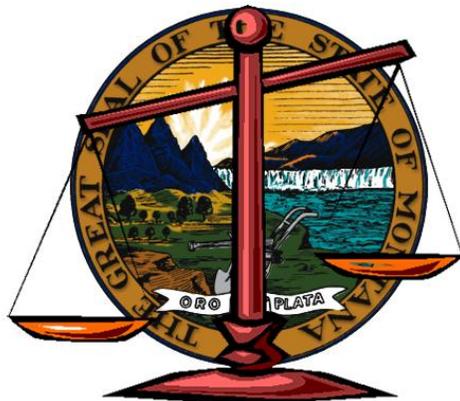


OPD Claims Portal User Guide



**Office of the State
Public Defender**

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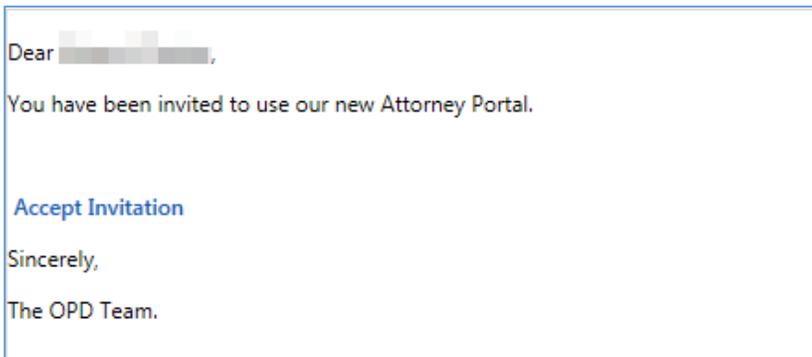
Introduction

In an effort to expedite and streamline the contractor billing process, OPD has implemented a new online billing system for contract attorneys to submit their monthly claims. This new system will expedite the payment of your claims. It will also allow you to begin entering your hours worked throughout the month instead of waiting for the 1st of the month when OPD emails out the summary claim form. You will have the ability to see the current status of your submitted claims. You will also be able to submit case status changes (i.e. close a case) using the new system.

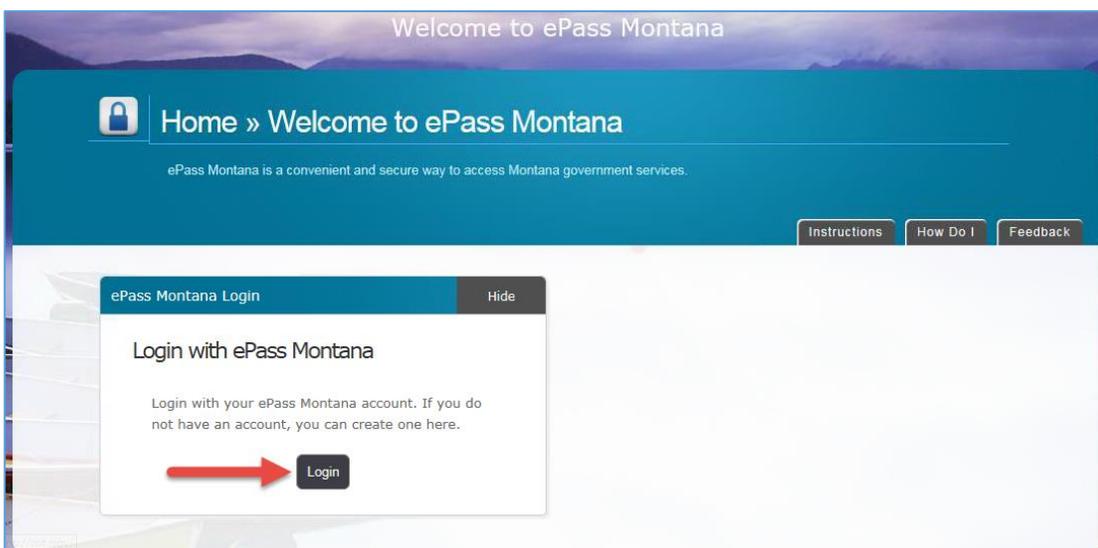
With the implementation of this new online billing system, very little is changing in terms of the documentation you are required to maintain and submit with your claims. You will still be required to maintain and submit detailed billing records. These detailed records will need to be scanned/attached to your online claim. You will no longer have to mail in any documentation to the regional offices or conflict office. The new system will replace the summary claim form that is emailed to you on the 1st of each month.

Logging In

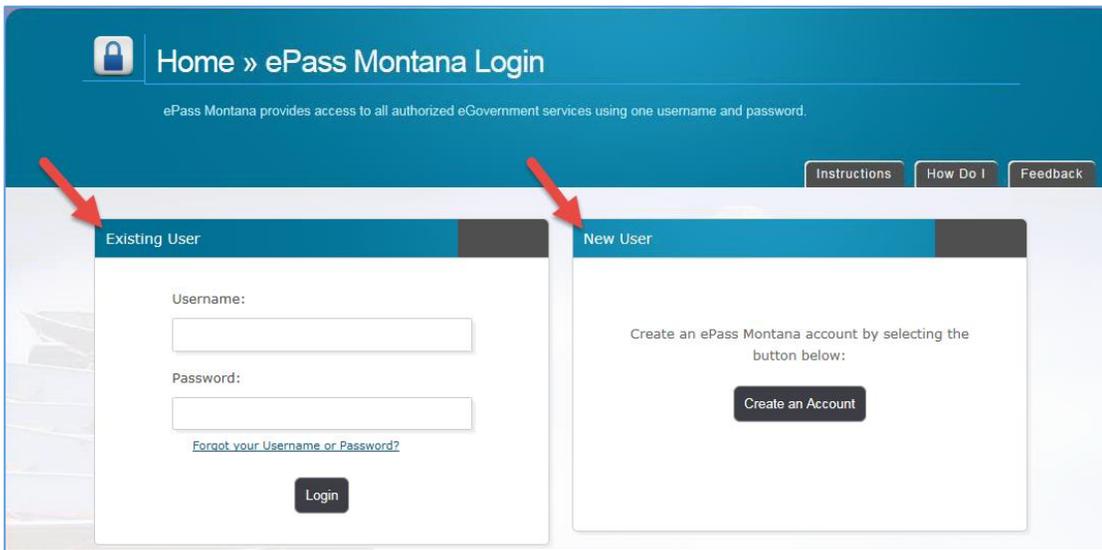
To log into the new system for the first time, you will be sent an email that looks like the image below. Click on the 'Accept Invitation' link in the email.



This will take you to the Montana ePass login page. Click the 'Login' button shown below.

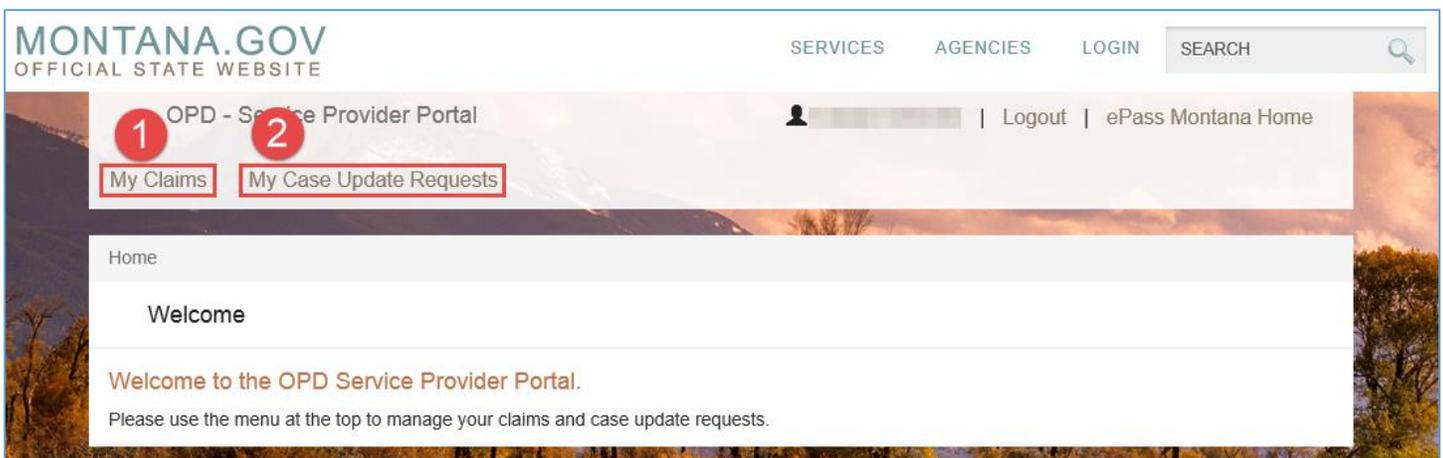


The next page will prompt you to either login with an existing Montana ePass account or create a new one as shown below. If you have used ePass for other state services such as the File Transfer Service, you may use that account, otherwise create a new account.



Once you have logged in/created your account you should see the page below. There are two primary areas that you will use to manage your billing and cases with OPD.

1. **My Claims** – This is the area where you will be able to create claims and enter your hours and other fees.
2. **My Case Update Requests** – This is where you will be able to request that the status of a case be changed to Closed or Inactive.



After you login to the site for the first time, you can navigate to <https://opdclaims.mt.gov>. We suggest that you bookmark this site for future reference. If you get a message saying you must be invited and do not see “My Claims” or “My Case Update Requests”, refer to the Help/FAQ section at the end of this document.

My Claims

Claim Creation

This area will show all of your claims, their status, and amount. When you first login to the system, this area will be blank as you have not submitted any claims. To generate a new claim, click the ‘+ New’ button in the My Claims grid as shown below. You will need to create a claim for each Region and Conflict Type combination (i.e. if you have conflict cases in Region 1 and Region 2 and non-conflict cases only in Region 2, you would end up with 3 individual claims).

OPD - Service Provider Portal Logout | ePass Montana Home

My Claims My Case Update Requests

Home / My Claims

Claims

My Claims + New Open Delete Search

Month Of Service	Region	Conflict Type	Claim Amount	Status Reason	Last Day to Submit
June 2015	Region 1	Conflict	--	Draft	08/14/2015
May 2015	Region 1	Conflict	\$ 2,120.32	Draft	07/15/2015
May 2015	Region 1	Non-Conflict	\$ 745.00	Submitted	07/15/2015
April 2015	Region 1	Non-Conflict	\$ 719.00	Inactive	06/14/2015
April 2015	Region 1	Conflict	\$ 223.40	Draft	06/14/2015

Figure A below shows the new claim screen. There are three fields you must fill out in order to generate a claim, Region (1), Month of Service (2), and whether it is a conflict or non-conflict claim (3).

Figure A

Home / My Claims / Claim

New

General

Attorney * Month of Service * 2

Region * 1 Conflict Type * 3

Claim Amount

Hours

Expenses

Attachments

4 Save

Field 1 – Region: to select a Region, click the magnifying glass next to the field. A popup window will appear showing which regions are available for billing based on the cases you are assigned (see below). You may either double click the Region or single click it and then click the ‘Select’ button in the lower right of the popup window.

Q Region *

Filtered Regions Search

Name
Region 1

1 records

Cancel Select

Field 2 – Month of Service: to select a Month of Service, click the down arrow next to the field. A dropdown menu will appear showing which Months of Service are available for billing (see below). You have the ability to select any Month of Service that is within 45 days of the current date. If you select the current month you will be able to enter expenses, however, you will not be able to submit the claim until that Month of Service is complete (the first day of the next month).

Home / My Claims / Claim

New

General

Attorney * [Search] Month of Service * [Dropdown]

Region * [Region 1] Conflict Type * [Dropdown]

Claim Amount [Text]

Month of Service dropdown menu options: May, June

Field 3 – Conflict Type: to select a Conflict Type, click the down arrow next to the field. A dropdown menu will appear allowing you to select either Conflict or Non-Conflict.

After entering in the required fields, you **MUST** click the 'Save' button in the lower right (#4 in Figure A above) in order to begin entering expenses. Once you save, you will not be able to edit fields 1 through 3.

Entering Fees and Expenses

Once you have created the claim, there are three primary areas or grids on the claim page, Hours, Expenses, and Attachments.

Hours

Only one claim line is necessary per case worked. Please sum all time worked by case for the month and enter the total into one claim line. Click the '+ New' button to add a new claim line (shown below).

Home / My Claims / Claim

er, E ~ June, 2015 ~ Region 1 ~ Non-Conflict

Claim Submission [Submit]

Please submit this claim by the 10th of the month following the month in which costs were incurred.

General

Attorney * [Search] Month of Service * June

Region * [Region 1] Conflict Type * Non-Conflict

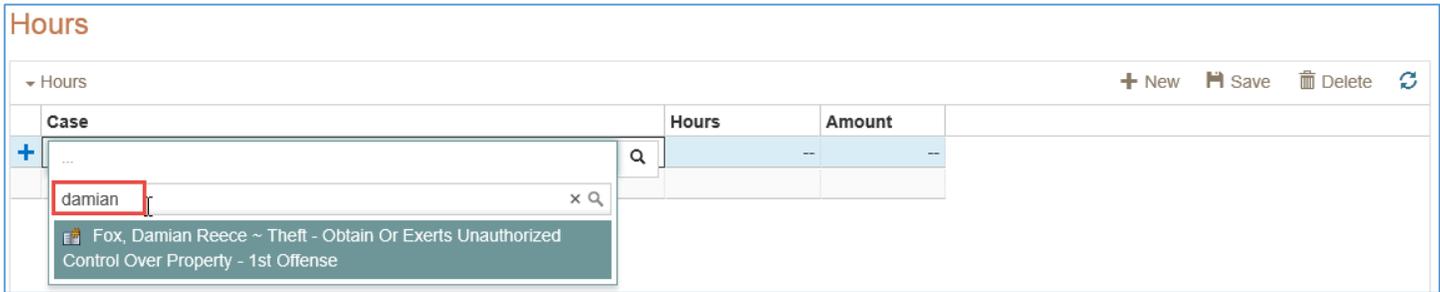
Claim Amount [Text]

Hours

Hours [Dropdown] + New Save Delete Refresh

Case	Hours	Amount
[Search]	--	--

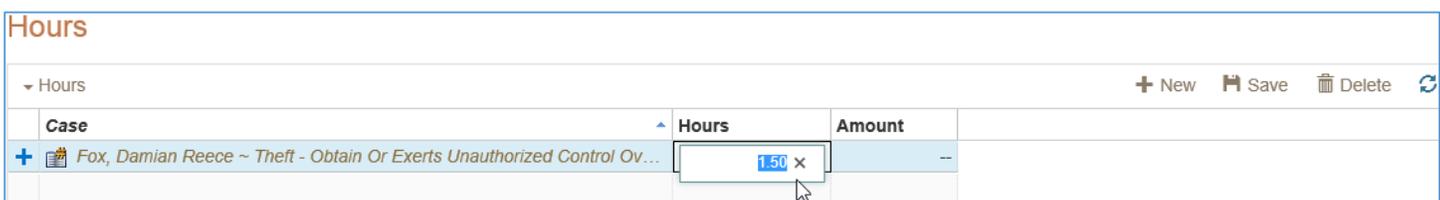
Once you have added a new claim line, you can select a case to bill on in one of two ways. First, you can simply begin typing in the 'Case' field the client name, Court/Cause #, or the charge description. As you type, it will begin showing results (shown below). Simply click the case to select it.



The second option to select a case is to **HOVER** on the new claim line you just added and click the magnifying glass () that appears to the far right of the case field/column (shown in image above). A popup window will appear with all of your billable cases (shown below). In this popup window, you can use the search box (1) to filter the results shown. With this search you can type a client name, charge, Court/Cause #, case type, or OPD Case # and press enter to search. You may also simply click a column header (2) to sort the list by that field. To select the case either double-click it or single click to select the correct row and then click the 'Select' button (3). **NOTE: If you don't see your case as an option, contact the Regional Office if non-conflict or the Conflict Office if the case is a conflict.**



Once you have selected a case click into the 'Hours' field and type the number of hours you would like to bill (see below). **NOTE:** you cannot click into the 'Amount' field as this is automatically calculated for you by the system based on OPD's current hourly rate.



Next you **MUST** click the 'Save' button in the upper right corner of the grid. After the save has completed, the amount field will be populated (see below). You do not need to save after each line entered. You may enter multiple lines and save them all at once, however, as a general practice saving often is recommended. **Please note that the system will only allow you to enter ONE claim line per case. As such, all time spent on a particular case for the month should be consolidated and entered on one line.**

Hours

Hours + New Save Delete Refresh

Case	Hours	Amount
Fox, Damian Reece ~ Theft - Obtain Or Exerts Unauthorized Control Ov...	1.50	\$ 93.00

Expenses

Similar to entering Hours, click the '+ New' button to add a new expense line. There are five different categories of expenses you can enter. Click the arrow in the 'Expense Type' field to see the options (shown below). Don't forget that you must save in order for your work to be saved.

Expenses

Expenses + New Save Delete Refresh

Expense Type	Description	Miles	Amount
Mileage		--	--

- Mileage
- Per Diem
- Lodging
- Office Supplies
- Stipend
- Other Fees

Mileage

When entering mileage charges you may enter a description of the travel (1). You are only allowed to type in the 'Miles' field (2) and not the 'Amount' field. The amount will automatically be calculated for you when you save based off of the State's current mileage rate (3). Don't forget that you must save in order for the amount to be calculated and for your work to be saved. You are also required to complete the OPD Travel Voucher form ([LINK](#)) and attach it to the claim (see Attachment section below for instructions on attaching files to your claim).

Expenses

Expenses + New Save Delete Refresh

Expense Type	Description	Miles	Amount
Mileage	Great Falls to Helena	95.00	\$ 54.63

Per Diem, Lodging, and Other Fees

When entering Per Diem, Lodging or Other Fees, you must enter a description (1). You are only allowed to type in the 'Amount' field as miles are not applicable to these expense types (2). You are also required to complete the OPD Travel Expense form ([LINK](#)) for Lodging/Per Diem and attach it to the claim (see Attachment section below for instructions on attaching files to your claim). Where applicable for 'Other Fees', make sure you attach the appropriate forms and documentation to the claim.

Expenses

Expenses + New Save Delete Refresh

Expense Type	Description	Miles	Amount
Per Diem	Lunch in Helena on 6/25	--	\$ 6.00
Mileage	Great Falls to Helena	95.00	\$ 54.63
Lodging	Hotel in Helena on 6/25. Travel voucher atta...	--	\$ 65.00
Other Fees	Example other fee	--	\$ 50.00

Office Supplies Stipend

When entering the monthly Office Supplies Stipend, you will not be able to enter an amount. Simply select 'Office Supplies Stipend' as the expense type and click the Save button. The allowed amount will automatically populate upon saving (see below). **NOTE:** you are only allowed to bill for one office supplies stipend per month, regardless of the number of regions you work in.

Expenses				
▼ Expenses + New Save Delete Refresh				
Expense Type	Description	Miles	Amount	
Per Diem	Lunch in Helena on 6/25	--	\$ 6.00	
Mileage	Great Falls to Helena	95.00	\$ 54.63	
Lodging	Hotel in Helena on 6/25. Travel voucher atta...	--	\$ 65.00	
Other Fees	Example other fee	--	\$ 50.00	
Office Supplies Stipend		--	\$ 25.00	

Attachments

In this grid, you will attach all required documentation related to your claim (i.e. detailed supporting documentation for hours worked, Travel Expense Form). You must attach supporting documentation in order to submit your claim for payment processing. **IMPORTANT** – Please consolidate all detailed invoices and other supporting documentation into a single attachment. This expedites the review/approval process. You claim can be rejected/returned to you if you attach an excessive number of files. There is also a file size limit of 10MB and it is suggested that if you scan your detailed invoices to do so in Black and White to reduce the file size (See FAQ at the end of this document for more details).

Similar to entering Hours and Expenses, click the '+ New' button to add a new attachment. A window like the one shown below will appear, click 'Choose File' (1). A standard file attachment window will open where you can navigate to the file on your computer that you wish to attach. After selecting the file, you can add a comment (2) if you want describing what the document is. Lastly click submit and you will see the file appear in the Attachments grid (see below).

Upload Document

File: C:\Users\... Desktop\OPD June Non-Conflict Detailed Expenses.xlsx 1 Choose File

Comments: Attached is the detail related to my June non-conflict claim 2

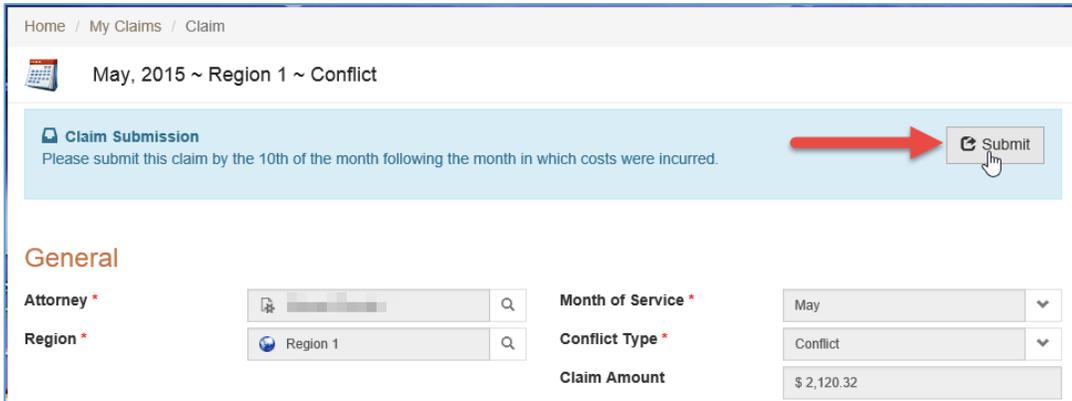
Cancel Submit

Attachments				
↑ / + New Download Delete Search Refresh				
Name	Comments	File Size	Last Updated	
 OPD June Non-Conflict Detailed Expenses.xlsx	Attached is the detail related to my June non-conflict claim	18 KB	2015-06-30 10:32 AM	

1 documents loaded

Claim Submission

Once you have finished entering all hours, expenses, and supporting documentation, click the submit claim button at the top of the page (see below). **NOTE:** you are not allowed to submit a claim until the Month of Service is complete (i.e. June claim forms cannot be submitted until July 1st).



Home / My Claims / Claim

May, 2015 ~ Region 1 ~ Conflict

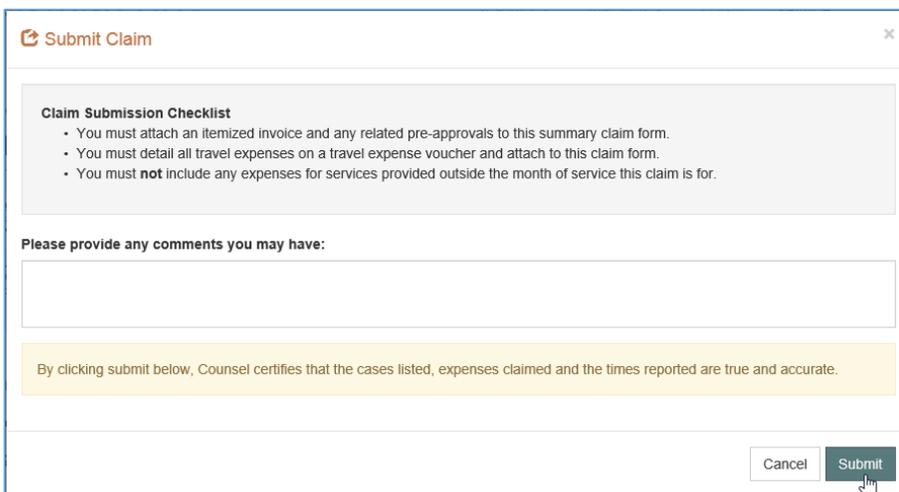
Claim Submission
Please submit this claim by the 10th of the month following the month in which costs were incurred.

Submit

General

Attorney *	<input type="text"/>	Month of Service *	May
Region *	Region 1	Conflict Type *	Conflict
		Claim Amount	\$ 2,120.32

Once you click submit, a popup window will appear with a claim submission checklist (see below). You can also add a comment about the submission. Once satisfied, click the submit button to submit your claim for payment processing.



Submit Claim

Claim Submission Checklist

- You must attach an itemized invoice and any related pre-approvals to this summary claim form.
- You must detail all travel expenses on a travel expense voucher and attach to this claim form.
- You must **not** include any expenses for services provided outside the month of service this claim is for.

Please provide any comments you may have:

By clicking submit below, Counsel certifies that the cases listed, expenses claimed and the times reported are true and accurate.

Cancel Submit

Claim Printing

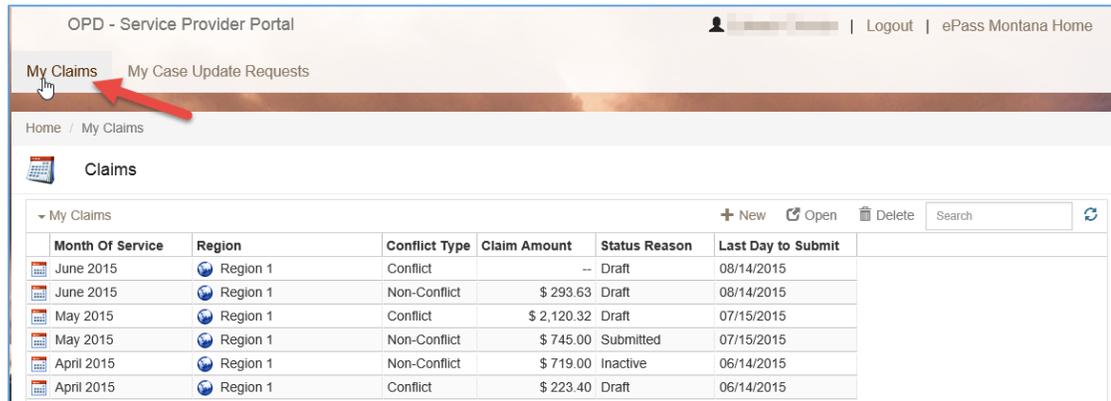
If you would like to print a copy of your submitted claim, open the claim and click the 'Print' button in the upper right section of the screen (see below). Depending on what internet browser you use, you will either be prompted to save or open or it may just automatically download the pdf copy of your claim.



General Claim Editing

You are allowed to make changes to your claim as long as you have not submitted it for payment processing.

To make edits to a claim form, open the claim by clicking the 'My Claims' section and then double-click the claim (see below).

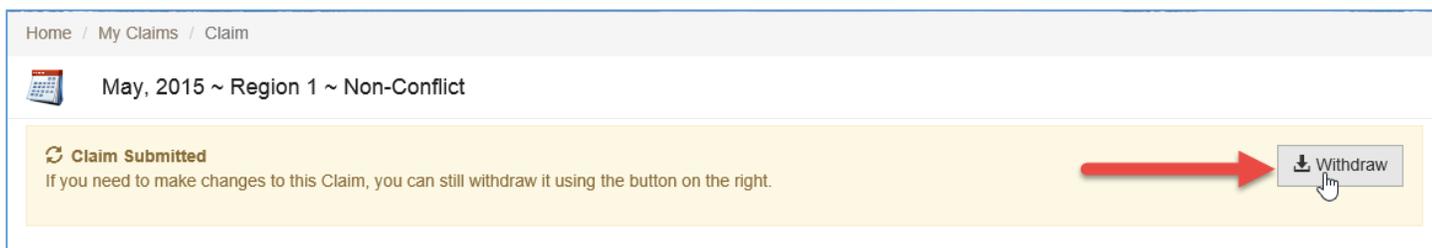


You will notice that all of the grids (Hours, Expenses, Attachments) have the same buttons in the upper right corner. If you make a mistake, you can either edit the appropriate field (hours, mileage, amount) or you can delete a row completely. To delete a row, select it by clicking the far left icon of the row (see 1 below) and then click the delete button (2).



Withdrawing a Claim

Even if you have submitted a claim, you can withdraw it for editing as long as the payment processing has not started. To do so, open the claim you want to make changes to and click the withdraw button (see below)



Home / My Claims / Claim

May, 2015 ~ Region 1 ~ Non-Conflict

Claim Submitted
If you need to make changes to this Claim, you can still withdraw it using the button on the right.

Withdraw

Viewing Claim Status

To view the status of your claim, navigate to 'My claims' and look at the Status Reason column (shown below). Statuses are as follows:

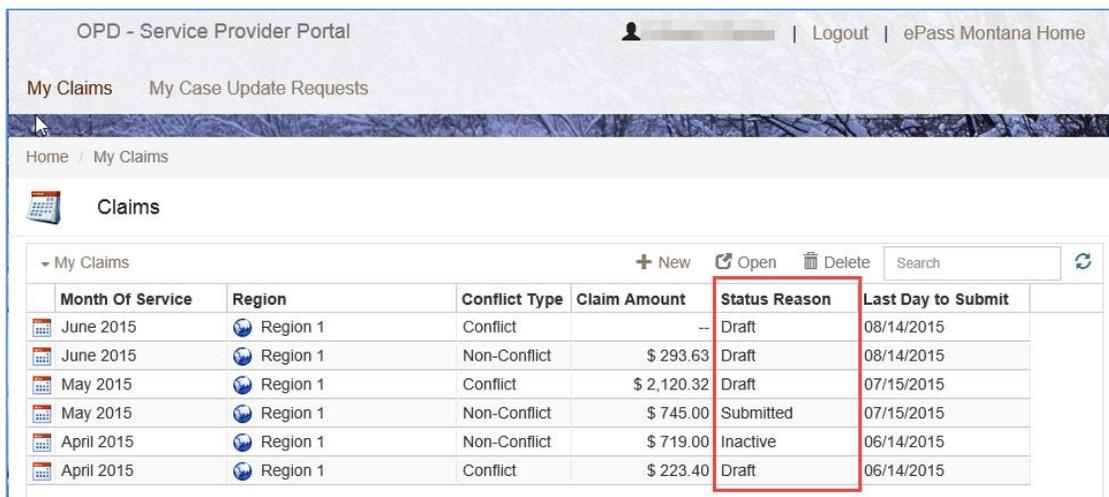
Draft – pending your submission to OPD.

Submitted – pending OPD review.

Approved – Claim has been approved and is pending payment.

Returned – Claim has been returned to you and needs your attention.

Processed – Payment has been made.



OPD - Service Provider Portal | Logout | ePass Montana Home

My Claims | My Case Update Requests

Home / My Claims

Claims

Month Of Service	Region	Conflict Type	Claim Amount	Status Reason	Last Day to Submit
June 2015	Region 1	Conflict	--	Draft	08/14/2015
June 2015	Region 1	Non-Conflict	\$ 293.63	Draft	08/14/2015
May 2015	Region 1	Conflict	\$ 2,120.32	Draft	07/15/2015
May 2015	Region 1	Non-Conflict	\$ 745.00	Submitted	07/15/2015
April 2015	Region 1	Non-Conflict	\$ 719.00	Inactive	06/14/2015
April 2015	Region 1	Conflict	\$ 223.40	Draft	06/14/2015

Changes to Claim Amounts

If an OPD employee makes any changes that affects the claim amount (i.e. reduce hours billed to a case, reduce mileage), they will make a note as to why the amount was changed. You should receive an email notification when changes are made to your claim as long as you have that option enabled on your account (See section relating to User Preferences). To view any changes made to your submitted claim, open the claim and you will see a section called 'Change History', click it to expand the grid. You will then see any adjustments that have been made to that claim (see below).

May, 2015 ~ Region 1 ~ Non-Conflict

Claim Submitted
If you need to make changes to this Claim, you can still withdraw it using the button on the right. [Withdraw](#)

General

Attorney * Month of Service *
 Region * Conflict Type *
 Claim Amount

Hours

Expenses

Attachments

Change History 

▼ Claim Update Logs for Claim

Name	Detail	Claim Line
Kyle Belcher: 6/30/2015	the correct lunch per diem is \$6, not \$7	Per Diem - May, 2015 ~ Region 1 ~ Non-Conflict

My Case Update Requests

The 'My Case Update Requests' area allows you to request status changes to cases (i.e. a case is complete and needs to be closed or a client went into warrant status and you need to have the case inactivated). To get to this area, click My Case Update Requests in the top area of the browser (shown below).

MONTANA.GOV
OFFICIAL STATE WEBSITE

SERVICES AGENCIES LOGIN SEARCH

OPD - Service Provider Portal | Logout | ePass Montana Home

My Claims **My Case Update Requests** 

Home / My Case Update Requests

Case Update Requests

▼ My Case Update Requests

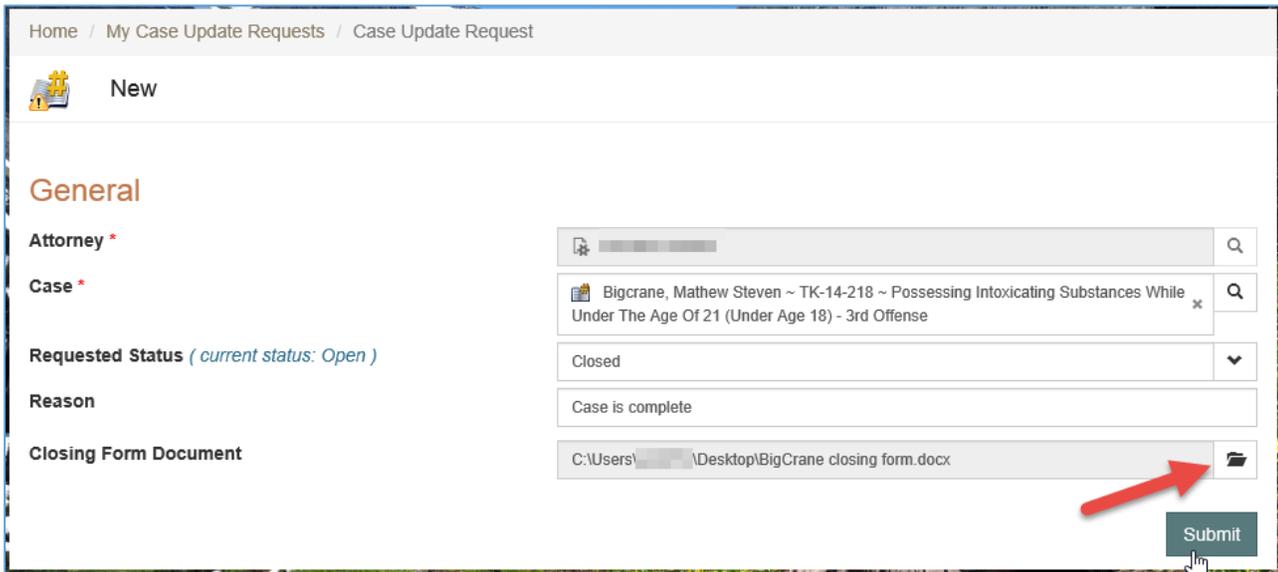
Case	Requested Stat...	Current Status	Request Date	Court Num...	Region
Brooks, Anthony Allen ~ TK-14-955 ~ Cr...	Closed	Complete	06/13/2015 11:22 A	TK-14-955	Region 1
Douma, Terri Ann ~ TK-15-22 ~ Operati...	Closed	In Progress	06/15/2015 11:46 A	TK-15-22	Region 1
Johnson, William Scott ~ TK-15-66 ~ Re...	Inactive	In Progress	06/15/2015 11:47 A	TK-15-66	Region 1

Creating a Case Update Request

Similar to creating a claim, click the '+ New' button in the top bar of the grid. On the page that opens, complete all of the fields shown. **NOTE:** A closing form is REQUIRED in order to submit a case update request of Closed. If you didn't receive a prepopulated form and would rather use the prepopulated form, you may contact the local regional office or Lynn

MacMillan (LMacMillan@mt.gov). You may also download the blank closing forms from the OPD web page <http://opd.mt.gov/forms.asp>.

To attach the closing form to the case update request, click the folder icon on the 'Closing Form Document' line (shown below). Once all fields are populated, click submit.



Home / My Case Update Requests / Case Update Request

New

General

Attorney *

Case *
Bigcrane, Mathew Steven ~ TK-14-218 ~ Possessing Intoxicating Substances While Under The Age Of 21 (Under Age 18) - 3rd Offense

Requested Status (current status: Open)
Closed

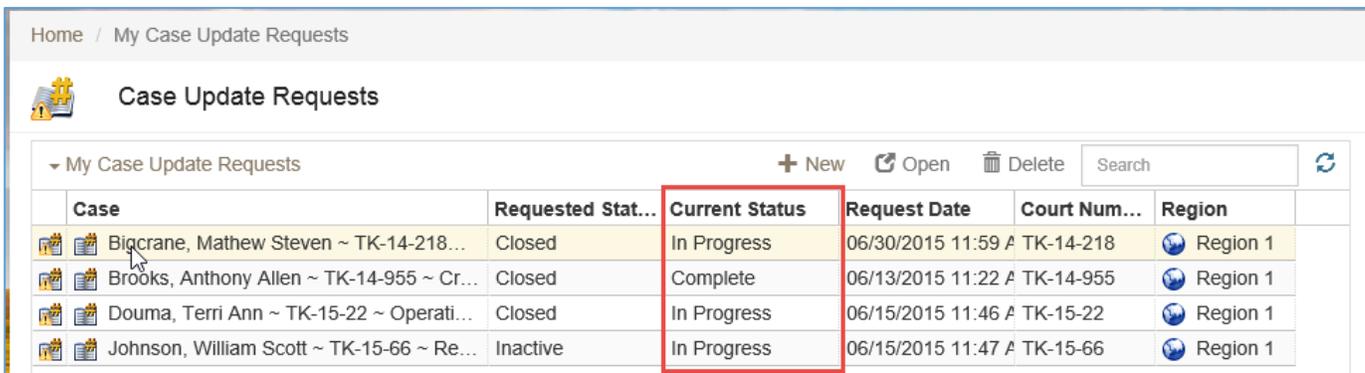
Reason
Case is complete

Closing Form Document
C:\Users\... \Desktop\BigCrane closing form.docx

Submit

Viewing Claim Update Request Status

Similar to viewing claim status, navigate to the My Case Update Requests area and the current status is shown (see below). The case status update is completed when the current status shows 'Complete'



Home / My Case Update Requests

Case Update Requests

My Case Update Requests + New Open Delete Search

Case	Requested Stat...	Current Status	Request Date	Court Num...	Region
Bigcrane, Mathew Steven ~ TK-14-218...	Closed	In Progress	06/30/2015 11:59 A	TK-14-218	Region 1
Brooks, Anthony Allen ~ TK-14-955 ~ Cr...	Closed	Complete	06/13/2015 11:22 A	TK-14-955	Region 1
Douma, Terri Ann ~ TK-15-22 ~ Operati...	Closed	In Progress	06/15/2015 11:46 A	TK-15-22	Region 1
Johnson, William Scott ~ TK-15-66 ~ Re...	Inactive	In Progress	06/15/2015 11:47 A	TK-15-66	Region 1

User Preferences

The 'My Case Update Requests' area allows you to change your communication preferences. To get to the user preferences screen, click your name in the top area of your browser (1 in image below). You will then get the screen shown below. You are allowed to update your email address, claim processing and claim change notifications. Options are as follows:

- 1) **Email** – this is the email address that all notifications from the new claims system will be sent. **NOTE:** This does not change your email address that you setup your State of Montana ePass account with nor does it change the email address that payment advice is sent (if you have elected to receive email payment advice).
- 2) **Notify me when claims are submitted, approved or returned** – this option will set the claims system to send you an email when an approval action or rejection has taken place on your claim.
- 3) **Notify me when changes are made to my claim** – this option will email you each time an OPD employee changes an amount on your claim (i.e. reduce billed hours, reduce mileage).



OPD - Service Provider Portal

1



Logout | ePass Montana Home

My Claims

My Case Update Requests

Home / Profile



Summary

First Name *

Last Name *

Email *

2

Notify me when claims are submitted, approved or returned

3

Yes No

Notify me when changes are made to my claim

4

Yes

5

Save

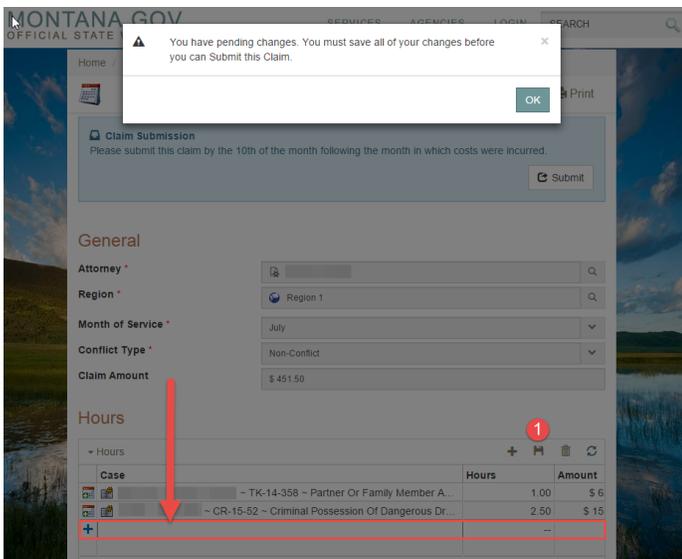
Help / FAQ

A case I need to bill hours for doesn't show up on the claim. What do I do?

In order for a case to be available for billing, you must be involved on the case in OPD's case management system. First, make sure that you are on the correct claim type when trying to select the case. If the case is a conflict case, be sure you are on the conflict claim form. If the case still isn't available after verifying you are on the correct claim form, you will need to contact the appropriate OPD staff. For conflict cases, contact the Conflict Coordinators Office at (406) 444-9161. For non-conflict cases, contact the Regional Office (a directory can be found [HERE](#)). **NOTE: Updates to case billing availability are done in a nightly process. If we have to associate/involve you to a case in our system, you have to wait until the next day for it to be available.**

When I attempt to submit my claim I get an error stating 'You have pending changes. You must save...'

Be sure you have saved all changes in both the 'Hours' and 'Expenses' grids by clicking the save icon (1 in image below). You may also have a blank claim line that is preventing the submission. Check each grid and make sure there are no blank claim lines (shown in the image below). To remedy this, simply click the save icon (1) and it will remove any blank rows for you.



I get an error and am unable to attach my detailed invoices due to file size or my claim has been returned to me for having too many attachments

If you are attaching a PDF file and it is too large, make sure you are scanning it in black and white, not color or 'auto'. Color PDFs are significantly larger in size than black and white. If your claim has been returned for having too many attachments and you don't have software that can merge documents into a single PDF like Adobe ACROBAT (not to be confused with adobe reader), there is a free program called CutePDF Editor that will allow you to do this. If you are interested in the software, you can read more at <https://www.cutepdf-editor.com/>. (Note: OPD does not support/troubleshoot the use of this program).

My claim amount was changed, who do I contact?

Before contacting OPD regarding any changes made to your claim, please login to the claims portal (<http://opdclaims.mt.gov>) and open the claim to the 'Change History' section (explained in this document [HERE](#)). Any changes to your claim require OPD staff to enter a note explaining the change. If you still have questions after viewing the change history notes, contact OPD at OPDClaims@mt.gov.

Why have I not been paid?

Before contacting OPD regarding the payment status of your claim, please login to the claims portal (<http://opdclaims.mt.gov>) and open the 'My Claims' page to view the status of your claim (explained in this document [HERE](#)). If you receive payment via EFT direct deposit and the claim status has been in the 'Processed' status for 2 business days (may be longer depending on your bank's processing times) and have not received payment, please contact OPD Accounting Staff (OPDAccounting@mt.gov). If you get a physical check mailed to you, please allow 5 business days after the claim status shows 'Processed'.

I am having problems logging in

You may reset your password or retrieve your ePass username [HERE](#).

After logging in for the first time using the link in the invitation email, you should be using <http://opdclaims.mt.gov> to access the site (you should bookmark this). If you have signed in and are not seeing the "My Claims" or "My Case Update Request Links", make sure you ARE NOT clicking the login link that is in the FAR upper right hand corner of the window (this will log you into ePass and NOT directly into the billing system). Be sure you are clicking the 'Login using ePass Montana' button on the lower part of the page (see screenshot below).

The screenshot displays the Montana State Government website header with 'MONTANA.GOV OFFICIAL STATE WEBSITE' and navigation links for 'SERVICES', 'AGENCIES', and 'SEARCH'. Below the header is the 'Office of the State Public Defender Claims Portal' section, which includes a logo, a 'Login' link, and a 'User Guide' button. A red circle with a slash is drawn over the 'LOGIN' text in the header. A red arrow points from the 'Login' link in the header to the 'Login using ePass Montana' button in the main content area. The main content area contains a 'Home' heading, a 'Welcome to the OPD Claims Portal.' message, and instructions: 'You must be invited via email to use this site. If you have received an email invitation, please click the link in the email. If you have not been invited, and need to submit claims, please contact OPD Staff at OPDClaims@mt.gov. If you have already responded to an invite and logged in for the first time, please login using ePass Montana by clicking the button/image below..'. The 'ePass Montana' button is highlighted with a red arrow.

If you continue to have problems, you may contact OPD Staff at OPDClaims@mt.gov.