Contractor & Vendor User Guide

ADVOPD DETAILED USER GUIDE AND FAQ
4/30/2024
CONTRACTS

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ADVOPD Contractor and Vendor Training Manual

Logging in to AdvOPD - Please Read

OPD's case management system is called AdvoLogix, all contractors (those that have MOUs with OPD) and service providers (those that perform work that OPD pays for) will now access their pre-approvals, supplementals, claims, and case lists in the AdvOPD Contractor and Service Provider Portal.

If you can not find the answer to your questions here please reach out to OPDOperations@mt.gov.

VERY IMPORTANT: Refer to the email provided to you with the email address OPD has on file for you. If you did not receive an email with this information, please contact opdoperations@mt.gov PRIOR to attempting to login.

Navigate to advopd.mt.gov (recommend bookmarking this for easy access) and select the Contractors & Vendors login option.

Chrome is the recommended browser for Salesforce.

Tips – Favorite or Bookmark the URL in your browser do you can easily access AdvOPD

** You must use the email we have on file, please do not select any of the social login options as you will not have access to the portal*

Introduction to AdvOPD

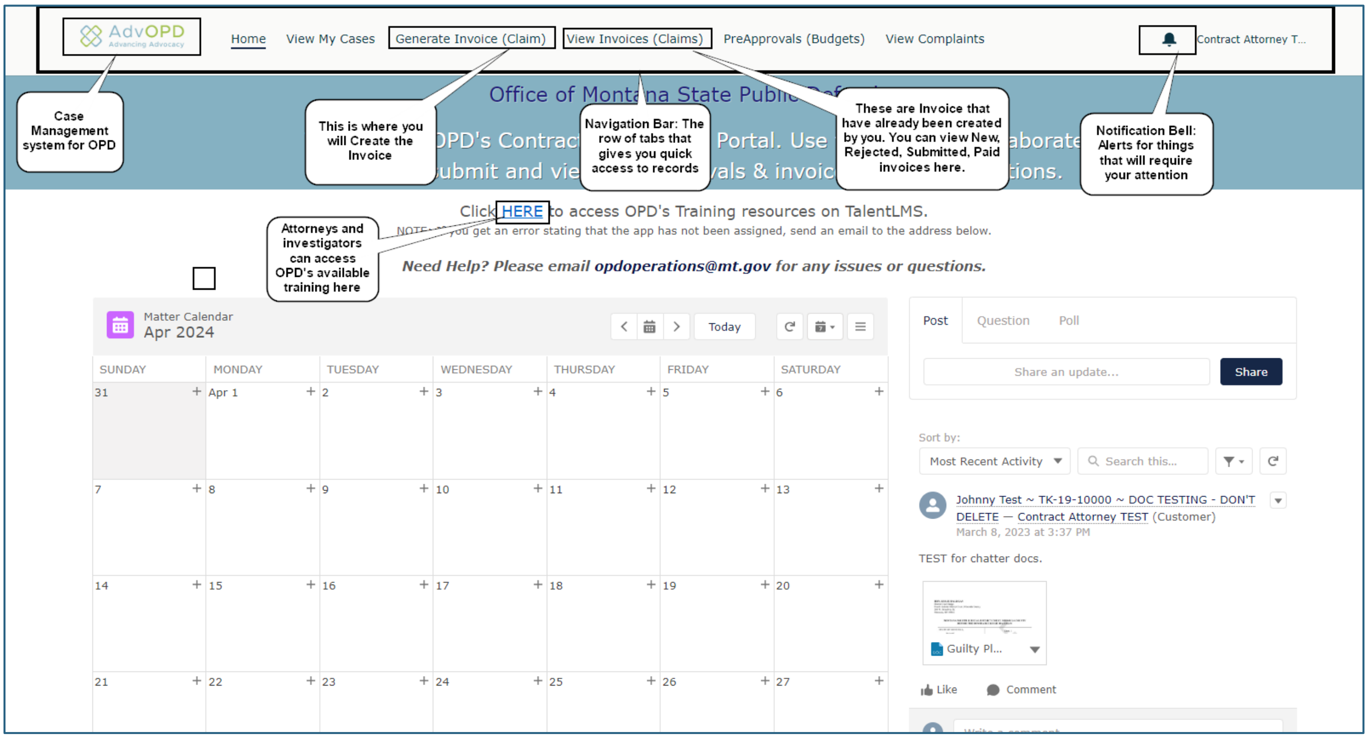
Overview & Terminology

AdvOPD is a Salesforce with AdvoLogix custom-built tools for OPD

When we say	We mean this	Example
Record	An item you are clicking on within AdvOPD.	Matter, Invoice, Contact, Budget, Budget Detail Etc..
Matter	A specific Case	Bingo Heeler TK-24-1234
Invoice	This is the container that you will ender line items into	INV-00012345
Line Item	These are the specific invoice items for a total month that will be entered into the Invoice	LI-001234
Budget	This is the entire amount requested by attorneys for external Service Providers.	BUD-001234
Budget Detail	This is the specific amount of money approved for a specific service provider	BDET-000123456
Pre-Approval	This is a request put in by an attorney for a specific amount of money that will create a budget detail	
Supplemental	This is a specific request for additional money requested by an attorney for a previously requested Pre-Approval	
Supporting Documentation	This is the documentation you create; you could refer to this as the invoice you would create for a private client. This can be a document that you or your own billing or case management system generates	Link an example of an invoice here
OPD ID	This is the Unique Identifier for a matter. Two or more matters can have the same cause number, but will always have a unique OPD ID	24-001234
Filing Cabinet	Matters and Invoices will have their own filing cabinets	
List View	A collection of records within an object displayed. **View Invoices, View My Cases, Pre-Approvals all have pre-set list views that will allow you to navigate through different stages and types of records.**	

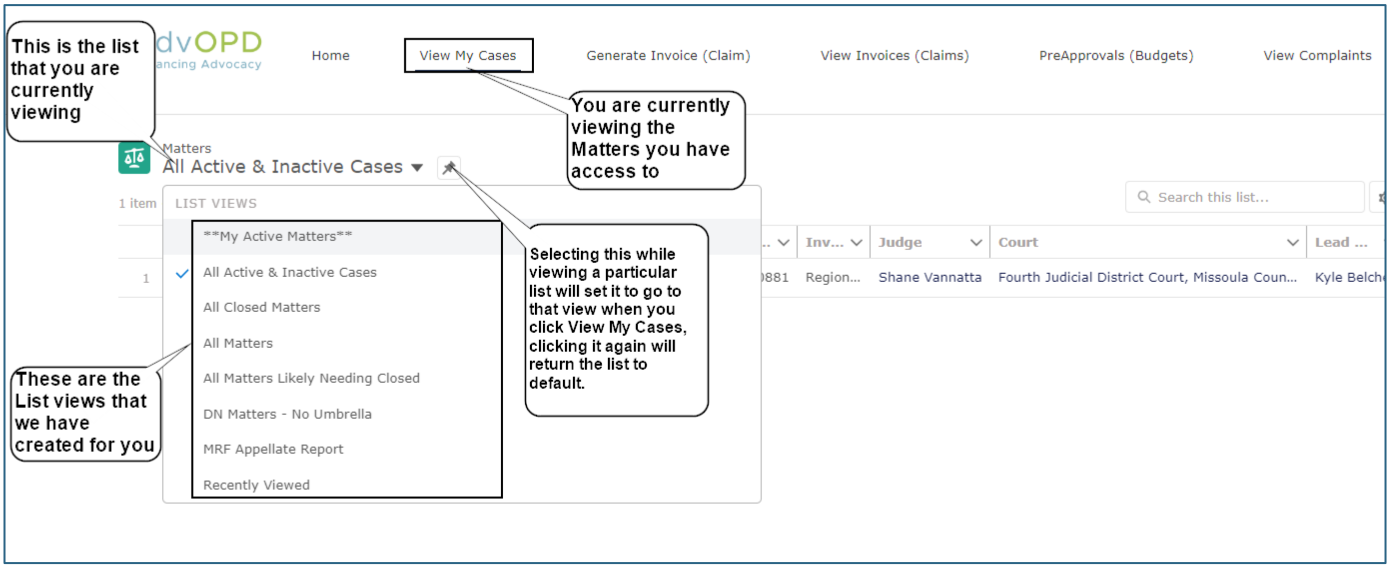
Platform Navigation & Quick Tips

AdvOPD Portal Home Page



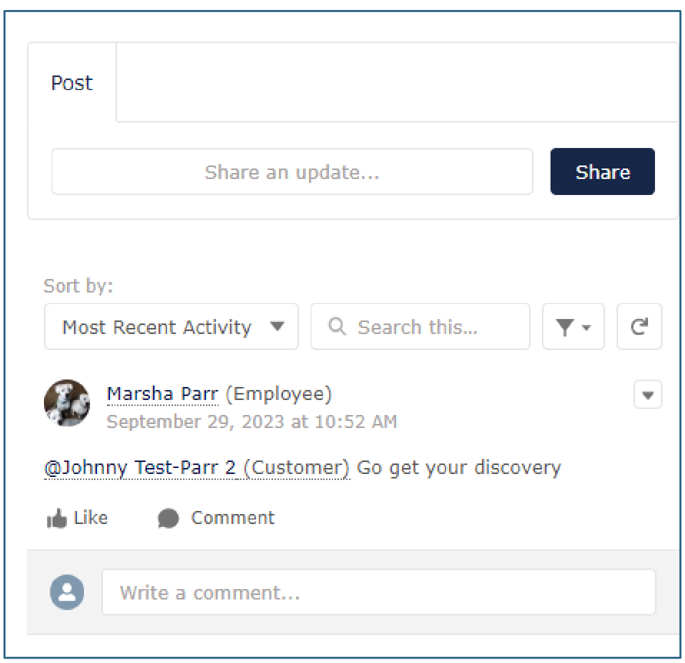
List Views

List views are a pre -selected fast and easy way to view information. We have created these for most of the Objects.



Chatter

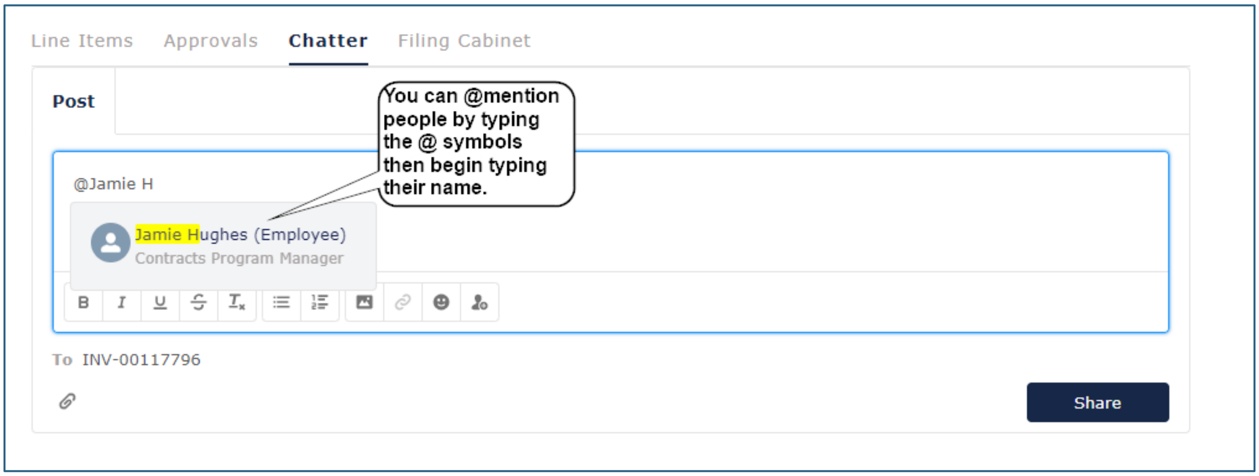
Chatter is a way to collaborate and communicate in relation to a specific page you are on.



To make a **general Chatter** post, type your message in the box

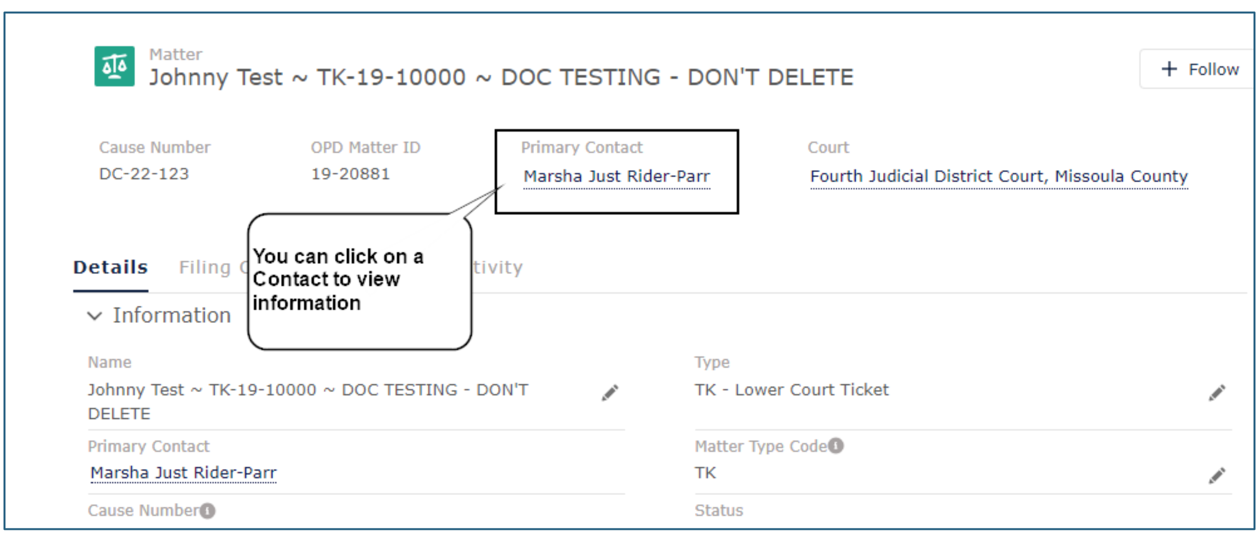
Customize the post with styles, bullet points, images, emojis, or @mentions.

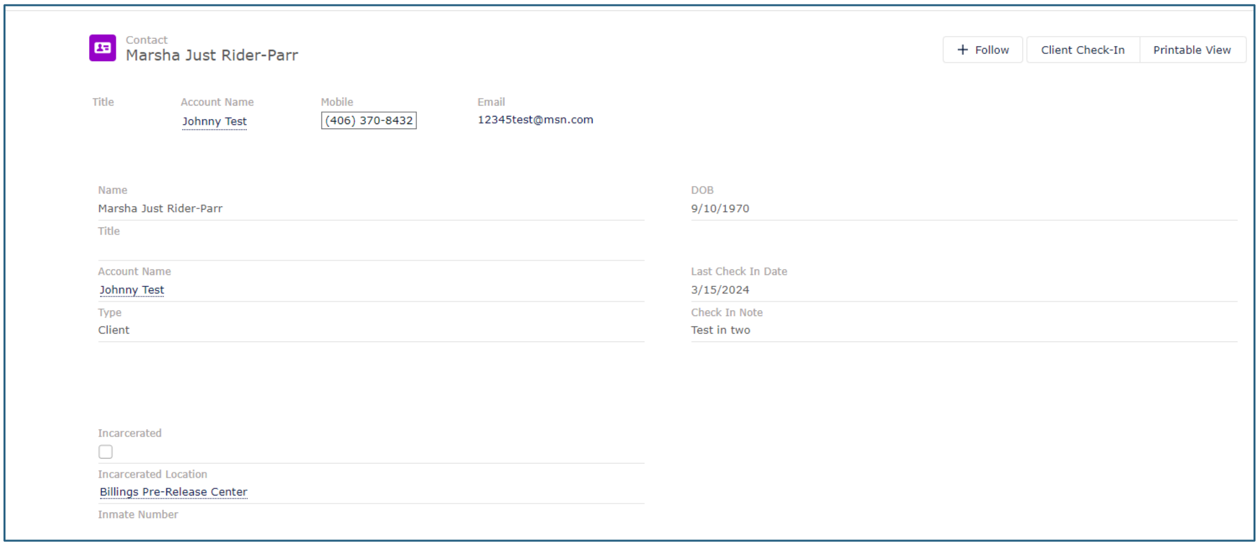
Click **'Share'** to publish the post.



Contacts

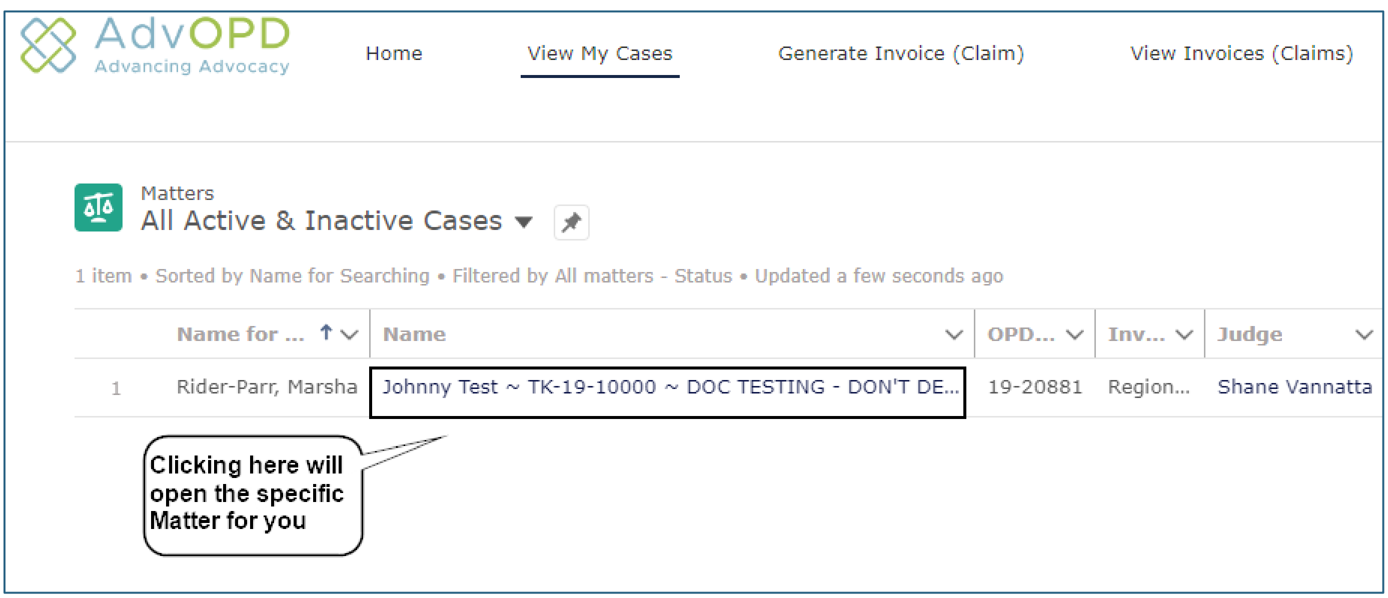
Contacts are specific people or entities related to the record, such as a client, court, expert ect.. If there is incorrect contact information or you have information to update, please email OPDOperations@mt.gov so we can ensure that information is correct.

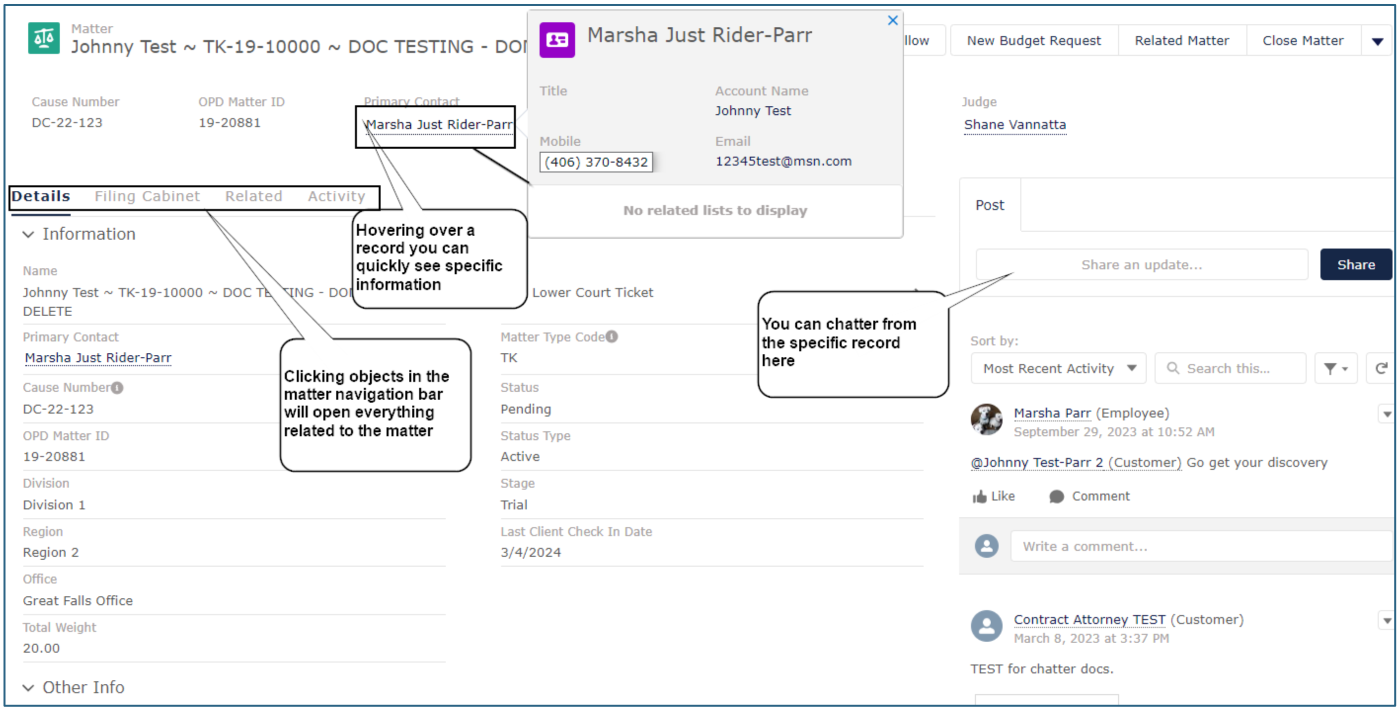




Matters

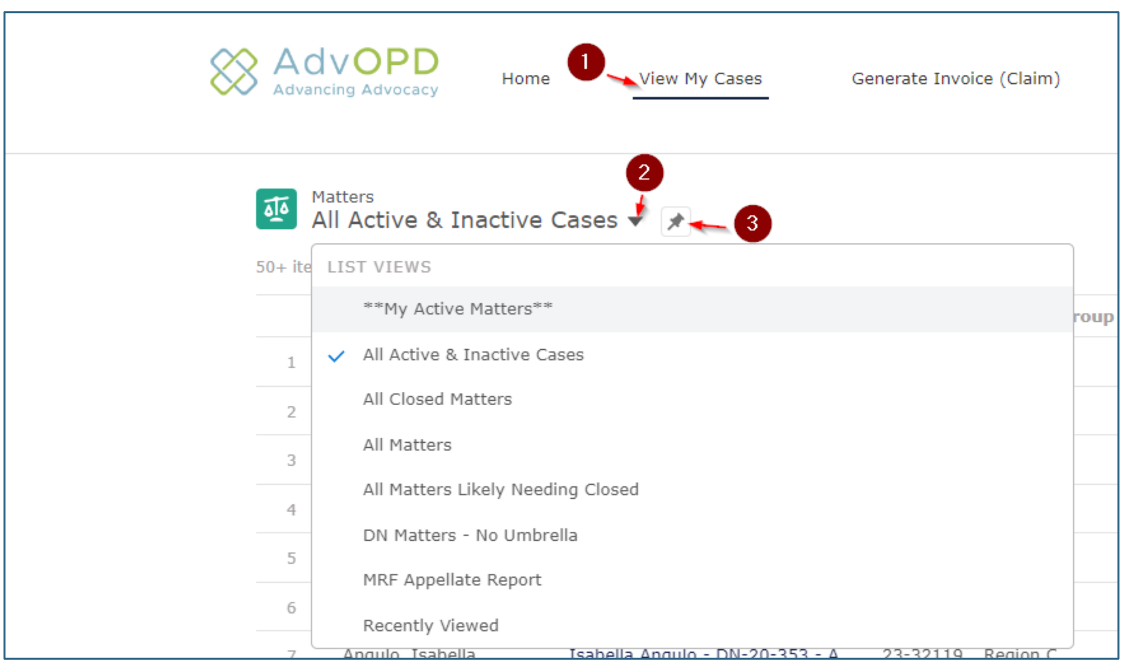
Matters are the specific cases within AdvOPD. This maintains a detailed description of all information relative to the case.





Viewing Cases

1. Use the navigation bar at the top of the portal and select **'View My Cases'**,
2. You will be brought to a list view named **All Active & Inactive Cases**,
3. If you select the push pin while on a specific list you will always be brought to that list when you click on **'View My Cases'.** Clicking the push pin again will unpin that list and the default **All Active & Inactive Cases** list will return to the default.



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 Invoice Group.
- To open a matter, click on the name of the matter to open that record
- The Invoice Group will tell you what invoice you will need to create to bill for that specific case

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.

Related Tab Overview – *Coming Soon*

Accepting and Declining Cases – *Coming Soon*

Pre-Approvals & Supplementals – *Attorneys Only*

Preapprovals are Governed by the Pre-Approval and Claims Procedure.

Preapprovals are a mandatory part of using third party contractors, no third party should start work until there is a preapproval in place. OPD cannot guarantee any payments to any party unless there's a preapproval approved. All third parties performing any OPD case work must be in the system. If you are looking for a Provider, Investigator, Expert or any other vendor that you would like to do OPD case work and they are not in our system please direct them to the link below or contact OPDOperations@mt.gov.

Interesting in becoming an OPD Contractor or Service Provider?

How does it work?

Preapprovals are requested from a case in AdvOPD and will then appear as approved funds on the case budget when approved. Once requested, there will be a review, usually by the Regional Manager at present (further approval may be required for larger preapprovals or Mental Health work).

The request will then be approved, denied or more information may be requested, so after submitting a preapproval request keep an eye on your email.

Contractors then will bill OPD through their own AdvOPD Account, rather than any charges being paid by counsel and claimed back. Contractors have a similar version of AdvOPD to your own and will have access to the same information in an AdvOPD case as you do once their funds are preapproved. Their billing is very similar to the billing a Contract Attorney uses, but a Preapproved Contractor cannot submit preapproval requests on their own.

For additional funds, you would submit a supplemental preapproval request which follows the same process, through the case view.

How does this look in Advo?

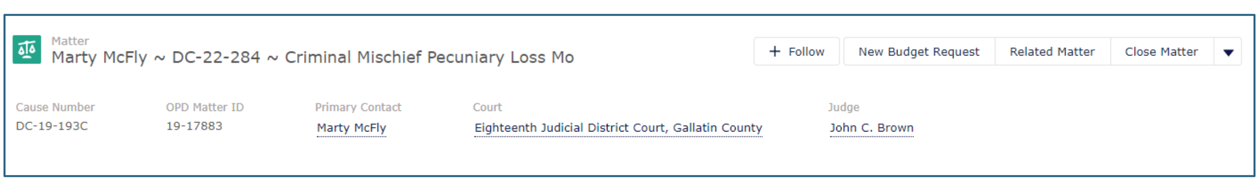
Log in to AdvOPD then go to **"View My Cases"** select the relevant case and click into it.

Tips

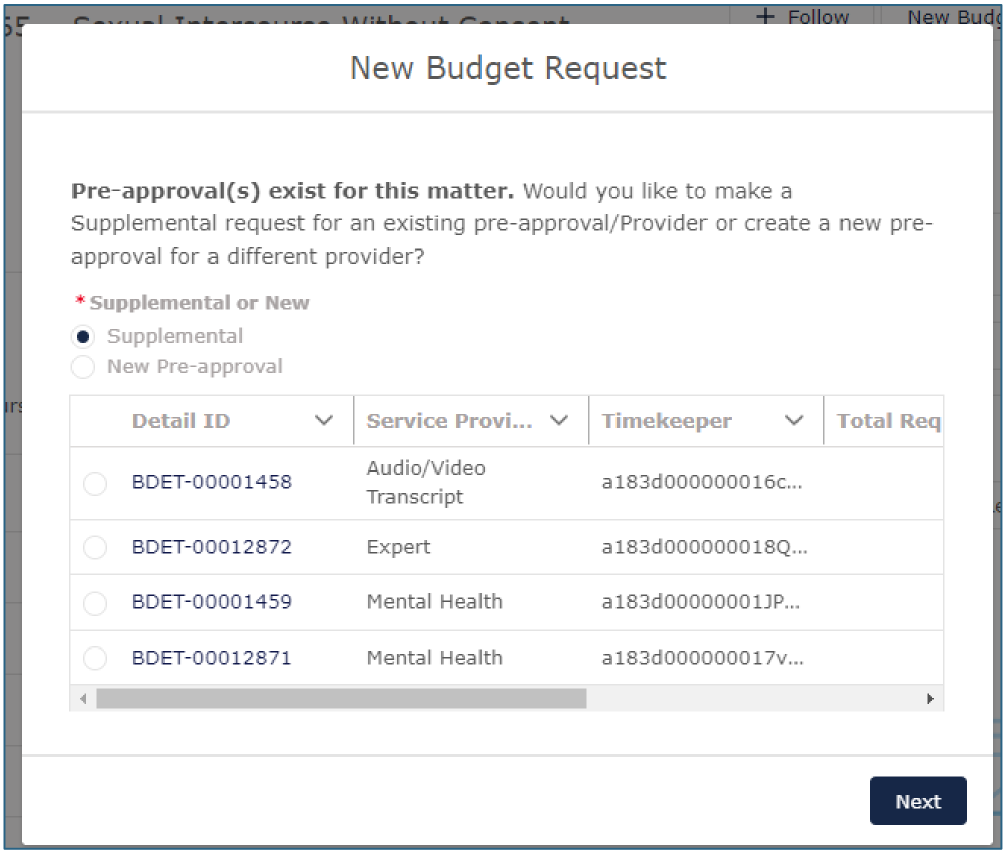
- You MUST select yes to travel if you and the provider have agreed it will be required. If you do not select yes the service provider will not be able to bill travel.
- ***'Timekepper'*** will be the name of the service provider. Some service providers have signed up under their company name. If you can not find them under their First and Last, you might be able to find them under their company name.
- Selecting Mental Health will provide you with an available list of flat fee services to choose from. Any work beyond the flat fee would need to be requested at the hourly rate.
- When filling in the justification. The more detail the better to prevent follow up questions from approvers. Please detail what type of contractor you'd like to use, why you need them, and what you hope to achieve from their services.
- Experts are relatively quick to onboard, however new Mental Health and Investigatory Contractors require an MOU and have an application process which is a little more in-depth and may take a little longer than the former.

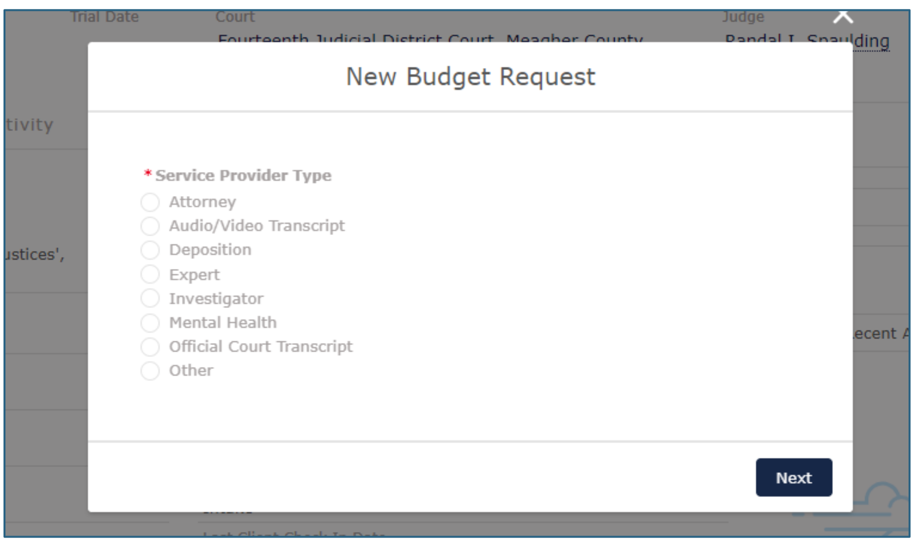
Creating a New Budget Request

Click on **New Budget Request** in the upper right hand corner.

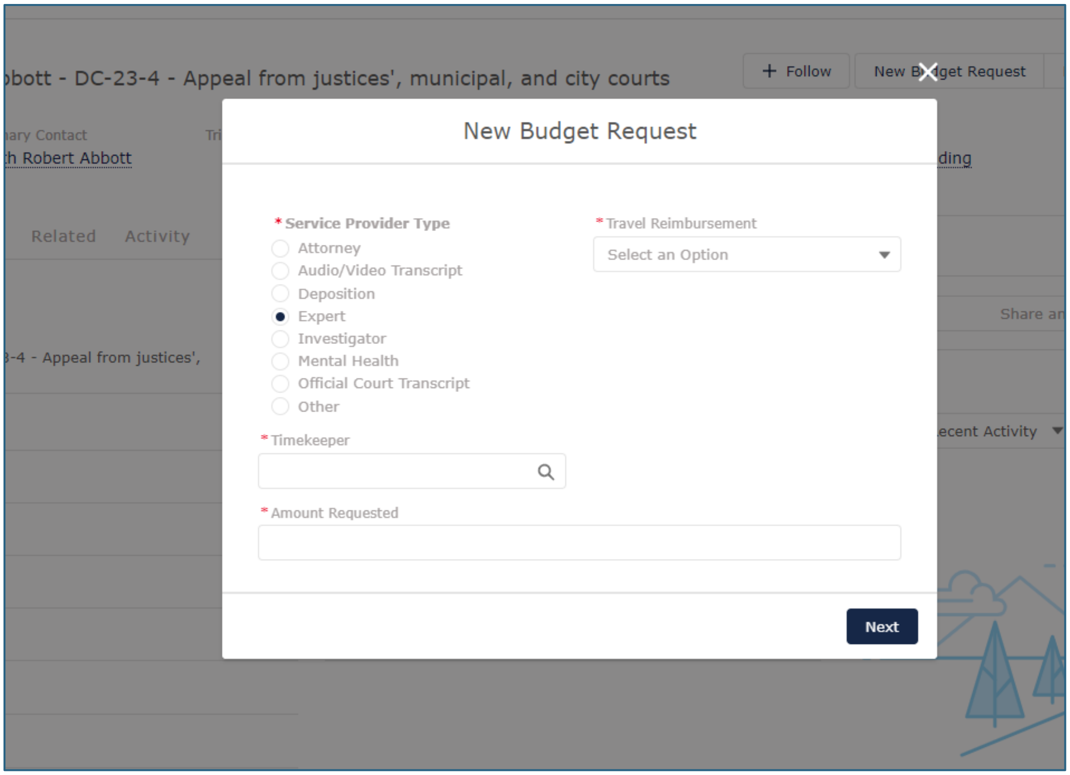


At this stage, if you have approved Pre-Approvals for this matter it will ask if this is for a Supplemental or a New Pre-Approval. Select from the list provided for a supplemental. Select Next.



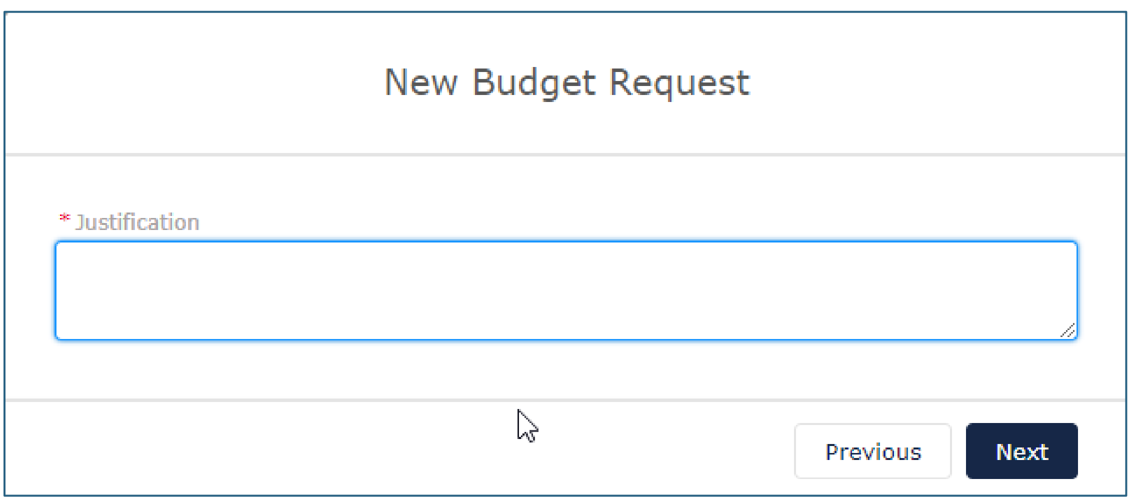


Fill out the Budget Request and select Next



Enter the justification and select Next

**When requesting official court transcripts or Audio Video be sure to review all selections. If you need an Expedited Court Transcript the box must be checked or the Court Reporter will not be able to bill correctly.*

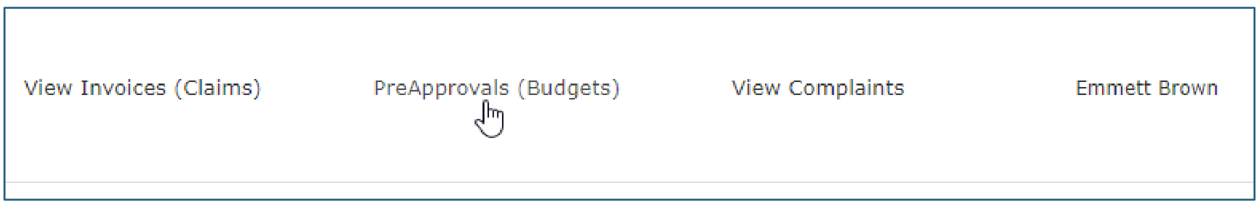


Once a preapproval request is submitted, you can find it by clicking the **Related** tab from the case which will show you all your budget requests. BUD # or the Budget is the full amount requested for the case. BDET # are the Budget Detail for specific Providers. You can then click into a given budget detail by clicking the budget detail number. You can also see the current budget and current charges against it from this view.

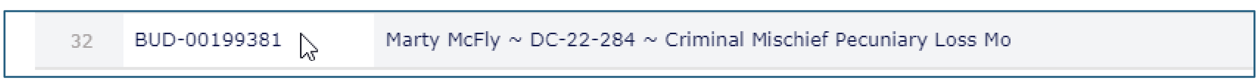
All Budget Details with Supplementals will have:

Base	Initial request for a Service Provider
Supplemental	Additional request for that same Service Provider
Parent	Record automatically created to link the Base with the Supplemental to track the total amount. This record will only be created when a Supplemental request is added.

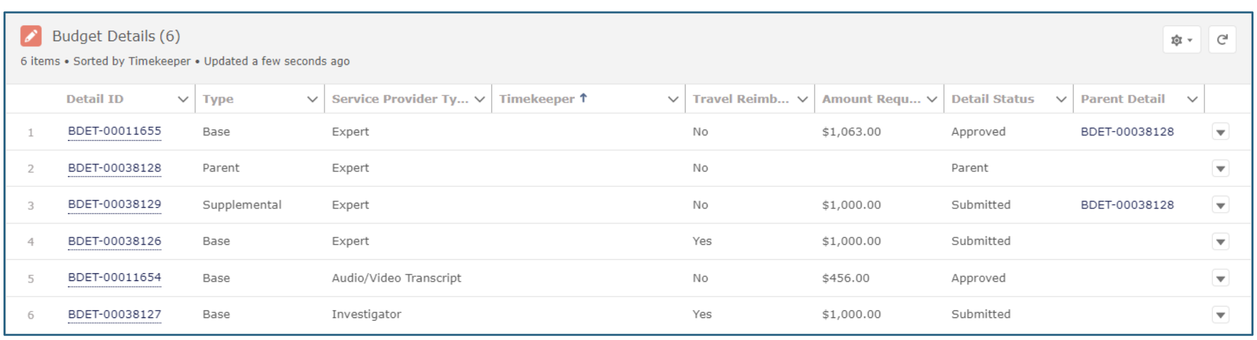
Alternatively, you can click the **Preapprovals** tab



This will display all case budgets for the cases you are assigned to. Click the budget number to see the full budget



You'll then be able to see a full list of the budget details, what is approved, submitted (pending approval) and denied etc.


Budget Details (6)
6 items • Sorted by Timekeeper • Updated a few seconds ago

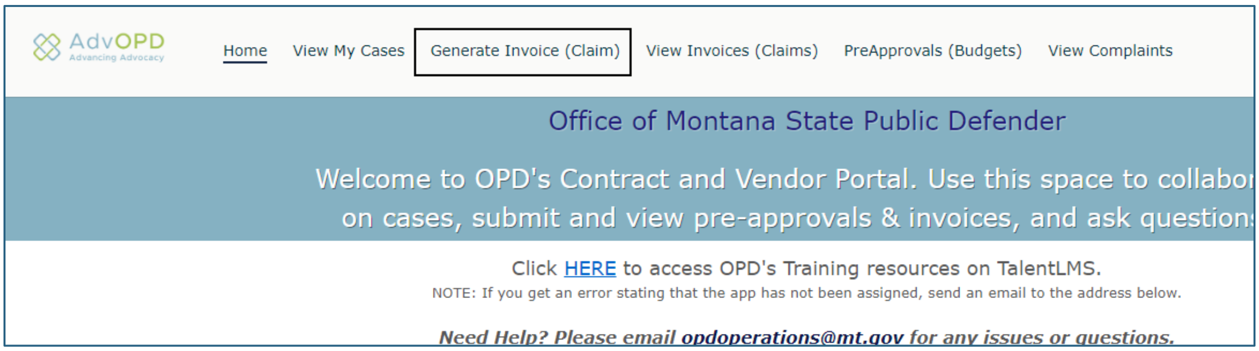
	Detail ID	Type	Service Provider Ty...	Timekeeper ↑	Travel Reimb...	Amount Requ...	Detail Status	Parent Detail
1	BDET-00011655	Base	Expert		No	$1,063.00	Approved	BDET-00038128
2	BDET-00038128	Parent	Expert		No		Parent	
3	BDET-00038129	Supplemental	Expert		No	$1,000.00	Submitted	BDET-00038128
4	BDET-00038126	Base	Expert		Yes	$1,000.00	Submitted	
5	BDET-00011654	Base	Audio/Video Transcript		No	$456.00	Approved	
6	BDET-00038127	Base	Investigator		Yes	$1,000.00	Submitted	

Creating and Submitting Invoice

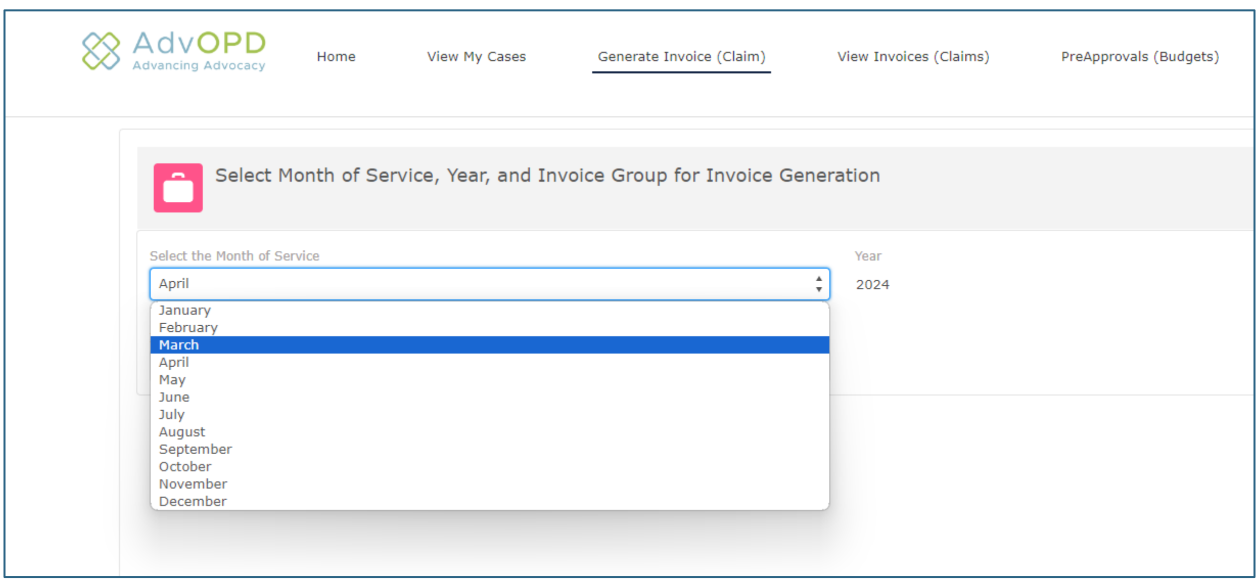
Generating a new Invoice

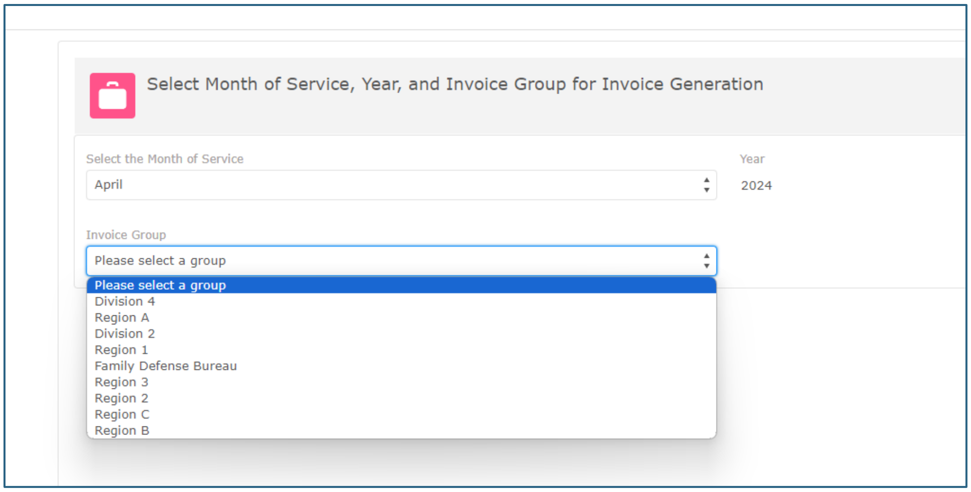
After logging into the AdvOPD Contractor and Vendor Portal, click the 'Generate Invoice (claim)' from the top navigation bar.

Attorney's Only – Attorneys can only create One invoice, per region, per month. All work for a specific month, within a region must be completed in one invoice.

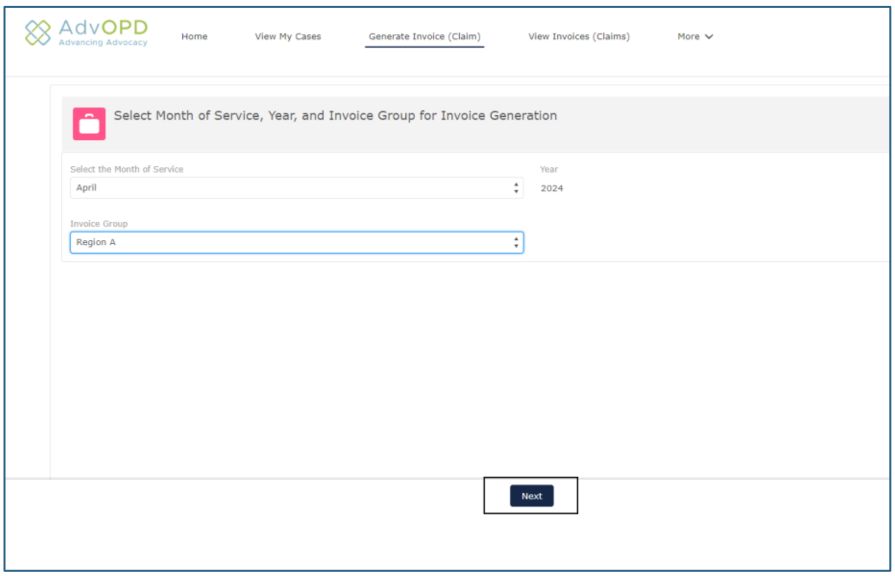


Select the month the work was performed. Then select the invoice group that you are creating the invoice for. If you are unsure of which invoice group a case belongs to, this can be found in the view my cases tab.





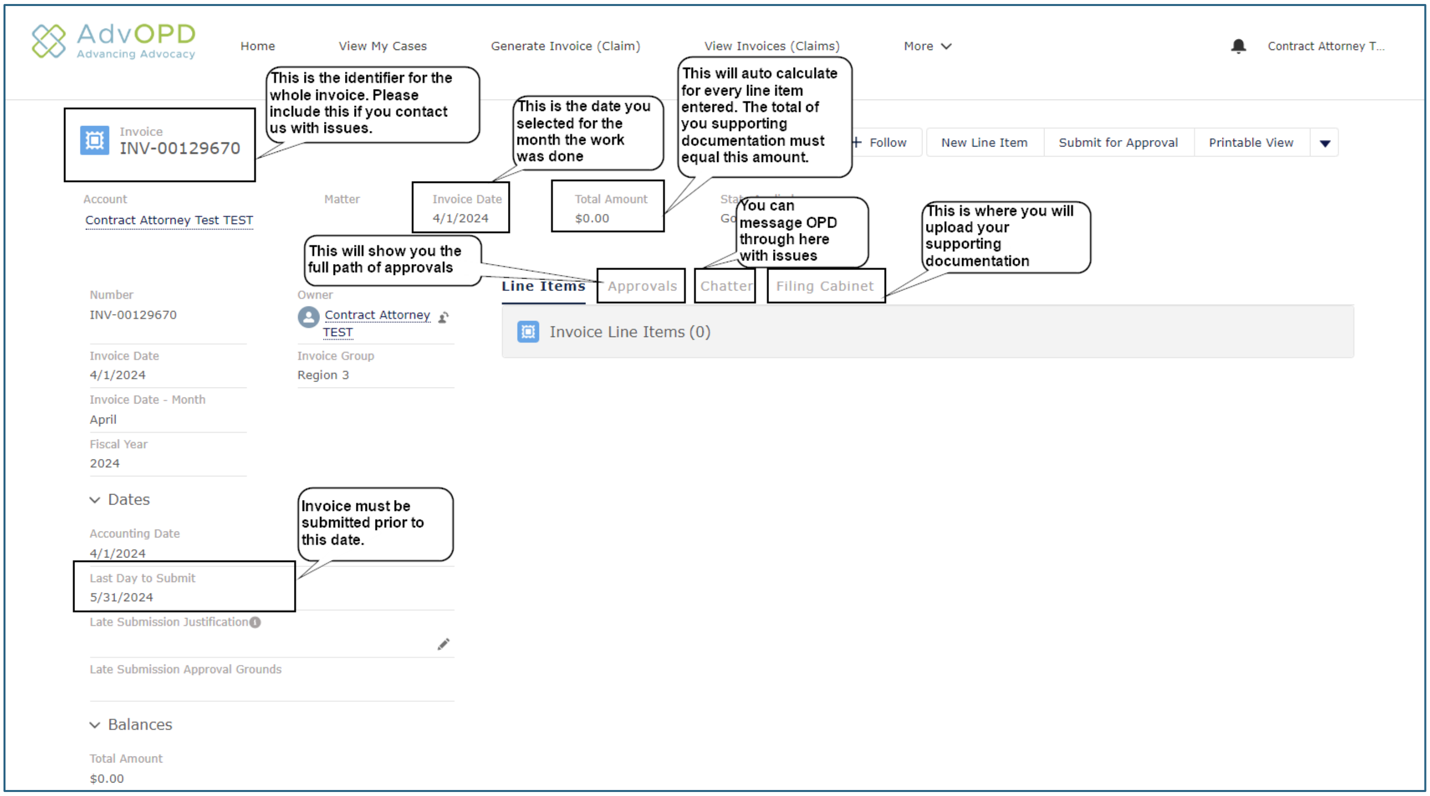
Then select next.



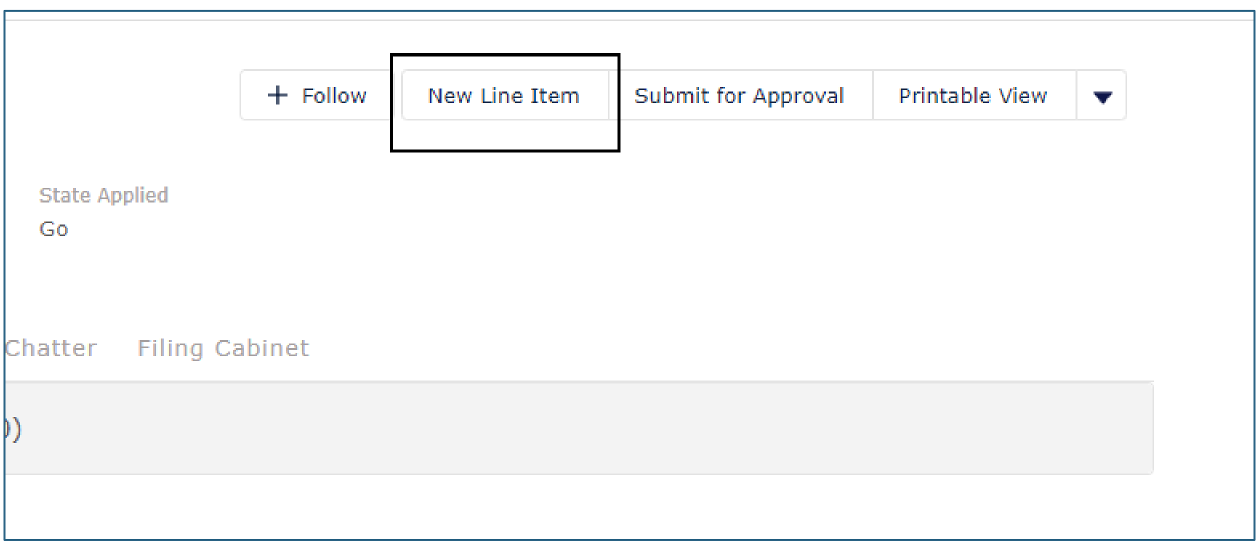
Tip – If you duplicate the tabs in your browser window you can easily view the invoice groups for all of you cases. We highly recommend including the Invoice Group on your supporting documentation to help assist in knowing what group a case belongs to.

Adding Line Items

Once you hit next the invoice will automatically open .



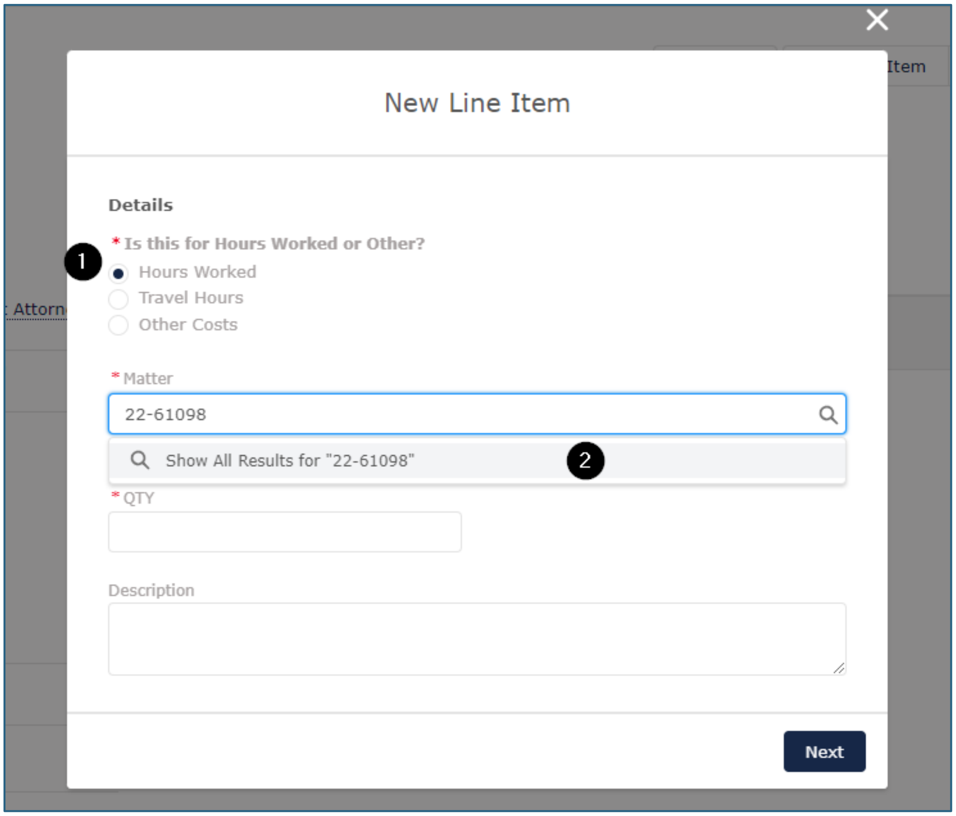
Select New Line Item

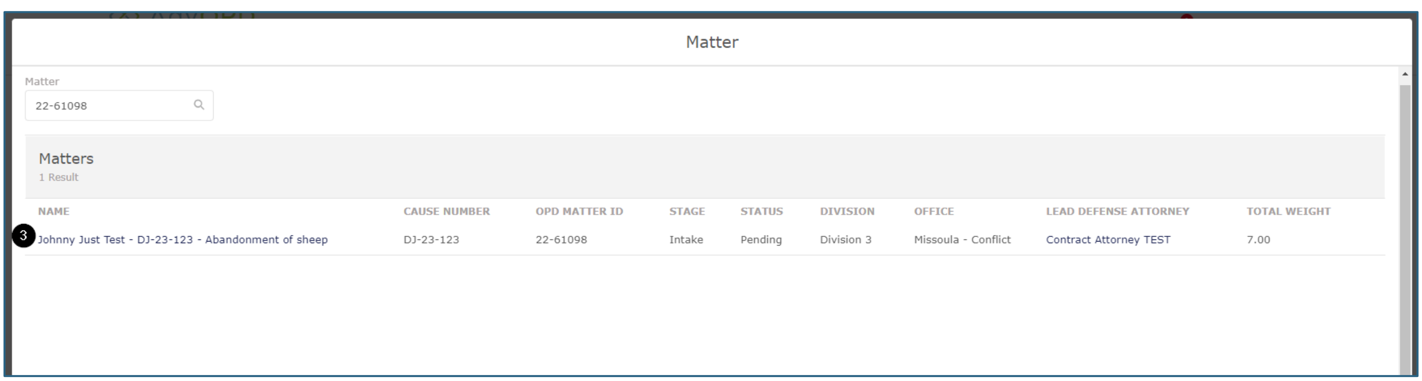


A box will open to guide you through adding the line items. One line item should contain the entirety of the work for that matter for that month. You will only have one line item for hours worked per matter.

Adding Hours Worked

Select the Hours Worked, enter the matter. You can find the matter by entering the client name or the OPD ID. If you have a client with multiple matters, confirm it is the correct case by clicking in the Matter text box and selecting "Show all results" and selecting the correct matter.

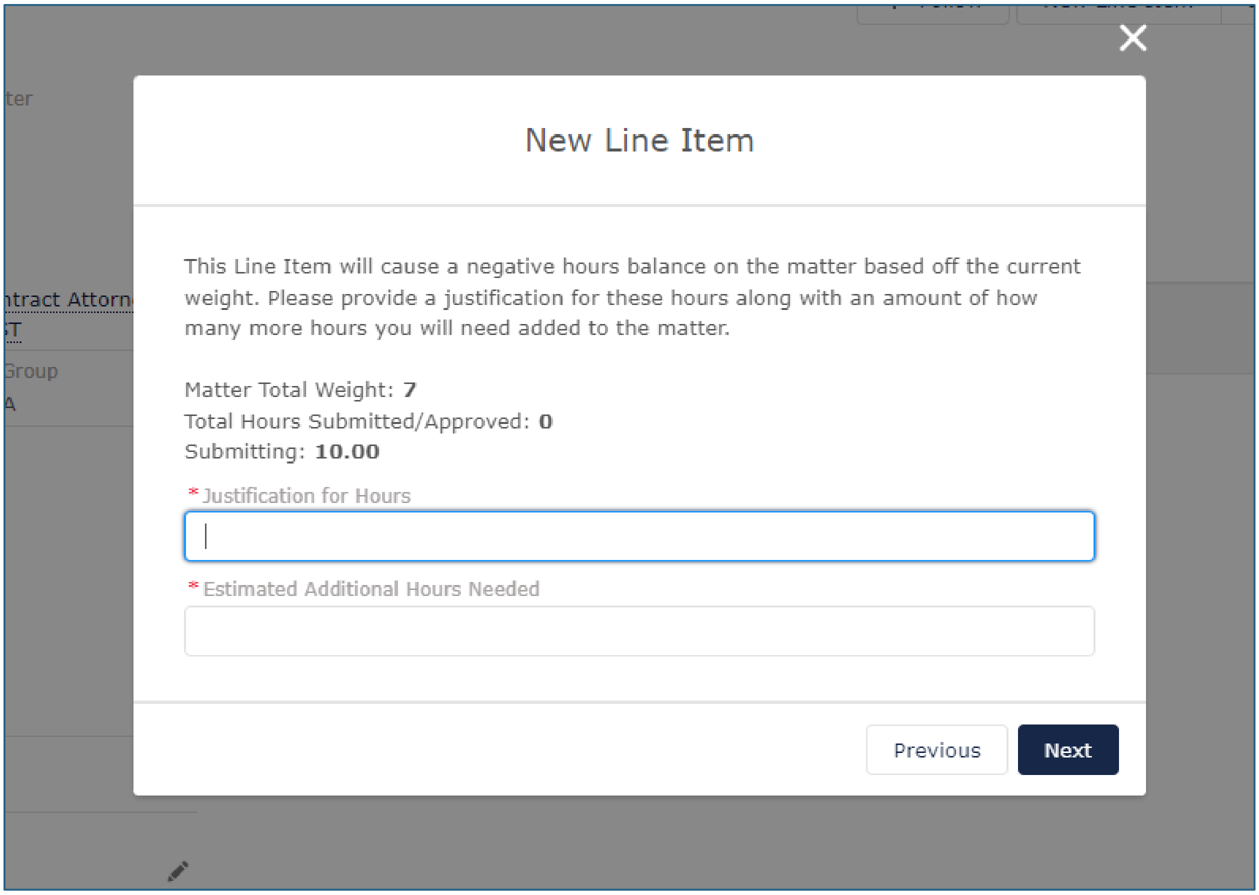




After you have selected the correct matter enter the total number of hours work for the month for that case in to the QTY box. At this time you do not need to enter a description as your uploaded documentation will suffice. Then select next.

Attorney's Only – Justification For Hours

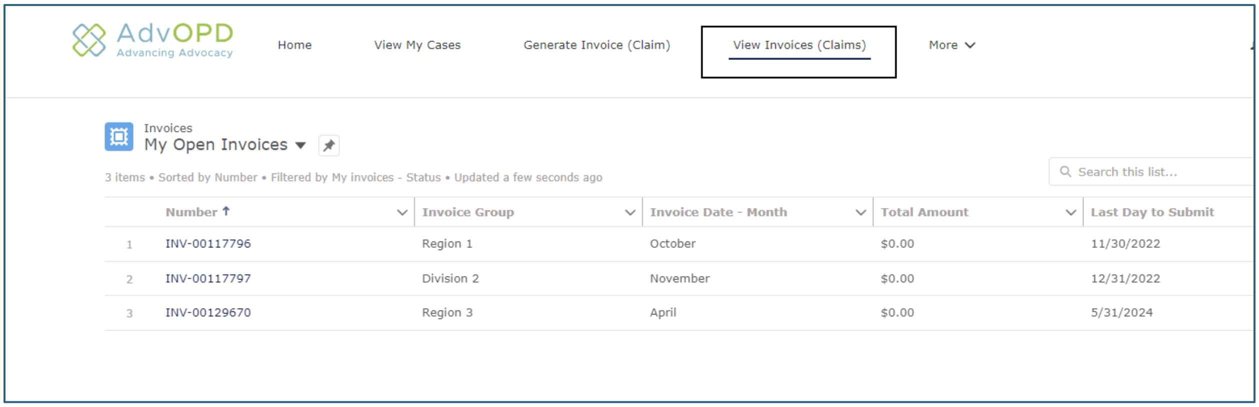
If work beyond the total matter case weight has been entered, you will be asked to enter a justification for this. This helps OPD understand if case weights are appropriate in their setting and as we collect further data will help us adjust in the future.



Once you select Next the line item will be created.

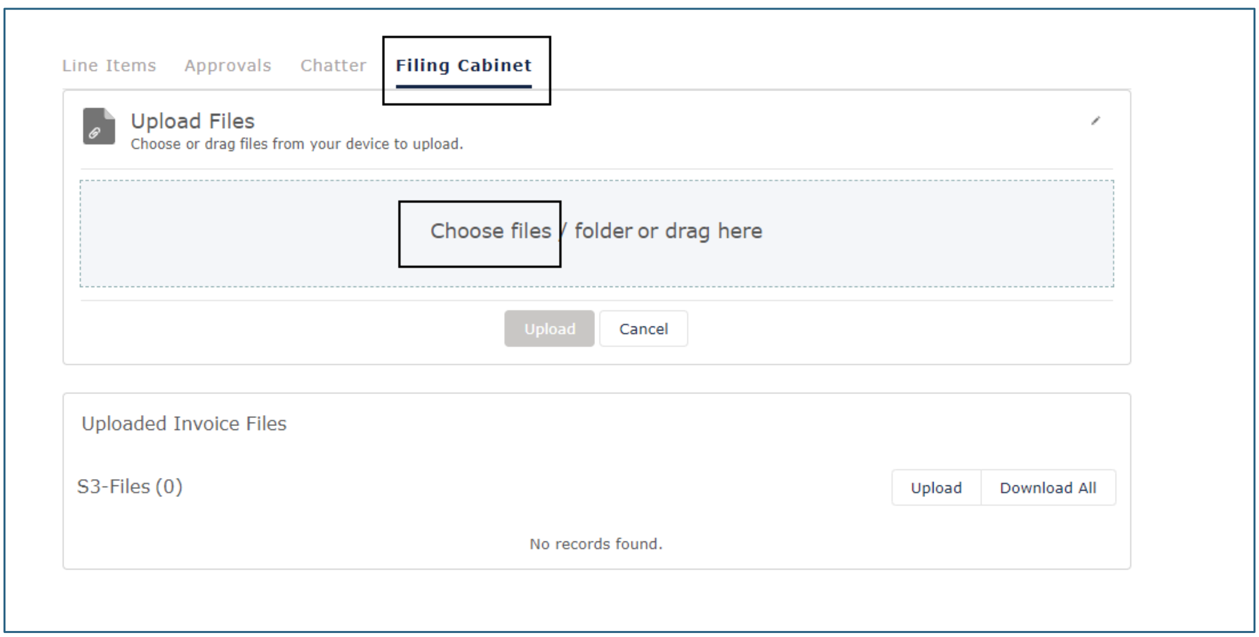
Once all the Line items have been created and your supporting documentation is uploaded select the submit for approval button.

Tip - Once an invoice has been created you can start and come back to the invoice with out needing to create another invoice. The invoice is now an OPEN invoice that will be in 'New' Status until it is submitted. You can select the 'View Invoice (Claims) tab to view all your open invoices that have not been submitted.



Uploading Supporting Documentation

Click the 'Filing Cabinet' tab above the box that you enter your line items. Then select Choose File. This will open a window with your documents. Find your document and select open. This will place the file in the Cabinet for review. If you have multiple documents, combining them is helpful and can speed up the review process.



Billing Assignment Incentives

This guide shows exactly how to bill for the incentive within the platform.

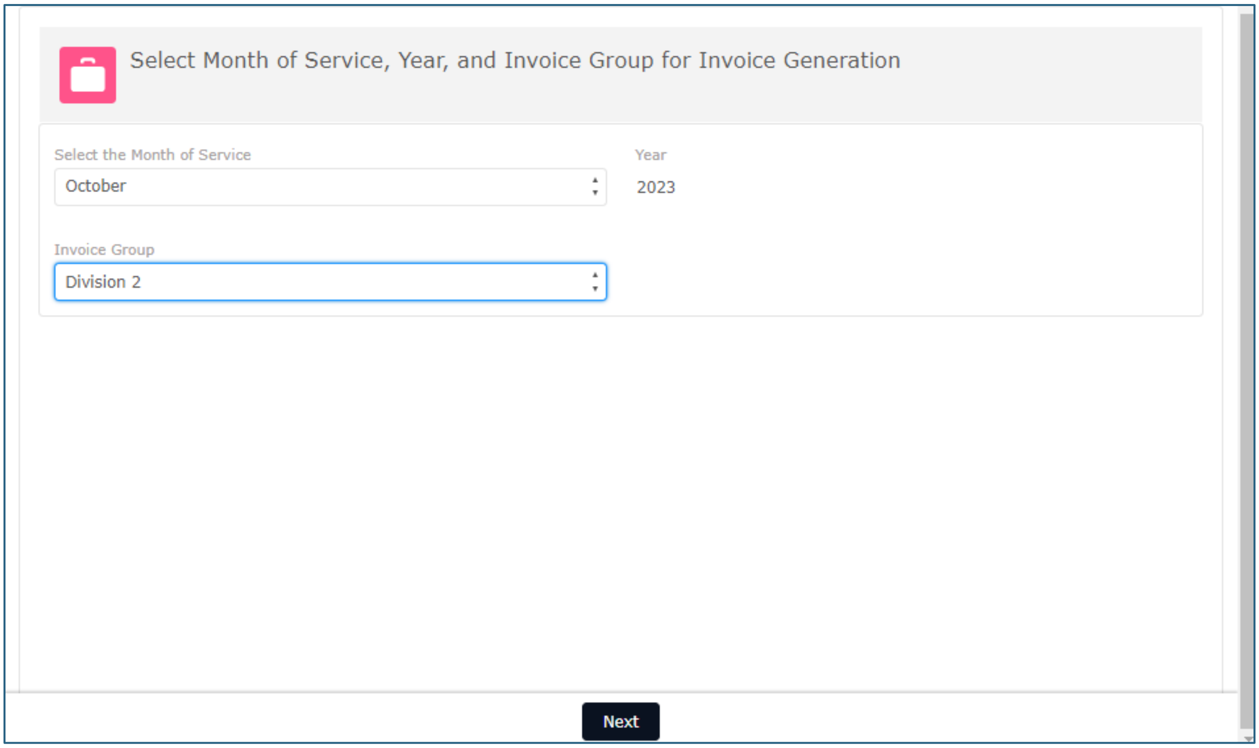
If you are not familiar with this incentive, a brief recap:

- A one-time incentive may be offered by OPD for certain cases.
- At present an Assignment Incentive of $500 is available for Appeals that are considered backlogged assigned to Contractors since September 1st 2023.

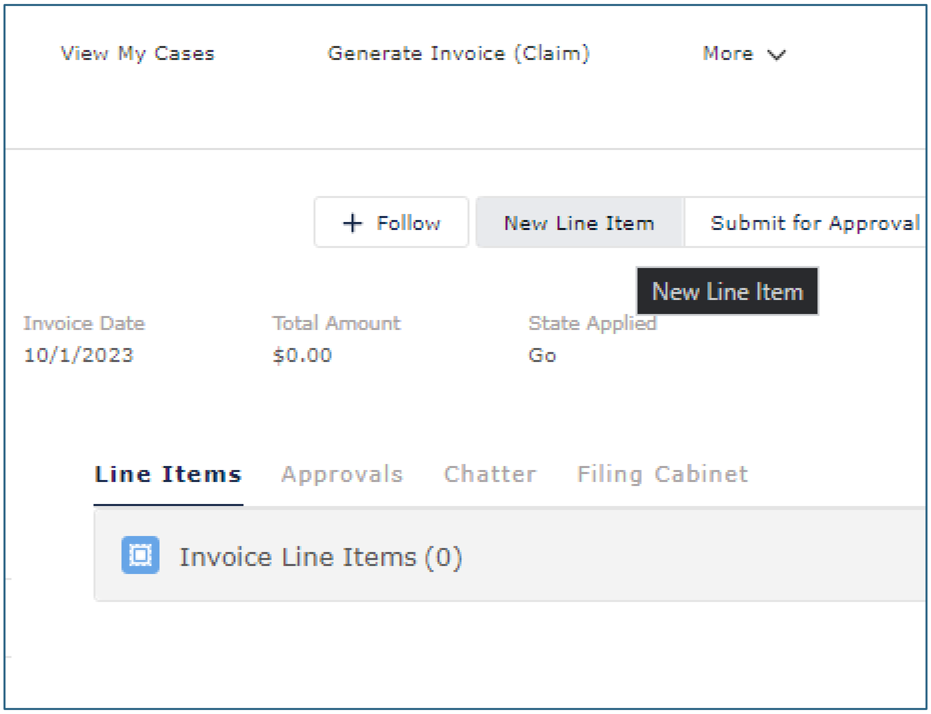
- This incentive is offered in addition to work (or travel) billed hourly through AdvOPD and is billed in the normal invoice for a given invoice group.

AdvOPD Process for EPS Billing

Generate an invoice for the relevant region and month for any case got an assignment incentive in (as of the time of writing these incentives will all be on Division 2 Invoices. The Assignment Incentive is your monthly invoice.

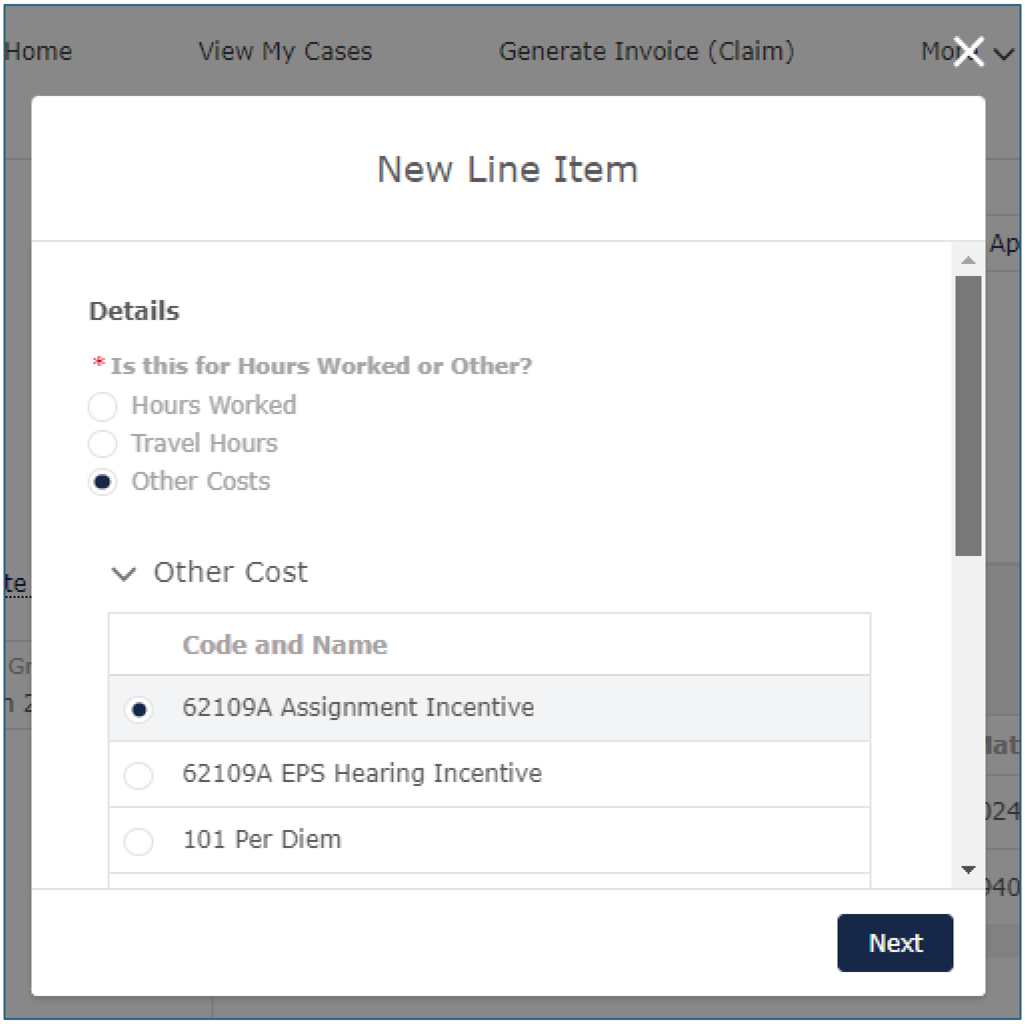


Next, go to **New Line Item** and click it, to add the incentive(s) to your claim.



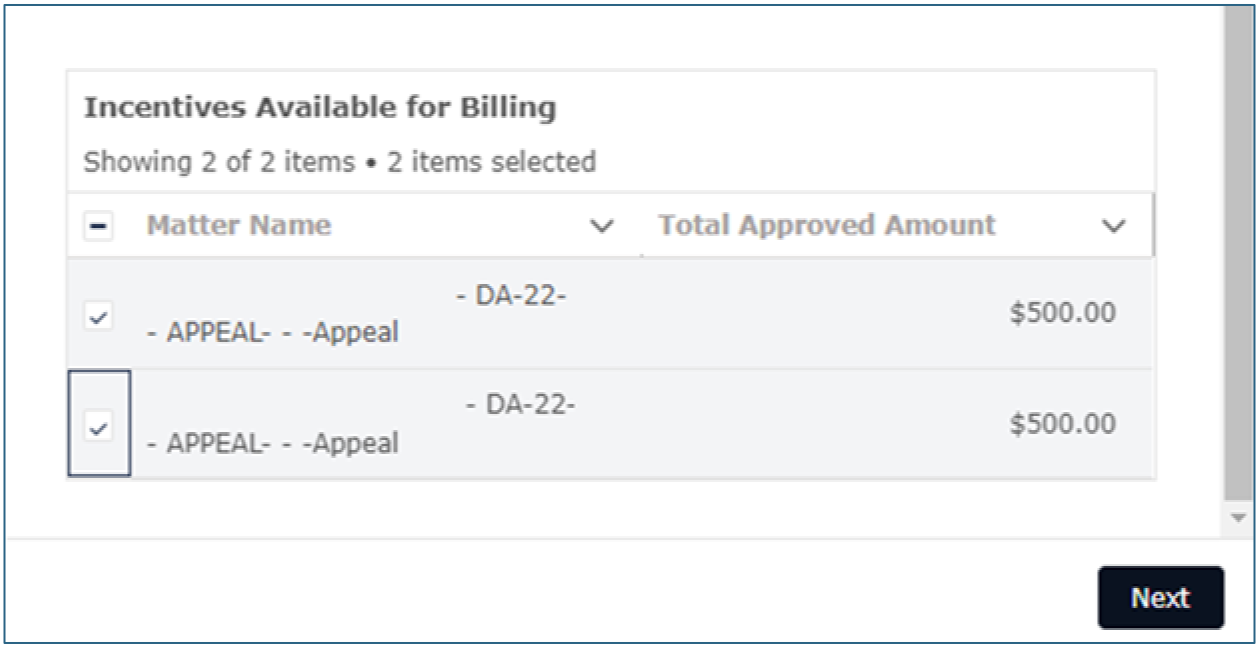
Select **Other Costs** then click the checkbox next to “62109A Assignment Incentive”. Once this is done scroll the gray side bar on the right of the New Line Item to scroll down and select any relevant Assignment incentives. Do not click next until you have scrolled down and checked any applicable cases.

You will see a list of all the cases where the system shows you accepted a case eligible for an assignment incentive in a multi-select list. You can click all of them at once rather than adding a line item for each manually.

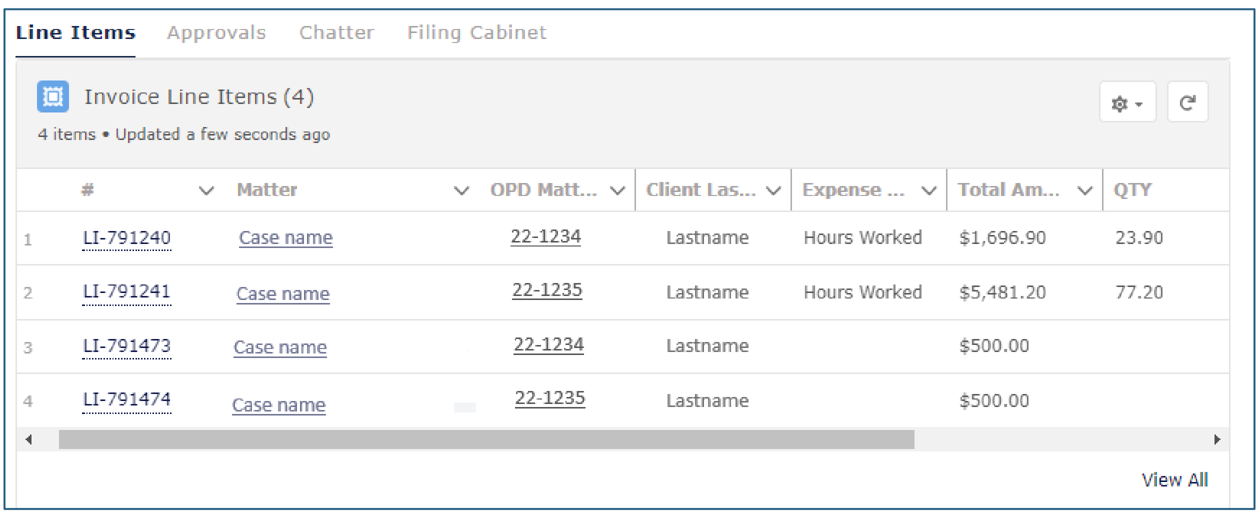


Tip: Is a case missing from this list where you accepted a case and believe you are eligible for an incentive? If so, please email OPDOperations@mt.gov for support.

Once you have checked all the incentives you wish to add to your invoice, press **next**.



All the cases now have line items on your monthly invoice for that region as in the screenshot below. Here line items 1 and 2 are for hourly work while 3 and 4 are for Assignment Incentives.


Line Items | Approvals | Chatter | Filing Cabinet

Invoice Line Items (4)

4 items • Updated a few seconds ago

	#	Matter	OPD Matt...	Client Las...	Expense ...	Total Am...	QTY
1	LI-791240	Case name	22-1234	Lastname	Hours Worked	$1,696.90	23.90
2	LI-791241	Case name	22-1235	Lastname	Hours Worked	$5,481.20	77.20
3	LI-791473	Case name	22-1234	Lastname		$500.00	
4	LI-791474	Case name	22-1235	Lastname		$500.00	

View All

After this, proceed to add your hourly work for those cases and any other in the invoice group for the month. Then add the supporting documents to the invoice filing cabinet then hit submit for approval like all other invoices.

Example Invoices - *Coming Soon*

Attorney

Investigator

Mental Health Provider

Experts and all other vendors

E-Filing

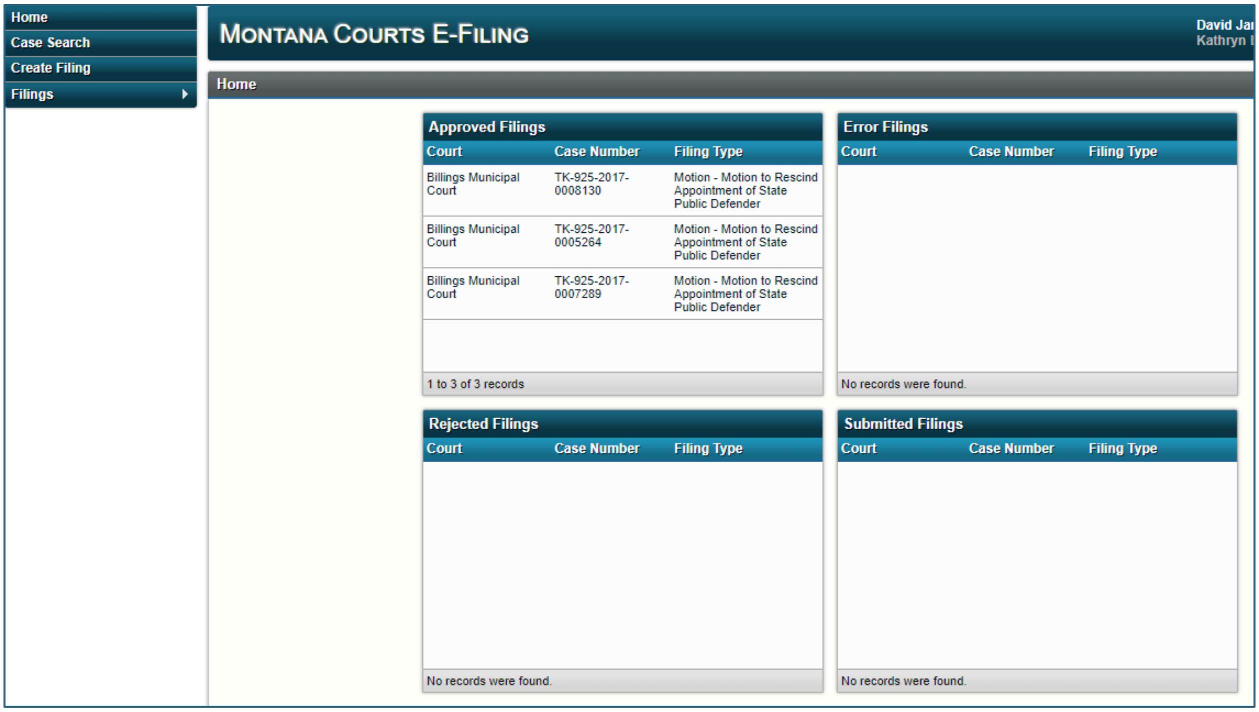
Once you are logged in, you can see this view.

Approved filings indicate ones the Clerk has accepted, date stamped and added to the case.

Rejected filings are roughly what they sound like, you would need to click back into them, make the changes the clerk requests and resubmit.

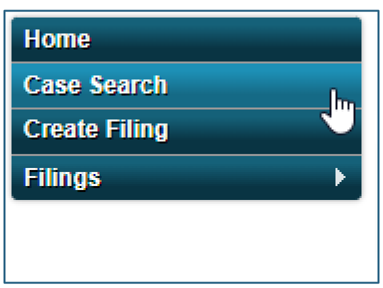
Submitted filings are those that are submitted but not yet approved. Once submitted they go to the Clerk of District Court's "filing queue" for a Deputy Clerk to process. They are generally processed "first come first serve" unless something is marked "Emergency filing" which will put it to the top of the queue.

Error filings are not in the queue or on the record but have been submitted. This is where the E-filing system itself has had an error. Usually the E-filing project will email you about outages once you're signed up and generally error filings occur when people file during a system outage. These need to be resubmitted (once an outage has ended, if there was one).



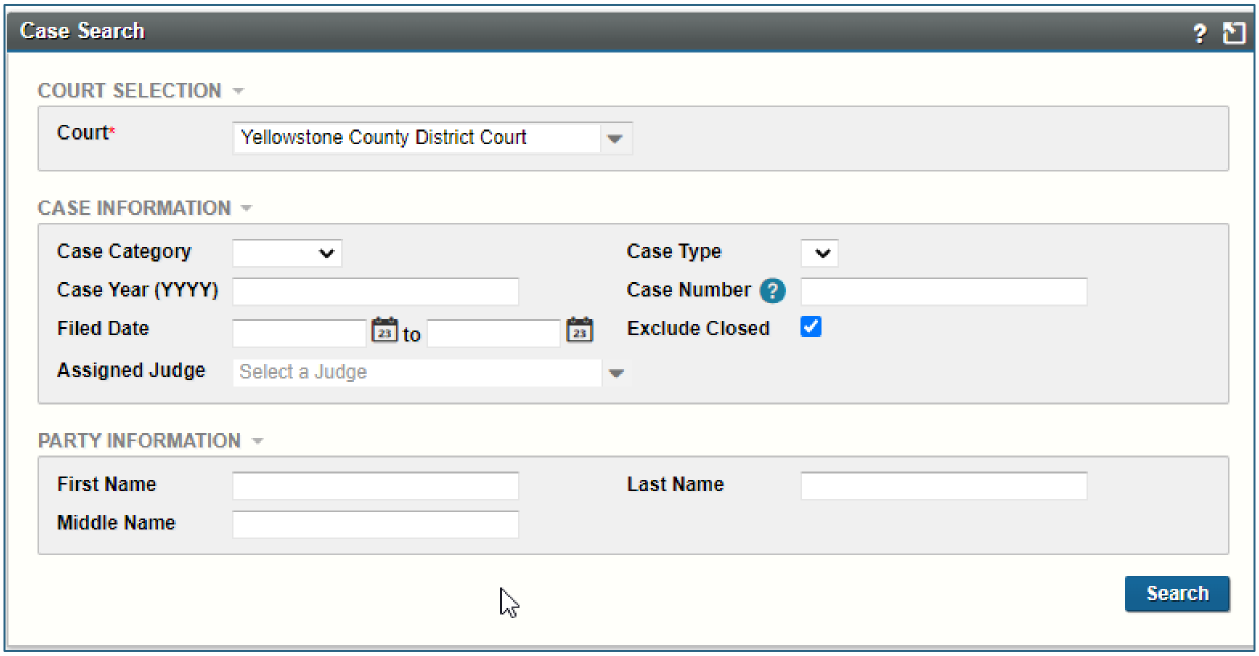
Looking up cases

To find a case and check if you're noticed up on in E-filing hit "Case Search" (shown below) which is in the top left of the screen.



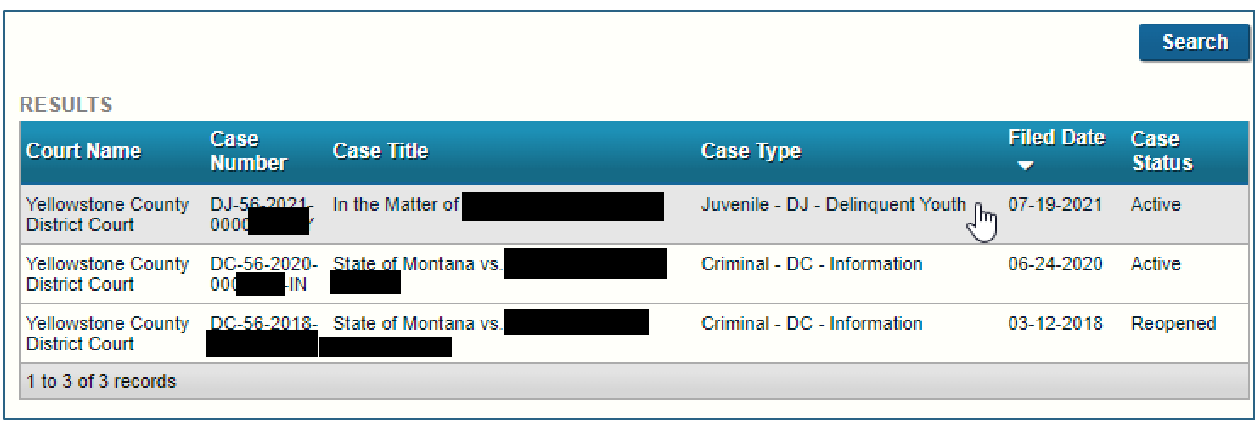
You will then get the below view.

Select the Court (if it is not whichever court you set as your default) and then use whichever search field you'd like. So for DC-22-21 John Smith, you'd search for Smith if using last name, or DC-56-2022-1 if you're searching by case number. Hit search when you're ready.



Underneath your search window, if there's any results, you'll get a list of cases which match when you're searching for.

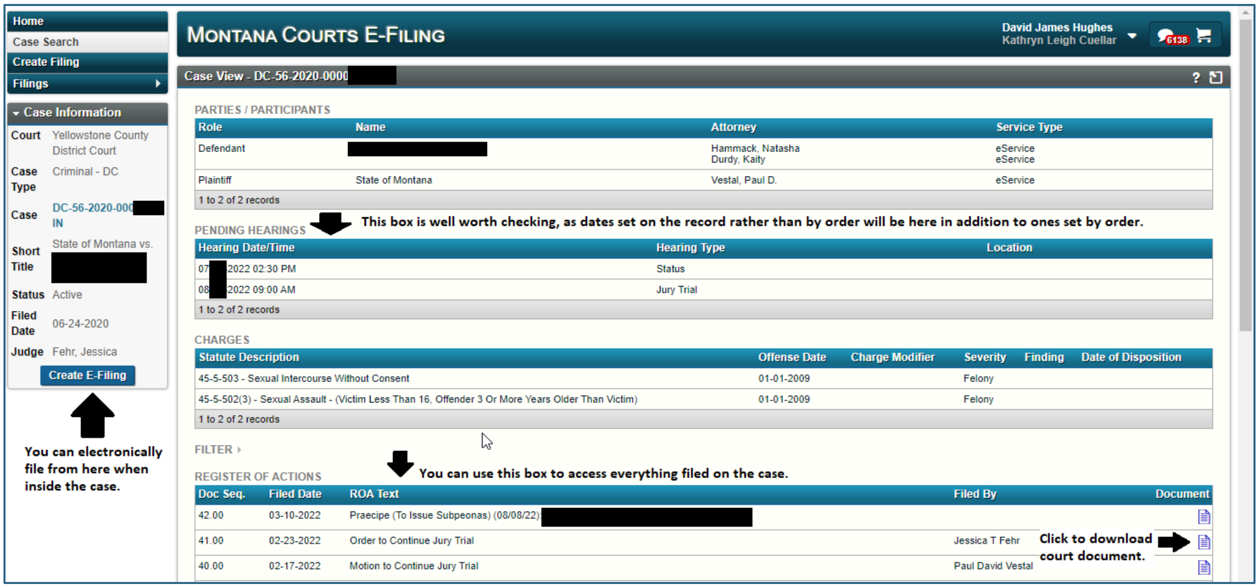
So if you has a client named Smith with 3 cases in Yellowstone County District Court and searched "Smith" as last name, it will allow you to see all three Smith cases in the results box. From here you can click into a case. Your own search won't have redacted boxes, naturally.



Court Name	Case Number	Case Title	Case Type	Filed Date	Case Status
Yellowstone County District Court	DJ-56-2021-000[redacted]	In the Matter of [redacted]	Juvenile - DJ - Delinquent Youth	07-19-2021	Active
Yellowstone County District Court	DC-56-2020-000[redacted]-IN	State of Montana vs. [redacted]	Criminal - DC - Information	06-24-2020	Active
Yellowstone County District Court	DC-56-2018-[redacted]	State of Montana vs. [redacted]	Criminal - DC - Information	03-12-2018	Reopened

1 to 3 of 3 records

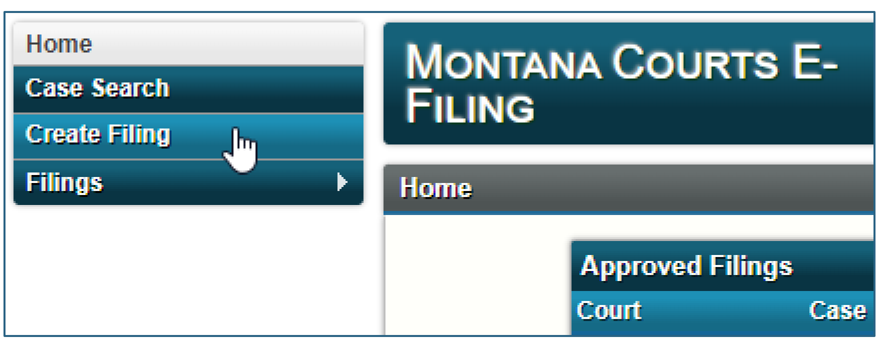
This is how it'll look once you click into a case.



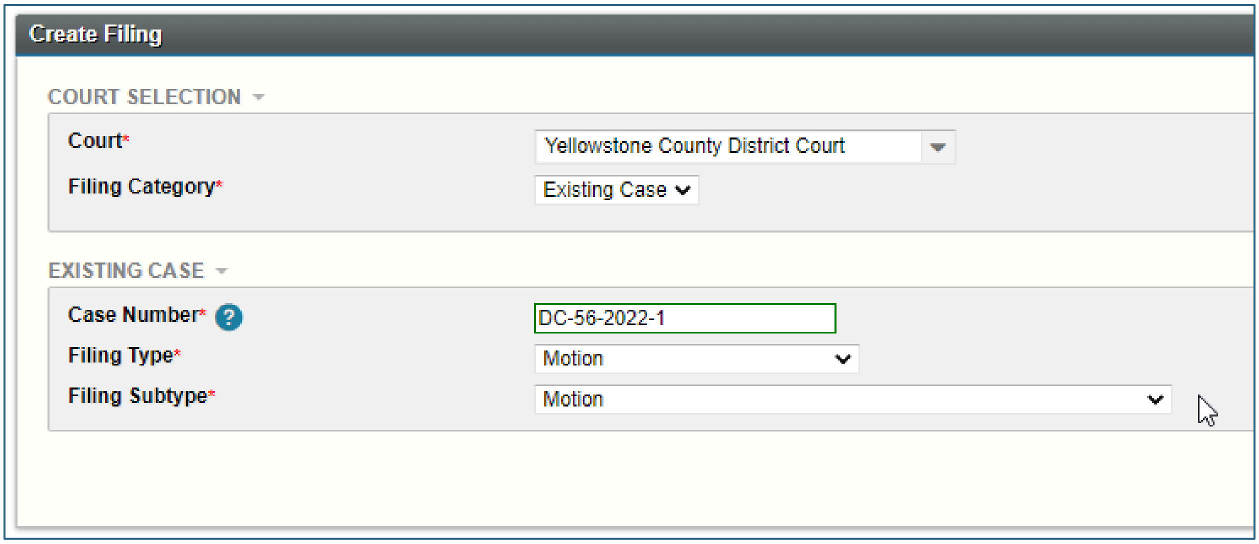
Filing on cases

There are two main ways to e-file from within the system. If you've got the case open (as in my prior screen shot). They are fundamentally the same process, however, if you e-file from within a case the case number the case-number field will be filled out automatically (if you click "Create Filing" in the top left it you manually enter it).

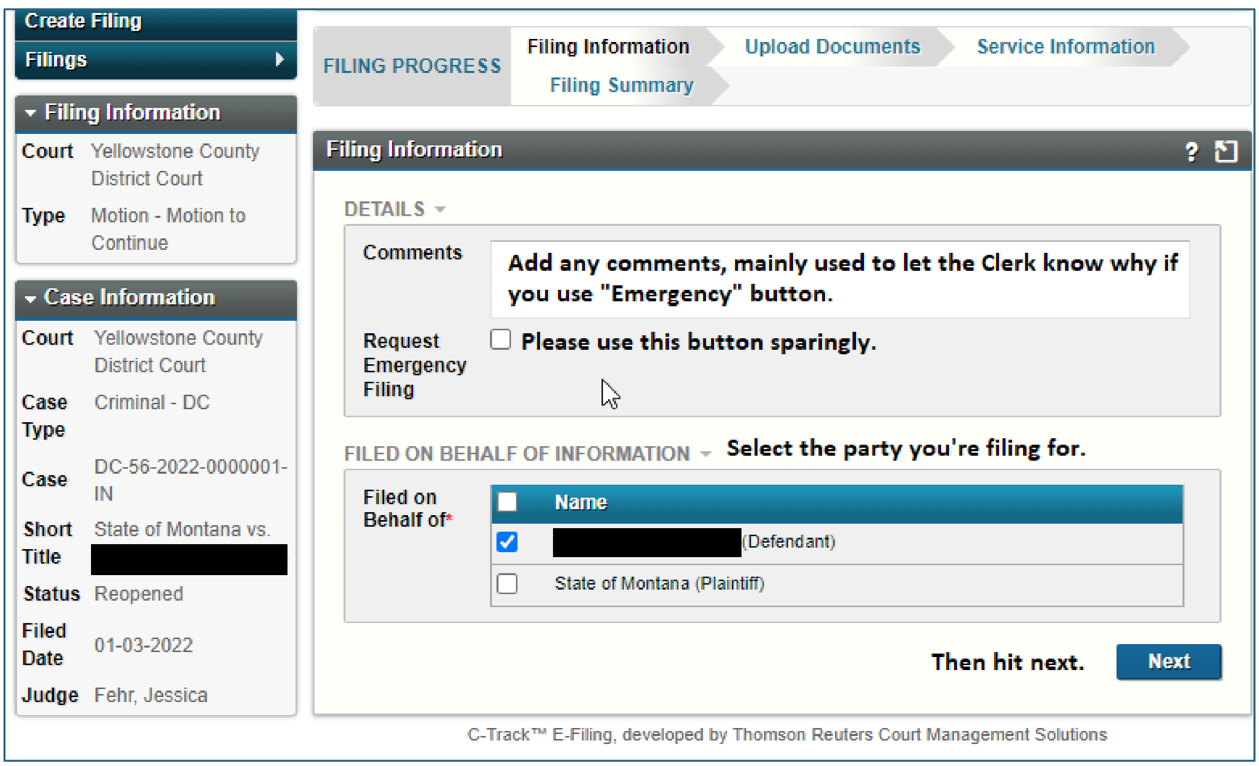
If you are filing from outside a case, just click here in the top left.



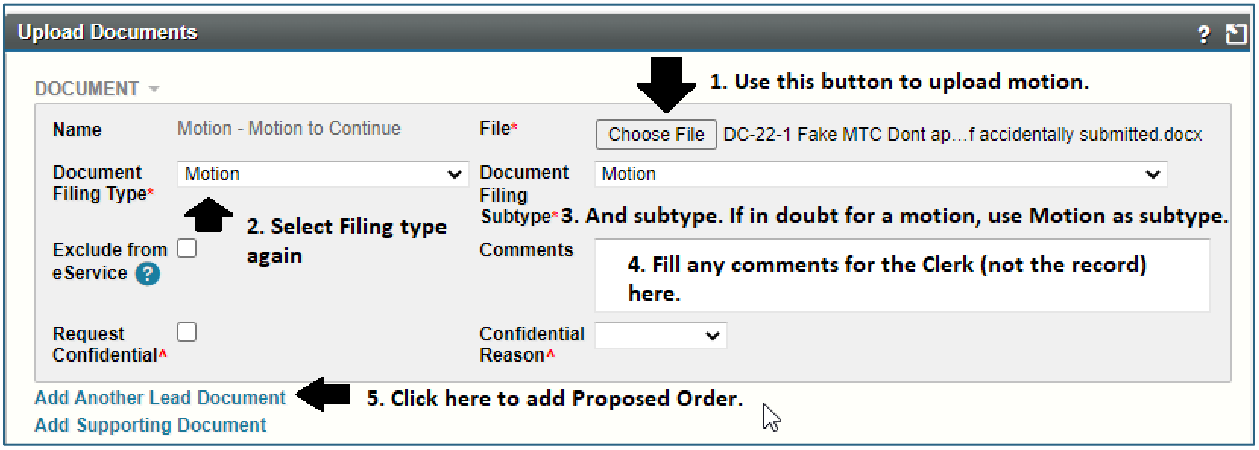
If the case number is a valid case number then a green indicator appears around the field you entered it in. You then select your filing type and subtype using the drop down menus. As an example, we're going to go through a Motion to Continue. This would be "Motion" for Filing Type and Motion for Filing Subtype (there are some issues in the system using the more specific subtypes on occasion, so if in doubt, you can avoid it). Then hit next.



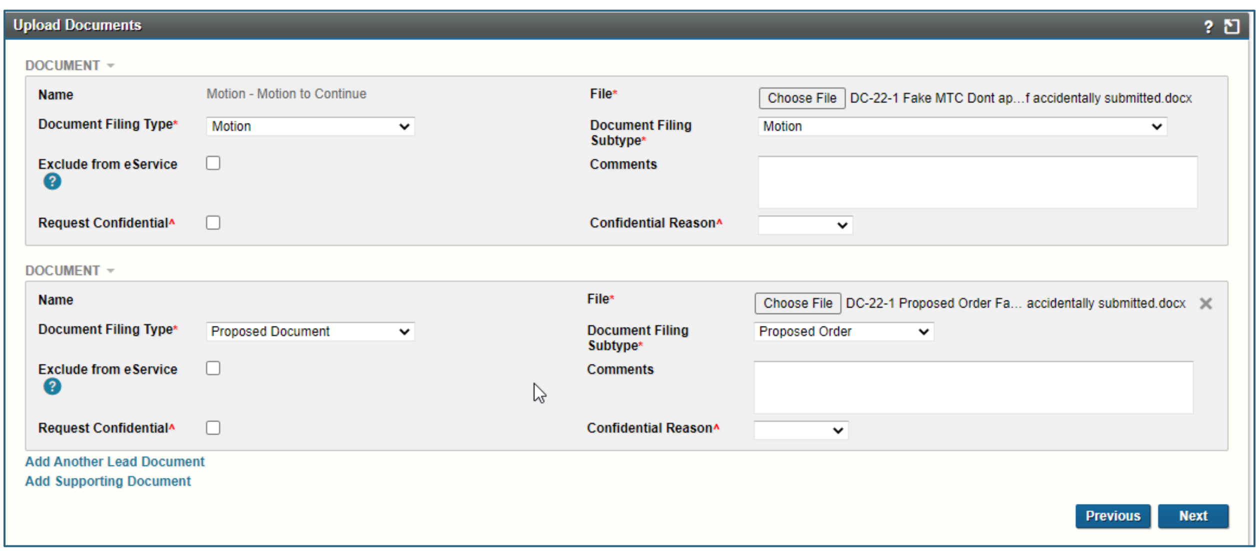
Subsequently you'll see the below screen.



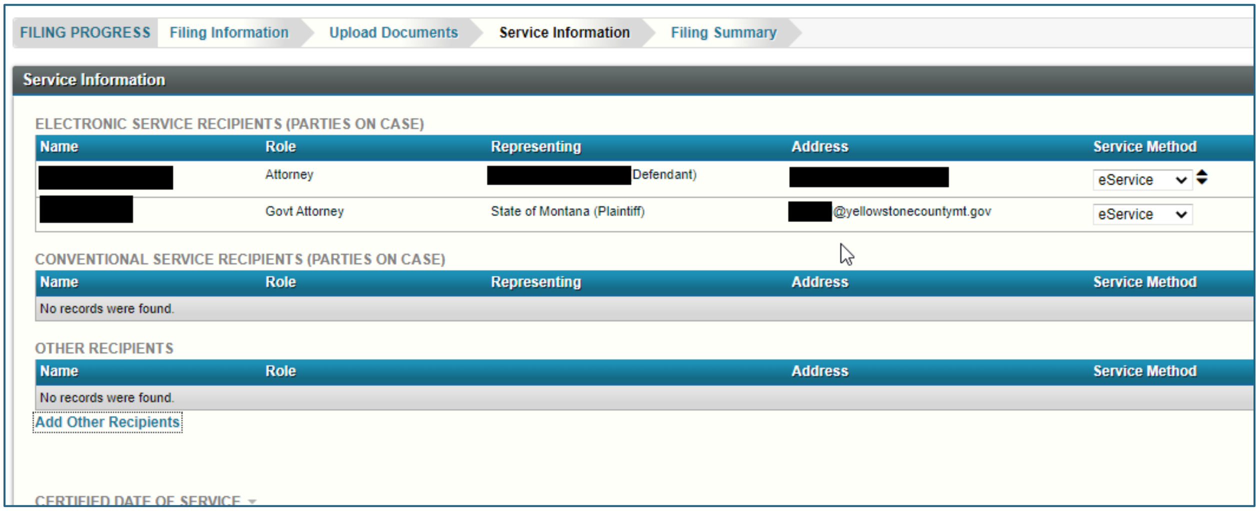
You'll then be on the Upload Documents screen.



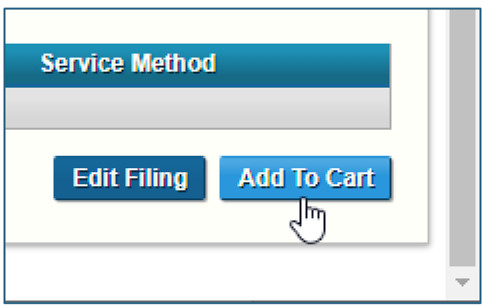
Follow the numbered steps above to add the Proposed Order. It will end up looking like the below. Then hit next.



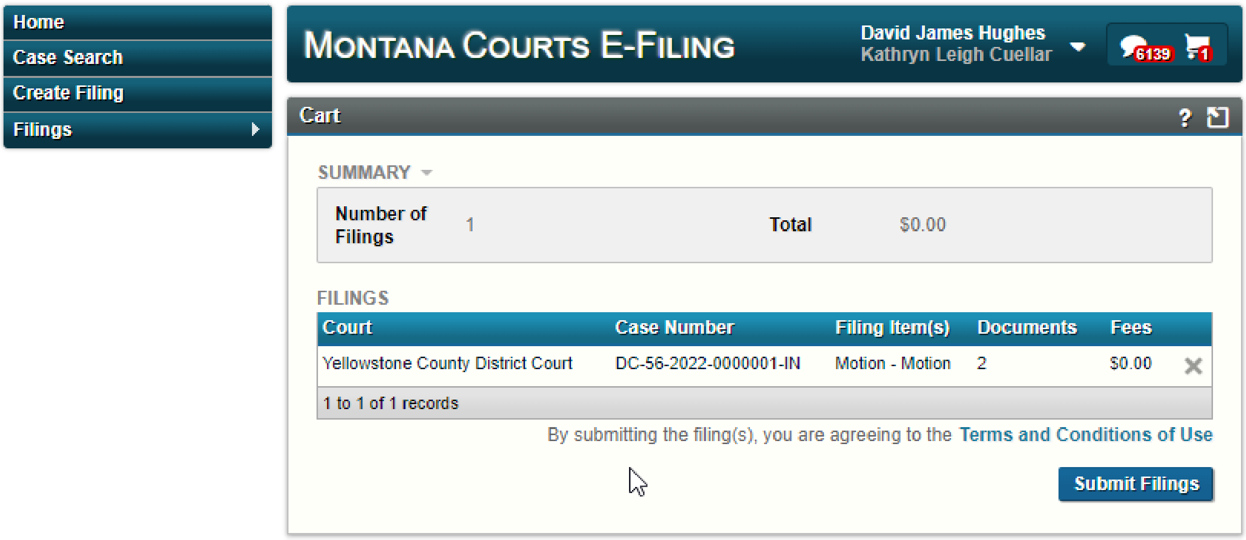
You'll then be on the screen shown below. This is the "service" stage, E-filing allows you to serve opposing counsel digitally through the e-filing system. If you need to serve someone not listed on the case, you can using the "Add Other Recipients" button. Otherwise, just hit next.



You'll now be on a review screen. It will give you all the information you've entered as a last chance to check everything is correct. Scroll down as you review it, and hit Edit Filing if you need to go back and fix anything, or if it looks good use "Add to Cart"

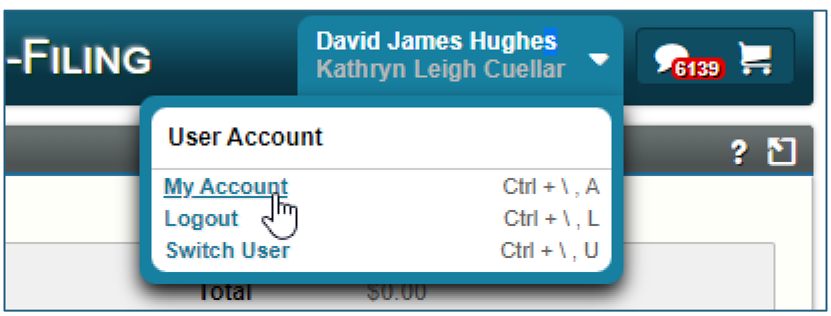


The system will then take you to your cart. When you are ready, hit "Submit Filings" and the filing will go to the Clerk's queue for processing and you'll be given a submission number. You will get an emailed notification of the submission and also an emailed notification when it is approved or denied.



C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions

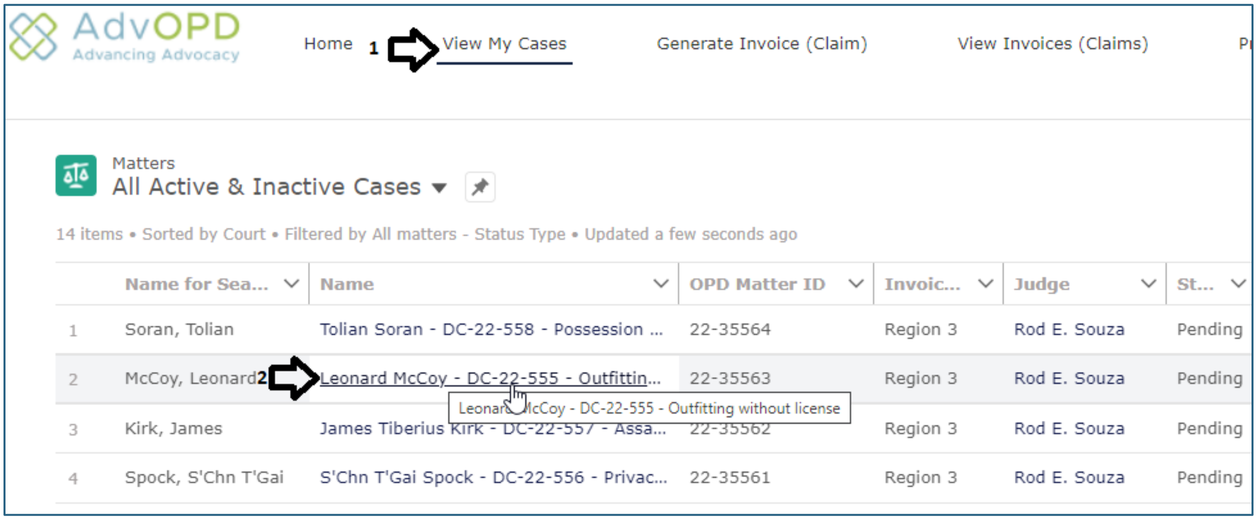
Useful extra tip: "My account" – Click on the drop down next to your name and click "My Account" to modify details which the E-filing system will use for service, set a default court, you can even add your own support staff as an "Authorized Filer" if you wish them to E-file for you (they will just need to sign up for e-file as a non-attorney then be added the permission from the "My Account" screen.



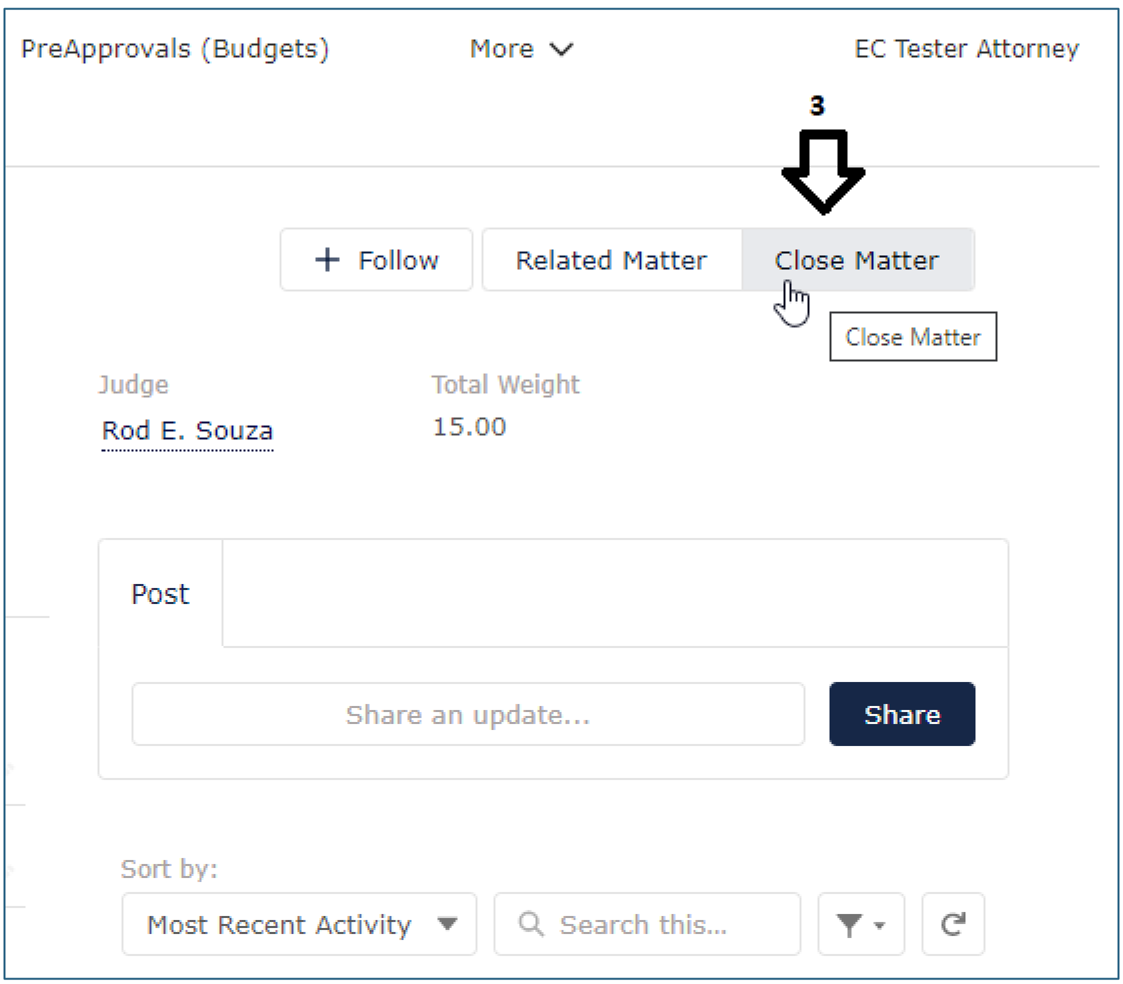
Closing Cases – *Attorneys Only*

If you have any questions outstanding after this guide, please email OPDOperations@mt.gov and we will assist you with resolving them.

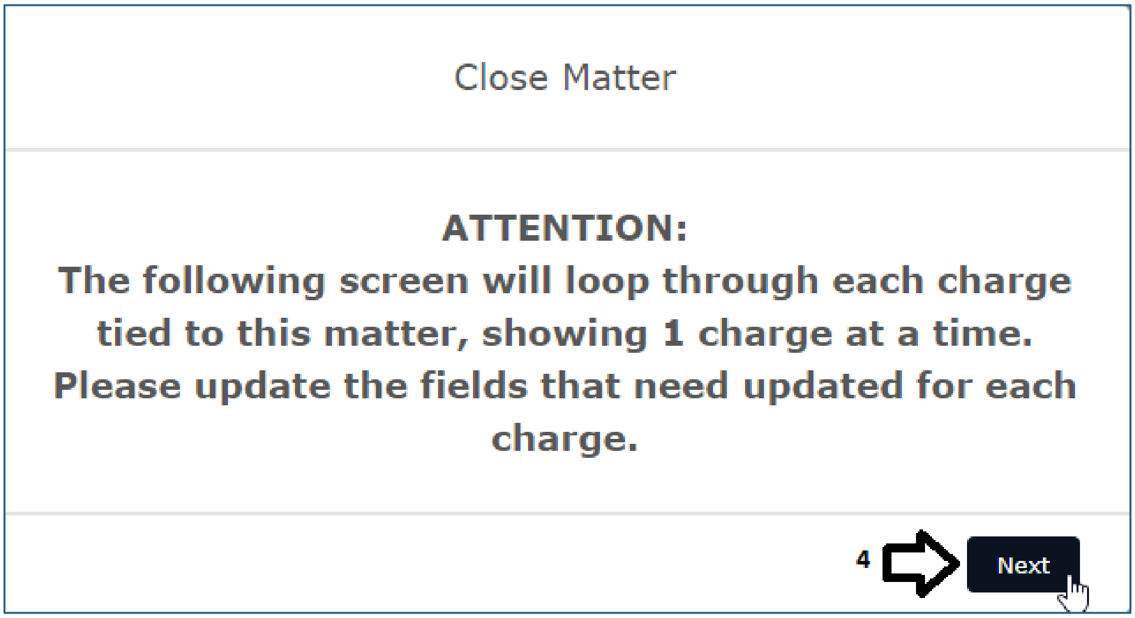
Log in to your Advo portal and select the view my cases tab (1) and then the case you wish to close (2).



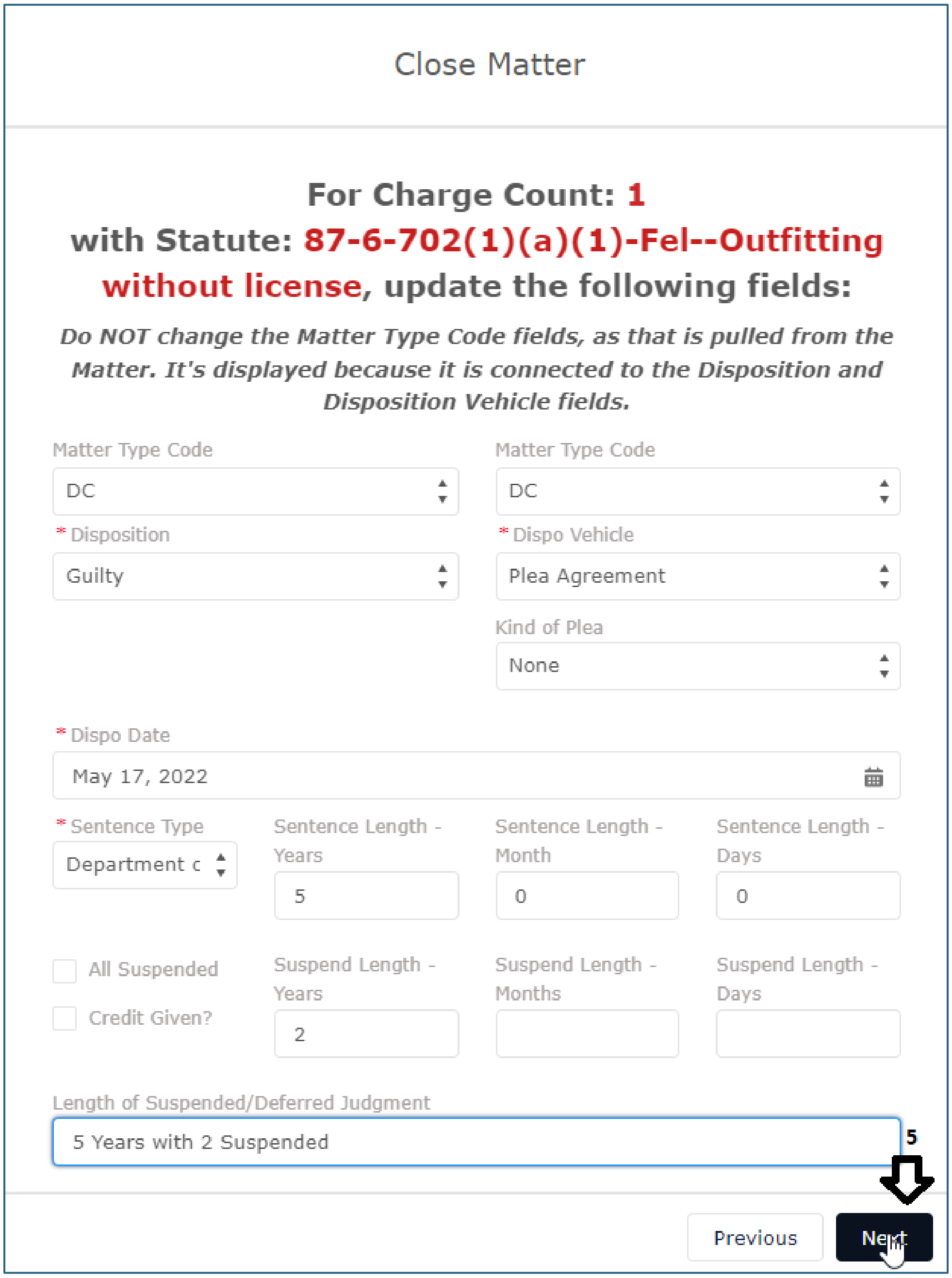
Next click the “Close Matter” button in the top right of your view (3)



You will then be prompted that you'll enter the closing information one charge at a time, please have closing information to hand. Hit the next button (4).



Fill in the details as prompted, and again hit next (5).



Close Matter

For Charge Count: 1
with Statute: 87-6-702(1)(a)(1)-Fel--Outfitting without license, update the following fields:

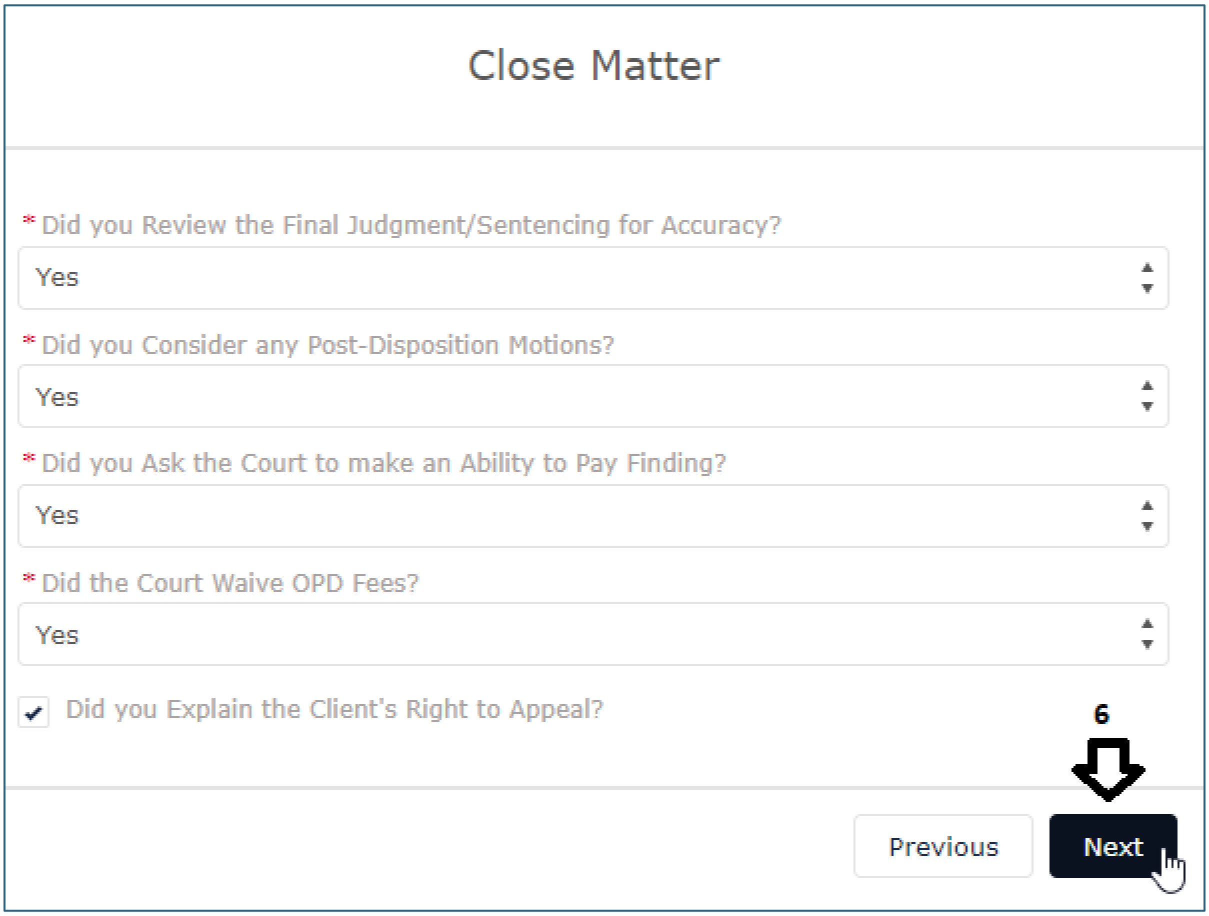
Do NOT change the Matter Type Code fields, as that is pulled from the Matter. It's displayed because it is connected to the Disposition and Disposition Vehicle fields.

Matter Type Code: DC
Matter Type Code: DC
* Disposition: Guilty
* Dispo Vehicle: Plea Agreement
Kind of Plea: None
* Dispo Date: May 17, 2022
* Sentence Type: Department c
Sentence Length - Years: 5
Sentence Length - Month: 0
Sentence Length - Days: 0
All Suspended
Credit Given?
Suspend Length - Years: 2
Suspend Length - Months:
Suspend Length - Days:
Length of Suspended/Deferred Judgment: 5 Years with 2 Suspended

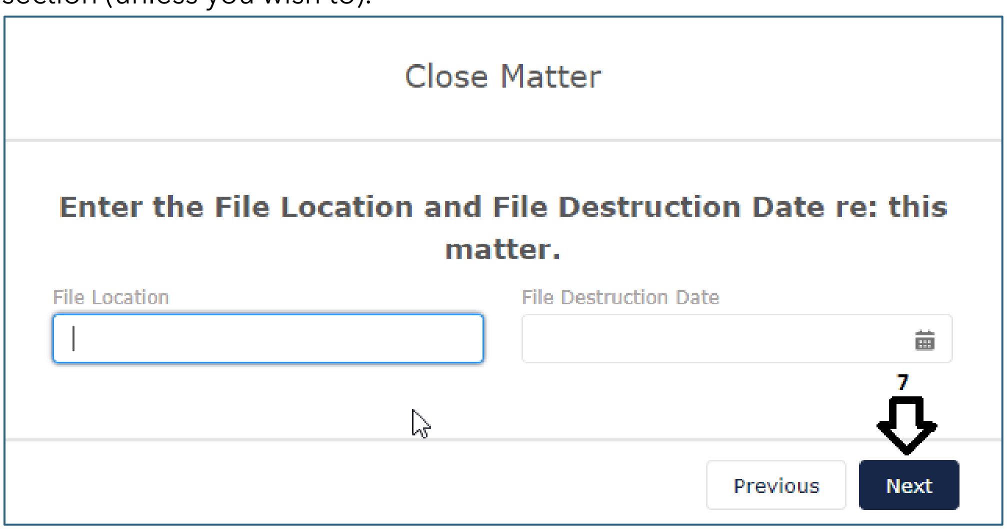
5

Previous | Next

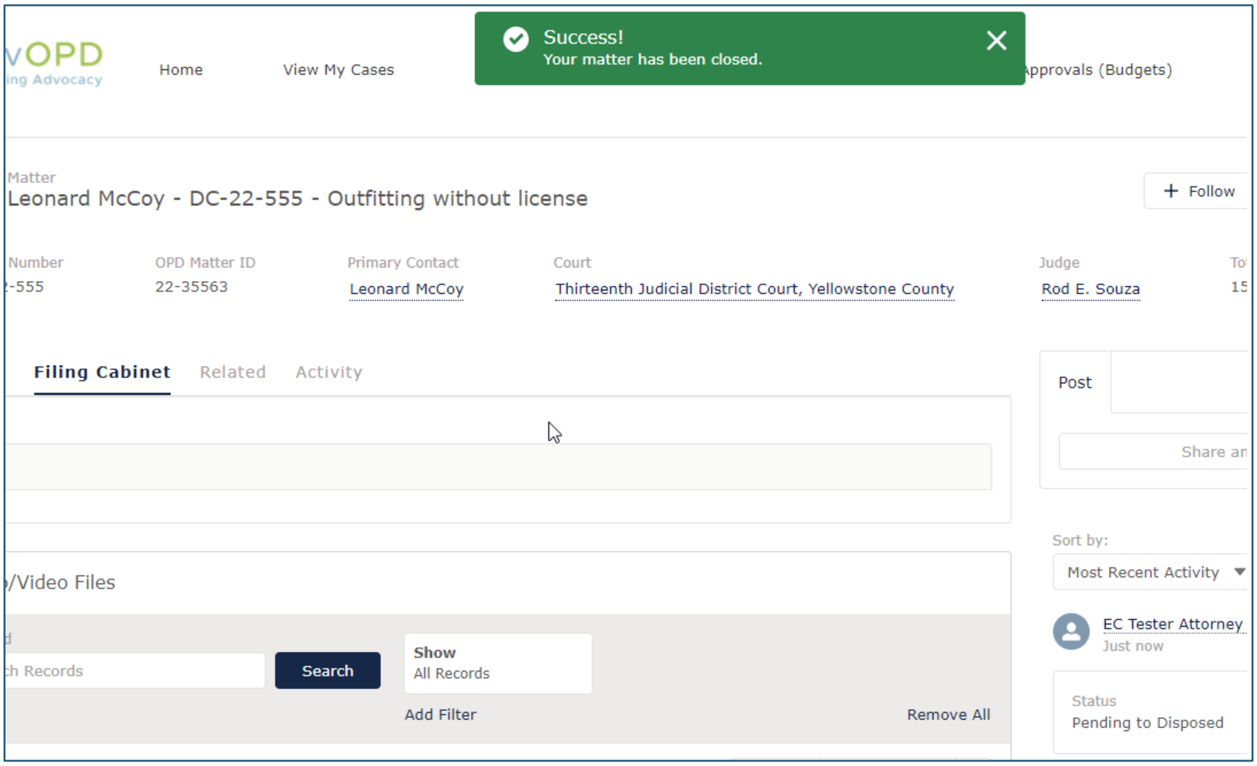
On the next page, once again fill the details in and hit next (6)



Lastly, hit the next button (7) on this final screen to close the case. While OPD contractors are obliged to abide by OPD file retention policy per the MOU, you don't need to fill in this section (unless you wish to).



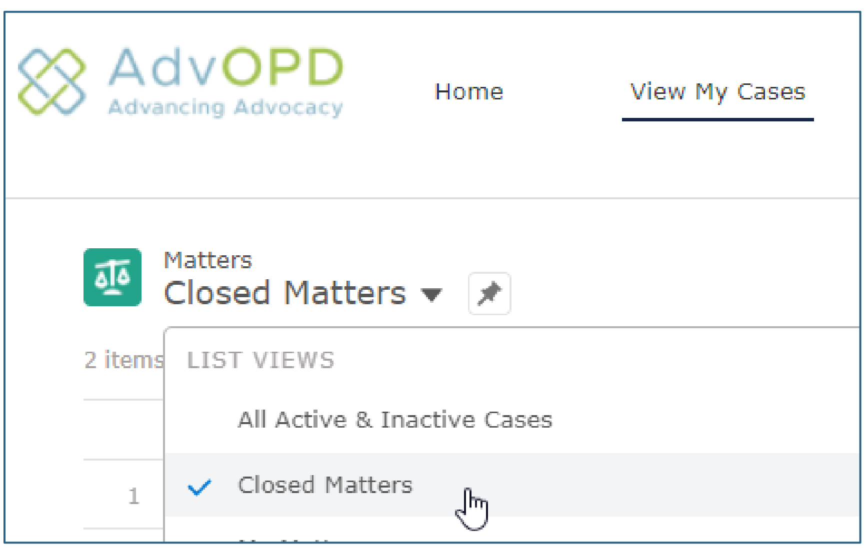
This will push you back into the main case screen where you will see that the case has been closed.



Other Closing Related Topics

Finding closed cases

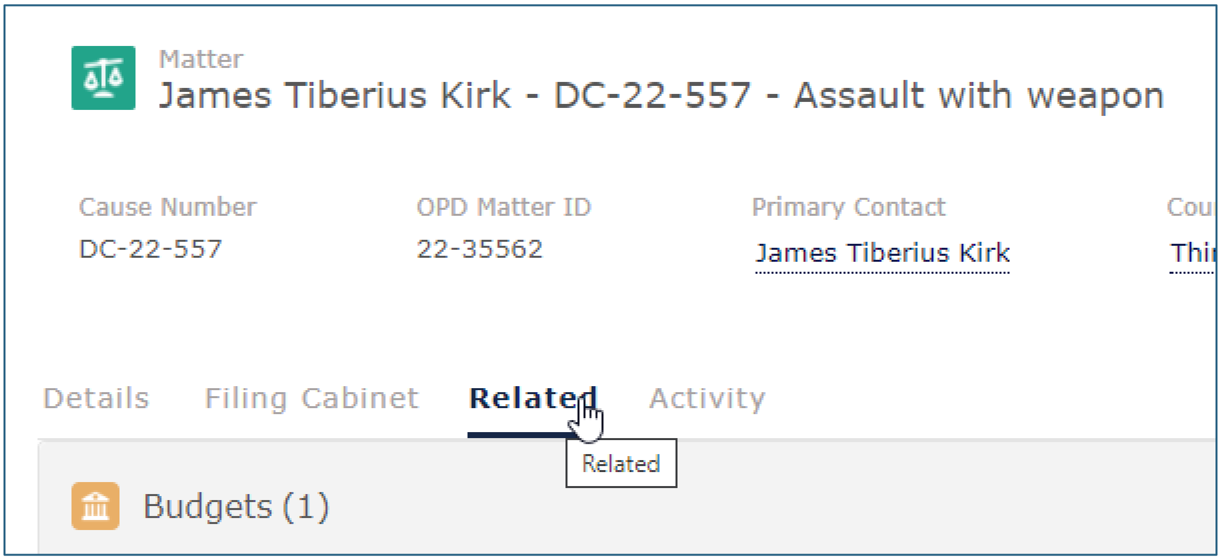
To look up any closed cases, you simply click across to "View My Cases" then Closed Matters, as below.



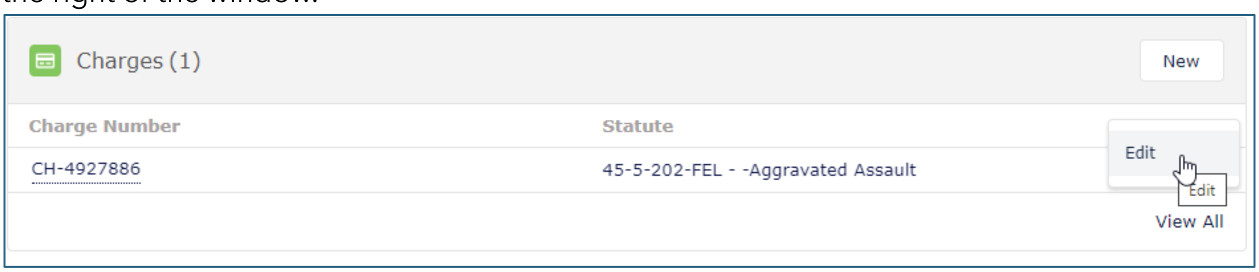
Issues with Inactive Statute? Or Penalty for this charge is 0 Error.

If you get an error when attempting to close, it is most often that the statute on the case is listed as inactive. When you get this error, you have the option to either request help from OPDOperations@mt.gov (we can fix it for you!) or if you feel more confident in Advo, you can fix it yourself.

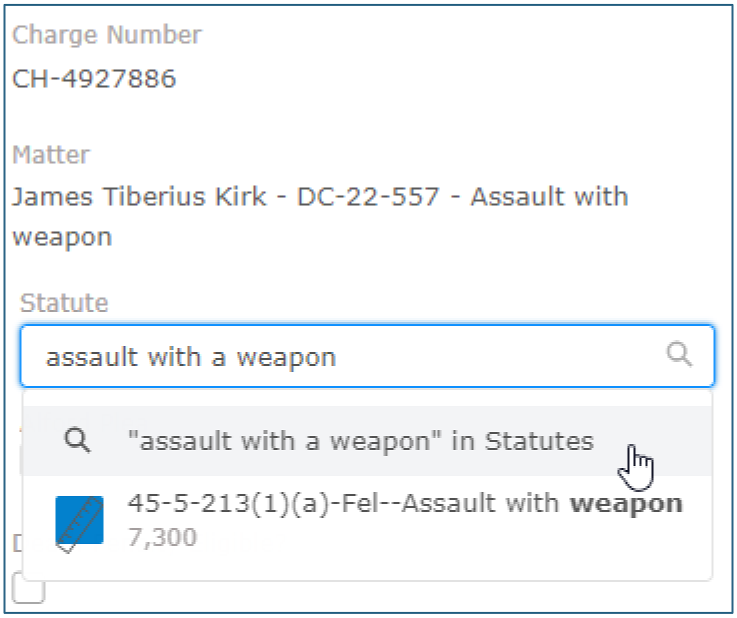
Click into the case you're having problems closing and click the related tab.



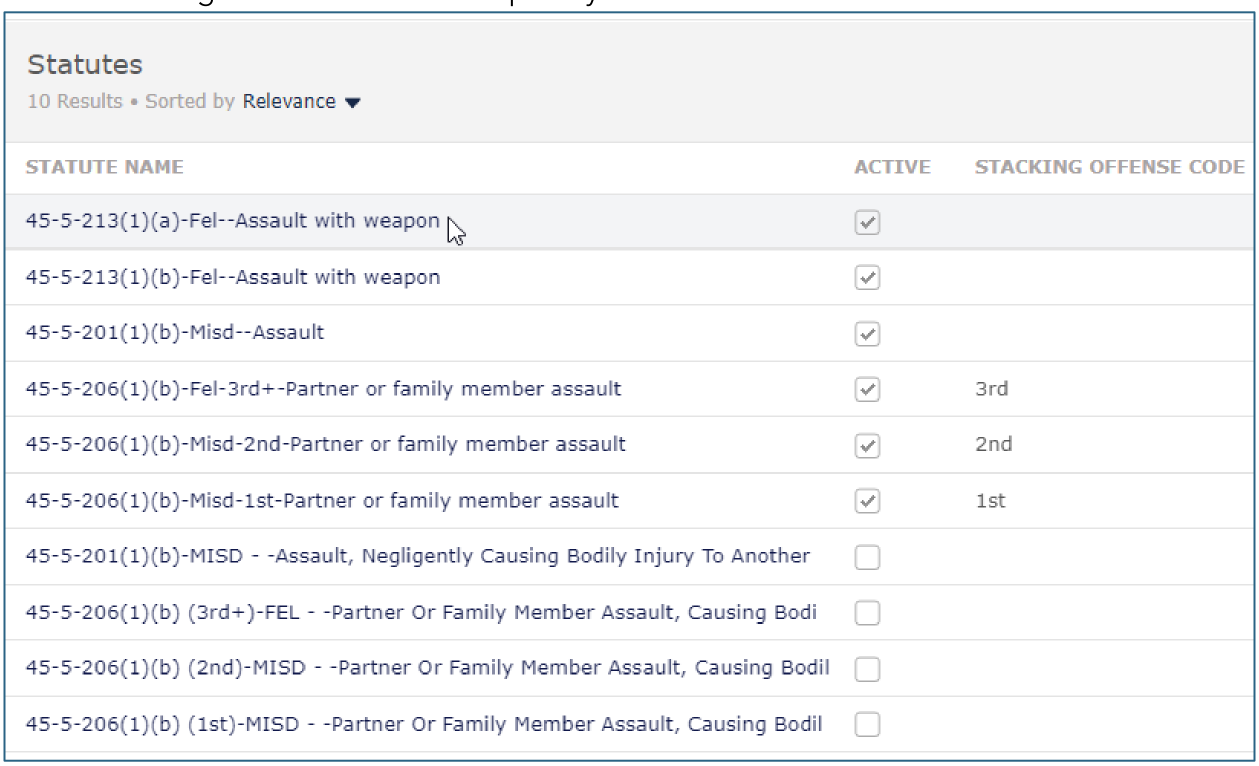
Scroll down to where you see "Charges" and tap the Edit button which is in the drop down on the right of the window.



Enter some key words for the charge and then hit the "In Statutes" search in the dropdown.



This screen will pull up. You can then peruse and find the active version of the statute the client was charged under. Select the option you wish to use.

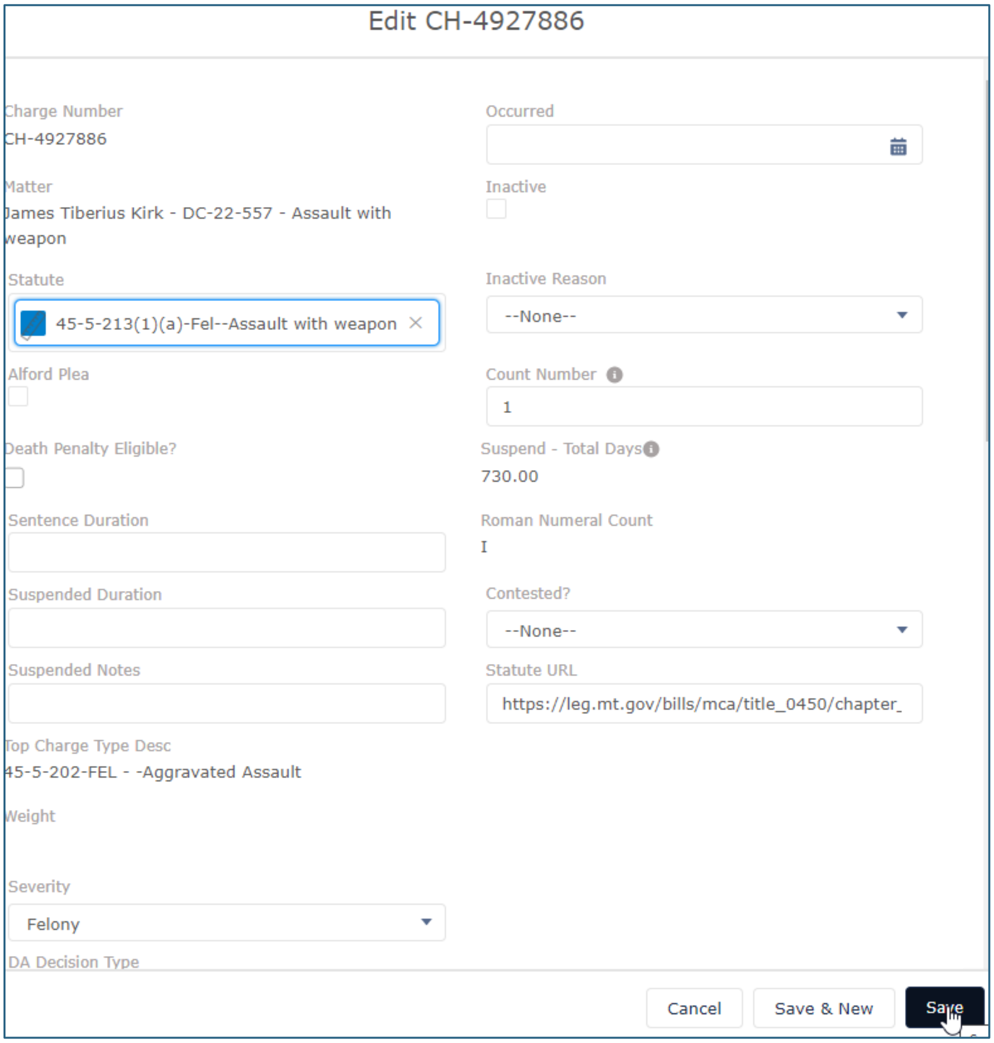


Statutes

10 Results • Sorted by Relevance

STATUTE NAME	ACTIVE	STACKING OFFENSE CODE
45-5-213(1)(a)-Fel--Assault with weapon	✓	
45-5-213(1)(b)-Fel--Assault with weapon	✓	
45-5-201(1)(b)-Misd--Assault	✓	
45-5-206(1)(b)-Fel-3rd+-Partner or family member assault	✓	3rd
45-5-206(1)(b)-Misd-2nd-Partner or family member assault	✓	2nd
45-5-206(1)(b)-Misd-1st-Partner or family member assault	✓	1st
45-5-201(1)(b)-MISD - -Assault, Negligently Causing Bodily Injury To Another		
45-5-206(1)(b) (3rd+)-FEL - -Partner Or Family Member Assault, Causing Bodi		
45-5-206(1)(b) (2nd)-MISD - -Partner Or Family Member Assault, Causing Bodil		
45-5-206(1)(b) (1st)-MISD - -Partner Or Family Member Assault, Causing Bodil		

Back in this screen, hit save. The charges will then be updated and you will be back in the main AdvOPD case and able to click into details, filing cabinet, etc. As well as being able to hit the close case button in the top right as usual.



Appellate Referrals – *Coming Soon*

Travel

The majority of our contractors travel for their work, and there are several different categories of travel that you can bill in your monthly invoice.

The travel rules you will be using are similar to those governing employee travel. Each type of travel compensation has specific requirements and the rates/information required are often specified by the State of Montana rather than by the agency.

What is classified as travel by the state?

Services rendered outside a 15-mile radius of the principal place of business.

Example 1: You are required to travel from your office in Helena to Butte for a misdemeanor trial and return in the afternoon.

This **is** travel that meets the requirements to bill, it involves going over 15 miles from your place of business.

Example 2: You need to visit the Yellowstone County Detention Facility from your office in Billings downtown, you drive there, visit your client and come back.

This **is not** travel that meets the requirements to bill. As you were at most 2.5 miles from your place of business.

This general rule applies to all types of travel compensation. Although some forms of compensation have additional requirements.

What forms of compensation are available?

- Travel hours – An hourly rate for your time spent travelling for state work. Specified in our Contractor Compensation Schedule. Currently, this is $45.00 per hour for attorneys.
- Mileage – A per-mile allowance for use of a personal vehicle while travelling as a state contractor. This has two "tiers". The rate is outlined in the Travel Information Summary currently $0.625 per mile for the first 1000 miles and $0.595 for any subsequent mileage.
- Per Diem – A fixed allowance, based on the hours and time in travel status. This is to help cover the cost of food during travel.
- Lodging – A fixed-rate which can be paid to contractors when state business dictates that they need to be travelling away from home overnight.

What information do I need on my invoice to claim them?

"Travel details, including the date of travel, departure location, arrival location, number of miles traveled, and purpose for travel. If claiming per diem for meals, you must include the time you departed your home base and the time you returned."

Travel Hours / Windshield Time

What are the specific requirements to bill Travel Hours?

In line with the general definition of travel outlined in the introduction:

"Travel rates apply to services rendered outside a 15-mile radius of the principal place of business"

The rates are available here.

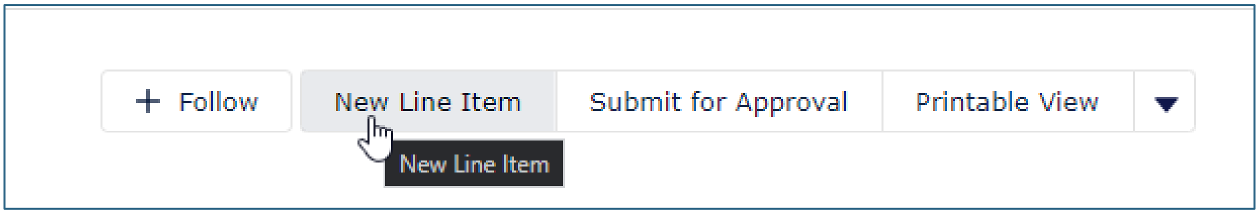
Requirements for this type of travel claim on a Contractor's Invoice

The normal requirements for an OPD invoice apply. So, these are the OPD Case ID number (or court case number), in addition to client name.

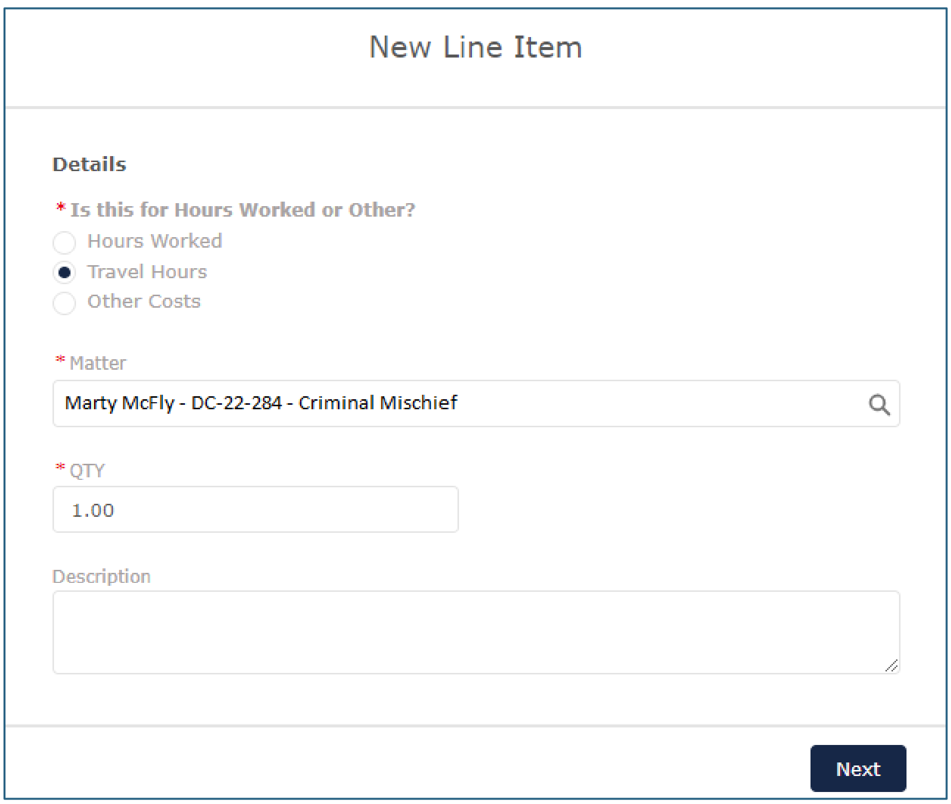
Additionally: Date of travel, departure location, arrival location, and purpose for travel.[1]

Billing Travel Hours

Generate your OPD Invoice for the month. As with hours worked, click **New Line Item**.



Select **Travel Hours**, pick the relevant **Matter** and the **number of hours**. Then click next to add the line item to the OPD claim.



[1] https://opd.mt.gov/_docs/Forms/AllContractors/Pre-Approval-and-Claims-Procedure.pdf

It once added, you'll have it in your line items on the invoice. Once all line items for that region and month are added and your own invoice documentation uploaded to the filing cabinet, you'd be set to submit for approval.

What if I'm delayed during travel and it takes longer? (Roadworks, winter weather on roads)

Report the accurate time taken for the journey on your line items. Adding more information in the "Description" field will always be useful in this circumstance. Alternatively, adding a brief note on your invoice would help explain the longer travel time.

Mileage

What are the specific requirements to bill Travel Hours?

In line with the general definition of travel outlined in the introduction:

"Travel rates apply to services rendered outside a 15-mile radius of the principal place of business"

The rates are available here.

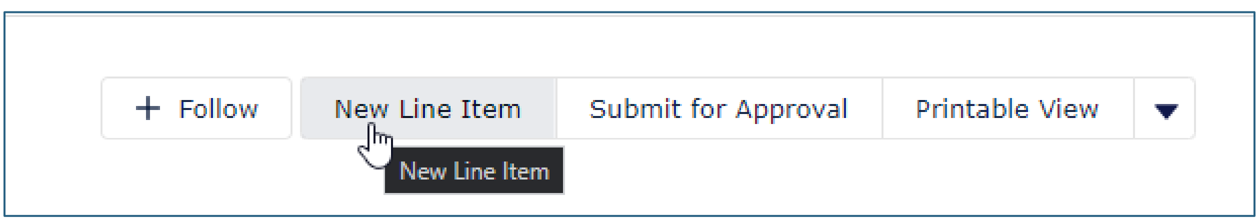
Requirements for this type of travel claim on a Contractor's Invoice

The normal requirements for an OPD invoice apply. So, these are the OPD Case ID number (or court case number), in addition to client name.

Additionally: Date of travel, departure location, arrival location, number of miles and purpose for travel.[2]

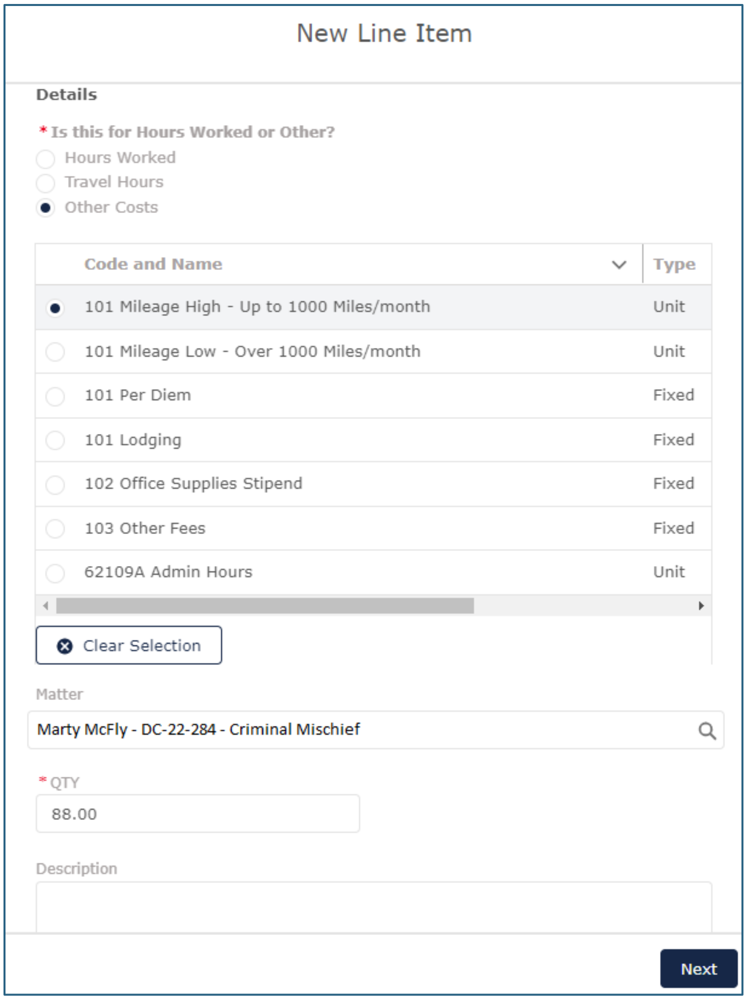
Billing Mileage

Generate your OPD Invoice for the month. As with hours worked, click **New Line Item**.



Select **Other Costs**, select **Mileage High** for the first 1000 miles of travel billed in a month, select **Mileage Low** for mileage over 1000 miles in a month. the relevant **Matter** and the **number of hours**. Then click next to add the line item to the OPD claim.

[2] https://opd.mt.gov/_docs/Forms/AllContractors/Pre-Approval-and-Claims-Procedure.pdf



It once added, you'll have it in your line items on the invoice. Once all line items for that region and month are added and your own invoice documentation uploaded to the filing cabinet, you'd be set to submit for approval.

Per Diem

What are the specific requirements to bill Per Diem?

In line with the general definition of travel outlined in the introduction:

"Travel rates apply to services rendered outside a 15-mile radius of the principal place of business"

Per Diem does have moderately more complicated requirements than most types of travel.

Additionally: *"Must be in travel status–at least 15 miles away from your headquarters or work site for the day–for MORE THAN 3 hours (a minimum of one minute over three hours) during the mealtime range to qualify for that meal allowance.*

This means, leave no later than 6:59 am for a morning meal, and don't return any earlier than 6:02 pm for the evening meal. (You must count your minutes and be VERY SPECIFIC about recording the start and finish of your travel shift)."[3]

The current Per Diem Rates can be found HERE under **State Employee Travel Information**.

**When these rates are changed, the rates will change in Advo based on the change date. Please make sure your uploaded documents are matching the correct rate.*

Per Diem Examples

Example 1: You leave your office in Missoula at 6am and drive to Billings for a hearing, which lasts three hours, you then turn around and return to Missoula. A total time in travel status of 13 hours, you return at 7pm.

You were in travel status over three hours in each required meal timeframe, so you could claim the full daily rate of $30.50.

Example 2: You leave your office in Missoula at 9am and drive to Deer Lodge to meet a client, on arrival at MSP, you're told the jail will be in lock down all day so turn around immediately and return to Missoula, for a total time in travel status of eleven hours, you return at 11.44 am. Your total travel time was less than three hours.

You were in travel status for 2 hours 44 minutes. You are not eligible for Per Diem.

Example 3: You leave your office in Missoula at 9am and drive to Butte for court, you have a one and a half hour hearing and return to Missoula at 1.18pm.

You were in travel status for 4 hours 18 minutes. You are eligible for Per Diem.

Because you departed after 6.59 am and were not in travel status three hours before 10am, you're not eligible for Morning Meal.

You were in travel status for three hours during the mid-day meal period, so can claim $8.50 for this meal.

You returned before the start of the Midday meal timeframe, so you cannot claim for this meal.

Requirements for this type of travel claim on a Contractor's Invoice

The normal requirements for an OPD invoice apply. So, these are the OPD Case ID number (or court case number), in addition to client name.

[3] https://doa.mt.gov/Travel_Information_Summary_Sheet-revised-Oct-20221.pdf

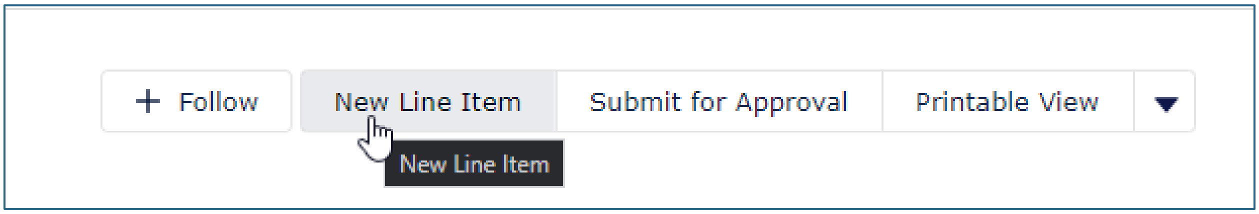
Additionally: Date of travel, departure time, return time, breakdown of meals claimed, hours in travel status, departure location, arrival location, number of miles and purpose for travel.[4]

No receipts are needed to claim Per Diem.

There's a full breakdown of Per Diem in the state employee Travel site along with more useful examples and details which will help you submit your Per Diem costs.[5]

Billing Per-Diem

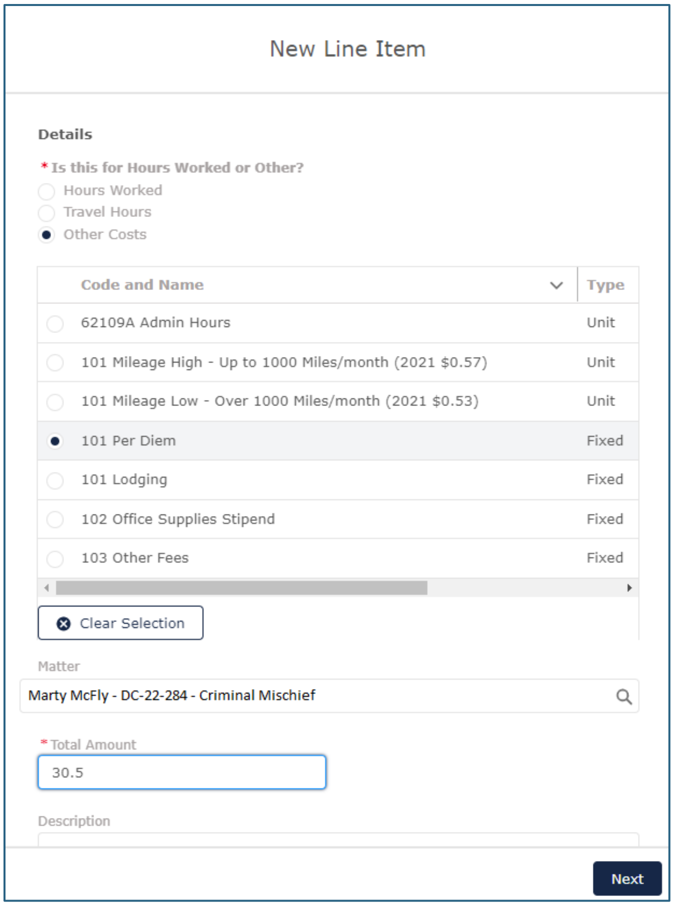
Generate your OPD Invoice for the month. As with hours worked, click **New Line Item**.



Select **Other Costs**, select **Per Diem**, select the relevant **Matter** and the **amount of money claimed**. Then click next to add the line item to the OPD claim.

[4] https://opd.mt.gov/_docs/Forms/AllContractors/Pre-Approval-and-Claims-Procedure.pdf

[5] https://montana.servicenowservices.com/citizen/?id=kb_article&sys_id=9d3ebab01b6615d0838287fbe54bcbfa



Once added, you'll have it in your line items on the invoice. Once all line items for that region and month are added and your own invoice documentation uploaded to the filing cabinet, you'd be set to submit for approval.

Lodging

The current Lodging can be found HERE under **State Employee Travel Information**.

What are the specific requirements to bill Lodging?

In line with the general definition of travel outlined in the introduction:

"Travel rates apply to services rendered outside a 15-mile radius of the principal place of business"

Lodging is for when you are travelling away from your base location overnight. In-general, this will be when state business takes you away from home overnight where travelling home isn't practical.

Please remember to include the following when invoicing lodging: OPD Matter ID or Court case number, Client name and the following Travel details: check in date, check out date, establishment name, and purpose for travel. Also remember to keep your receipt and upload it when you come to bill.

When you either check in or out of a hotel, you will be given a printed receipt. It is imperative to keep this receipt if you wish to bill for travel. This will be the detailed breakdown which includes taxes and fees. Accounting are not able to accept booking confirmations in lieu of receipts.

The current lodging rates can be found on the State Travel website.

DOA Travel Resources

A claim may be more with the inclusion of hotel taxes and fees. It will not cover the inclusion of cleaning fees and similar charges charged by vacation rentals.

Additionally: When booking a Lodging establishment, please ask for their best rate.

Many hotels in Montana do offer stays for cheaper than the Government rate, so please ask.

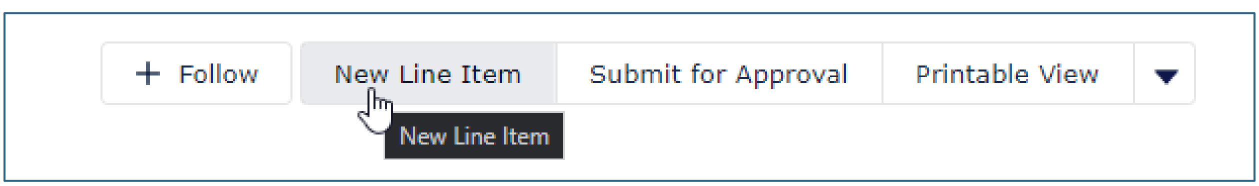
Where can I stay?

A list of lodging establishments that offer a state rate provided by the Department of Administration can be found HERE – under **State Per Diem Lodging Establishments**. You can find more information about lodging and review the guidelines on lodging on the State Employee Travel page.[6]

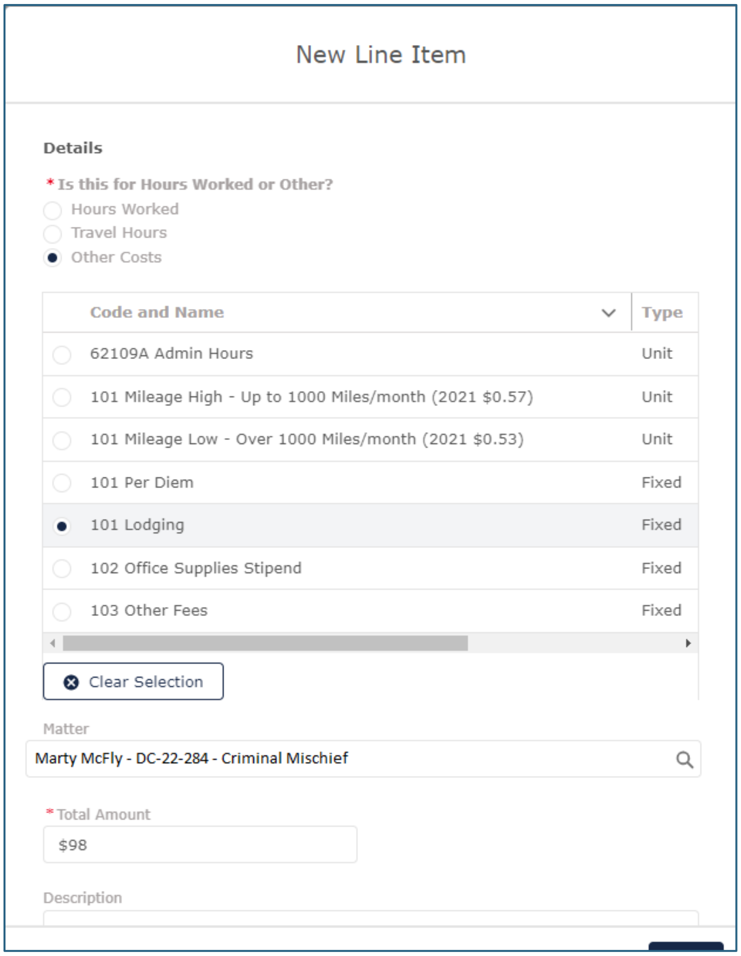
While you can stay at any of these hotels, you are free to select another type of lodging establishment if you so wish, as long as your bill is within the rate mandated by the state, the use of short-term rentals is permissible (but be careful of cleaning fees which can't be covered by OPD).

Billing Lodging

Generate your OPD Invoice for the month. As with hours worked, click **New Line Item**.



Select **Other Costs**, select **Lodging**, select the relevant **Matter** and the **amount of money claimed**. Then click next to add the line item to the OPD claim.



Once added, you'll have it in your line items on the invoice. Once all line items for that region and month are added and your own invoice documentation uploaded to the filing cabinet, you'd be set to submit for approval.

Travel – Example Invoice with all categories included

Magic City Law Office - Emmett Brown **INVOICE**

Marty McFly - DC-22-284 Criminal Mischief - OPD Case ID: 22-1654

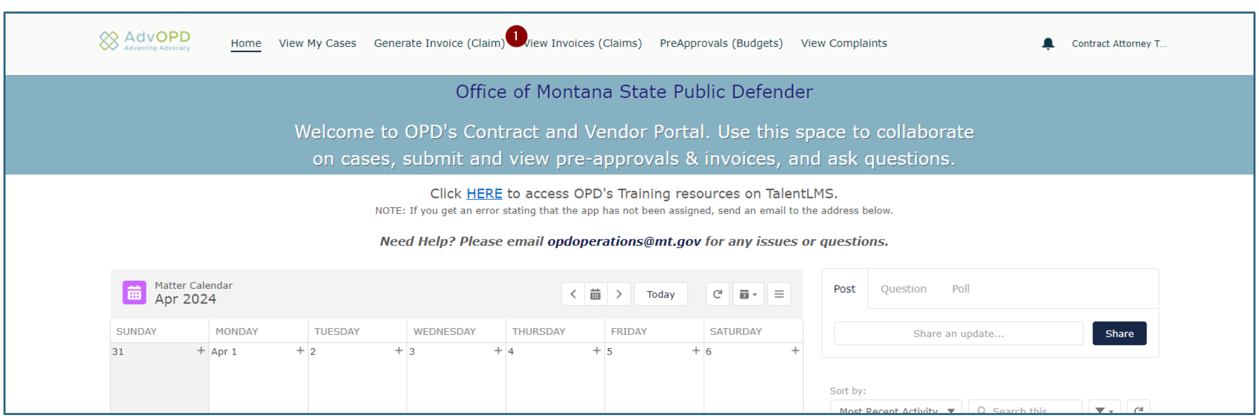
Type	Date	Notes	Quantity	Rate	Total
Service	10/08/2022	email vids he states he wants to go to trial now text	1.30	$71.00	$92.30
Service	10/15/2022	emails on contact- forms	0.10	$71.00	$7.10
Service	10/19/2022	Emails to prosecutor in order to attempt dismissal short of MTD hrg.	0.20	$71.00	$14.20
Service	10/20/2022	Telephone call to client re MTD hearing.	0.10	$71.00	$7.10
Service	10/22/2022	Prepare for Motion to Dismiss Hearing.	0.10	$71.00	$7.10
Service	10/24/2022	Travel to Billings from Butte to meet client at jail before hrg	3.25	$45.00	$146.25
Service	10/24/2022	Lodging - Overnight stay at BW Motel, checked out 10/25			$90
Service	10/25/2022	Motion to Dismiss Hearing	1.0	$71.00	$71.00
Service	10/25/2022	Travel Billings to Butte Returning home.	3.25	$45	$146.25
Per Diem		Departed office (Butte for Billings) 10/24/2022 9am Back @ office (Billings to Butte) 10/25/2022 1pm. Lunch/Dinner 10/24, Breakfast and Lunch 10/25.			$39
Mileage	10/24/2022	Butte to Billings night before MTD hearing to visit client prior.	226	0.625	$141.25
Mileage	10/25/2022	Billings to Butte after MTD hearing.	226	0.625	141.25

Total hours worked: 2.8
Total travel hours:6.5

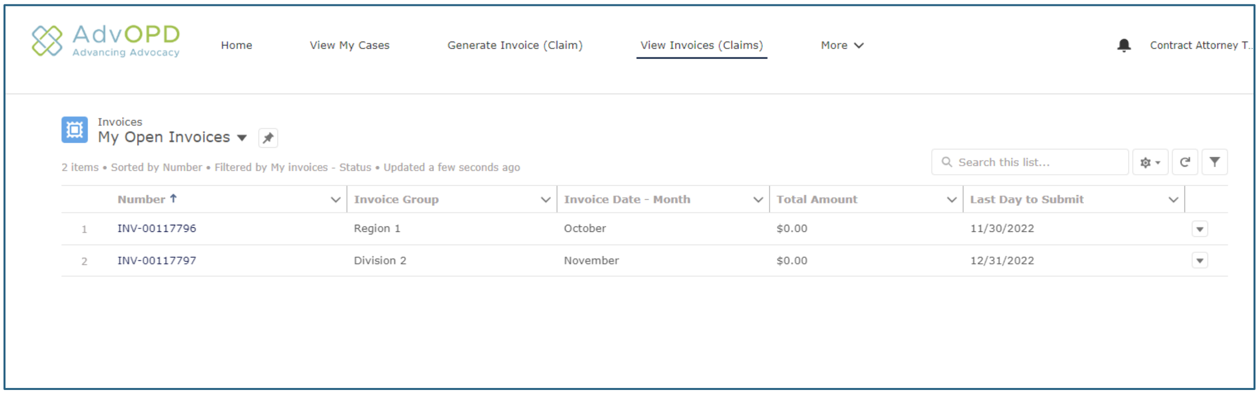
Total: 902.8

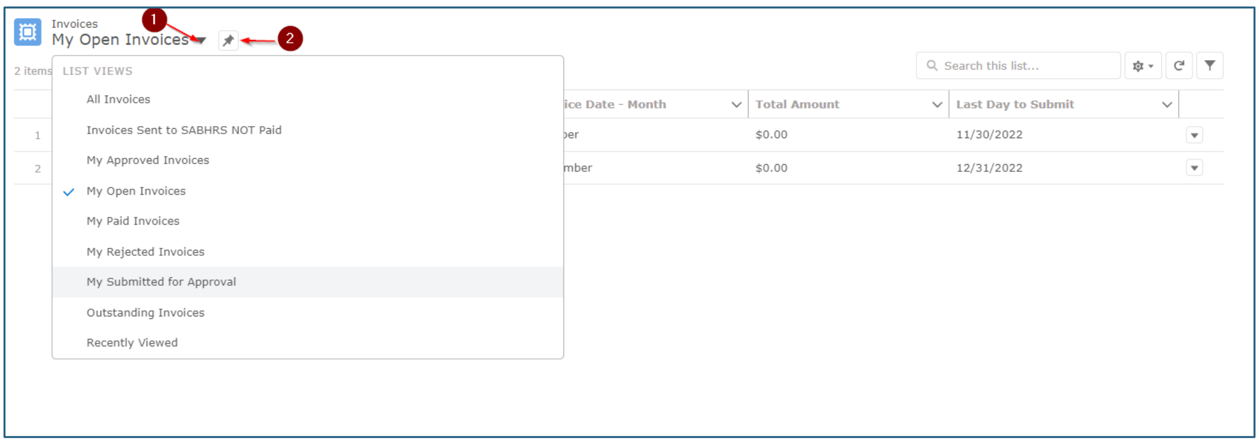
Rejected or Edited Invoices

Select **View Invoice (Claims)**



The view will default to your "OPEN" invoice





Select the list where your invoice is sitting.

All Invoice – Every invoice, created, submitted, rejected, approved, and paid

Invoices Sent to SABHRS NOT Paid – These invoices have been approved for payment but have not been completed yet.

My Approved Invoices – These have been Approved by accounting but have not yet been approved by Attorney approver.

My Open Invoices – Invoice that have been created but not yet submitted or have been recalled.

My Paid Invoices – All paid invoices

My Rejected invoices – Invoices rejected by an approver for policy or procedure issues.

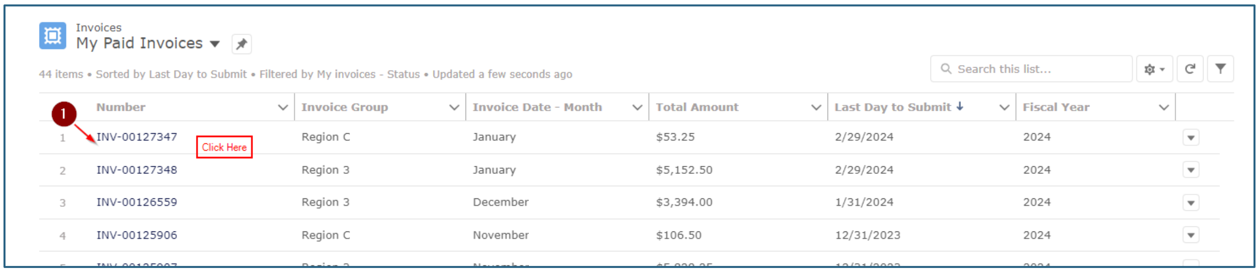
My Submitted for Approval – Invoices submitted but not yet approved.

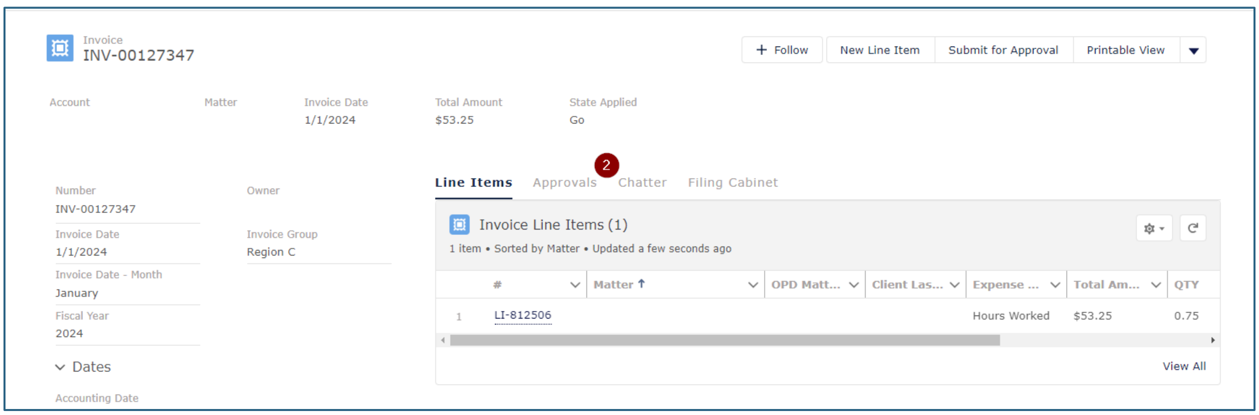
Invoice Approval Stage

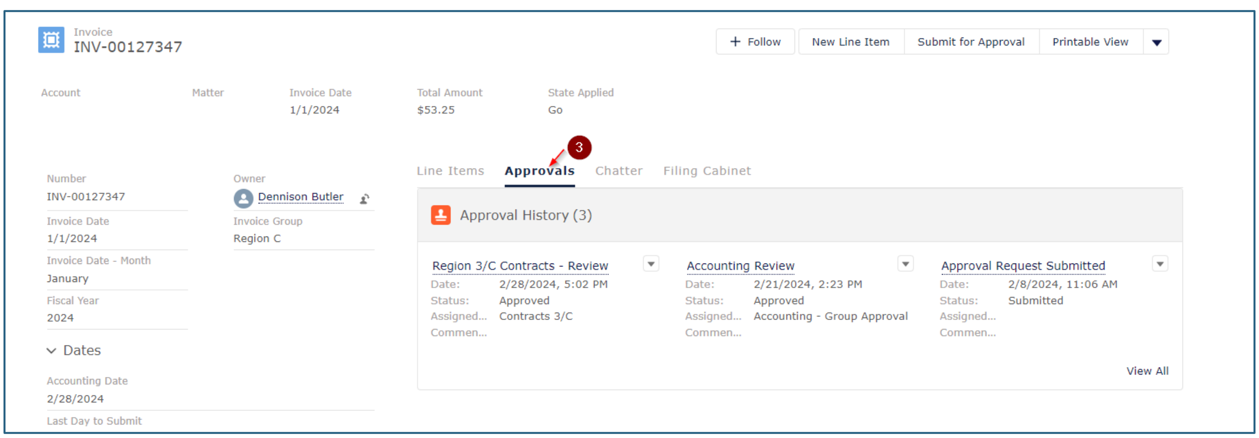
All invoices can be tracked through the approvals tab of the invoice.

1. Select the invoice # you would like to view.
2. Select the Approvals tab.
3. All stages of the invoice will be listed here.

***If your invoice is rejected you will be able to view the message from the rejector here.**



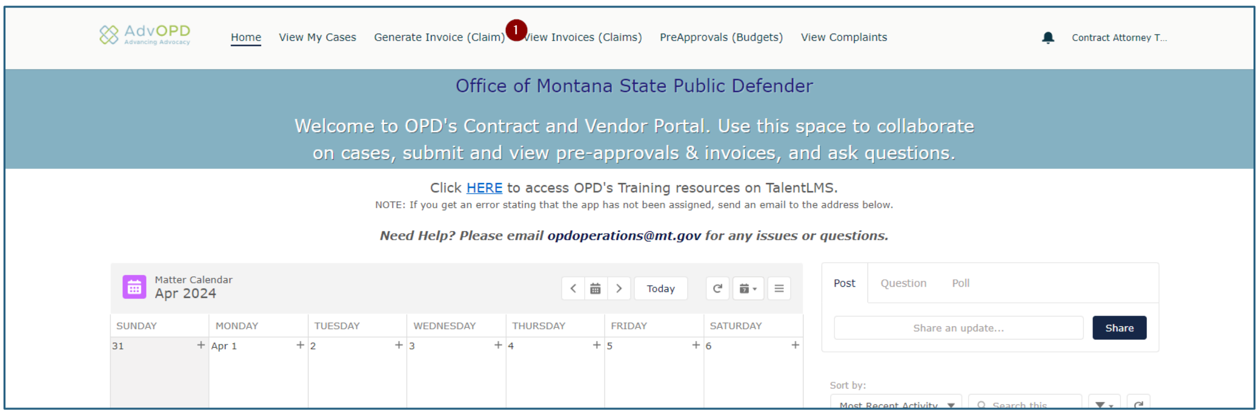




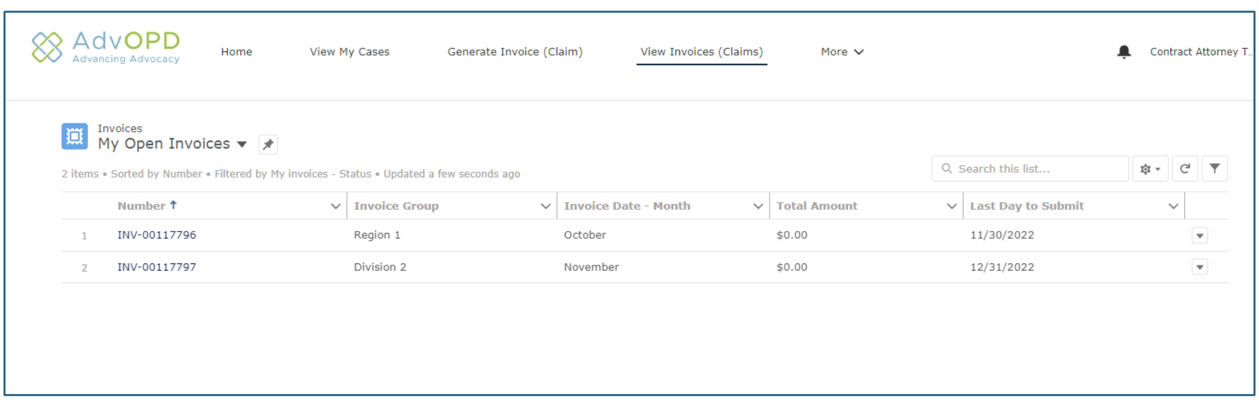
Recall - Amending your Claim to avoid Rejection.

This guide is to pull back an invoice after submission or '**Recall'** an invoice you have submitted for corrections. Open and Rejected invoices can be edited. Invoices an all-other stages are locked and can not be changed with out being rejected by OPD staff or **Recalled** by you.

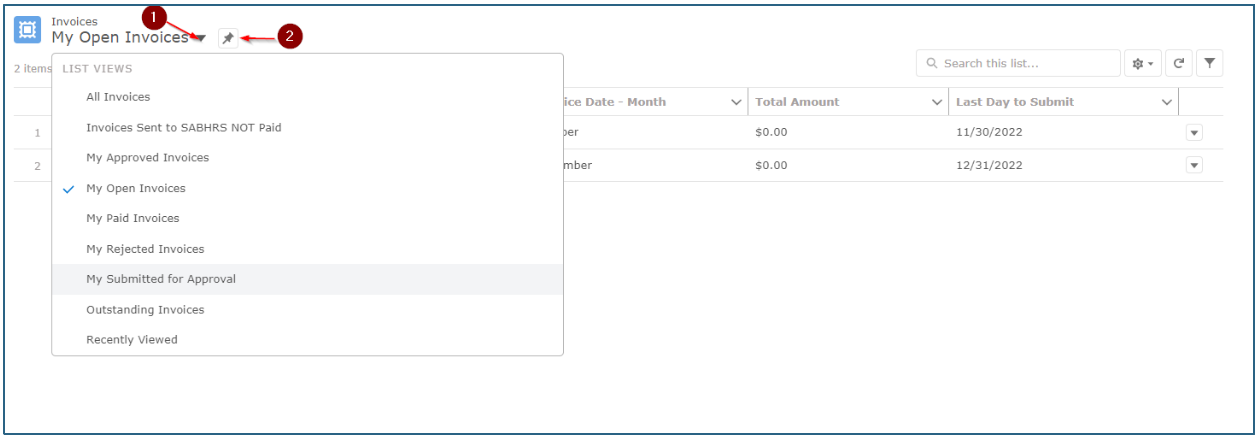
Select **View Invoice (Claims)**



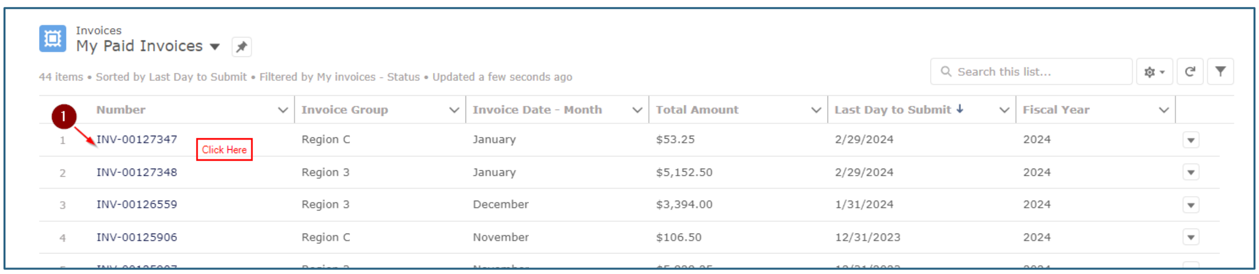
The view will default to your "OPEN" invoice



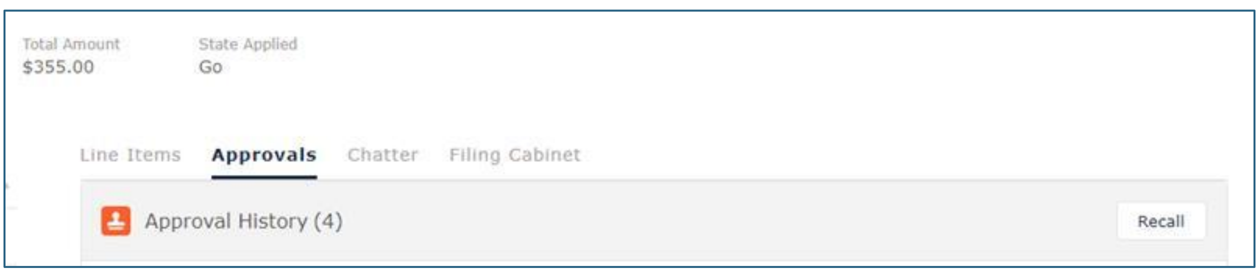
Select the list where the invoice is that you want to edit.



Click the INV- # of the invoice that you want to recall and edit

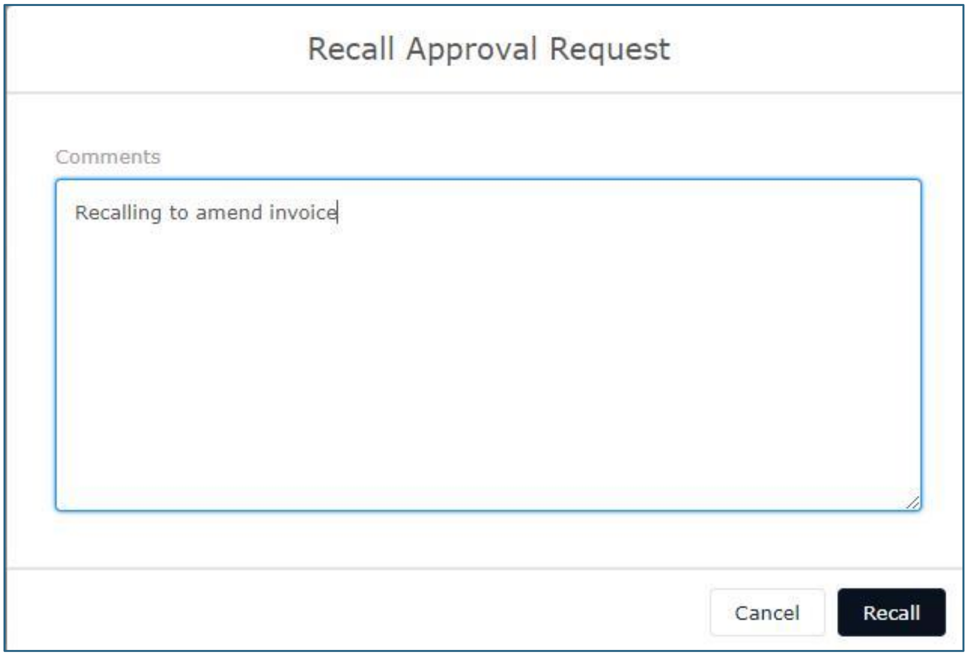


Then click **Approvals** in the center then click **Recall**.

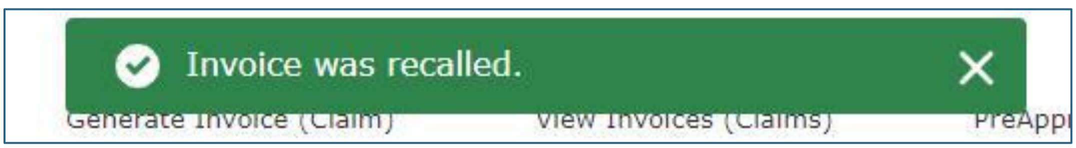


Then click **Recall** again (no reason is needed unless you wish to add one)

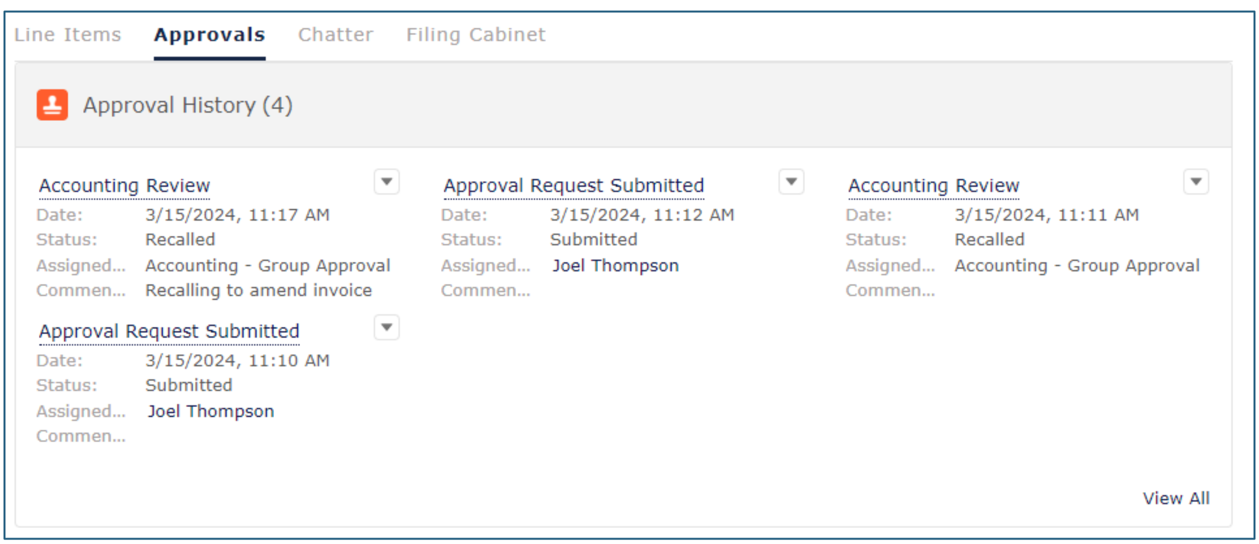
**Please remember that the 30 day clock to pay invoices stops when invoices are in a rejected status.*



When the invoice is recalled you will have this banner pop up and you'll be able to modify the invoice or add/remove documents.

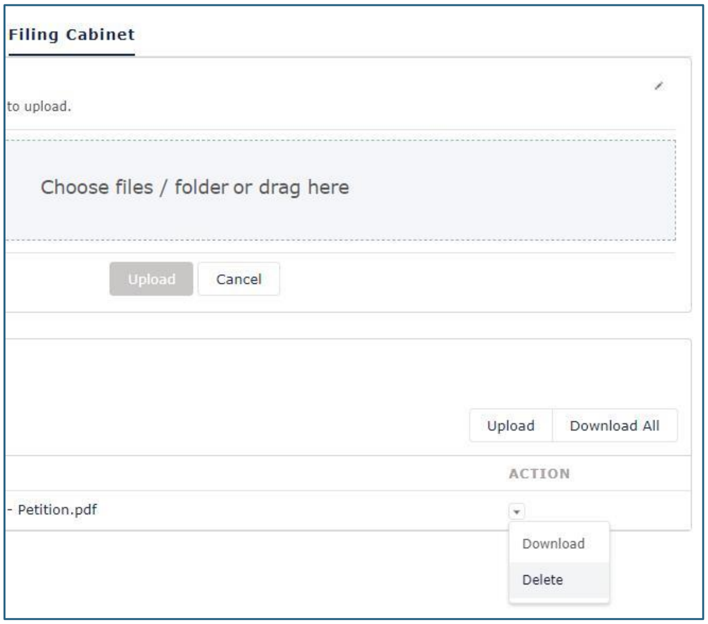


You'll then see the invoice as recalled here in the window you use to track the progress of your invoice.



Removing uploaded invoice documents

To remove documents you do it here in the **Filing Cabinet** tab.



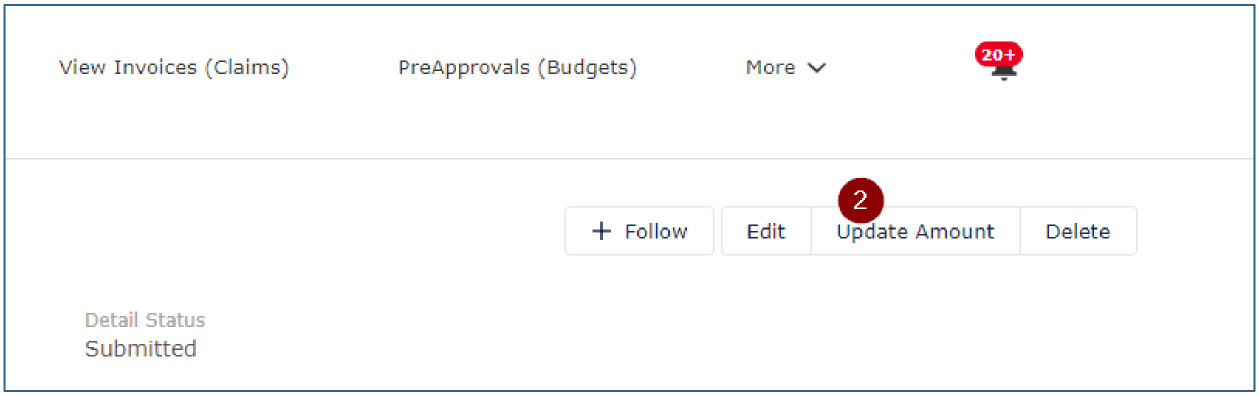
Editing Line Items

For Line Items, contractors can't change the value using the edit button. If you click in to the line item you can select **Update Amount** or **Delete** and add it back.

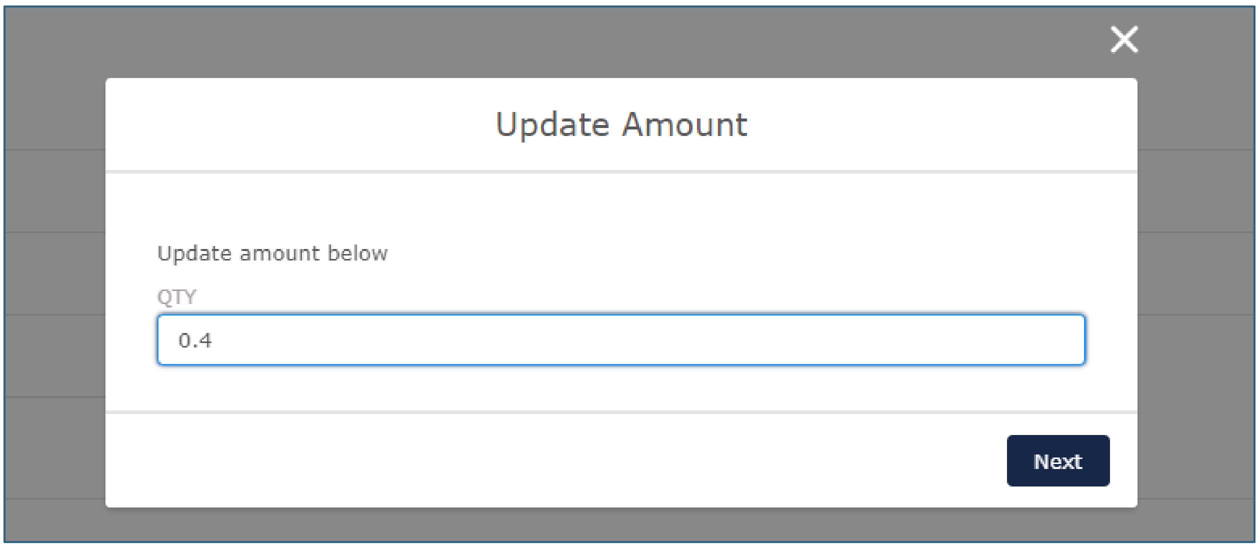
Update Amount In Line Item

Select Line Item number - **LI- #**

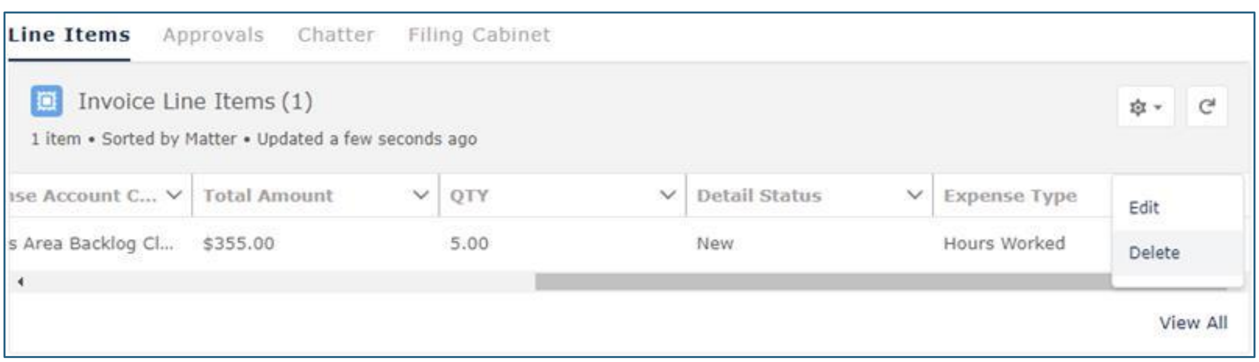
Click **Update Amount**



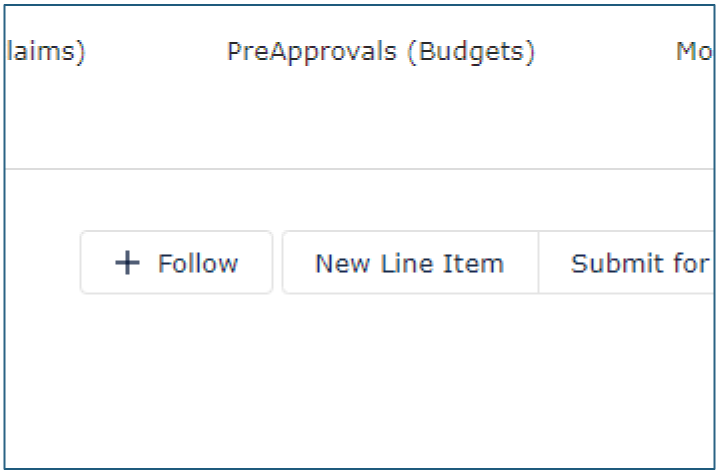
Enter corrected amount and select **Next**



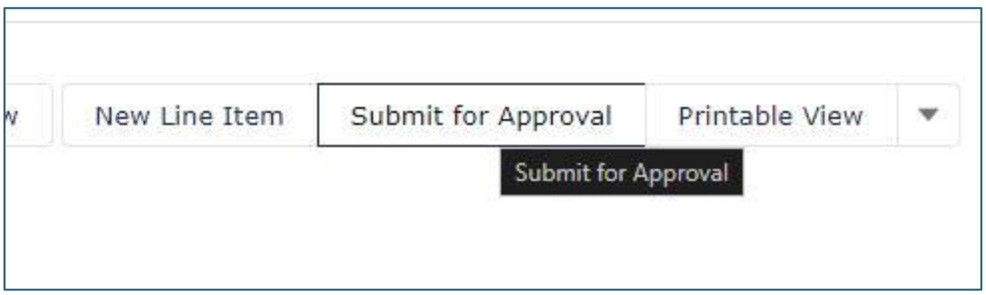
Deleting Line Item



Once delete it, you can add a replacement line item using **New Line Item**



Always remember to submit for approval again after you have recalled an invoice and made changes to it! If you do not it won't get reviewed and will stay in draft status indefinitely.



Having further problems, or have questions? Email OPDOperations@mt.gov for assistance.

FAQs

Please note this document is a work in progress.
If you have suggestions for topics to address here, please let us know!

What is the OPD Contracts Program?

Pursuant to Montana Code Annotated § 47-1-121, the Office of State Public Defender contracts with private attorneys, investigators, and mental health providers, to provide services to OPD Clients. Contractors are involved at every stage of OPD cases, from representing clients at arraignment to performing mental health evaluations to tracking down witnesses to arguing in front of the Montana Supreme Court. Contractors are an important and vital part of OPD.

Contracts Program Staff

The Contracts Program is part of the Central Services Division of OPD. The current Contracts team can be found HERE. All General questions should be directed to OPDOperations@MT.gov

Prospective Contractors

How can I become an OPD Contractor?

To be eligible to receive OPD case assignments as a Mental Health Provider, Investigator or Attorney, a contractor must have a Memorandum of Understanding (MOU) with OPD. All other vendors are not required to have an MOU. Interested vendors or contractors can click the HERE to being the application process. Once initial information is submitted the contracts team will guide you through next steps.

What kind of work do OPD MOU Holders perform?

OPD represents clients at every level of the Montana state justice system, from local city courts to the Montana Supreme Court, in a variety of matters. OPD Attorneys, whether as employees or as contractors, generally provide direct representation in the following types of cases[7]:

[7] This list is not exhaustive. A complete list of the types of cases OPD may be appointed on can be found at Montana Code Annotated § 47-1-104(4).

- Defendants in any criminal case where jail time is a possible sentence;
- Juvenile Defendants in Youth Court;
- Respondents in Guardianship or Involuntary Commitment proceedings;
- Parents and Children in Dependent Neglect cases; and,
- Appeals to the Montana Supreme Court for OPD clients.

In many cases, OPD attorneys require the aid, assistance, or expertise of outside professionals to best represent their clients.

OPD Contract Investigators provide a wide range of investigative services for OPD Attorneys, which may include discovery analysis, crime scene documentation, witness interviewing, and a wide variety of research tasks.

OPD Contract Mental Health Professionals provide a number of evaluations, recommendations, and opinions for OPD Attorneys and Clients, which may include competency evaluations, mental health evaluations, psycho-sexual evaluations, or chemical dependency evaluations.

How much does OPD pay its MOU holders?

By statute, all contractor rates are set by the Director of OPD and are subject to change. To find the current rates please see the OPD Contractor Compensation Schedule.

Are there any other benefits to contracting with OPD?

We are always looking for new and better ways to support our contractors. Currently OPD offers the following benefits to its contract attorneys:

- The opportunity to work on challenging, unique, and diverse cases for indigent, disenfranchised clients that would otherwise be without legal representation or services;
- The ability to attend any OPD sponsored CLEs free of charge, as well as other training opportunities. Please note that while registration to OPD CLEs is free, OPD does not pay for travel costs related to attending CLEs, though we are usually able to offer lower hotel rates to our contractors through room block reservations;
- Weekly Case Summary emails summarizing all relevant United States and Montana State Supreme Court orders and decisions;
- Ability to receive a Lexis Advance license if certain criteria are met.
- Ability to bill for administrative time for those using admin assistants.
- Dedicated team for case management platform support.

Am I required to have insurance to obtain an MOU?

No, professional liability insurance coverage in not required to apply for an MOU. The specific insurance requirements for each type of provider are as follows:

Attorneys

Counsel has and shall maintain in force for all times and work done, pursuant to this MOU, a Lawyers' Professional Liability Insurance policy, occurrence coverage, with minimum coverage of $250,000 per occurrence and $500,000 aggregate per year. Counsel shall provide proof of liability coverage upon request. If "occurrence" coverage is unavailable or cost prohibitive, Counsel may obtain "claims made" coverage provided the following conditions are met:

1. The commencement date of this MOU must not fall outside the effective date of insurance coverage and it will be the retroactive date for insurance coverage in future years; and,

2. The "claims made" policy must have a three-year tail for claims that are made (filed) after the cancellation or expiration date of the policy.

Investigators

Investigator has and shall maintain in force for all times and work done, pursuant to this MOU, a Professional Liability Insurance policy, occurrence coverage, with minimum coverage of $500,000 aggregate per year. Investigator shall provide proof of liability coverage upon request.

Mental Health Professionals

Provider has and shall maintain in force for all times and work done, pursuant to this MOU, a Professional Liability Insurance policy. Provider shall provide proof of liability coverage upon request.

What should I know before deciding whether to apply for an MOU?

Working with OPD can be some of the most challenging and rewarding work of your career. Prior to choosing to serve indigent clients however, we ask that each contractor carefully consider their ability and willingness to work with the State of

Montana and our clientele. Additionally, the following policies and procedures will inform you of OPD's expectations for our contractors:

- OPD Policies & Procedures
- OPD Mental Health Protocol
- OPD Contractor Compensation Schedule
- OPD Pre-Approval and Claims Procedure

Please note that we are in the process of updating all operating procedures and policies to reflect the Advo, our new case management system. Should you have any questions or concerns not addressed in these documents, please reach out to OPDOperations@mt.gov.

Current Contractors

How can I be approved to accept assignments in additional Practice Areas or Practice Regions?

Contract Attorneys and Mental Health Providers are limited to assignments within the regions and case/evaluation types for which they were initially approved.

Attorneys

- If you would like to be approved to accept assignment in additional regions or courts, please email the Contract Assistant, as listed above, with the additional courts or regions in which you would like to practice.
- If you would like to be approved to accept assignment of additional case types than you were initially approved for, please download the Attorney MOU Amendment Form, complete it, and email it to the Contracts Assistant, as listed above.

Mental Health Providers

- If you would like to be approved to accept assignment of additional types of mental health services than you were initially approved for, please download the Mental Health Professional MOU Amendment Form and email that form, along with **REDACTED** copies of reports for ***each type of additional evaluation*** to the Contracts Assistant, as listed above.

Who do I talk to if I have a question about…?

Any issue(s) relating to a case assigned to me by OPD

- The attorney that assigned you the case

A potential mental health issue I've identified in a case assigned to me

- The attorney that assigned you the case; and/or,
- OPD's Mental Health Consultant, Dr. Scolatti at mjs@sabersop.org

Any issue(s) related to my claims or the Claims Portal

- Please email the OPD Claims Box with your question or issue: opdclaims@mt.gov

Registering or Accessing eMACS

- Please contact one of the Contracts Program Staff listed above

My MOU with OPD

- Please contact one of the Contracts Program Staff listed above

Updating my contact or payment information

- Please contact one of the Contracts Program Staff listed above

An issue not listed here

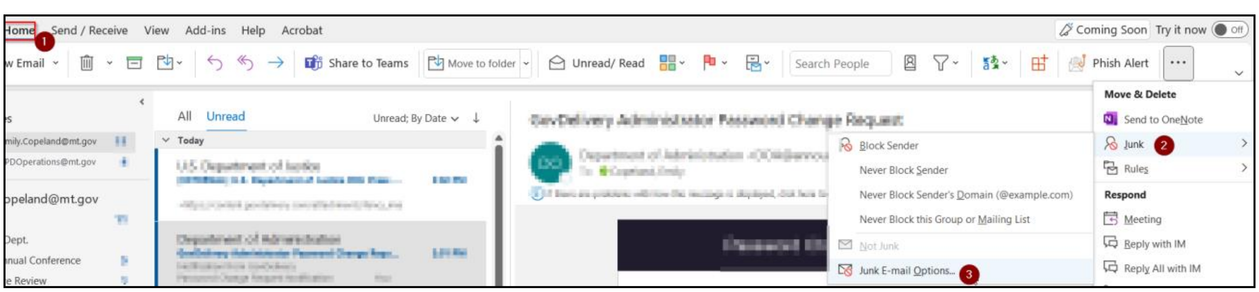
- Please contact one of the Contracts Program Staff listed above

I am not getting email from OPD

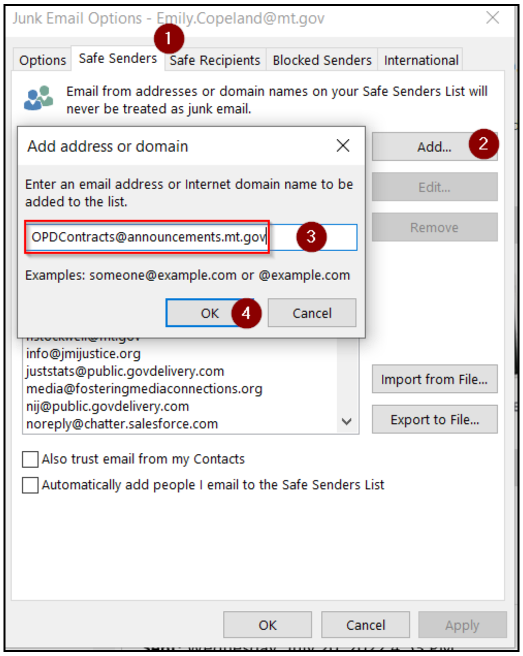
Adding OPD Contracts Office Email to Safe Sender **List** *(to avoid emails going to Spam or Junk folders)*

If using Outlook:

Open Outlook, from the 'Home' tab find where your 'Junk' tab is (mine is hidden in the ribbon, you can see where I found it in the image below). Open the Junk tab and then 'June E-mail Options'



From the Junk E-mail Options, then hit the 'safe senders' tab and then 'Add'. Enter the email address Contract's office uses to email via GovDelivery: OPDContracts@announcements.mt.gov, press apply, then OK.



If using Gmail:

*gmail does not have a true 'safe senders list' the way Microsoft Outlook does. Some alternative options exist to ensure these emails are not put in junk or spam:

Option 1: Save Your Contact

On a Computer

Go to **contacts.google.com >** select ***Create contact*** at the top left corner **>** enter the sender's **email address >** click ***Save*** at the bottom right corner.

On an Android Smartphone or Tablet

Find and open your ***Contacts app >*** click the ***Add button >*** enter contact's **name and email address>** next to your email account, tap the **Down arrow** to select the desired account that will receive the messages from the account you've whitelisted **>** click **Save** before exiting to save your changes.

Contacts Name: OPD Contracts Office

Email Address: opdcontracts@announcements.mt.gov

Option 2: Mark as "Not Spam"

If a message from a trusted sender somehow ends up in your spam folder, **marking it as safe manually** will signal Gmail that this is the type of message you'd want to receive in the future.

To do so, open the **Gmail website >** select **Spam** (or select **More,** then find **Spam) >** open the desired email **>** mark it as **"not spam"** at the top of the page.

The email will automatically be sent to your inbox and removed from the spam folder. However, this method **doesn't guarantee** that the specific sender will be put on the Gmail approved senders list for good.

Option 3: Create a Filter Rule

Gmail works better with creating rules rather than giving you a pre-set option. This gives you more space for personalisation and adjusting your account to your fit. Creating rules and specific filters is **the closest Gmail comes to "a safe sender" or "whitelisting"**.

Open the **Gmail website >** go to the **search box** at the top of the page **>** select the **down arrow >** there's a **From** field in which you should **enter the trusted sender email address >** at the bottom of the **search window** click on **Create filter >** select **Never send it to spam >** click **Create filter.**

I am having Claims Portal login issues:

The Claims Portal requires the use of Google Chrome browser, this can be downloaded for free here: https://www.google.com/chrome/
If you log in and do not see My Claims, My Case Status Updates, etc, please first clear your browser cache by following these instructions:

- **Log out of portal** and then, to open menus used to clear your cache, cookies, and history be sure your browser is open and use the keys below depending on your computer:
  - Windows: Press Crtl-Shift-Delete
  - Mac: Command-Shift-Delete
- Use the browser specific instructions from the table below:

Browser Type	Clear Browser Cache Instructions
Chrome	1. At the top of the "Clear browsing data" window, click Advanced 2. Select the following: o Download history o Cookies and other site data o Cached images and files 3. From the "Time Range" drop-down menu, you can choose the period of time for which you want to clear cached information. To clear your entire cache, select All Time 4. Click CLEAR DATA 5. Exit/quit all browser windows and re-open the browser 6. Log back into portal

If you are still unable to access the portal, please email opdclaims@mt.gov with your issues and your attempts to resolve it.

When I try to upload an attachment to the Claims Portal, I get an "internal server error" message

This is likely due to the attachment file size being larger than 4mb. As the system is unable to upload a file exceeding that size, you must compress or split the file you are attempting to upload. If the document is scanned, be sure it is scanned in black and white.

If you are confident the attachment does not exceed 4mb and are still expecting this error, please email opdclaims@mt.gov with your issues and the attachment.

LMS: Information - *Coming Soon*