

# AdvOPD External Provider Portal Instructions

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## 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](http://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 21-1188 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 21-1188 Stage Intake

Last Client Check In Date

Court Twentieth Judicial District Court, Lake County

Judge James A. Manley

Lead Defense Attorney [Michael M. Bartholomew](#)

Prosecuting Agency Lake County Attorney's Office

Prosecuting Attorney [Michael M. Bartholomew](#)

Post

Share an update... Share

Sort by: Most Recent Active Search this feed

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

Cause Number DC-20-178 OPD Matter ID 21-1188 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).



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):

Matters All Active & Inactive Cases

50+ items • Sorted by Name for Searching • Filtered by All matters - Status Type • Updated a few seconds ago

Use the search below to find the matter you need to enter a pre-approval for

Search this list...

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

Matter [Vannatta, Shane DA 1...](#) - Theft - Obtain Or Exerts Unauthoriz

Cause Number: DC-20-2188 OPD Matter ID: 20-13842 Primary Contact: [Vannatta, Shane DA 1...](#) Court: Fourth Judicial District Court, Missoula Cour

**1**

Details Related Activity Filing Cabinet

Information

Name: [Vannatta, Shane DA 1...](#) Type: DC - District Court

Matter  
 V... - DC-20-011 ~ Theft - Obtain Or Exerts Unauthoriz

Cause Number      OPD Matter ID      Primary Contact      Court      Judge  
 DC-20-011      20-1...      V...      Fourth Judicial District Court, Missoula County      Shan...

Details    **Related**    Activity    Filing Cabinet

Budgets (1)

Budget ID	Total Budget	Total Pending Approval
<a href="#">BUD-00228867</a>		\$0.00

[View All](#)

Budget  
 BUD-00210496

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

Matter  
 E... - Aggravated Kidnapping

Total Budget      Total Pending Approval  
 \$0.00

Budget Details (0)

5. Select the Service Provider Type and fill the required fields
  - a. **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**

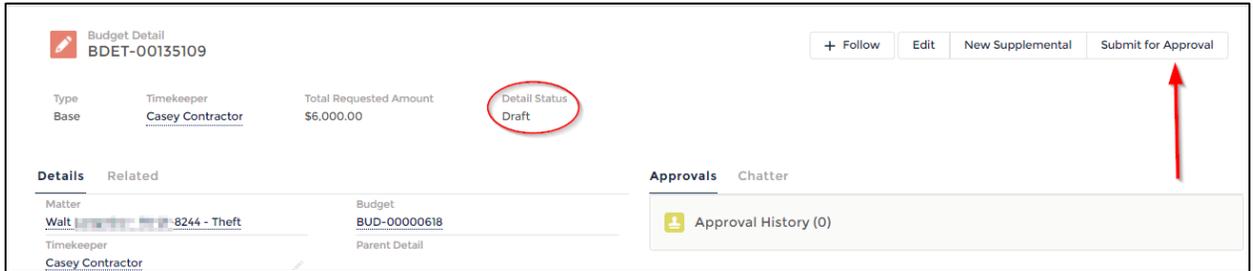
Medical Document No of Pages:

Legal Document No of Pages:

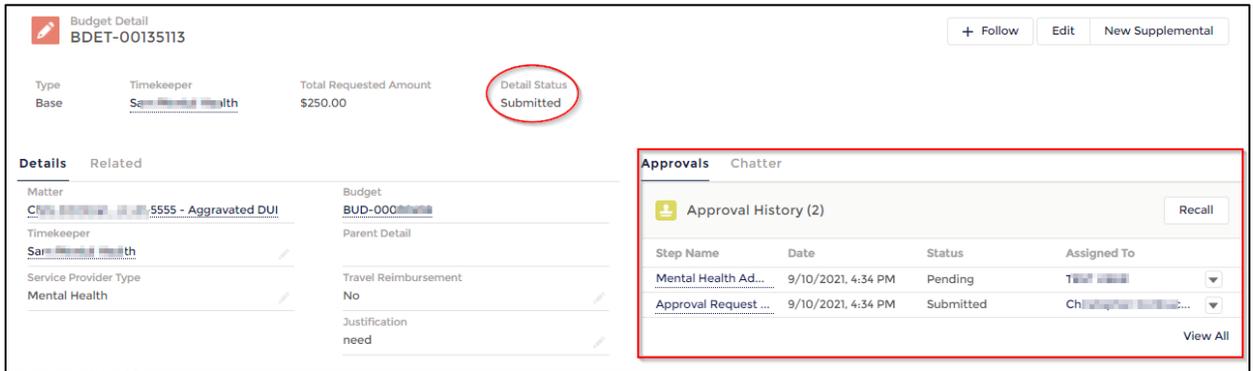
Other Document No. of Pages:

[Next](#)

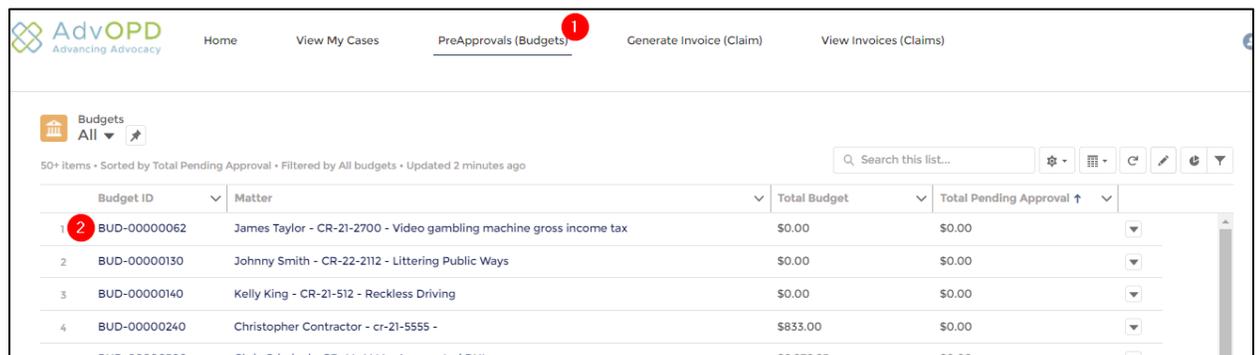
6. After entering the required information and clicking Next, you will be brought to your **DRAFT** pre-approval, you can edit or keep it in draft until you are ready to submit.
  - a. *Tip: do not include a \$ (dollar sign) when entering the requested amount*



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



## Entering Supplementals (Attorneys Only)



2. 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-0000300

+ Follow    New - Pre Approval

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

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-0000024	Base	Mental Health	Test Mental Health Provider	Yes	\$1,111.00	Approved	
2 BDET-0000017	Base	Expert	Sammy Service Provider	Yes	\$400.00	Approved	
3 BDET-0000018	Base	Other	Deb Timekeeper	Yes	\$600.00	Approved	BDET-0000019
4 BDET-0000019	Parent	Other	Deb Timekeeper	Yes		Parent	
5 BDET-0000020	Parent	Other	Deb Timekeeper	Yes	\$500.00	Draft	BDET-0000019
6 BDET-0000021	Base	Other	Christina Chasko	No	\$300.00	Draft	
7 BDET-0000042	Base	Audio/Video Transcript	eScribers	Yes	\$276.25	Approved	

Budget Detail  
BDET-0000024

+ 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-0000300](#)

Timekeeper: [Test Mental Health Provider](#)    Parent Detail: [BDET-0000019](#)

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 ...

4. After clicking New Supplemental, a screen will prompt you for specific information. Fill the required fields and press Next

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-0000300](#)

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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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) and '20-6827' (which is unchecked).

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

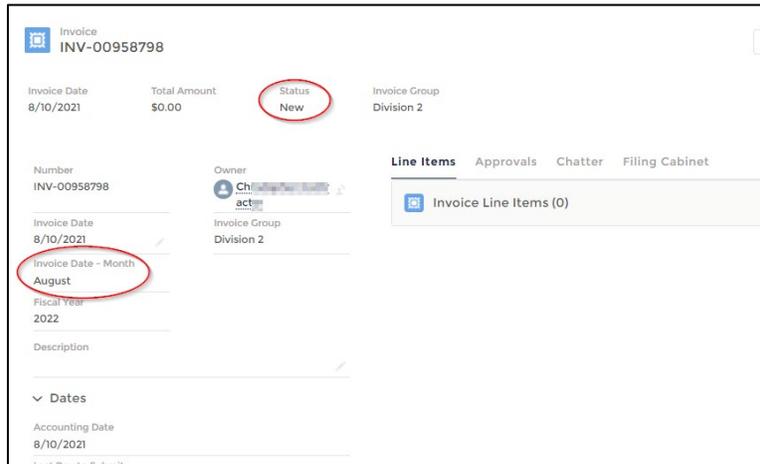
prompted to upload your supporting documentation required by policy. Note: NO CHANGES TO REQUIRED DOCUMENTATION, please continue to use the same documentation you used in the prior system or refer to the [OPD Pre-Approval and Claims Procedure 3\(a\)](#) for details on invoice expectations.

then press **Next**

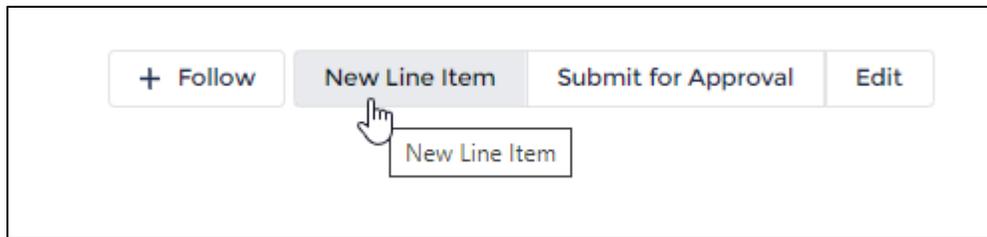
- After the shell has been created, you are brought to your Invoices list of Recently Viewed (you can change this list by selecting the down arrow). Open the NEW shell by clicking on the INV-#: c

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] - CR-21-82502
- at6 Chris [redacted] - CR-21-82801
- at6 Stenel [redacted], Chas Christian - [redacted] - CR-20-195
- at6 Chris [redacted] - CDC-21-22120
- at6 Chris [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

\* QTY

Description

**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

\* Estimated Additional Hours Needed

[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  
 Invoice Date: 8/10/2021 Invoice Group: Division 2  
 Invoice Date - Month: August  
 Fiscal Year: 2022  
 Description:

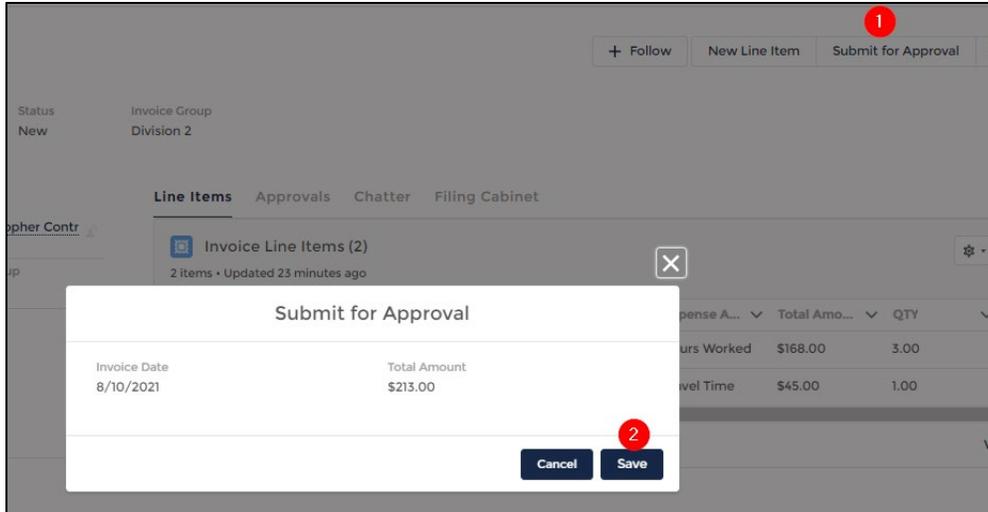
**Line Items** Approvals Chatter Filing Cabinet

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

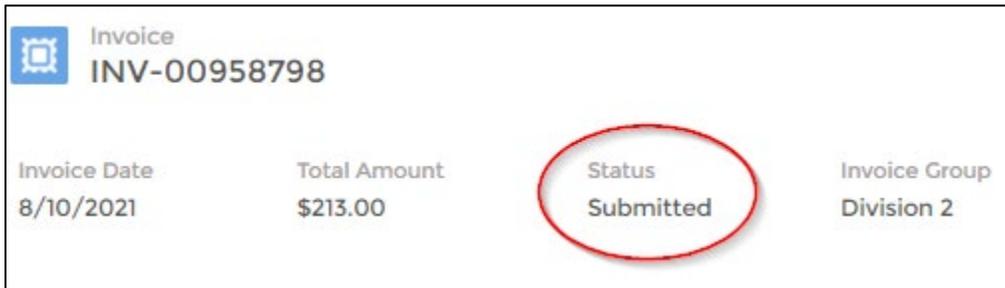
#	Matter	Expense Ty...	Expense A...	Total Amo...	QTY
1	LI-4970578 Christopher Contractor -	Hours Worked	Hours Worked	\$168.00	3.00

[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:



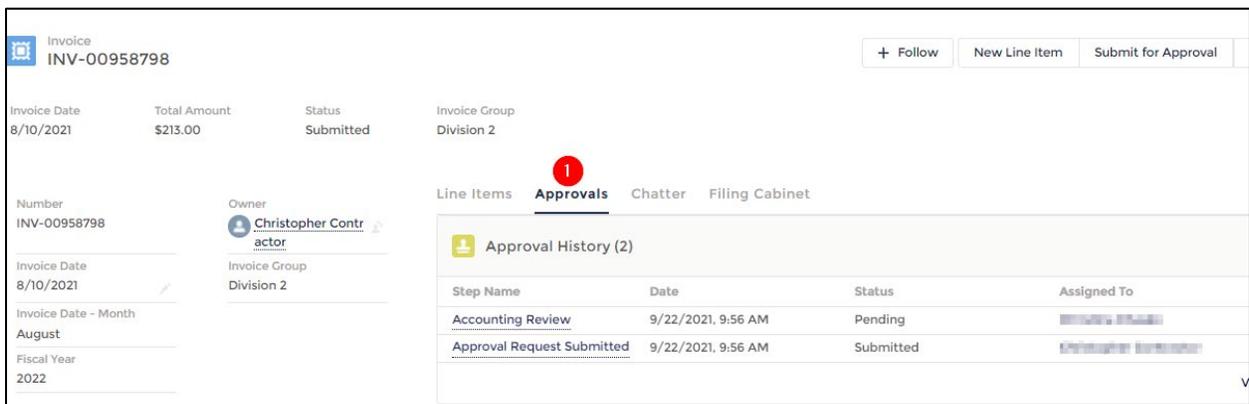
Notice the Status changes to Submitted:



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:

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

Invoice Line Item  
LI-000078

+ Follow Edit Update Amount Delete

Invoice	Timekeeper	UTBMS Expense Code	Total Amount	Detail Status
INV-00000038	Sammy Service Provider	621091	\$902.00	New

### Creating and Submitting Invoices – Non-Attorneys

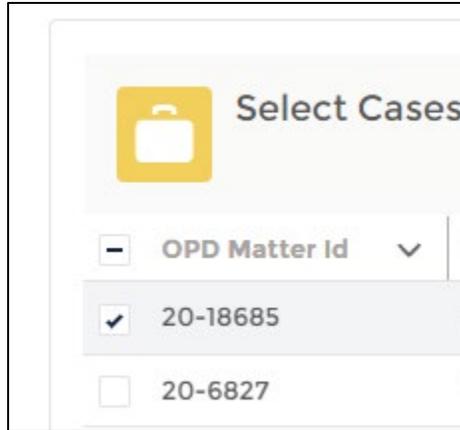
1. After logging into the AdvOPD Contractor and Vendor Portal, **click the ‘Generate Invoice (claim)’** from the top navigation bar.

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:*

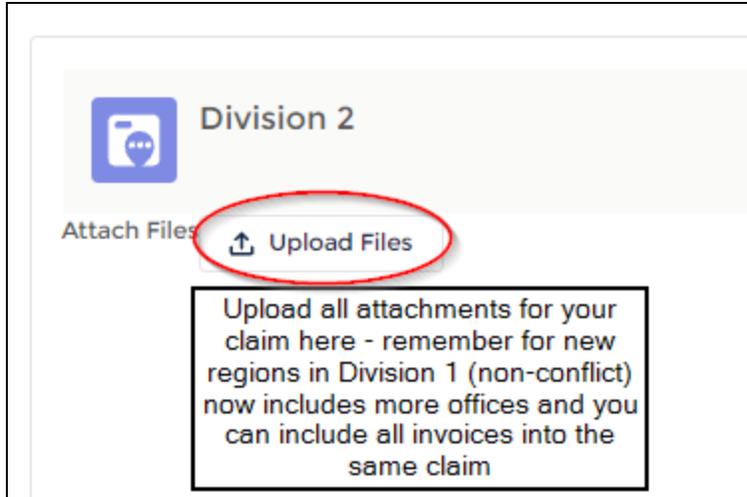
Court	Invoice Group
Montana Supreme Court	Division 2
Montana Supreme Court	Division 2
Montana Supreme Court	Division 2
Mineral County Justice Court	Region A

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

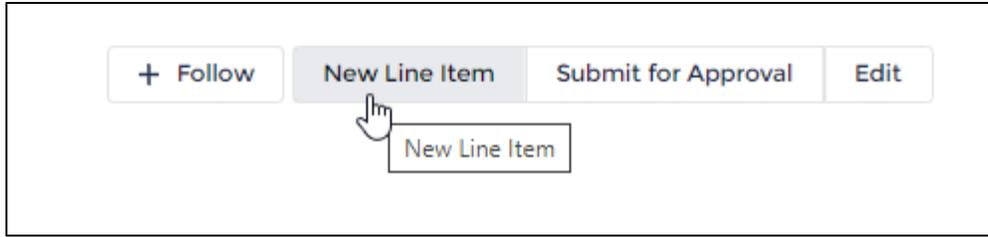
Invoice Date: 8/10/2021 | Invoice Date - Month: **August** | Fiscal Year: 2022

Description: [Empty]

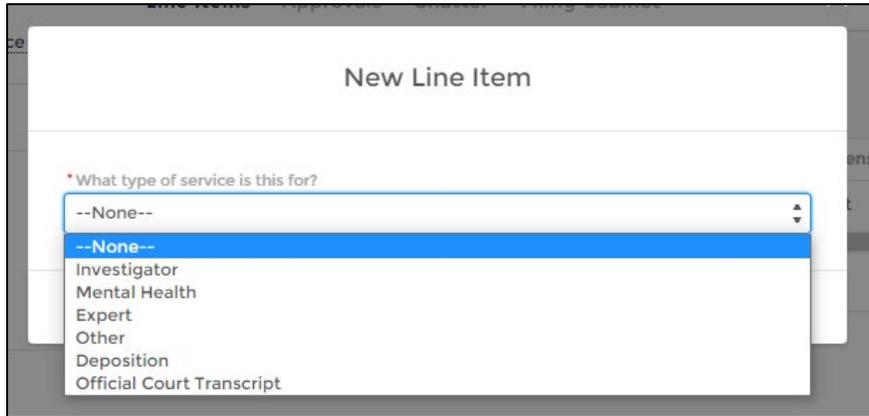
Line Items: Invoice Line Items (0)

Accounting Date: 8/10/2021

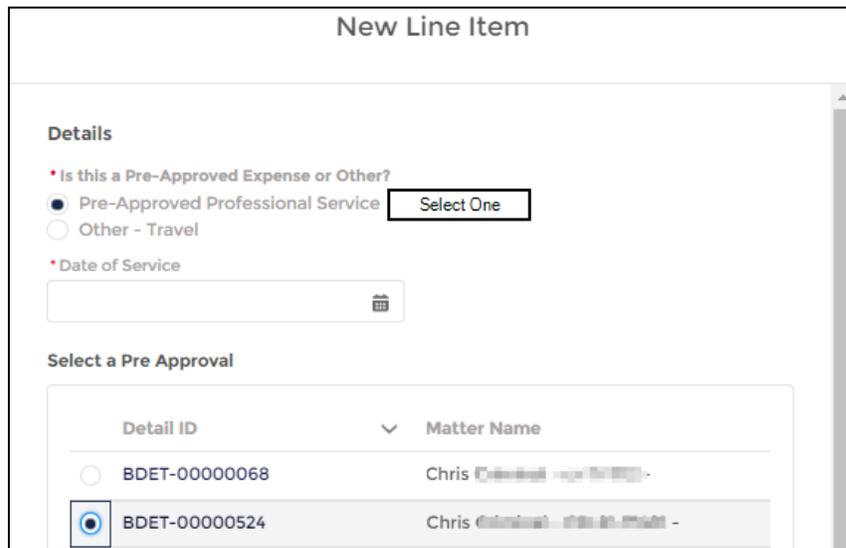
- What previously was called 'Claim Lines' in the Hours or Expenses section within CRM is now called 'Line Items' in AdvOPD, **press New Line Item** to add hours and/or expenses to this invoice:



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

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 (Attorneys Only)

OPD now has a portal with the functionality to allow Contractors to close cases directly rather than submitting requests to OPD to close cases (prior method in CRM). Note, OPD no longer requires the traditional 'closing forms' AS LONG AS a final sentence/judgement order is provided with all relevant information.

1. Click 'View My Cases' from the top navigation bar and select the case you need to close by clicking on the link in the NAME column:

Matters  
All Cases ▾

66 items • Sorted by Name • Filtered by All matters - Status • Updated a few seconds ago

Search this list...

Name ↑	Judge	Court	Received Date...	Division	Office
1 Allison Alias - dc-21-1234 -	Emily Copeland	Hamilton City Court	5/26/2021	Division 2	
2 Anna Moss - -			7/21/2021	Division 1	Region 2 - Missoula
3 Anna Moss - CR-21-11123 - Reckless Driving	Anne Peterson	Helena Municipal Court	7/18/2021	Division 3	Region B - Bozeman
4 Anna Moss - CR-21-34567 - Reckless Driving			7/2/2021	Division 1	Region 1 - Kalispell

- After you've opened the case you need to close, notice the 'Close Matter' button in the upper right:

Matter  
Banksy Kosovich - DC-17-18 -

+ Follow Related Matter **Close Matter**

Cause Number OPD Matter ID Primary Contact Court Judge  
 Montana Supreme Court Chief Justice Mike McGrath

Details Related Activity Filing Cabinet

Information

Name Type  
 SR - Sentence Review

Post  
 Share an update... Share

- After clicking Close Matter on the appropriate case, a screen notifies you of the process, press next:

Close Matter

**ATTENTION:**

The following screen will loop through each charge tied to this matter, showing 1 charge at a time. Please update the fields that need updated for each charge.

Next

- The next screen appears with charge, count and matter type codes. ONLY FILL IN THE REQUIRED FIELDS
  - For Disposition – please select the appropriate disposition, different options may appear depending on the matter type you are closing
  - For Disposition Vehicle—this is how the disposition was achieved i.e. bench trial or plea agreement
  - For Disposition Date—this should be the date judgment given
    - EXAMPLE:

Close Matter

**For Charge Count: 1**  
with Statute: **46-18-903---Application for review**, update the following fields:

*Do NOT change the Matter Type Code fields, as that is pulled from the Matter. It's displayed because it is connected to the Disposition and Disposition Vehicle fields.*

Matter Type Code	Matter Type Code
SR	SR
*Disposition	*Dispo Vehicle
No Change to Sentence	Sentence Review Hearing
*Dispo Date	
Sep 27, 2021	

Previous **Next**

- After entering the charge information, the next screen appears with a series of questions, answer accordingly, and then a checkbox confirming you've explained the Client's right to appeal:

Close Matter

\* Did you Review the Final Judgment/Sentencing for Accuracy?  
Yes

\* Did you Consider any Post-Disposition Motions?  
Yes

\* Did you Ask the Court to make an Ability to Pay Finding?  
Yes

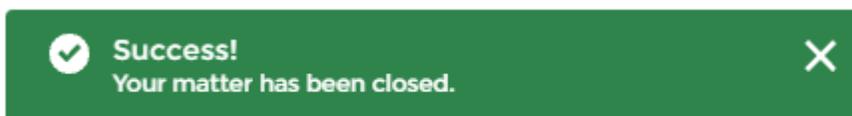
\* Did the Court Waive OPD Fees?  
No

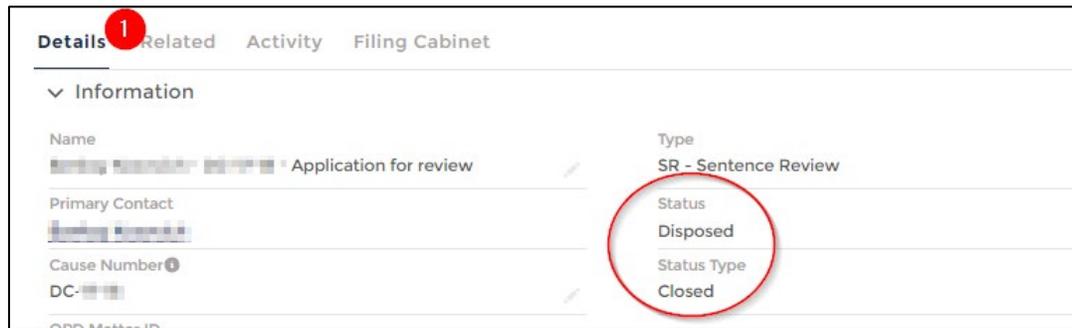
Did you Explain the Client's Right to Appeal?

Previous **Next**

VIEW ALL

- For File Location / Destruction – **IGNORE this screen and skip by pressing NEXT** (temporary)





8. Ensure you have provided either the final sentence/judgement or closing form, if necessary, by uploading the document into the Filing Cabinet of the matter (*temporary, will be part of closing flow in future but for now this is separate step*):



**NOTE: due to data migration and data updating from the old system to the new, some charges on cases have inactive statutes which may throw an error if you are trying to close the matter.**

Please email [Opdoperations@mt.gov](mailto:Opdoperations@mt.gov) if you experience this issue and we will update the information ASAP.

## Closing Cases – Modifying Charges

If you have a matter that has charges modified or reduced, follow these instructions prior to closing the matter:

1. Open the matter you need to modify charges by clicking on the link in the NAME column:

	Name ↑	Judge	Court	Received Date...	Division	Office
1	Allison Alias - dc-21-1234 -	Emily Copeland	Hamilton City Court	5/26/2021	Division 2	
2	Anna Moss - -			7/21/2021	Division 1	Region 2 - Missoula
3	Anna Moss - CR-21-11123 - Reckless Driving	Anne Peterson	Helena Municipal Court	7/18/2021	Division 3	Region B - Bozeman
4	Anna Moss - CR-21-34567 - Reckless Driving			7/2/2021	Division 1	Region 1 - Kalispell

2. After opening the matter record, click on 'Related':

AdvOPD Advancing Advocacy

Home View My Cases PreApprovals (Budgets) Generate Invoice (Claim) View Invoices (Claims)

Matter Anna [REDACTED] - Reckless Driving

+ Follow Related Matter Close Matter

Cause Number OPD Matter ID Primary Contact Court Judge

**Details** Related Activity Filing Cabinet

Information

Name Anna [REDACTED] Type CR - Lower Court Criminal Complaint

Primary Contact [REDACTED] Status Pending

Cause Number [REDACTED] Status Type [REDACTED]

Post

Share an update... Share

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

3. You are brought to a screen with various related information to the matter, click on Charges:

Matter Anna [REDACTED] - Reckless Drive

Cause Number OPD Matter ID Primary Co

Details **Related** Activity Filing Cabinet

Budgets (1)

Budget ID	Total Budget
BUD-00000552	\$600.00

Budget Details (4)

Detail ID	Service Provider Type
BDET-00000051	Investigator
BDET-00000052	Investigator
BDET-00000053	Investigator
BDET-000000574	Mental Health

**Charges (3)**

Charge Number
CH-302268
CH-302274
CH-302275

4. You are now brought to a list of all charges on that matter, to edit a charge use the drop down arrow on the right hand side (You can also click the CH-### hyperlink, and then press edit on the

Matters > Anna Moss - CR-21-34567 - Reckless Driving  
Charges

3 items • Updated a minute ago

	Charge Number	Statute	
1	CH-302268	Driving Under The Influence of Alcohol-1st Offense	
2	CH-302274	61-8-301 Reckless driving	
3	CH-302275	45-6-204(1)-FEL - -Burglary	

*Note: Red arrows point to the 'Charge Number' column header and the dropdown arrows in the first and second rows. An 'Edit' button is visible in the second row's dropdown menu.*

5. Charge Modifications:

a. Change the Statute:

i. Click the X next to the current statute to remove that one:

### Edit CH-302268

Charge Number  
CH-302268

Matter  
Anna Moss - CR-21-34567 - Reckless Driving

Statute  
 Driving Under The Influence of Alcohol-... 

Alford Plea

Occurred  
6/21/2021

Inactive

Inactive Reason  
--None--

Count Number  
1

*Note: A red circle with the number '1' highlights the 'X' icon next to the current statute.*

### Edit CH-302268

Charge Number  
CH-302268

Matter  
Anna Moss - CR-21-34567 - Reckless Driving

Statute  
reck

Start typing to begin pulling up results, if you dont see the one you want press the gray highlighted part below

Q "reck" in Statutes

- 61-8-301 Reckless driving 1/1/1955
- 23-2-523(1)-MISD - -Operate Reckless/N...
- 23-2-523(5)-MISD - -Reckless Approach ...
- 23-2-531(5)-MISD - -Operate In Reckless ...
- 45-8-333-Misd--Reckless or malicious u...

Occurred  
6/21/2021

Inactive

Inactive Reason  
--None--

Count Number  
1

Suspend - Total Days  
0.00

Roman Numeral Count  
1

Contested?  
--None--

Statute URL

*Note: A red arrow points from the search results list to the 'Statute' input field.*

1. NOTE: the search is very powerful, you can search terms like felony or misdemeanor with descriptor text or you can enter the statute in full if known
- iii. Select the correct statute and press Save at bottom

Charge  
CH-302268

Statute  
61-8-301 Reckless driving

Matter  
Anna Moss - [redacted] - Reckless Driving

Charge Number

b. Inactivate a Charge:

- i. Select the charge you need to inactivate, press edit

Edit CH-302268

Charge Number  
CH-302268

Matter  
Anna Moss - [redacted] - Reckless Driving

Statute  
61-8-301 Reckless driving

Alford Plea

Death Penalty Eligible?

Sentence Duration

Occurred  
6/21/2021

Inactive  1

Inactive Reason  
--None-- 2  
--None--  
Amended  
Dismissed  
Incorrectly Entered

Charge  
CH-302268

Statute  
61-8-301 Reckless driving

Matter  
Anna Moss - [redacted] - Reckless Driving

Charge Number