

AdvOPD Invoicing – Official Court Reporters

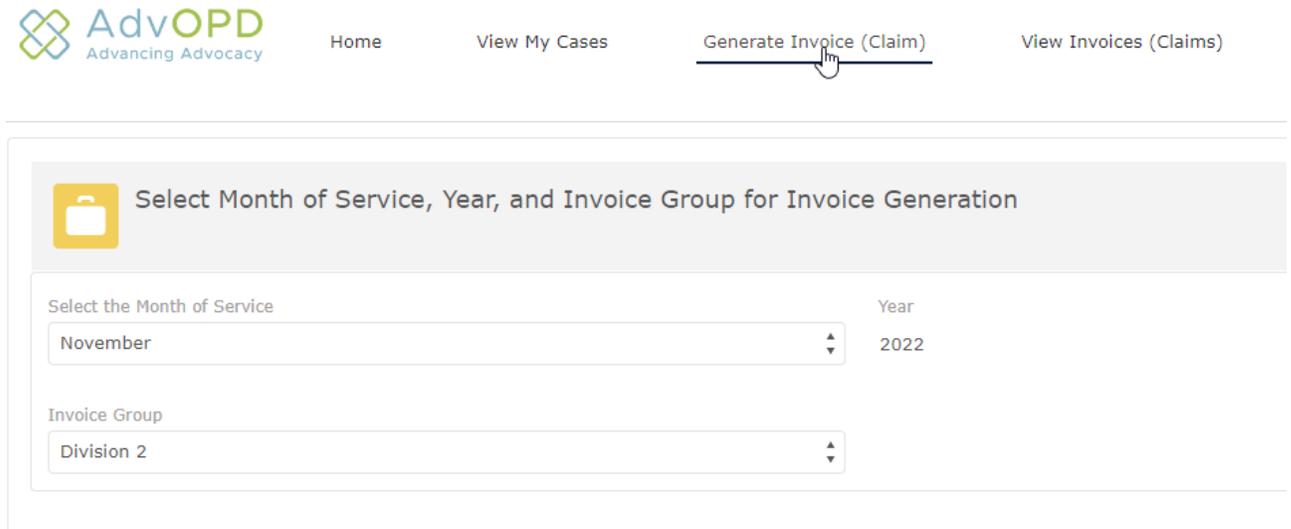
Updated 12/2022

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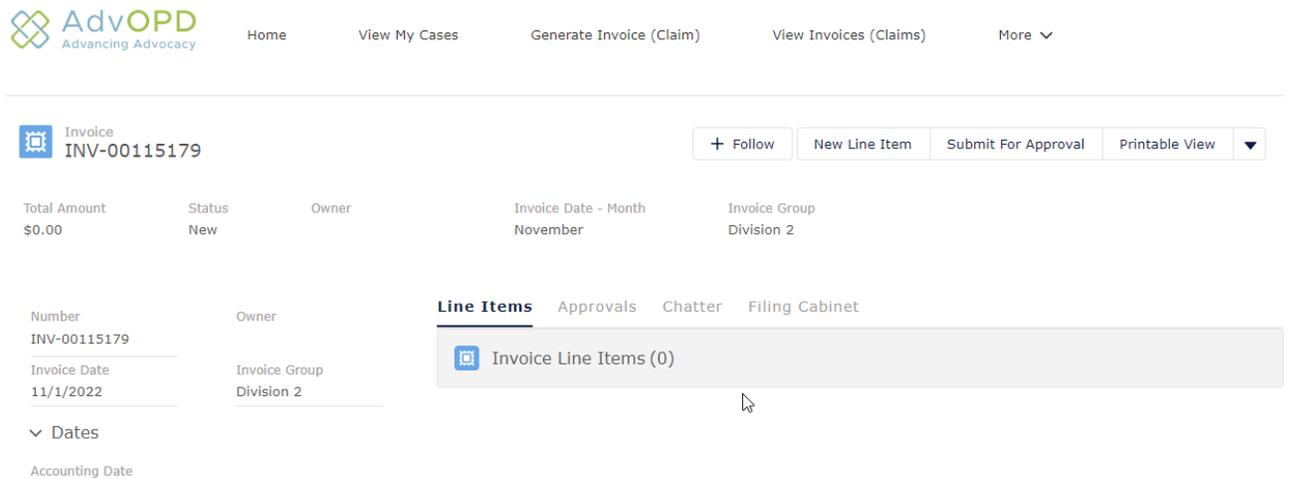
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Creating and Submitting Invoices

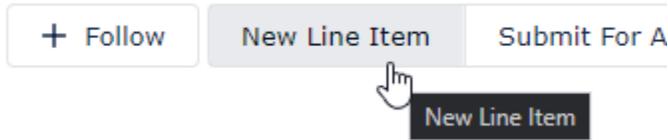
1. After logging into the AdvOPD Contractor and Vendor Portal, **click the ‘Generate Invoice (claim)’** from the top navigation bar:



You are brought to a draft invoice.



2. To add work to the draft invoice, you now simply press **New Line Item**



- Pressing **New Line Item** will bring you to this screen. Input **Official Court Transcript** and the relevant **date of service** completion and then press **Next**.

New Line Item

* What type of service is this for?
Official Court Transcript

* Date of Service ⓘ
Nov 30, 2022

November 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today

Next

- After the prior step will have a page similar to this. Select the relevant **Budget Detail/Matter** and **scroll down**.

New Line Item

Details

* Is this a Pre-Approved Expense or Other?
 Pre-Approved Professional Service
 Other - Travel

Select a Pre Approval

Detail ID	Matter Name
<input checked="" type="radio"/> BDET-00000659	John Smith ~ DA-19-1 ~ Appeal

Drag this bar down or use your mouse scroll wheel to continue.

- Once you have scrolled down past the budget details, you will reach this view. Select **Expedited** or **Non-Expedited** (whichever is appropriate) and then just put the number of original pages

produced in the **Pages** box, then the total number of copies in Number of **Additional Copies** (we have generally¹ eliminated the need to select first and additional, unless you are only billing for these).

If the invoice is for Division 2, this will default to three copies. If the invoice is for any other invoice group, this will default to zero.

Important note for Official Court Transcripts: We have automated the invoice line creation for first copy and additional copies. You now choose expedited or not, enter the number of pages and the total number of copies and we will create the appropriate invoice lines. The **ONLY** time you will select the options for first copy or additional copies in the table below is if you have already billed for the official transcript and are **JUST** providing additional copies.

Code and Name
<input checked="" type="radio"/> 62109D Official Court Transcript - Non-Expedited
<input type="radio"/> 62109D Official Court Transcript - First Copy
<input type="radio"/> 62109D Official Court Transcript - Expedited
<input type="radio"/> 62109D Official Court Transcript - Add'l Copies

Official Court Transcript

* Pages

* Number of Additional Copies

Description

- When you have pressed “Next” you will be back in your draft invoice and see all three-line items (original, first and subsequent copies) added. It will resemble this screenshot.

¹ Unless you are **only** billing for copies, in which case you would add first copy and additional copy line items instead (as appropriate).

Invoice Line Items (3) ⚙️ 🗑️

3 items • Sorted by Matter • Updated a few seconds ago

#	Matter ↓	OPD Matt...	Client Las...	Expense ...	Total Am...	QTY	Det
1	LI-693161	[REDACTED]	[REDACTED]	Official Court ...	\$2.20	1.00	New
2	LI-693162	[REDACTED]	[REDACTED]	Official Court ...	\$0.50	1.00	New
3	LI-693163	[REDACTED]	[REDACTED]	Official Court ...	\$0.50	2.00	New

View All

- From here, you're all set to hit **Submit for Approval**. This button will send your invoice for review and approval. Unless you hit this button, the invoice will remain in draft status.



Invoice Group
Division 2

Important Note: OPD has eliminated the requirement for Transcriptionists to add invoices/worksheets to the filing cabinet in each OPD Claim. So, you may submit for approval without adding these to the filing cabinet.

Viewing and Recalling Invoices

If you would like to view Invoices you have submitted for approval, select the **View Invoices (Claims)** option from the top menu, then use the drop down next to **My Open Invoices** on left to change to **My Submitted for Approval**. You can follow these steps to also view your rejected invoices, paid, etc.:

Invoices
My Open Invoices

5 items

LIST VIEWS

- All Invoices
- 1 My Approved Invoices
- 2 My Open Invoices
- 3 My Paid Invoices
- 4 My Rejected Invoices
- 5 My Submitted for Approval
- Recently Viewed

Step 2

Step 3

If you need to modify an invoice. Click on the invoice number. If the invoice is in **Submitted for Approval** and you realize you need to make an amendment, then once inside the invoice view. Press the Approvals tab and then the Recall button to unlock the invoice and recall it from the accounting queue to modify.

Invoice Date - Month
December

Invoice Group
Division 2

Line Items **Approvals** Chatter Filing Cabinet

Step 1

Approval History (2)

<p>Accounting Review</p> <p>Date: 12/14/2022, 12:22 PM</p> <p>Status: Pending</p> <p>Assigned... Accounting - Group Approval</p> <p>Commen...</p>	<p>Approval Request Submitted</p> <p>Date: 12/14/2022, 12:22 PM</p> <p>Status: Submitted</p> <p>Assigned...</p> <p>Commen...</p>
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Recall

Step 2

[View All](#)

Input any comments you wish to enter (if you have any) and then press **Next**.

Recall Approval Request

Comments

Recalling as I forgot to add a line item.

The invoice is now in **New** status and can be modified before resubmission.



Invoice
INV-00115178

+ Follow

New Line Item

Submit For Approval

Pr

Submit For Approval

Total Amount
\$320.00

Status
New

Owner

Invoice Date - Month
December

Invoice Group
Division 2

If you run into any technical problems or need help please email OPDOperations@mt.gov