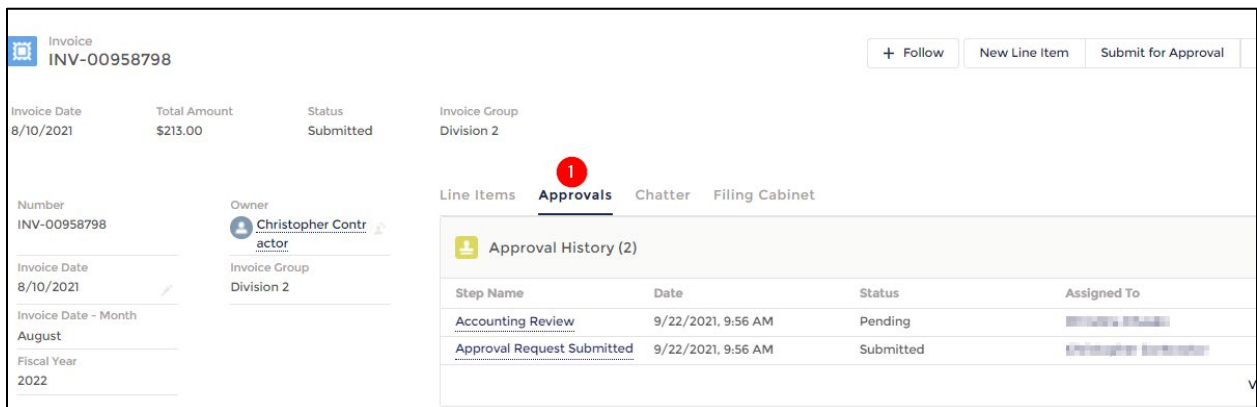
Notice the Status changes to Submitted:



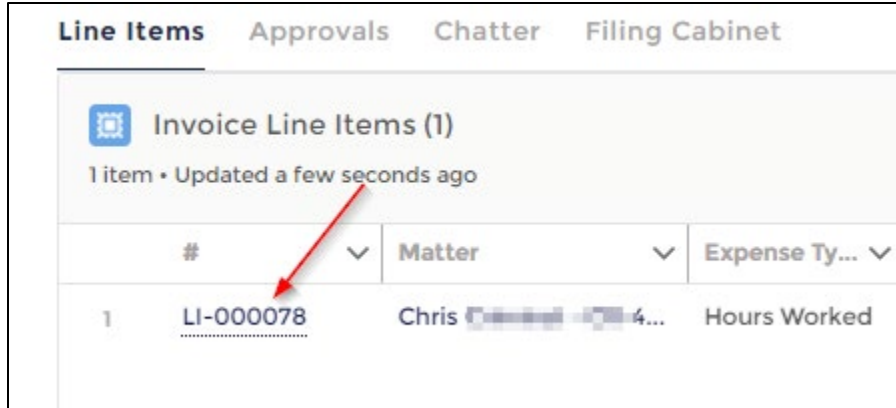
10. If you have additional invoices to complete, navigate back to the top menu bar and select the 'View Invoices (claims)' from the top navigation bar and open the next Invoice to add line items to:

2	INV-00958798	8/10/2021	9/9/2021	\$213.00	Submitted	Division 2	ccont
3	INV-00958799	9/17/2021	10/17/2021	\$348.00	New	Region 1	ccont

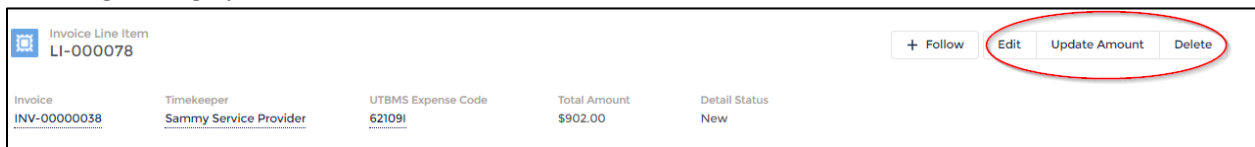
After submitting, you can view the approval process, and at which step the claim is pending review:



If you need to edit a line item you've entered, open the record by clicking here:



After opening the LI-# record, you are brought to the Line Item record page and you will see the following editing options:



Creating and Submitting Invoices – Non-Attorneys

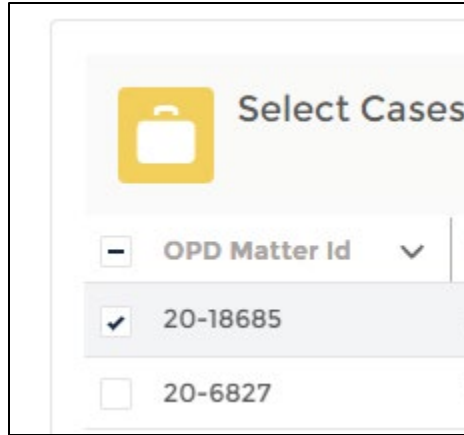
1. After logging into the AdvOPD Contractor and Vendor Portal, **click the ‘Generate Invoice (claim)’** from the top navigation bar.

You are brought to a ‘Select Cases’ page – **only select ONE case from one region you need to create the shell invoice for that you will then add each claim line to (line item).**

Tip: at this time, search is not enabled on the select cases screen so you can click on any of the columns to sort the information to better find what you are looking for:

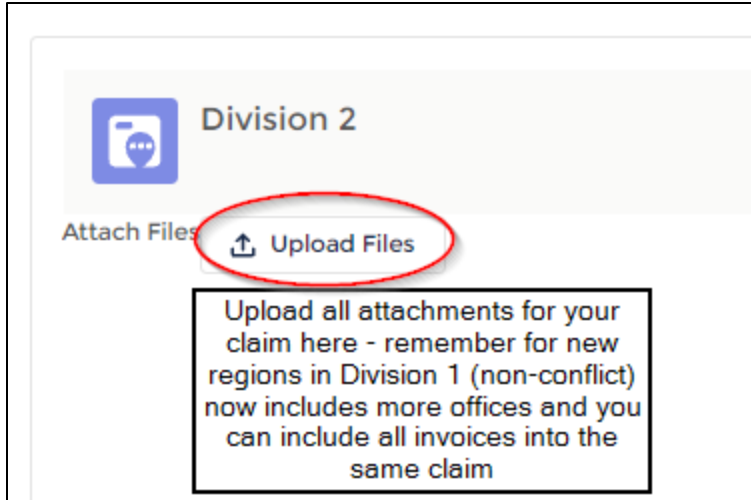
Court	Invoice Group
Montana Supreme Court	Division 2
Montana Supreme Court	Division 2
Montana Supreme Court	Division 2
Mineral County Justice Court	Region A

2. You will select a case from the Region and/or Division you want to submit invoices for by marking the checkboxes here (**please review highlighted part above for this step**):



3. After selecting ONE CASE from the invoice group you need to bill for, **press Next** and you are brought to a screen with the first 'shell' invoice being created, **select the Month of Service by selecting ANY day in the month e.g. choosing any date between August 1-31 will create an August invoice.** After selecting your month of service, then press Create/Upload – you will be prompted to upload your supporting documentation required by policy.

Note: NO CHANGES TO REQUIRED DOCUMENTATION, please continue to use the same documentation you used in the prior system or refer to the [OPD Pre-Approval and Claims Procedure 3\(a\)](#) for details on invoice expectations.



then press **Next**

- After the shell has been created, you are brought to your Invoices list of Recently Viewed (you can change this list by selecting the down arrow). Open the **NEW** shell by clicking on the INV-#: c

	Number	Invoice Date	Due Date	Total Amount	Status	Invoice Group
1	INV-00958798	8/10/2021	9/9/2021	\$0.00	New	Division 2

When you open the invoice, you are brought to a page that looks like this, notice the Status is **NEW** and the Month of Service reflects the month you selected when creating the invoice:

Invoice
INV-00958798

Invoice Date: 8/10/2021 | Total Amount: \$0.00 | Status: **New** | Invoice Group: Division 2

Number: INV-00958798 | Owner: Ch... | Invoice Group: Division 2

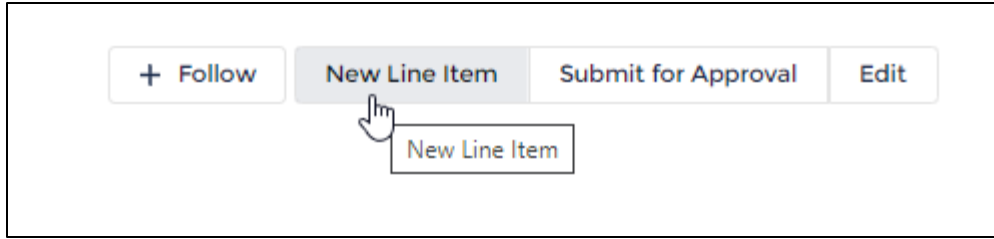
Invoice Date: 8/10/2021 | Invoice Date - Month: **August** | Fiscal Year: 2022

Description: [Empty]

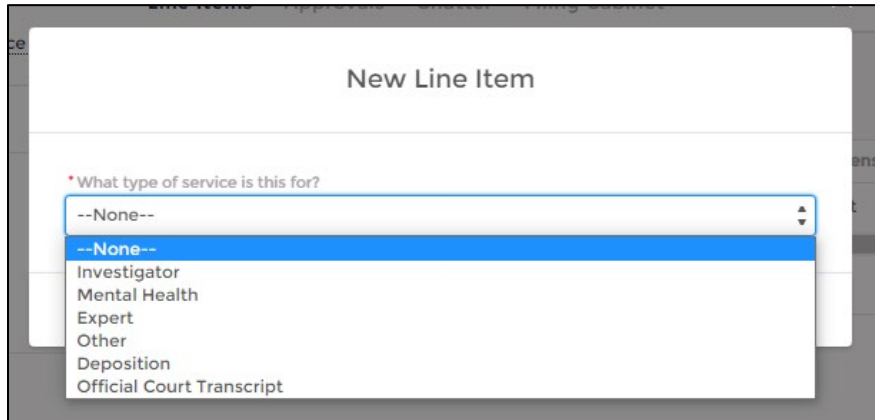
Line Items: Invoice Line Items (0)

Accounting Date: 8/10/2021

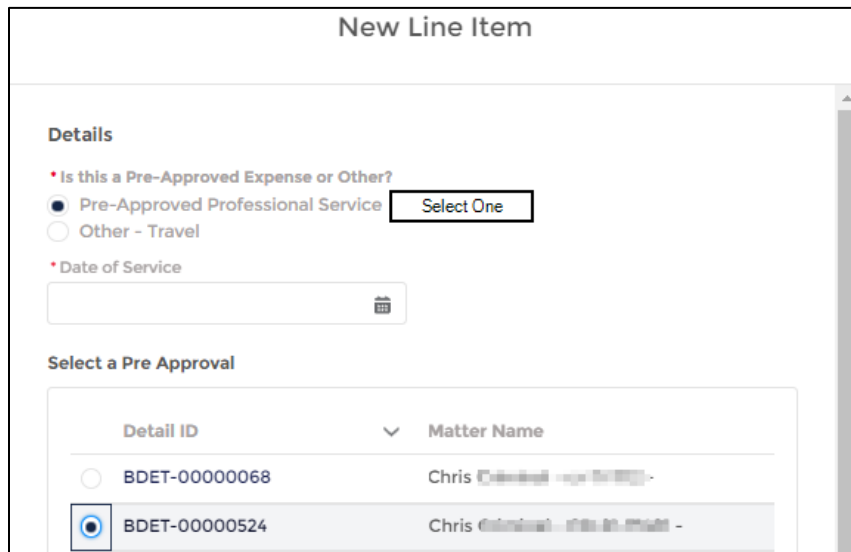
- What previously was called 'Claim Lines' in the Hours or Expenses section within CRM is now called 'Line Items' in AdvOPD, **press New Line Item** to add hours and/or expenses to this invoice:



A new screen appears, select the service you provide:



6. Indicate if you are billing for a pre-approved professional service or entering travel hours, indicate the date of service, and then select a pre-approval you are billing against (the matter name is on the right hand side column)



Please make a selection below

Code and Name

62109I Hours Worked - Investigator

62109S Hours Worked - Subpoenas

62109I 62109I - Migration

Select the Service Code (Options Change Based on Initial Selection of Type of Service Being Provided)

*QTY

8.00

Enter Hours Here, System Calculates Based on Current OPD Rates

Description

Description is optional but you are still expected to upload supporting documentation describing the work you completed, no changes to prior documentation accepted

7. Continue this process to add New Line Items for each billable item within this Invoice Group.
8. If you did not upload your supporting documentation file/s in Step 3, you can upload them by clicking on Filing Cabinet, then using the upload button.
9. After you have inputted all hours and costs, press the Submit for Approval button, and then Save:

+ Follow New Line Item **1** Submit for Approval

Status Invoice Group
New Division 2

Line Items Approvals Chatter Filing Cabinet

Invoice Line Items (2)

2 items • Updated 23 minutes ago

Submit for Approval

Invoice Date	Total Amount
8/10/2021	\$213.00

2

Expense A...	Total Amo...	QTY
Hours Worked	\$168.00	3.00
Level Time	\$45.00	1.00

After submitting, you can view the approval process, and at which step the claim is pending review:

Invoice
INV-00958798

+ Follow New Line Item Submit for Approval

Invoice Date: 8/10/2021 Total Amount: \$213.00 Status: Submitted Invoice Group: Division 2

Number: INV-00958798 Owner: Christopher Contractor Invoice Group: Division 2

Invoice Date: 8/10/2021 Invoice Date - Month: August Fiscal Year: 2022

Line Items **Approvals** Chatter Filing Cabinet

Approval History (2)

Step Name	Date	Status	Assigned To
Accounting Review	9/22/2021, 9:56 AM	Pending	Christopher Contractor
Approval Request Submitted	9/22/2021, 9:56 AM	Submitted	Christopher Contractor

If you need to edit a line item you've entered, open the record by clicking here:

Line Items Approvals Chatter Filing Cabinet

Invoice Line Items (1)
1 item • Updated a few seconds ago

#	Matter	Expense Ty...
1	LI-000078	Chris [redacted] 4... Hours Worked

After opening the LI-# record, you are brought to the Line Item record page and you will see the following editing options:

Invoice Line Item
LI-000078

+ Follow **Edit** Update Amount Delete

Invoice: INV-0000038 Timekeeper: Sammy Service Provider UTBMS Expense Code: 621091 Total Amount: \$902.00 Detail Status: New

Closing Cases
Coming soon