

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

Training for AdvOPD Portal

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

Contract Attorneys (includes instruction for submitting pre-approvals)

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

Non-attorney Contractors and Service Providers

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

Using AdvOPD Portal

Viewing Cases

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



Tips:

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

Viewing Documents in Filing Cabinet

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

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

+ Follow Close Matter

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

Details Related Activity **Filing Cabinet**

Information Filing Cabinet

Name: Buckley Cole Russell Ackerman - DC-20-178 - Driving Under The Influence Of Alco
 Type: DC - District Court

Primary Contact: Buckley Cole Russell Ackerman
 Status: Pending

Cause Number: DC-20-178
 Status Type: Active

OPD Matter ID: 21-11888
 Stage: Intake

Last Client Check In Date

Court: Twentieth Judicial District Court, Lake County
 Judge: James A. Manley

Lead Defense Attorney: [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: 21-11888 Primary Contact: Buckley Cole Russell Ackerman Court: Twentieth Judicial District Court, Lake County

Details Related Activity **Filing Cabinet**

Folders

Vendor Accessible Search

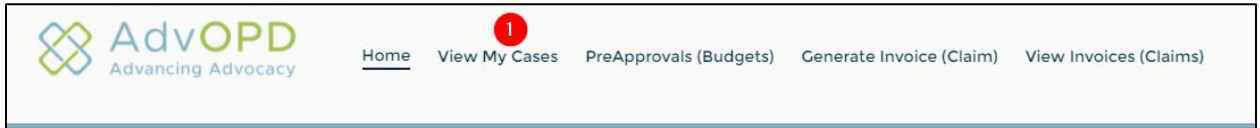
No results found

Entering Pre-approvals (Attorneys Only)

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

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

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



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

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

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

Matter
Vannatta, Shane - DA 1... - DC-20-212 ~ Theft - Obtain Or Exerts Unauthoriz

Cause Number: DC-20-212 OPD Matter ID: 20-139-21 Primary Contact: Vannatta, Shane Court: Fourth Judicial District Court, Missoula Cour

Details **Related** Activity Filing Cabinet

Information

Name: Vannatta, Shane - DA 1... - DC-20-212 ~ Theft - Obtain Or Exerts Unauthoriz Type: DC - District Court

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

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

Details **Related** Activity Filing Cabinet

Budgets (1)

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

View All

4. Select New – PreApproval button from upper left

Budget
 BUD-00210496

+ Follow **New - Pre Approval**

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

Budget Details (0)

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

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

New - Pre Approval

Details

* Service Provider Type:

* Travel Reimbursement:

* Timekeeper:

* Justification:

Budget Information

* Amount Requested:

Mental Health

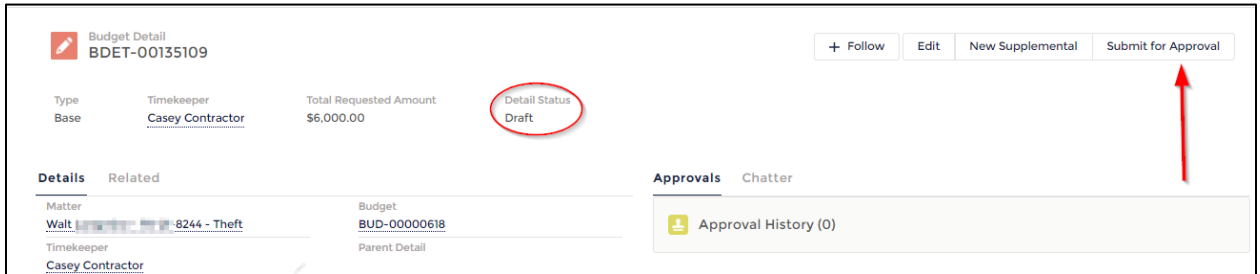
Medical Document No of Pages:

Legal Document No of Pages:

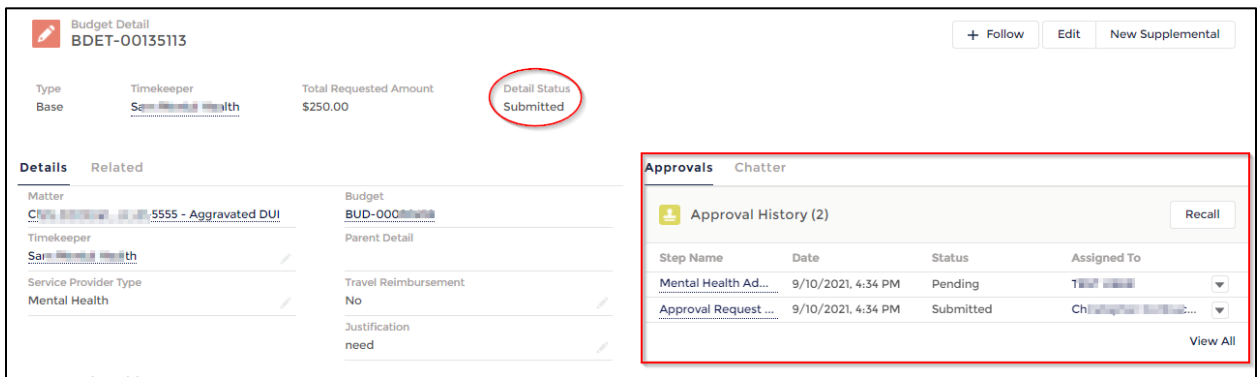
Other Document No. of Pages:

Next

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

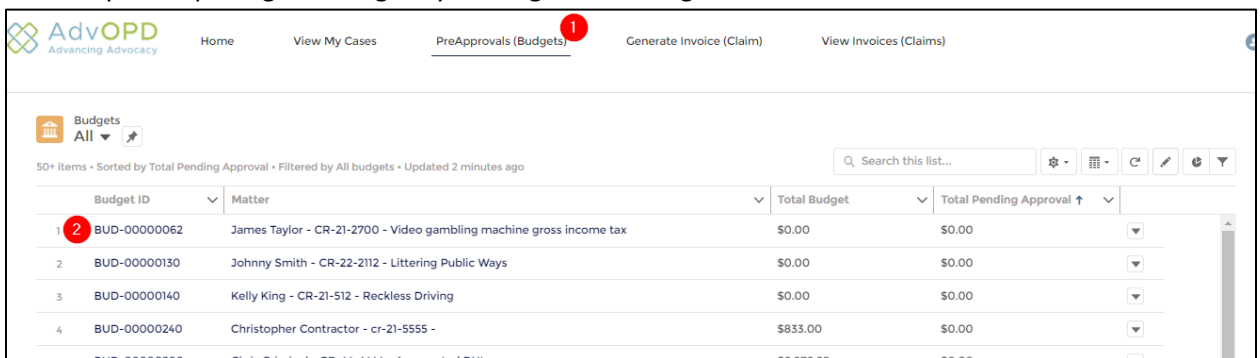


- Upon submit, you can optionally enter a comment and then **press Submit**
- You will now notice a box with Approval History appears and the Detail Status says Submitted instead of Draft



Entering Supplementals (Attorneys Only)

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



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

Budget
BUD-00000300

+ Follow New - Pre Approval

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

Budget Details (7) Budget Detail = Pre-approval

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

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

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

Budget Detail
BDET-00000024

+ Follow Edit New Supplemental Submit for Approval

Type: Base Timekeeper: Test Mental Health Provider Total Requested Amount: \$5,000.00 Detail Status: Approved

Details Related

Matter: Chris Criminal - CR-44-4444 - Aggravated DUI Budget: BUD-00000300

Timekeeper: Test Mental Health Provider Parent Detail

Service Provider Type: Mental Health Travel Reimbursement: Yes

Approvals Chatter

Approval History (4)

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

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

Budget Detail
BDET-00135112

+ Follow Edit New Supplemental Submit for Approval

Type: Supplemental Timekeeper: Test Mental Health Provider Total Requested Amount: \$5,275.00 Detail Status: Draft

Details Related

Matter: Chris Criminal - CR-44-4444 - Aggravated DUI Budget: BUD-00000300

Timekeeper: Test Mental Health Provider Parent Detail: BDET-00135111

Service Provider Type: Mental Health Travel Reimbursement: Yes

Justification: Need another evaluation

Approvals Chatter

Approval History (0)

Invoices (claims)

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

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

The new Division 1 Regions:

Region 1 is now:

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

Regional: Koan Mercer, kmerc@mt.gov

Region 2 is Now:

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

Regional: Annie DeWolf, adewolf@mt.gov

Region 3 is Now:

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

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

Division 3, Conflict Defender Division Regions:

Region A:

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

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

Region B:

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

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

Region C:

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

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

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

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

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

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

Creating 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 – **the purpose of this is to select ONE case from each 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:

<input type="checkbox"/>	Court	Invoice Group
<input type="checkbox"/>	Montana Supreme Court	Division 2
<input type="checkbox"/>	Montana Supreme Court	Division 2
<input type="checkbox"/>	Montana Supreme Court	Division 2
<input type="checkbox"/>	Mineral County Justice Court	Region A

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

Select Cases

OPD Matter Id

20-18685

20-6827


19-34280

21-4076

Select Cases						
OPD Matter Id	Name	Matter Type Code	Court	Invoice Group		
<input checked="" type="checkbox"/> 20-18000	Joseph Thomas (Pilot) - CA 00-0440 ~ ...	DA	Montana Supreme Court	Division 2		
<input type="checkbox"/> 20-00007	Paula Debraque Wagner - CA 00-0099...	DA	Montana Supreme Court	Division 2		
<input type="checkbox"/> 19-3-00001	Erica Brantley - CA 00-0076 - Appeal	DA	Montana Supreme Court	Division 2		
<input checked="" type="checkbox"/> 21-40076	Regan Patricia Macpherson - PR 01-13...	TK	Mineral County Justice Court	Region A		

By selecting these 2 cases, the system will create two 'shell claims'. One for Division 2 and one for Region A (conflict), the next screen prompts you for Month of Service

- After selecting ONE CASE from each 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.** Select this for each invoice group, and then press Create/Upload – you will be prompted to upload your supporting documentation as required.


Division 2


Indicates Invoice Group Being Created

OPD Matter Id	Name	Matter Type Code	Court	Invoice Group
20-18000	Joseph Thomas (Pilot) - CA 00-0440...	DA	Montana Supreme Court	Division 2

* Select the month of Service

 Complete this field.

Create/Upload



Division 2

Attach Files

↑
Upload Files

Upload all attachments for your claim here - remember for new regions in Division 1 (non-conflict) now includes more offices and you can include all invoices into the same claim

then **press Next**

This process will continue for each 'shell' being created depending on the cases you selected initially

- After all shells have 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

+ Follow New Line Item Submit for Approval Edit

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

Number: INV-00958798 Owner: Ch...
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 (0)

Accounting Date: 8/10/2021
Last Day to Submit: 9/30/2021

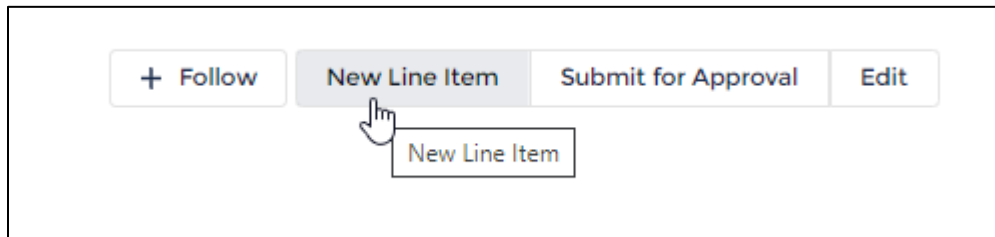
Accounting Date: 8/10/2021
Last Day to Submit: 9/30/2021

Late Submission Justification:

Late Submission Approval Grounds:

Total Amount:

- 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 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

* A value is required.

* QTY

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

Please enter some valid input. Input is not optional.

Description

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

Next

If you select Other Costs, you can enter Mileage, Per Diem, Lodging, Office Stipend, etc. 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:

New Line Item

Details

* Is this for Hours Worked or Other?

Hours Worked
 Travel Hours
 Other Costs

* Matter

CC Christopher Contractor - DA-21-1 - ×

* QTY

4.10

Description

Reviewed transcripts, email communication, start of drafting

Next

New Line Item

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

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

* Justification for Hours

trial

* Estimated Additional Hours Needed

2

Previous
Next

Invoice INV-00958798

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

Number: INV-00958798
 Owner: Christopher [redacted]
 Invoice Date: 8/10/2021
 Invoice Group: Division 2

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	Hours Worked	Hours Worked	\$168.00	3.00

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

Submit for Approval

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

Cancel Save

Notice the Status changes to Submitted:

Invoice INV-00958798

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

7. 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:

The screenshot shows an invoice titled 'Invoice INV-00958798'. The status is 'Submitted'. The invoice date is 8/10/2021, and the total amount is \$213.00. The invoice group is 'Division 2'. The owner is 'Christopher Contractor'. The 'Approvals' tab is selected, showing an 'Approval History (2)'. The history table has the following data:

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:

The screenshot shows the 'Line Items' tab with a table containing one item. A red arrow points to the 'LI-000078' entry.

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

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

The screenshot shows the 'Invoice Line Item' record page for 'LI-000078'. The 'Edit' button is circled in red. The page displays the following information:

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

Creating Invoices – Non-Attorneys

Coming soon

Closing Cases

Coming soon