

AdvOPD External Provider Portal Instructions

Contents

AdvOPD Portal	1
Accessing AdvOPD Portal.....	1
Training for AdvOPD Portal.....	1
Using AdvOPD Portal	2
Viewing Cases.....	2
Viewing Documents in Filing Cabinet	2
Entering Pre-approvals (Attorneys Only)	3
Entering Supplementals (Attorneys Only)	5
Invoices (claims)	8
Creating and Submitting Invoices - Attorneys	9
Creating and Submitting Invoices – Non-Attorneys.....	15
Editing Invoices	18
Closing Cases (Attorneys Only)	19
Closing Cases – Modifying Charges.....	20
Appeal Referral (Attorney Only)	26

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 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.

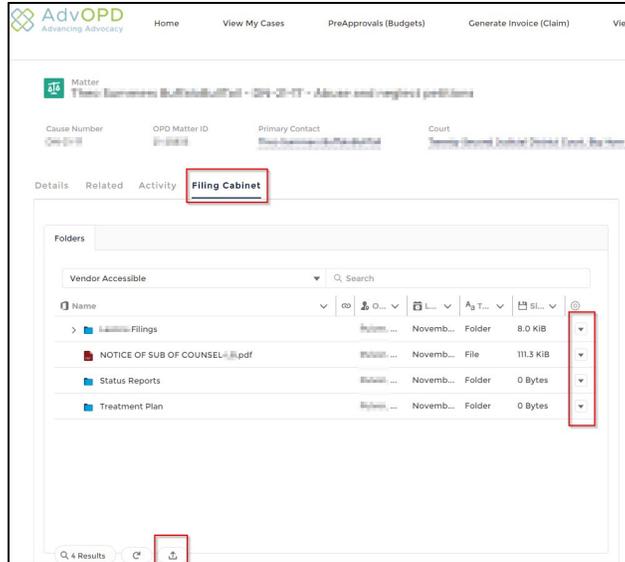


Tips:

- 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. Download or Preview files using the far right drop down. Upload files using the upload button at bottom. **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.**



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. The 'Matter' column is sortable though by clicking on the column name, matters are listed by client FIRST name. Click the Budget ID link for the matter you are entering the pre-approval for, skip to step 4.

Alternatively, 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 Search...	Name	Judge	Court	Receiv...	Divis...	Office	Sta...	OPD...	Created Date
1	DA 1...	Chief Justice Mike M...	Montana Supreme C...	7/22/2019	Division 2		Pending		7/22/2019, 3:10 PM
2	...	Shane Vannatta	Fourth Judicial Distri...	5/29/2020	Division 3	Region A - Missoula	Pending		6/4/2020, 11:58 AM
3	...	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
 Vanessa Marie All - DC-20-252 ~ Theft - Obtain Or Exerts Unauthoriz

Cause Number	OPD Matter ID	Primary Contact	Court
DC-20-252	20-1004	Vanessa Marie All	Fourth Judicial District Court, Missoula Cour

Details **1** Related Activity Filing Cabinet

Information

Name	Type
Vanessa Marie All - DC-20-252 ~ Theft - Obtain Or Exerts Unauthoriz	DC - District Court

Matter
 Vanessa Marie All - DC-20-252 ~ Theft - Obtain Or Exerts Unauthoriz

Cause Number	OPD Matter ID	Primary Contact	Court	Judge
DC-20-252	20-1004	Vanessa Marie All	Fourth Judicial District Court, Missoula County	Shan

Details Related Activity Filing Cabinet

Budgets (1)

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

View All

4. Select New – Pre Approval button from upper left:

Budget
 BUD-00210496

+ Follow New - Pre Approval

Matter
 Esmeralda Renee Rodriguez - DC-20-252 ~ Aggravated Kidnapping

Total Budget
 Total Pending Approval
 \$0.00

Budget Details (0)

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

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

New - Pre Approval

Details

*Service Provider Type Mental Health	*Travel Reimbursement --None--
*Timekeeper Enter the individual you are requesting services from HERE	*Justification

Budget Information

*Amount Requested

Mental Health

Medical Document No of Pages

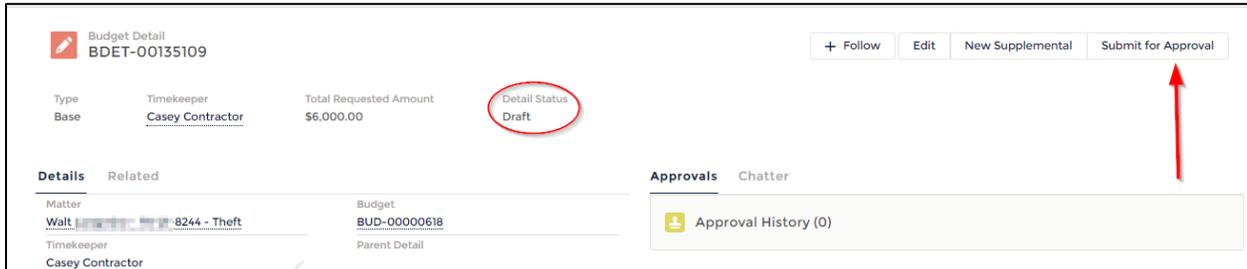
Legal Document No of Pages

Other Document No. of Pages

Next

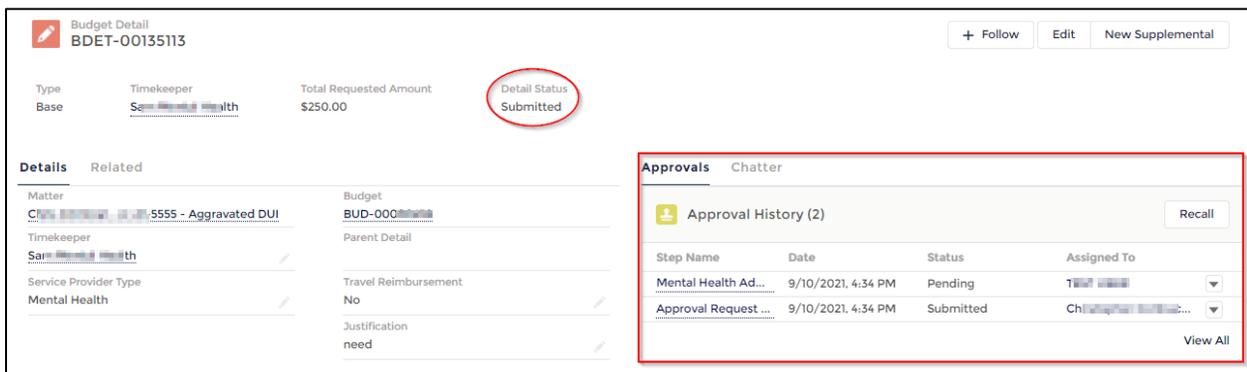
6. After entering the required information and clicking Next, you will be brought to your **DRAFT** pre-approval, you can edit or keep it in draft until you are ready to submit.
 - a. *Tip: do not include a \$ (dollar sign) when entering the requested amount*

7. When ready, **press the Submit for Approval button in the upper right**



8. Upon submit, you can optionally enter a comment and then **press Submit button**

9. You will now notice a box with Approval History appears and the Detail Status says Submitted instead of Draft



10. If a pre-approval is rejected, you will be notified via email. If the pre-approval is approved, both you as the requesting attorney and the provider services are requested from will receive an email notifying of the approval and approved amount.

Entering Supplementals (Attorneys Only)

1. 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 (explained above) or by clicking on the PreApprovals (Budgets) button at the top and opening the budget by clicking on the Budget ID for that matter:

Budget ID	Matter	Total Budget	Total Pending Approval
BUD-0000062	James Taylor - CR-21-2700 - Video gambling machine gross income tax	\$0.00	\$0.00
BUD-0000130	Johnny Smith - CR-22-2112 - Littering Public Ways	\$0.00	\$0.00
BUD-0000140	Kelly King - CR-21-512 - Reckless Driving	\$0.00	\$0.00
BUD-0000240	Christopher Contractor - cr-21-5555 -	\$833.00	\$0.00

2. After clicking on the Budget ID, you are now in the Budget record. Find and select the Budget Detail (pre-approval) you need to enter the supplemental for. Remember the Timekeeper field is the Service Provider being requested for
 - a. **NOTE:** If entering the initial supplemental for an individual, use the 'Base' record type (second column). If a supplemental has previously been entered for that provider, use the 'Parent' record type – the system will give you an error if trying to add to wrong type

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

3. 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:

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

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

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

Approval History (0)

Invoices (claims)

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

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

The new Division 1 Regions:

Region 1 is now:

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

Regional: Koan Mercer, kmercerc@mt.gov

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:

What does this mean for your invoices?

Due to the reduction in regions when you bill for cases you will now 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, Conflict Defender Division Regions:

Region A:

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

Regional: Jordan Kilby, jordan.kilby@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:

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

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

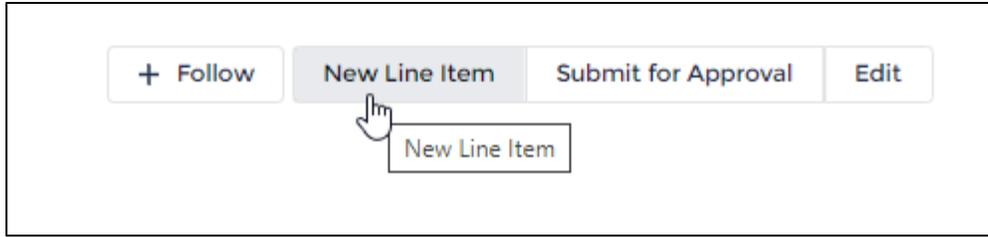
Creating and Submitting Invoices - Attorneys

1. After logging into the AdvOPD Contractor and Vendor Portal, **click the ‘Generate Invoice (claim)’** from the top navigation bar.
2. Using the drop downs, select the month of service and invoice group:

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

3. Press the Upload Files button to upload the supporting documentation required (Step 8 explains how to upload files after creation)

4. What previously was called ‘Claim Lines’ in the Hours or Expenses section within CRM is now called ‘Line Items’ in AdvOPD, from the upper right corner **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 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

Please enter some valid input. Input is not optional. Enter a Number of Hours for both Hours Worked or Travel Hours, they will be calculated based on current rates

Description

NOTE: When searching for Matters you will notice as you search the system will only show 5 results based on what it thinks you are searching for, if you do not see the matter you are needing be sure to press the 'Show all Results for: xx' (screen shot below)

Details

*Is this for Hours Worked or Other?

Hours Worked
 Travel Hours
 Other Costs

*Matter

chris

Show All Results for "chris"

- Chris [REDACTED] - CR-21-82502
- Chris C [REDACTED] - CR-21-82801
- Stewart [REDACTED], Chas Christian [REDACTED] - CR-20-195
- Chris [REDACTED] - CDC-21-2212C
- Chris [REDACTED] - Open Container / Public Drinking / Vehicles - CR-11-1111

Next

- Use the Travel Hours to enter the number of hours travelling (e.g. windshield time) for each matter.
- If you select Other Costs, you can enter Mileage, Per Diem, Lodging, Office Stipend, etc.:

New Line Item

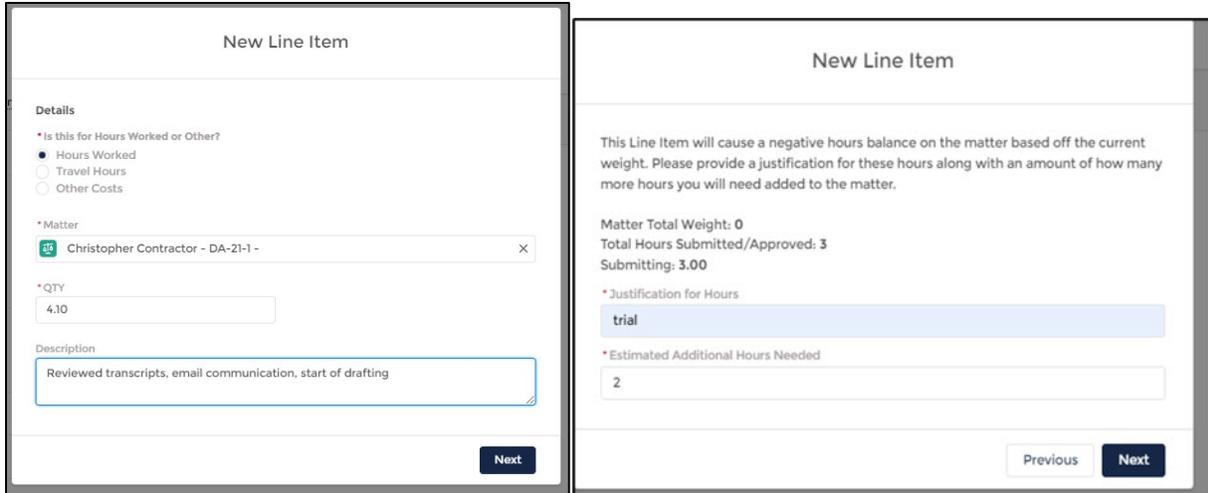
Details

*Is this for Hours Worked or Other?

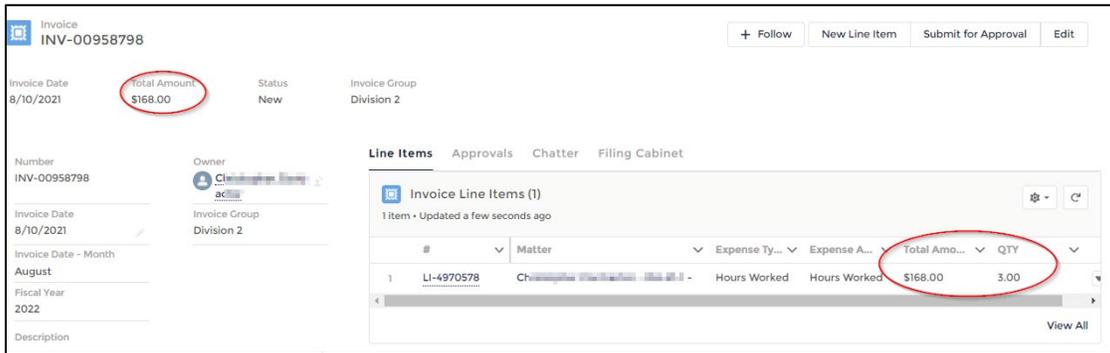
Hours Worked
 Travel Hours
 Other Costs

Code and Name ↑
1 <input type="radio"/> 101 Mileage High - Up to 1000 Miles (per month)
2 <input type="radio"/> 101 Mileage Low - Over 1000 Miles (per month)
3 <input type="radio"/> 101 Per Diem
4 <input type="radio"/> 101 Lodging
5 <input type="radio"/> 102 Office Supplies Stipend
6 <input type="radio"/> 103 Other Fees
7 <input type="radio"/> 62109A Admin Hours

- After entering the required 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:

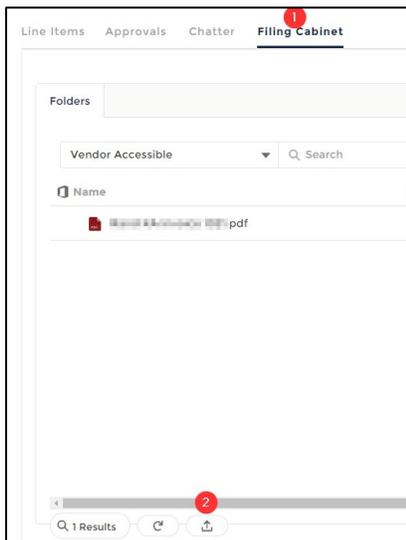


After you press Next, the system adds the line item, notice the quantity of the line item and the total amount of the claim update:



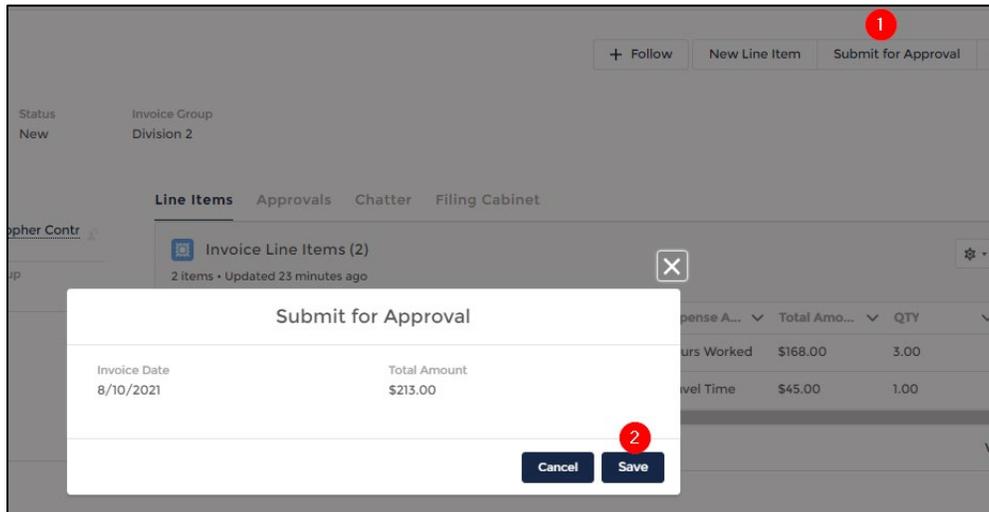
Continue this process to add New Line Items for each billable item within this Invoice Group.

- If you did not upload the supporting documentation in Step 3, you can upload by clicking on Filing Cabinet, then using the upload button:

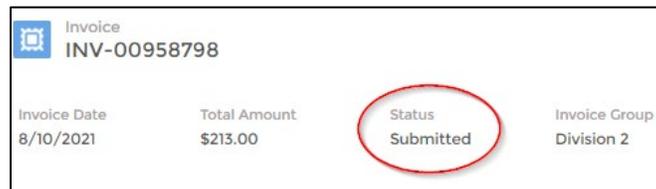


Note: At this time, the system will not allow you to delete files you've uploaded (this is temporary). If you need a file deleted, please email opdoperations@mt.gov with the file name and invoice month

9. After you have inputted all hours and costs and ensured the documentation is attached, press the Submit for Approval button, and then Save:



Notice the Status changes to Submitted:



After submitting, you can view the approval process, and at which step the claim is pending review:



If you need to edit a line item you've entered, open the record by clicking here:

Line Items Approvals Chatter Filing Cabinet

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

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

Invoice Line Item
LI-000078

+ Follow Edit Update Amount Delete

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

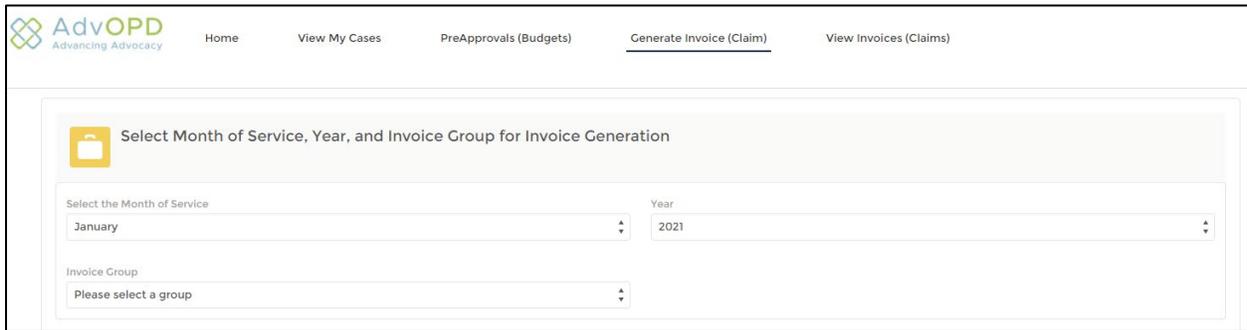
- If you have additional invoices to complete, navigate back to the top menu bar and select the 'Generate Invoices (claims)' from the top navigation bar and create the next Invoice to add line items to.

Creating and Submitting Invoices – Non-Attorneys

Note: if you are an Official Court Reporter, please follow the instructions here:

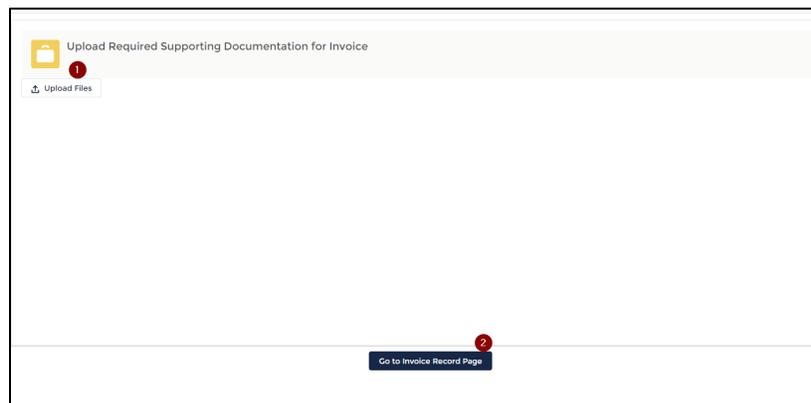
<https://opd.mt.gov/Contractors/Transcript-Services>

1. After logging into the AdvOPD Contractor and Vendor Portal, **click the ‘Generate Invoice (claim)’** from the top navigation bar.
2. Using the drop downs, select the month of service and invoice group:

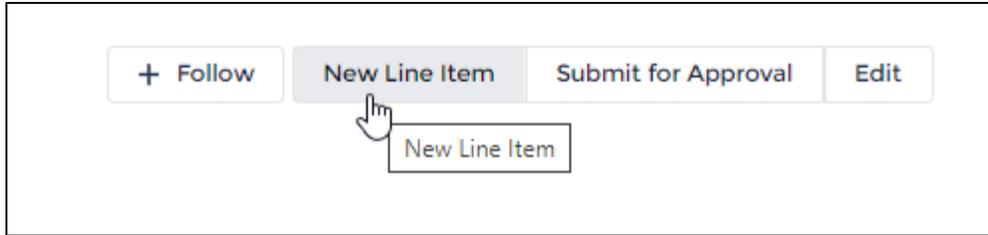


Note: NO CHANGES TO REQUIRED DOCUMENTATION, please continue to use the same documentation you used in the prior system or refer to the [OPD Pre-Approval and Claims Procedure 3\(a\)](#) for details on invoice expectations.

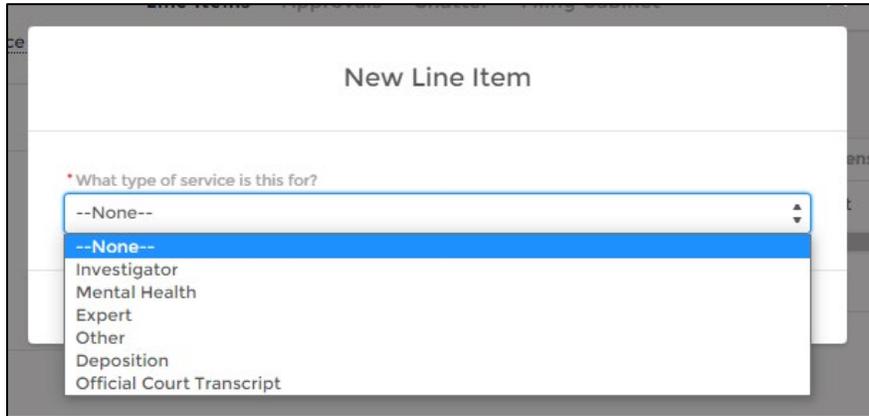
3. Press the Upload Files button to upload the supporting documentation required (Step 7 explains how to upload files after creation)



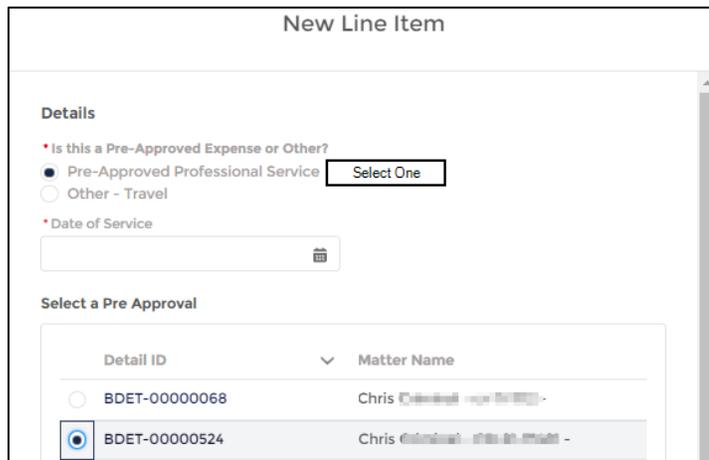
4. What previously was called ‘Claim Lines’ in the Hours or Expenses section within CRM is now called ‘Line Items’ in AdvOPD, **press New Line Item** to add hours and/or expenses to this invoice:



A new screen appears, select the service you provide:



5. Indicate if you are billing for a pre-approved professional service or entering travel hours, indicate the date of service, and then select a pre-approval you are billing against (the matter name is on the right-hand side column)



Please make a selection below

Code and Name

- 62109I Hours Worked - Investigator
- 62109S Hours Worked - Subpoenas
- 62109I 62109I - Migration

Select the Service Code (Options Change Based on Initial Selection of Type of Service Being Provided)

Clear Selection

*QTY

8.00

Enter Hours Here, System Calculates Based on Current OPD Rates

Description

Description is optional but you are still expected to upload supporting documentation describing the work you completed, no changes to prior documentation accepted

Previous Next

- Continue this process to add New Line Items for each billable item within this Invoice Group.
- If you did not upload your supporting documentation file/s in Step 3, you can upload them by clicking on Filing Cabinet (in middle of screen about), then using the upload button.
- After you have inputted all hours and costs, press the Submit for Approval button, and then Save:

+ Follow New Line Item **1** Submit for Approval

Status Invoice Group
New Division 2

Line Items Approvals Chatter Filing Cabinet

Invoice Line Items (2)
2 items • Updated 23 minutes ago

Submit for Approval

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

Cancel **2** Save

After submitting, you can view the approval process, and at which step the claim is pending review:

Invoice INV-00958798

+ Follow New Line Item Submit for Approval

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

Number INV-00958798 Owner Christopher Contr actor

Invoice Date 8/10/2021 Invoice Group Division 2

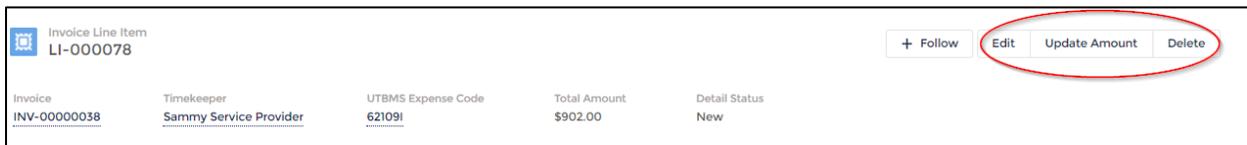
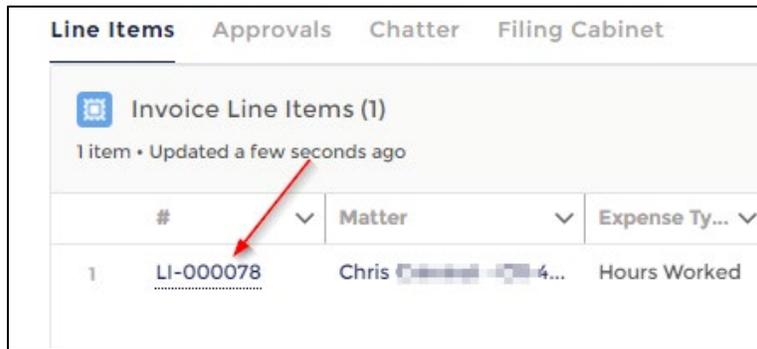
Invoice Date - Month August Fiscal Year 2022

Line Items **1** Approvals Chatter Filing Cabinet

Approval History (2)

Step Name	Date	Status	Assigned To
Accounting Review	9/22/2021, 9:56 AM	Pending	Christopher Contr
Approval Request Submitted	9/22/2021, 9:56 AM	Submitted	Christopher Contr

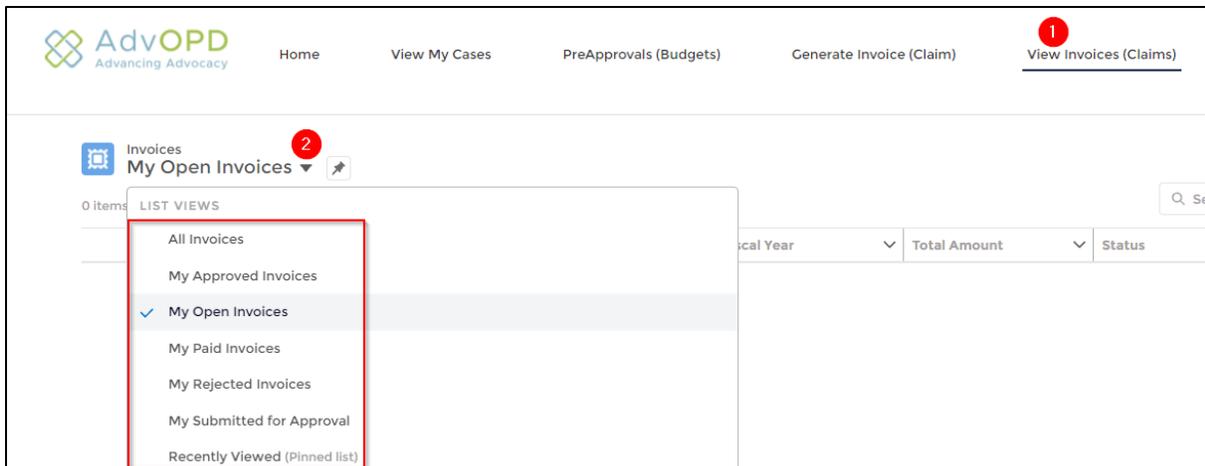
If you need to edit a line item you've entered, open the record by clicking here:



Editing Invoices

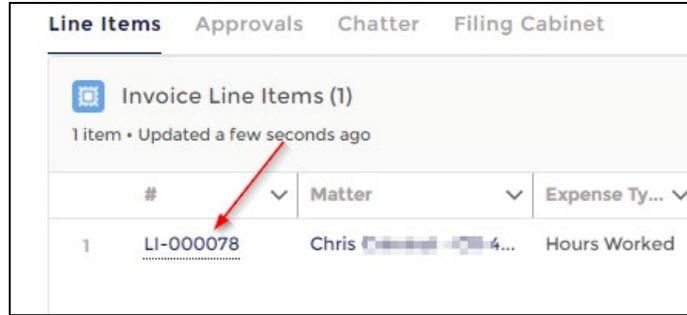
All Invoices will be available to you in the AdvOPD portal. Navigate to the 'View Invoices (claims)' from the top menu to start. Notice you are brought to a list view of 'My Open Invoices', open meaning DRAFT.

To view other invoices, you can use the drop down to select a different view:

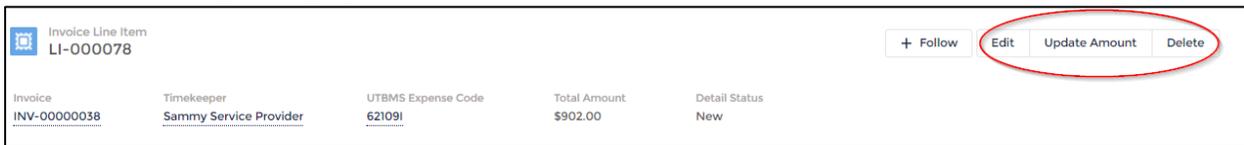


To edit a line item on an invoice:

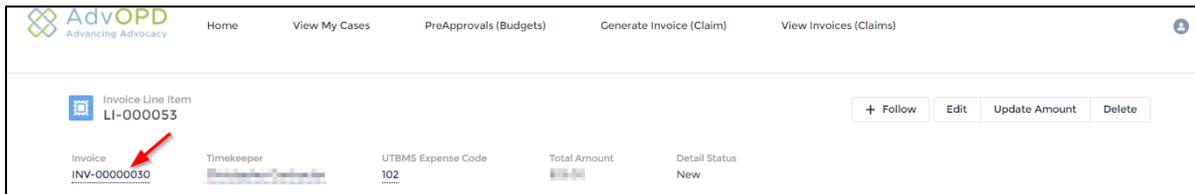
1. If you need to edit a line item you've entered, open the invoice record, and then open the line item that needs editing by clicking here:



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

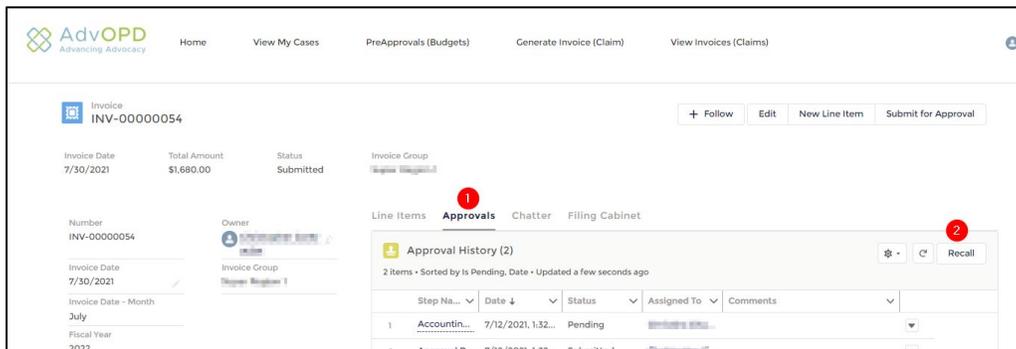


3. After editing, you can return to the invoice by clicking here:



To withdraw a submitted claim:

1. Open the invoice needing withdrawn
2. After opening the invoice, select Approvals then Recall returning it to an open/draft status. You can then add line items or files **and resubmit when ready:**



Closing Cases (Attorneys Only)

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

NOTE: due to data migration and data updating from the old system to the new, some charges on cases have inactive statutes which may throw an error if you are trying to close the matter. Examples of these errors are jail time not allowed, or exceeds amount, statute inactive, etc.

Please email Opdoperations@mt.gov if you experience this issue and we will update the information ASAP.

Closing Cases – Modifying Charges

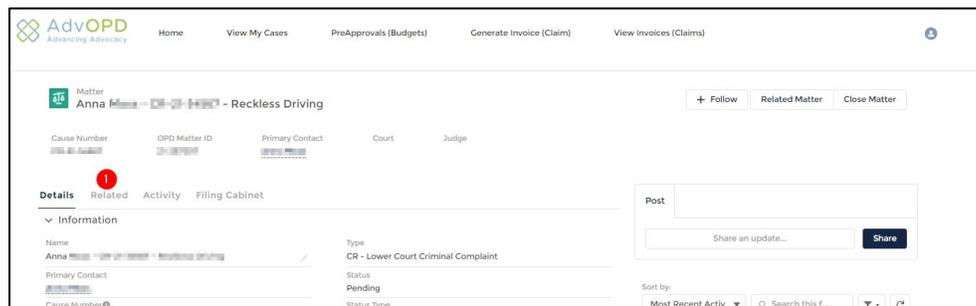
If you have a matter that has charges modified or reduced, **follow these instructions prior to closing the matter:**

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



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

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



AdvOPD Advancing Advocacy

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

Matter **Anna Moss - Reckless Driving** + Follow Related Matter Close Matter

Cause Number OPD Matter ID Primary Contact Court Judge

Details Related Activity Filing Cabinet

Information

Name: Anna Moss Type: CR - Lower Court Criminal Complaint

Primary Contact: Status: Pending

Cause Number: Status Type:

Post: Share an update... Share

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

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

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

Cause Number OPD Matter ID Primary Cause

Details **Related** Activity Filing Cabinet

Budgets (1)

Budget ID	Total Budget
BUD-0000052	\$600.00

Budget Details (4)

Detail ID	Service Provider Type
BDET-00000051	Investigator
BDET-00000052	Investigator
BDET-00000053	Investigator
BDET-00000054	Mental Health

Charges (3)

Charge Number
CH-302268
CH-302274
CH-302275

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

Charges

3 items • Updated a minute ago

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

5. Change Statute or Inactivate Charge Modifications:

a. **Change the Statute:**

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

Edit CH-302268

Charge Number
CH-302268

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

Statute

Driving Under The Influence of Alcohol-... X

Alford Plea

Occurred
6/21/2021

Inactive

Inactive Reason
--None--

Count Number
1

- ii. After removing the statute, begin typing into the field to yield new results:

Charge Number
CH-302268

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

Statute
reck

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

61-8-301 Reckless driving
1/1/1955

23-2-523(1)-MISD - -Operate Reckless/N...

23-2-523(5)-MISD - -Reckless Approach ...

23-2-531(5)-MISD - -Operate In Reckless ...

45-8-333-Misd--Reckless or malicious u...

Occurred
6/21/2021

Inactive

Inactive Reason
--None--

Count Number
1

Suspend - Total Days
0.00

Roman Numeral Count
I

Contested?
--None--

Statute URL

- iii. Select the correct ACTIVE statute and press Save at bottom
iv. Return to the matter by clicking on the Matter hyperlink:

Charge
CH-302268

Statute
[61-8-301 Reckless driving](#)

Matter
[Anna Moss - \[redacted\] - Reckless Driving](#)

Charge Number

b. Inactivate a Charge:

- i. Select the charge you need to inactivate, press edit
ii. First check the box next to Inactive, then select Inactive reason, then press save:

Edit CH-302268

Charge Number
CH-302268

Matter
Anna Moss - CR-21-11123 - Reckless Driving

Statute
61-8-301 Reckless driving

Alford Plea

Death Penalty Eligible?

Sentence Duration

Occurred
6/21/2021

Inactive 1

Inactive Reason
--None-- 2

- None--
- Amended
- Dismissed
- Incorrectly Entered

iii. Return to the matter by clicking on the Matter hyperlink:

Charge
CH-302268

Statute
[61-8-301 Reckless driving](#)

Matter
[Anna Moss - CR-21-11123 - Reckless Driving](#)

Charge Number



Closing Process

1. After ensuring the correct charges and statutes for the matter at final disposition, click 'View My Cases' from the top navigation bar and select the case you need to close by clicking on the link in the NAME column:

Matters
All Cases

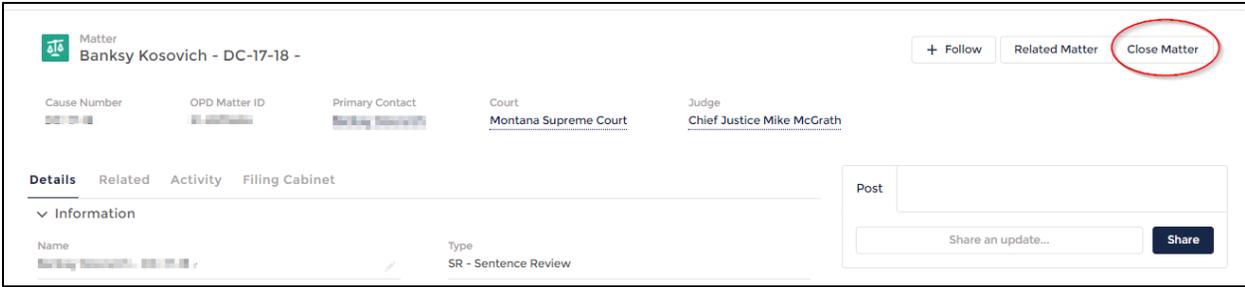
66 items • Sorted by Name • Filtered by All matters - Status • Updated a few seconds ago

Search this list...

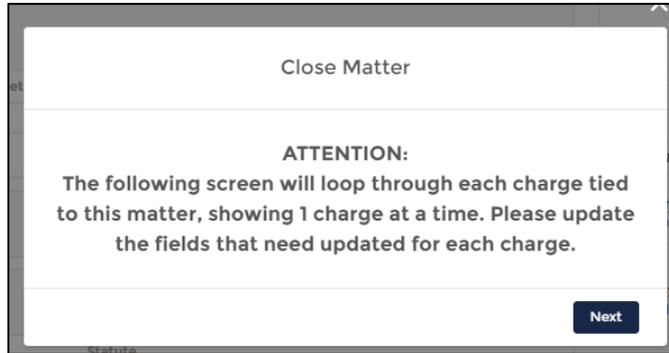
	Name ↑	Judge	Court	Received Date...	Division	Office
1	Allison Alias - dc-21-1234 -	Emily Copeland	Hamilton City Court	5/26/2021	Division 2	
2	Anna Moss - -			7/21/2021	Division 1	Region 2 - Missoula
3	Anna Moss - CR-21-11123 - Reckless Driving	Anne Peterson	Helena Municipal Court	7/18/2021	Division 3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



2. After you've opened the case you need to close, click the 'Close Matter' button in the upper right:



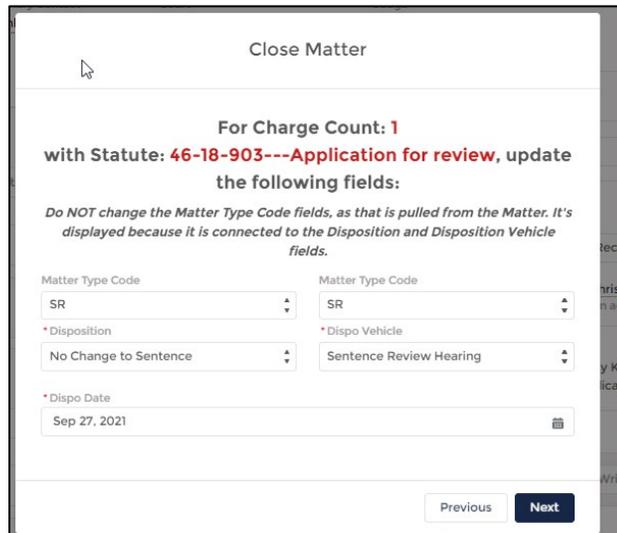
3. A screen notifies you of the process, after reviewing press next:



4. The next screen appears with the first charge, count and matter type codes.

ONLY FILL IN THE REQUIRED FIELDS

- a. For Disposition – please select the appropriate disposition, different options may appear depending on the matter type you are closing
- b. For Disposition Vehicle—this is how the disposition was achieved i.e. bench trial or plea agreement
- c. For Disposition Date—this should be the date judgment given
 - i. EXAMPLE:



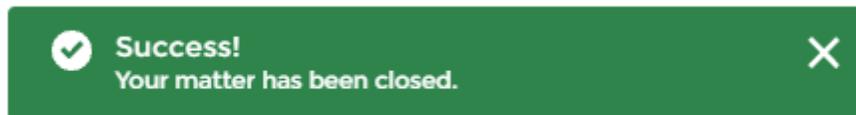
5. After entering the charge information, the next screen appears with a series of questions, answer accordingly, and then a checkbox confirming you've explained the Client's right to appeal:

The screenshot shows a form titled "Close Matter" with the following questions and answers:

- Did you Review the Final Judgment/Sentencing for Accuracy? Yes
- Did you Consider any Post-Disposition Motions? Yes
- Did you Ask the Court to make an Ability to Pay Finding? Yes
- Did the Court Waive OPD Fees? No
- Did you Explain the Client's Right to Appeal?

At the bottom right, there are "Previous" and "Next" buttons. A "VIEW ALL" link is visible at the very bottom.

6. For File Location / Destruction – IGNORE this screen and skip by pressing NEXT (temporary)
7. At the top of the screen you will get a green confirmation bar:

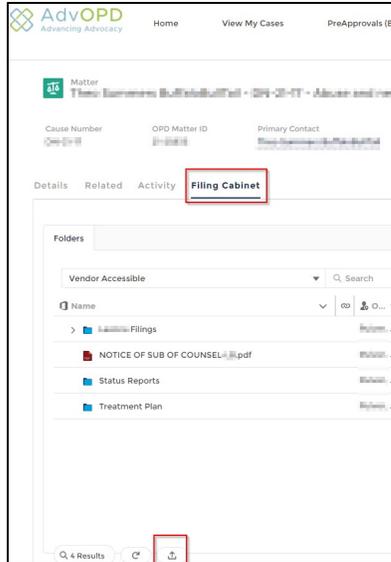


The screenshot shows the "Details" page for a matter. The "Information" section is expanded, showing the following details:

Name	Type
Application for review	SR - Sentence Review
Primary Contact	Status
Cause Number	Disposed
DC	Status Type
	Closed

A red circle highlights the "Status" and "Status Type" fields, which are "Disposed" and "Closed" respectively. A red circle with the number "1" is also present above the "Details" tab.

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



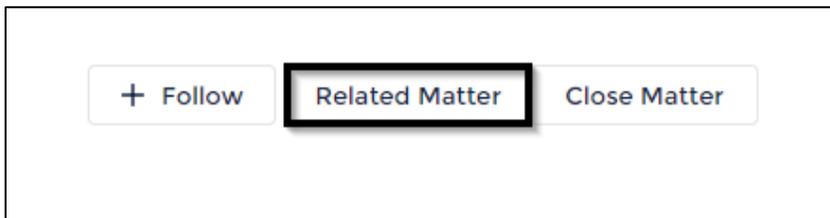
Appeal Referral (Attorney Only)

If your client choose to file an appeal you will create a related matter, follow the instructions below to create the referral

1. Select the matter being appealed from **View My Cases**



2. Select **Related Matter** button which creates a new matter using the underlying matter's information when the two are related to one another (other examples include revocations, sentence review, etc.) This will create a reference link between the two and copy portions of the original Matter data in to the new one.



3. Select the **Appellate Appeal** from the drop down
 - a. Note: OP Appellate Writ must be done by an OPD Support Staff, you will receive an error message asking you to contact us to create this type of related Matter.

Related Matter

Choose the Related Matter type you need to create.

* Matter Type

Appellate Appeal

OP Appellate Writ

Appellate Appeal

Next

- The underlying Matter ideally is closed before you move forward, we understand some appeal deadlines do not always allow enough time to receive final judgments, however. Select **yes to proceed**

Related Matter

This Matter is not closed. Do you wish to proceed?

* Choose Whether to Proceed

Yes

No

Previous **Next**

- Enter necessary information into the required fields, note you must upload the documents for the referral into the matter, and select Next

Related Matter

* Date of Judgment

* What Sentence was Imposed?

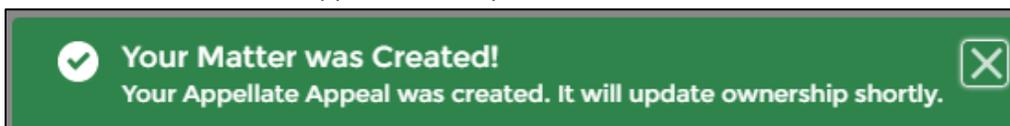
Grounds for Appeal

You must ensure the Judgment, Case Register, and all Minute Entries are copied into the 'Other' folder* in the Filing Cabinet of this matter for the Appellate Division to initiate the appeal.

*If you are a contractor, please upload to the Vendor Accessible folder.

Previous **Next**

- Confirmation Banner will appear to alert you that the Matter was created



- Select the X in the right above the box



- You will not be directed to the appellate matter just created however you will see the data below on your original matter indicating the status:

Name	Angelina Jo Lee - DG-21-2702 - Penalty for aiding resident in leaving or not ret	Type	DG - Guardi
Primary Contact	Angelina Jo Lee	Matter Type	DG
Cause Number	DG-21-2702	Status	On Appeal
OPD Matter ID	21-2879551	Status Type	Closed
Division	Division 1		
Region	Region 1		
Office	Region 1 - Kalispell		
Other Info			
Court	Dawson's Creek County Court	Lead Defense Attorney	Christopher Contractor
Judge	Jonathan Judge	Prosecuting Agency	Stephanie Plum Agency
Appellate Appeal?	<input checked="" type="checkbox"/>	Prosecuting Attorney	Branch Connelly

The 'Status' field on the original Matter will update to 'On Appeal'

An 'Appellate Appeal' field will be visible on the original Matter record and the box will be checked