Office of State Public Defender Claims Portal User Guide

Table of Contents

To quickly navigate to a specific area just click on the desired section in the table below. Please note the instructions for Contract Attorneys and other types of Service Providers are separated – please ensure you are following the appropriate instructions.

Introduction

To expedite and streamline contractor billing processes, OPD utilizes an online billing system for contractors and service providers to submit their claims. This system allows for timely review and processing of all claims while allowing each user the ability to view the current status of each claim and approval request submitted in the system.

For any questions or issues regarding a claim or the claims portal, email opdclaims@mt.gov.

Attorneys: Per OPD's Pre-Approval and Claims Procedure as well as OPD Policy 125 all OPD employees and contractors are **required** to enter all claims and pre-approvals in the portal. This is necessary to track and approve all such requests in a timely manner. Further, without a pre-approval submitted and approved, other contractors and service providers (mental health professionals, investigators, transcriptionists, etc.) will be unable submit their claims to OPD.

In addition to the claim you enter on the portal, you must include detailed documentation (e.g. invoice) as an uploaded attachment to each claim. Per the Pre-Approval and Claims Procedure policy, the invoice must include the following for each client:

- ✓ The OPD Case ID Number;
- ✓ Details of specific tasks performed;
- ✓ The dates on which the specific tasks were performed;
- ✓ The actual amount of time spent performing said tasks rounded to the nearest one-tenth of an hour (.1 hours); and,
- ✓ Travel details, including the date of travel, departure location, arrival location, number of miles traveled, and purpose for travel. If claiming per diem for meals, you must include the time you departed your home base and the time you returned. If seeking reimbursement for lodging, airfare, car rentals, parking or other non-client expense, you must include an itemized (room) receipt (not a credit card slip) from the hotel, airline, rental car agency, etc.

Service Providers: Per OPD's Pre-Approval and Claims Procedure as well as OPD Policy 125 all OPD employees and contractors are **required** to enter all claims and pre-approvals in the portal. Per OPD Policy 125 all OPD attorneys (contract and employees) are **required** to enter all pre-approvals in the portal for service providers (mental health professionals, investigators, administrative support, transcriptionists). This is necessary so service providers can submit their bill to OPD. If you do not have an approved pre-approval in the system you will not be able to bill nor, should you be working on the case until you have received notification of this approval in the system. If you are unsure of your pre-approvals, review the *My Pre-Approvals* section to determine what pre-approvals you have available and steps to take if you do not have the pre-approval needed in the system.

In addition to the claim you enter on the portal, you must include detailed documentation (e.g. invoice) as an uploaded attachment to each claim. Per the Pre-Approval and Claims Procedure policy, the invoice must include the following for each client:

- ✓ The OPD Case ID Number;
- ✓ Details of specific tasks performed;

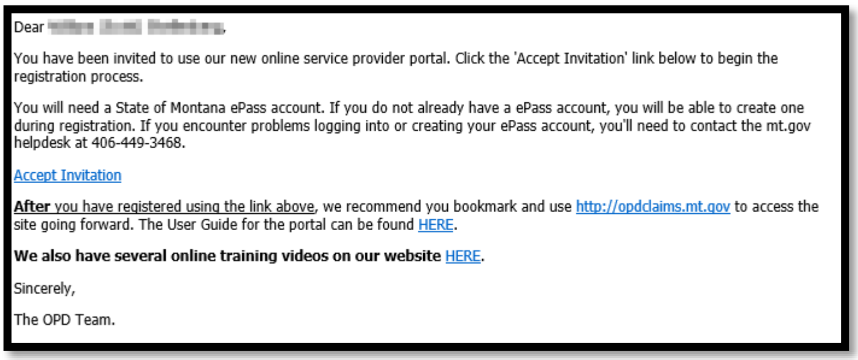
- o If performing services on an hourly basis, ensure the task(s) are broken down by rounding to the nearest one-tenth of an hour (.1 hours)

✓ The dates on which the specific tasks were performed;

✓ Travel details, including the date of travel, departure location, arrival location, number of miles traveled, and purpose for travel. If claiming per diem for meals, you must include the time you departed your home base and the time you returned. If seeking reimbursement for lodging, airfare, car rentals, parking or other non-client expense, you must include an itemized (room) receipt (not a credit card slip) from the hotel, airline, rental car agency, etc.

Logging In

To log into the system for the first time, you must use the “Accept Invitation” link included in an email invitation for portal access. You will receive an email like this with the link:



Dear [redacted],

You have been invited to use our new online service provider portal. Click the 'Accept Invitation' link below to begin the registration process.

You will need a State of Montana ePass account. If you do not already have a ePass account, you will be able to create one during registration. If you encounter problems logging into or creating your ePass account, you'll need to contact the mt.gov helpdesk at 406-449-3468.

Accept Invitation

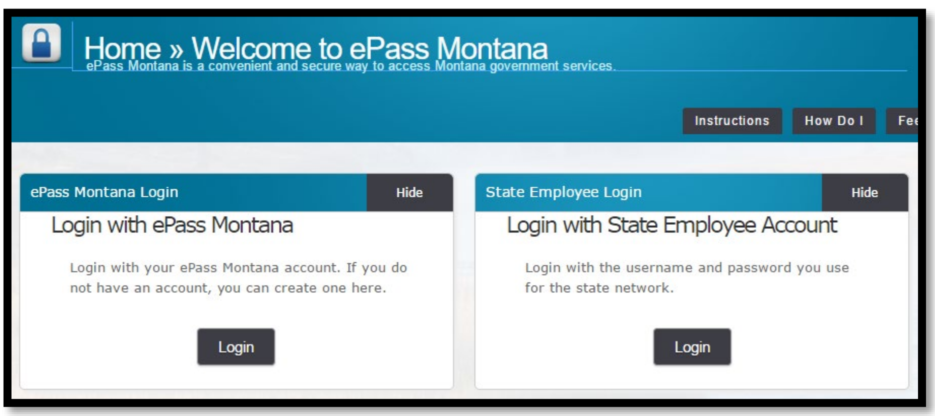
After you have registered using the link above, we recommend you bookmark and use http://opdclaims.mt.gov to access the site going forward. The User Guide for the portal can be found HERE.

We also have several online training videos on our website HERE.

Sincerely,

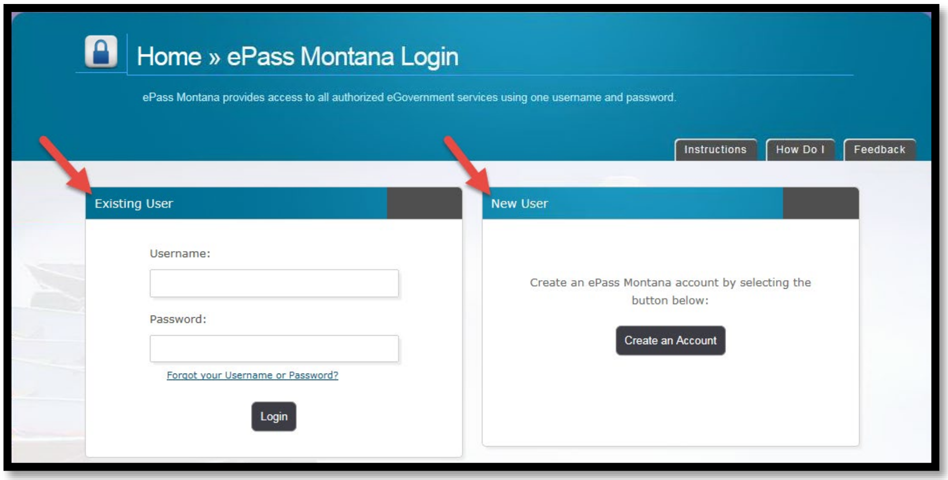
The OPD Team.

After clicking the link, you will be brought to the Montana ePass login page:

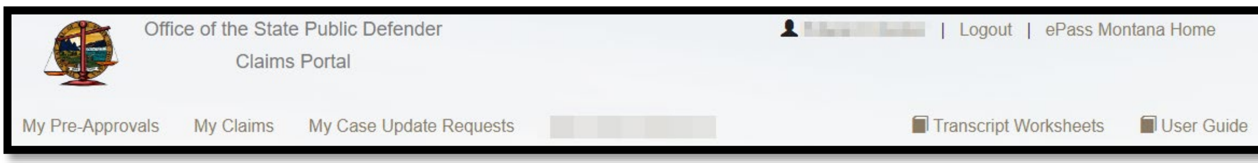


All contractors and service providers will use the “Login with ePass Montana” option, while state employees will select “Login with State Employee Account.” Contractors and service providers using ePass will have the option to create a new account after selecting Login as shown below.

If you have previously created an ePass account for other state services, such as the File Transfer Service, please use the existing user option to login. If you have **not** previously created an ePass account, create a new account:



Once you have logged in/created a new account, **ATTORNEYS** should see the page below:



These are the areas you will use to manage your cases and billing with OPD.

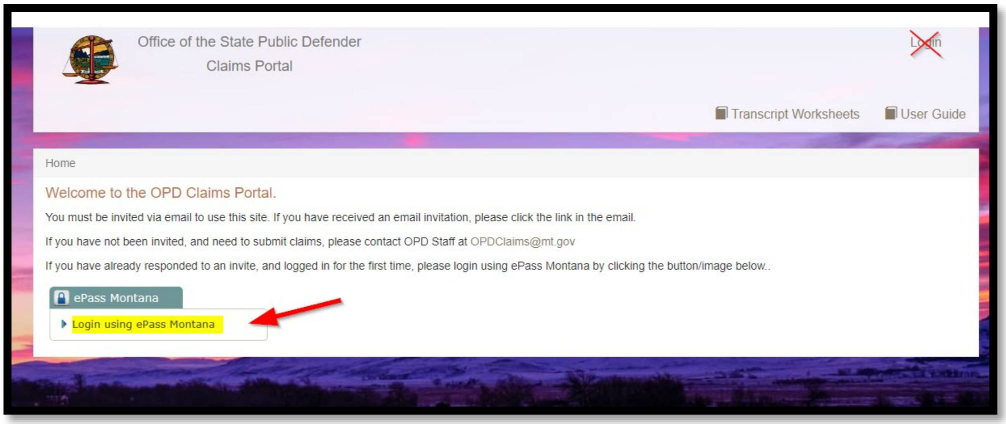
1. My Pre-Approvals: Here you enter requests for funding for other service providers to work on your case (e.g. a mental health provider, investigator, etc.)
2. My Claims: Where you will create claims and view previous claims entered
3. My Case Update Requests: Where you upload closing forms and request a case be closed out or changed to inactive

For **SERVICE PROVIDERS**, you should see this upon log in:

These are the areas you will use to manage your cases and billing with OPD:

1. My Pre-Approvals: Where you can view your approved pre-approvals for specific tasks, the amounts approved, and the cases associated with the pre-approvals
2. My Claims: Where you will create new claims and view previous claims entered

For future logins, use www.opdclaims.mt.gov (bookmark this link for easy reference) and make sure to use the **Login Using ePass** Option every time:



If you login and do not see the menu of *My Claims*, *My Case Update Requests, etc.* and it states you must be invited, refer to the OPD Contractor F.A.Q.

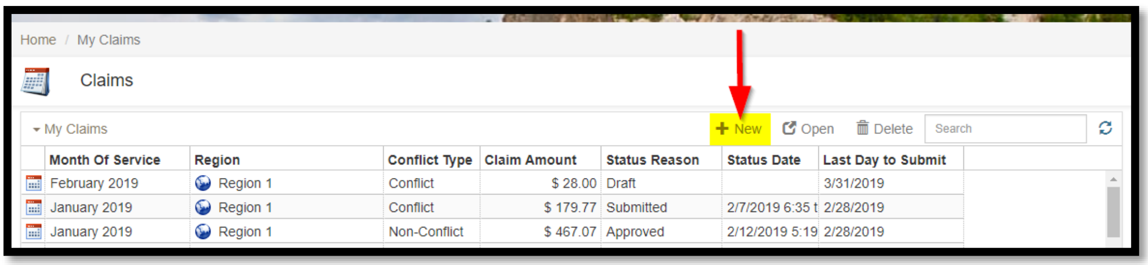
Contract Attorney Instructions

For instructions for other service provider types, refer to page 18

Claim Creation and Viewing

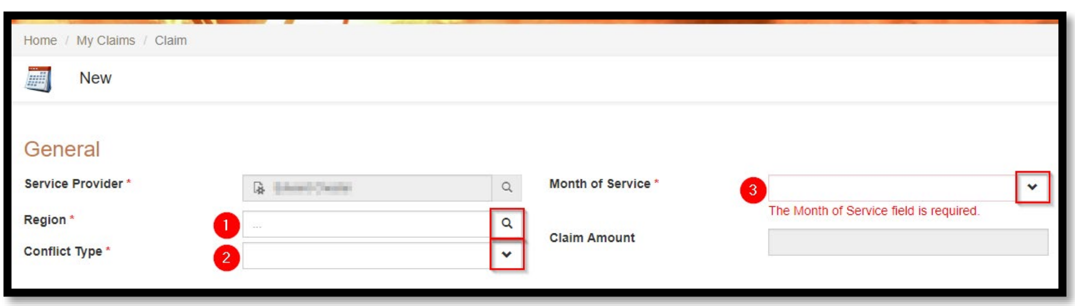
By selecting *My Claims* from the top menu, you will be able to create new claims, view previously drafted and submitted claims, and the details of the claims (e.g. region, conflict type, amount).

To create a new claim, click the *+New* button as shown below:



A separate claim must be created for each Region and Conflict type. For example, if you have conflict cases in Region 1 and Region 2 and non-conflict cases in Region 1, you will have three separate claims: Region 1, Conflict; Region 2, Conflict; and Region 1, Non-Conflict.

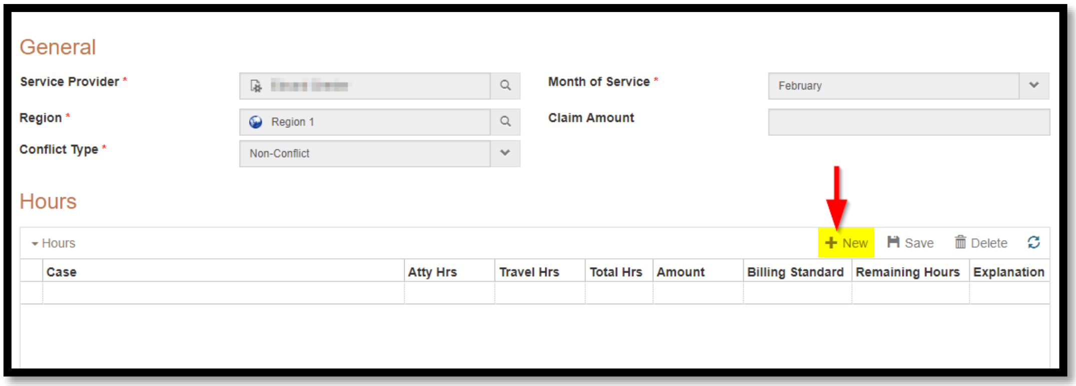
After selecting *+New*, this screen will appear:



Using the magnifying glass or drop-down arrows for each required section, input the specific information for the claim you are creating. If you are entering claim information for the current month of service, you will not be able to submit until the month is over.

As a reminder, all claims are due by the last day of the following month of service (e.g. for work done in February, you must submit your claim by midnight on March 31). Per OPD Policy 130 and the Pre-Approval and Claims Procedure Policy, late claims will not be approved absent extraordinary circumstances. If you have missed this deadline, and you wish to request approval for a late claim, you must email opdclaims@mt.gov explaining the extraordinary circumstances for missing the claim deadline. For questions regarding this policy, refer to the Pre-Approval and Claims Procedure Policy.

After you have entered the required information, please review carefully as you will not be able to edit these fields after you select *Save* towards the bottom of the screen. Once you have saved, the next screen will appear:

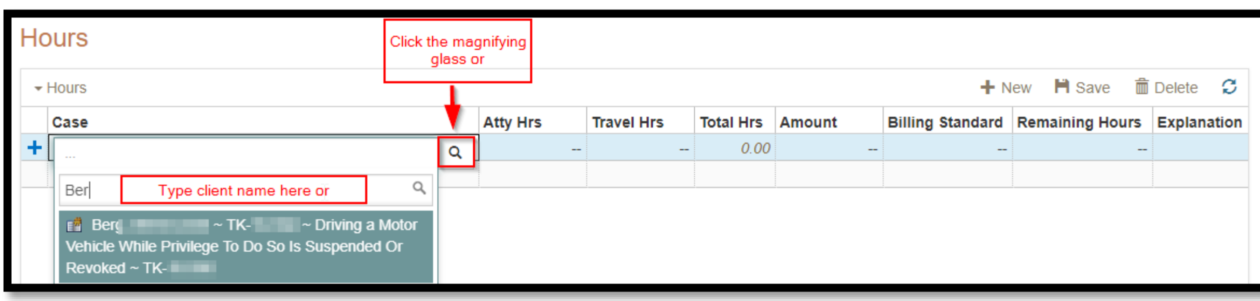


Entering Hours, Expenses, and Uploading Attachments

Hours

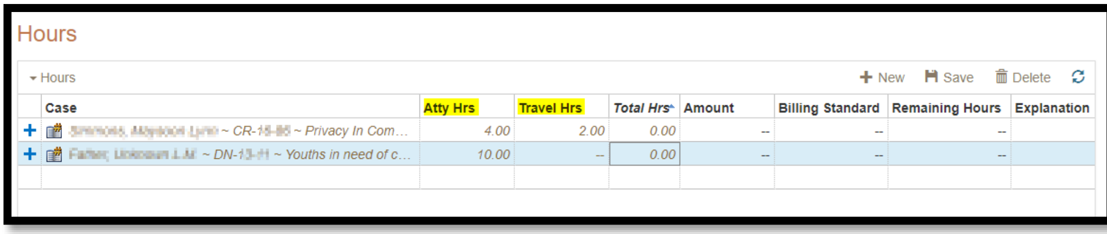
Using the *+New* button under the *Hours* section, you will create a new claim line. **Only one claim line is allowed per case worked**, therefore please sum all time worked within the month being claimed by each case and enter the total into one claim line. The system will only allow you to enter one claim line per case, so all time spent on a particular case needs to be consolidated into one claim line.

After you create the claim line, either use the magnifying glass to find the client from all your available cases OR use the case field to type in the client name and select the correct name and case (if client has multiple open cases for billing):



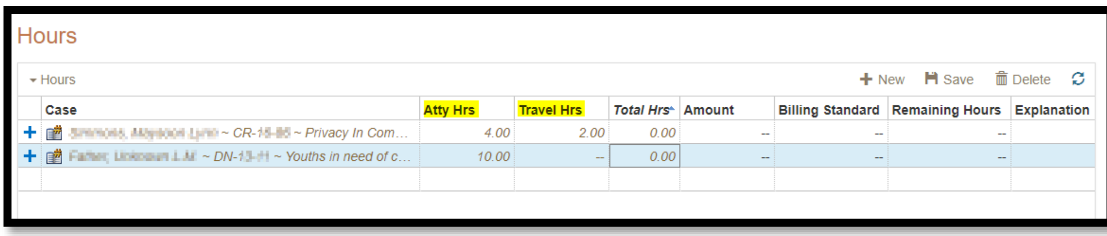
NOTE: If you do not see your case as an option, make sure you are in the correct Region and Conflict type. This information was provided to you when the case was assigned. If after confirming the Region and Conflict type are accurate and the case or client is still not showing, email opdclaims@mt.gov **with the OPD Case ID** for the specific case not showing to determine the issue.

Once you have the correct client and case in the claim line, enter the total hours worked (does not include travel time) for the claim month into the *Atty Hrs* box:



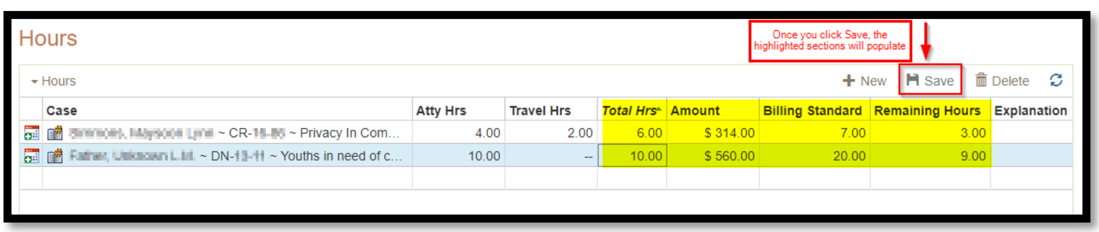
NOTE: You will <u>not</u> be able to edit the *Total Hrs* or *Amount* fields as these are automatically calculated by the system based on currently set rates. For questions regarding current OPD rates, refer to the [OPD Contractor Compensation Schedule](#).

If any travel time is applicable to the specific case, put that separate amount in the *Travel Hrs* box:



NOTE: Per the [Contractor Compensation Schedule](#), travel hours are only available for services rendered outside a 15-mile radius of the principal place of business.

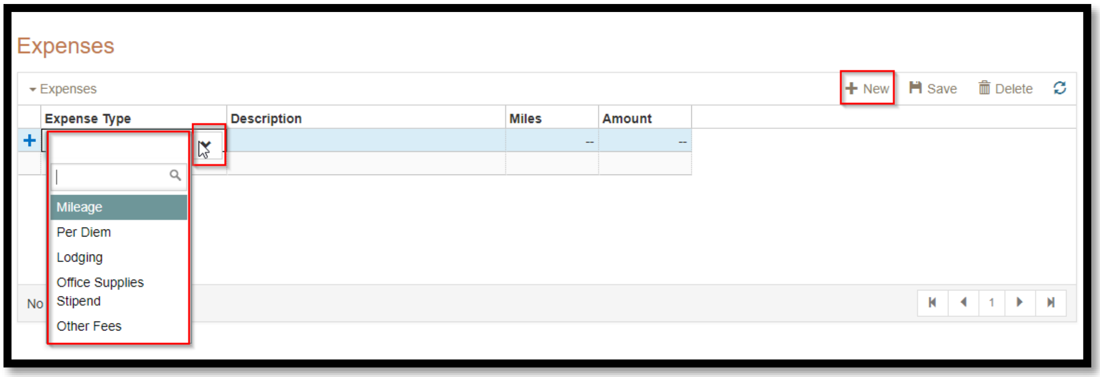
Next, you must click *Save* in the upper right of the grid for the *Total Hrs* and *Amount* to calculate and show:



You are not required to save after each claim line is entered as the system will allow you to enter multiple claim lines at one time and save, however, as a general best practice, saving often is always recommended.

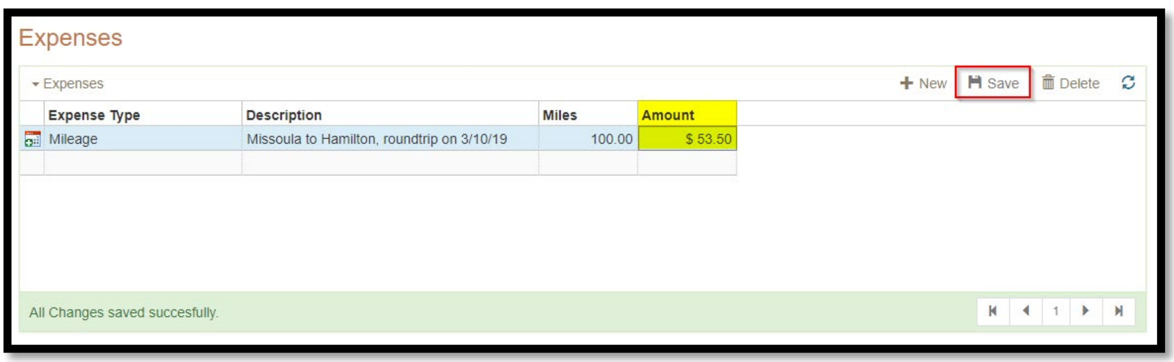
Expenses

This section is similar to the Hours, for a new expense use the *+New* button and select the *Expense Type* from the drop-down arrow:



Mileage

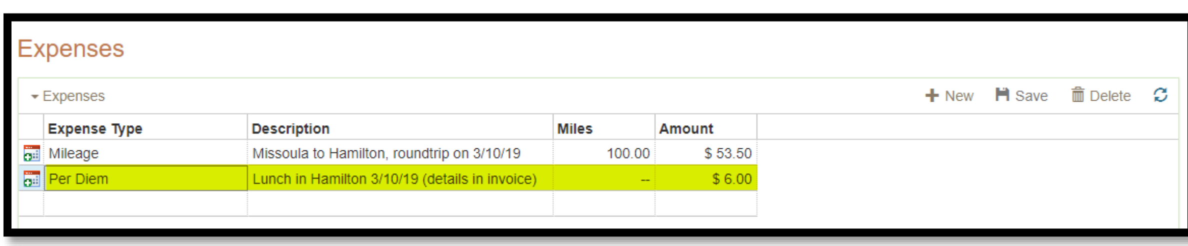
For this expense type, **enter the travel details** in the *Description* field and then enter the miles using the calculation from the [MDT Distance Calculator](). After you click *Save*, the *Amount* field will automatically calculate based on current mileage reimbursement rates:



NOTE: Per the [Contractor Compensation Schedule](), mileage expenses only apply to services rendered outside a 15-mile radius of the principal place of business.

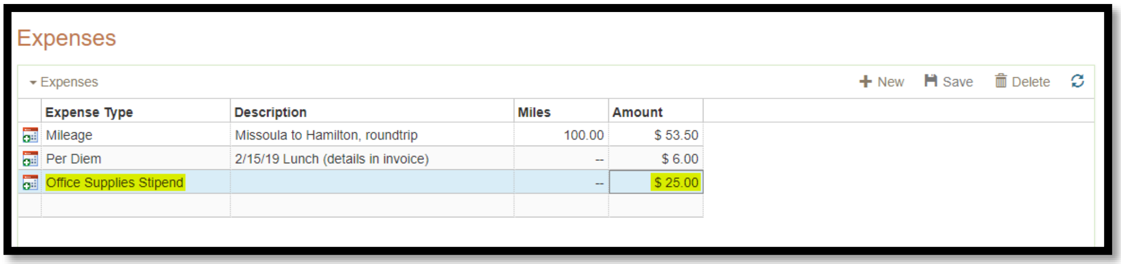
Per Diem, Lodging, and Other Fees

When claiming these types of expenses, you type into the *Description* field and the *Amount* field only:



Office Supplies Stipend

Every contract attorney is eligible for the *Office Supplies Stipend* one time per month. For this expense, you only select the *Expense* type and then click *Save*, the amount will auto-populate. Once this has been entered and saved you can not enter this expense in any other regions or claims for the month of service already claimed.



Do not forget the details of the expenses being claimed must be included in your invoice:

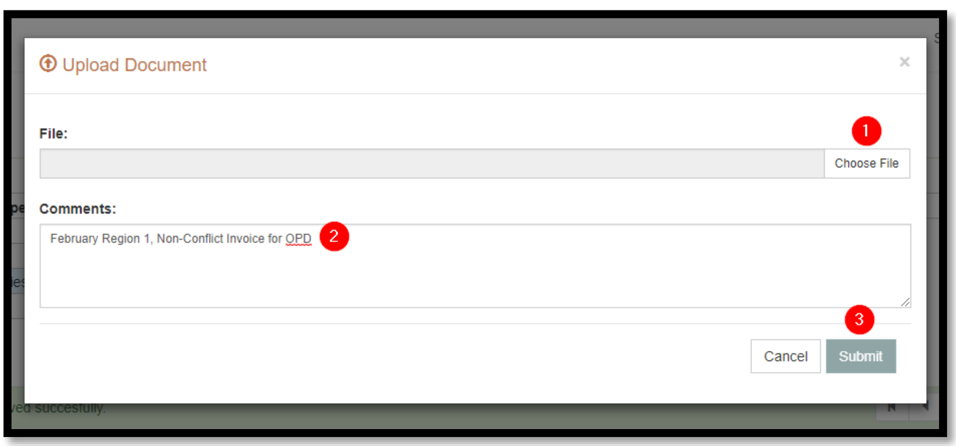
Mileage:
- ✓ All travel details including date of travel, departure location, arrival location, number of miles traveled, and purpose for travel.

Per Diem:
- ✓ If you are claiming per diem for meals, you must include the time you departed your home base and the time you returned.

Lodging:
- ✓ If seeking reimbursement for lodging, airfare, car rentals, parking or other non-client expense, you must include an itemized (room) receipt (not a credit card slip) from the hotel, airline, rental car agency, etc.

Attachments

In the attachments section, you will again use the *+New* button to upload the appropriate documentation (e.g. invoice) to the claim. After clicking this, an *Upload Document* window appears:

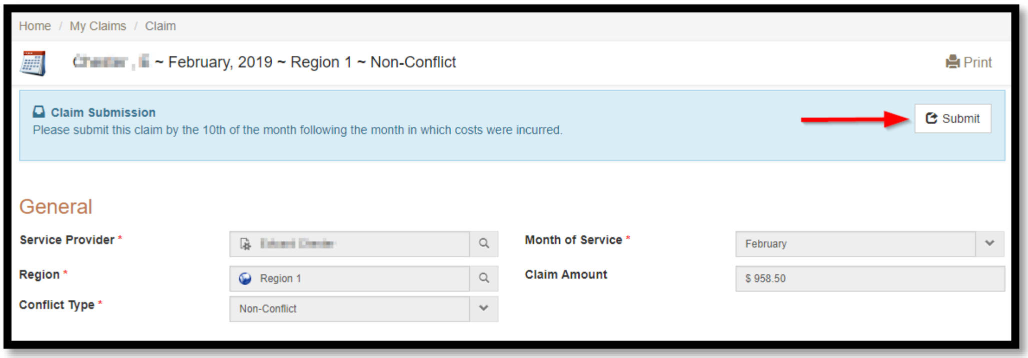


Use the *Choose File* button to select the appropriate document, enter comments regarding the attachment, and click *Submit*.

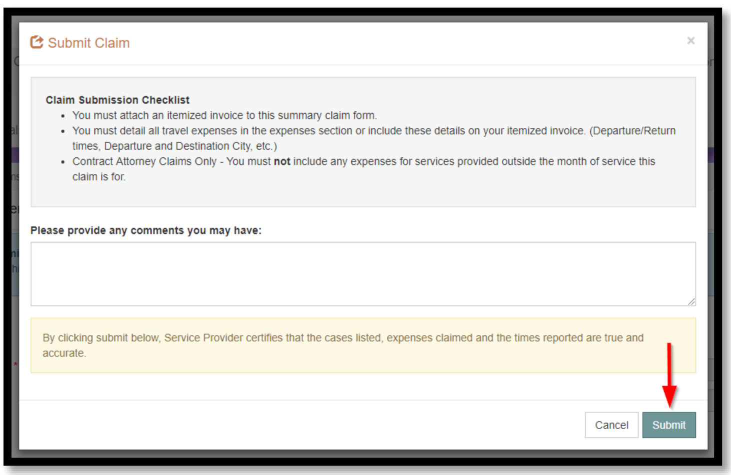
NOTE: Please consolidate all invoices and supporting documents into a single invoice to expedite the review/approval process, however, please also be aware the system's file size limit is 4MB. If the file is scanned and larger than this limit when combined, ensure the scan is in black and white to reduce file size. If this does not reduce the size below the limit, refer to the OPD Contractor F.A.Q.

Claim Submission

After you have entered all hours and expenses, uploaded all required documentation, as well as carefully reviewed all the information (**once submitted, you cannot edit your claim**), then you are ready to submit your claim for processing/approval. To do so, click the *Submit* button at the top of the page:



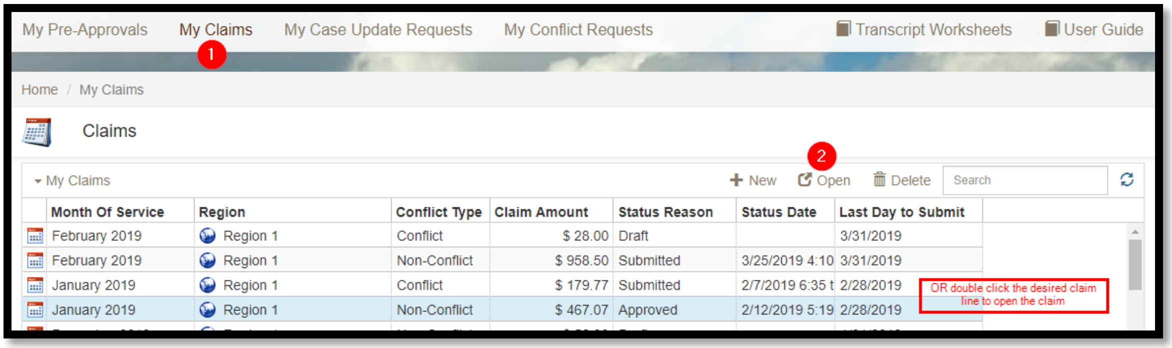
After clicking *Submit*, a new window will pop up with reminders of specific claim requirements. If you wish to include a comment with your claim, enter it in the box. Once satisfied with your claim, again select *Submit* for your claim to be reviewed for processing/payment by OPD Accounting.



Claim Printing, Editing, and Reviewing

Claim Printing

If you would like to print a copy of your submitted claim, use the *My Claims* button from the initial login page and select the claim you wish to print:



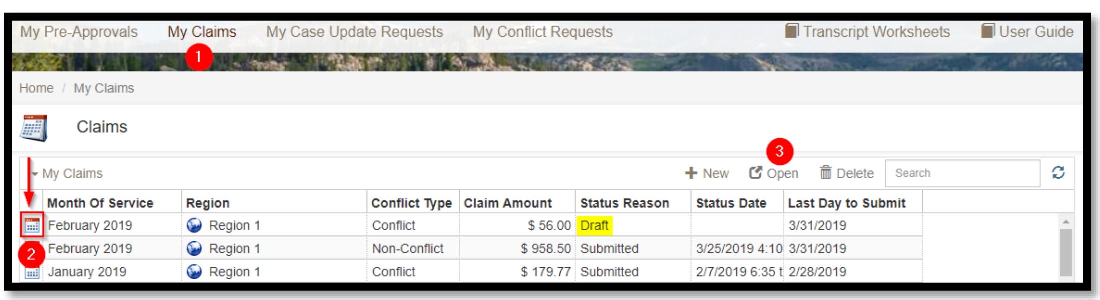
Once opened, you will see a *Print* button on the right of the screen (depending on the browser you are using, after clicking *Print* you will either be prompted to save or open, or it may automatically download a pdf of the claim, depending on your settings):

Claim Editing and Reviewing

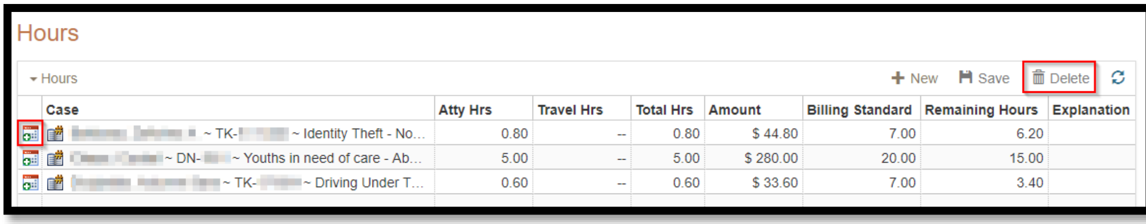
When viewing claims from *My Claims*, you will notice each claim line has a given status:

- 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 requires your attention to resolve the issue
- Processed: Payment has been made

Only claims not in *Submitted* status can be edited*. If your claim is still in *Draft* status and you need to edit the information navigate to the appropriate claim by opening it from *My Claims*. To select a claim line, either double click the claim line to open it or select the icon from the far left to select the row:

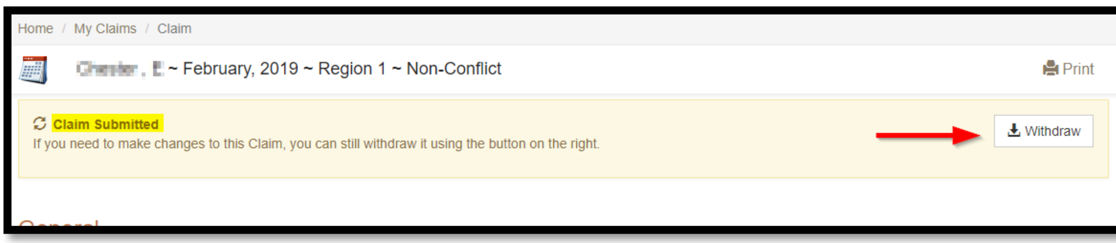


Once you have the claim needing editing open, you can edit the appropriate fields (hours, mileage, etc.) needing changed. Simply type into the boxes needing editing or if you wish to delete entire rows, select the row from the far-left icon (see below) and then click delete from the grid menu:



Just as the original claim required, you must save the information in order for the system to re-calculate any edited amounts.

*If you have submitted a claim but the approval/payment processing <u>has not yet begun</u>, you can withdraw the claim to return it to Draft status for editing purposes. To determine if you can withdraw a claim, open the specific claim and if given the option below you can withdraw it for editing:

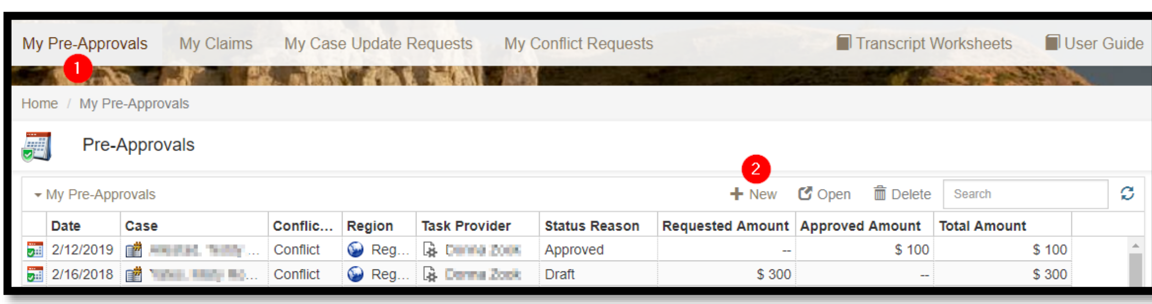


Change History

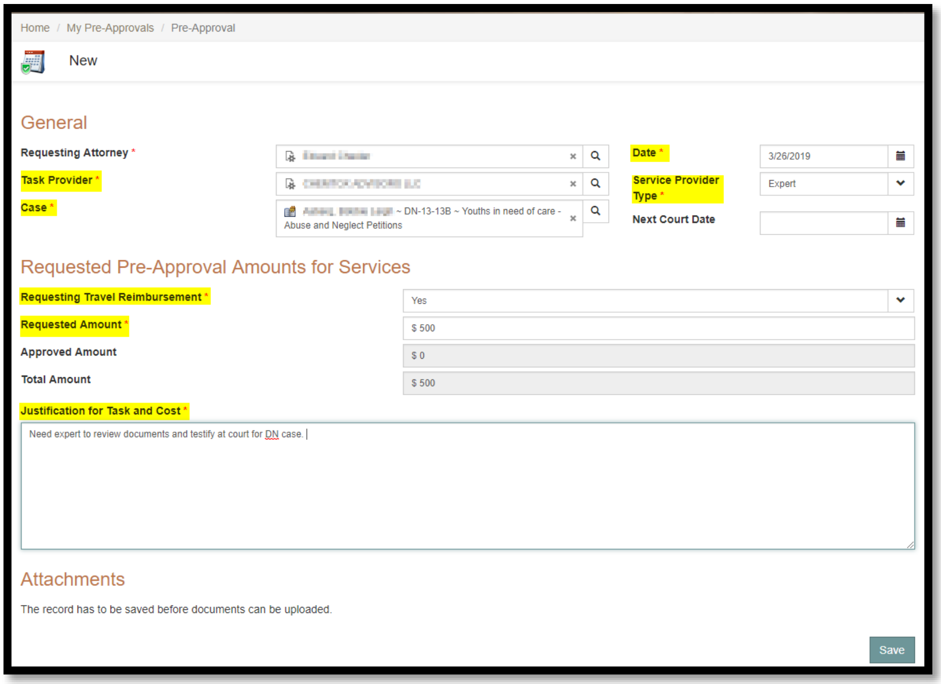
Within each claim, there is a *Change History* section below the *Attachments* section. When clicked into, this section will show any changes made by an OPD employee with an explanation for the change. Depending on your User Preferences, you will receive an email notifying you of any changes made to your claims.

My Pre-Approvals

This area allows you to submit requests for professional services such as Mental Health Providers, Investigators, Administrative Support Staff or Transcriptionists, and Experts for the case. To create a new pre-approval, click *My Pre-Approvals* from the top menu, then select the *+New* button:

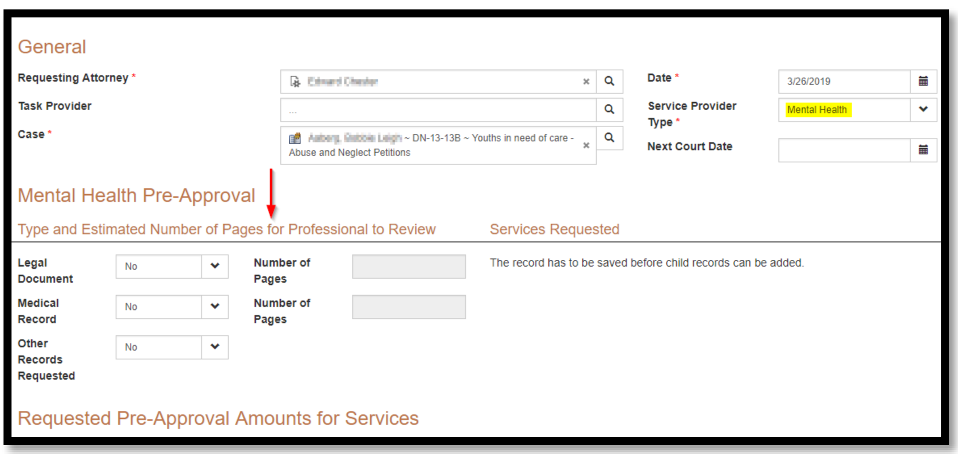


Each section with a red asterisk is required, input the required information for each type of service provider being requested:



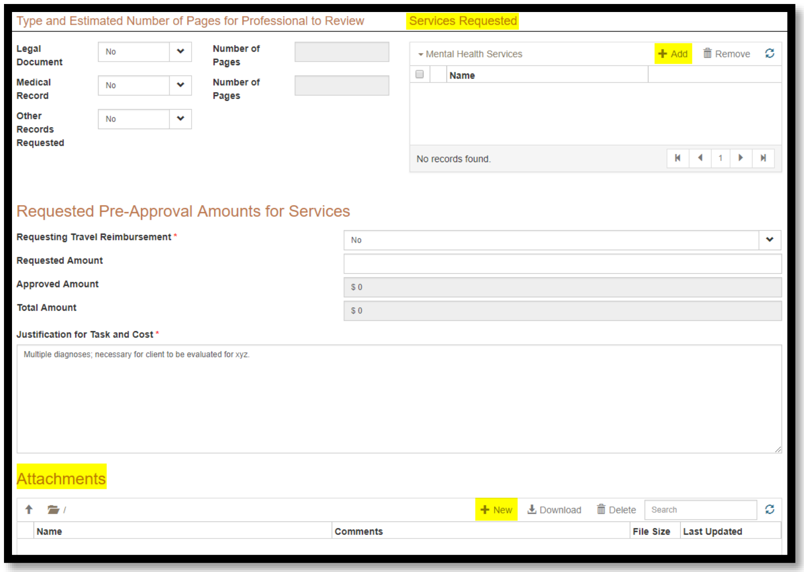
Mental Health Provider Pre-Approvals

When you select *Mental Health* from the *Service Provider Type* drop down, a new section appears under *Mental Health Pre-Approval*:



If you do not have a specific provider you want to use or are open to suggestion, leave the Task Provider field blank and the Mental Health Consultant can make a recommendation and enter it after you submit. You can also reach out to him to discuss prior to creating the Pre-Approval, simply email Dr. Scolatti at mjs@sabersop.org with any questions or concerns.

After filling out the remaining required sections that do not auto populate (*Case, Travel Reimbursement, and Justification*), click *Save*. Then, you are able to enter the *Services Requested* as well as upload any attachments necessary:



NOTE: Any attachments and data entered on the pre-approval request is visible by all parties in the approval process as well as the service provider, if approved.

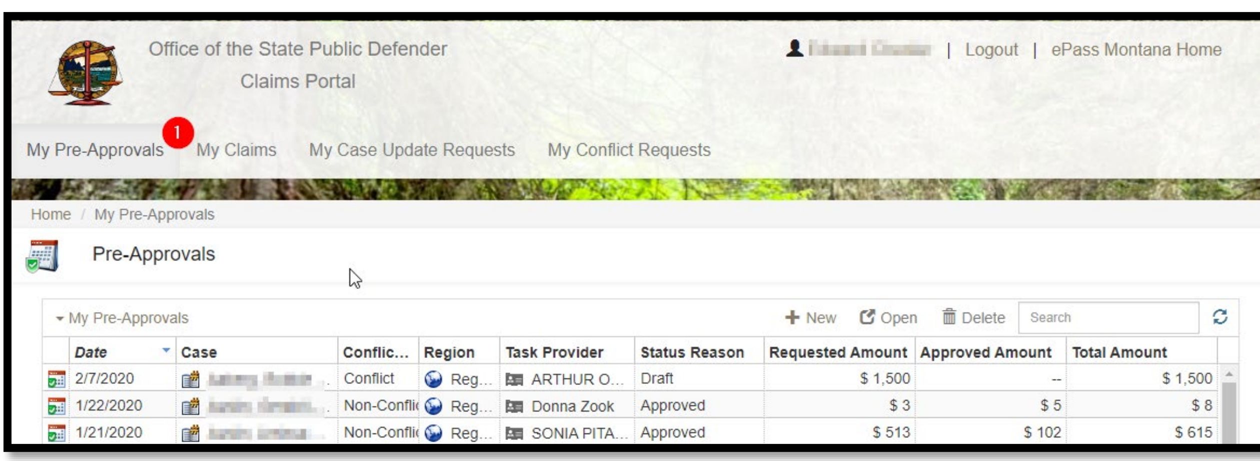
Once all information has been entered correctly, you are ready to submit the *Mental Health Pre-Approval* request using the *Submit* button at the top of the screen, enter any comments necessary, and click *Submit* once more. Once this request has been approved or rejected, you will receive an email notification.

If approved, the service provider will also get notification of an approved pre-approval which indicates to them they may begin working on the case.

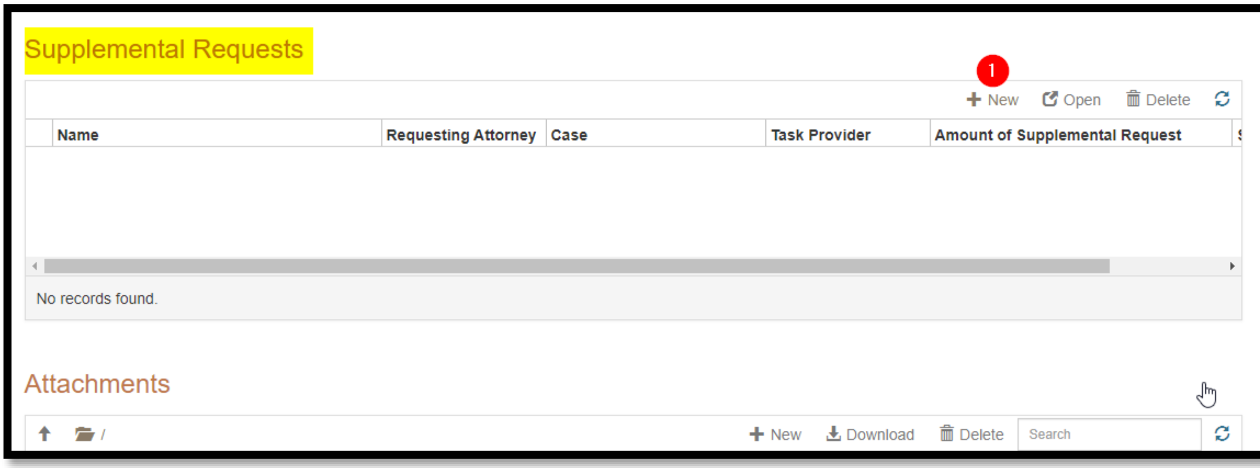
Supplementals for Pre-Approvals

Occasionally, it is necessary to request additional funds for the approved pre-approval in the portal. To complete a supplemental, first navigate to the original pre-approval entered by selecting My Pre-approvals and then opening the specific pre-approval by double clicking on the pre-approval row.

Tip: You can use the columns to sort by clicking on them, for example to sort by date simply click on the Date column to sort by most recent.

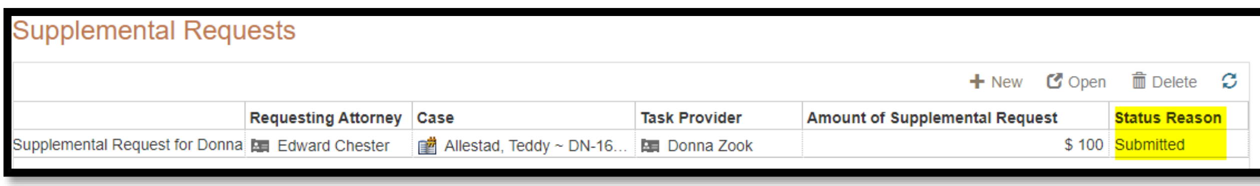


Once you have opened the pre-approval you need to add a supplemental to, scroll down to the Supplemental Requests section. Then use the +New to create the request.



Fill in the required fields and press Save and then select Save and Close. Re-open the Request and at the top there is a Submit button (note, if you do not submit the request it will remain in Draft status).

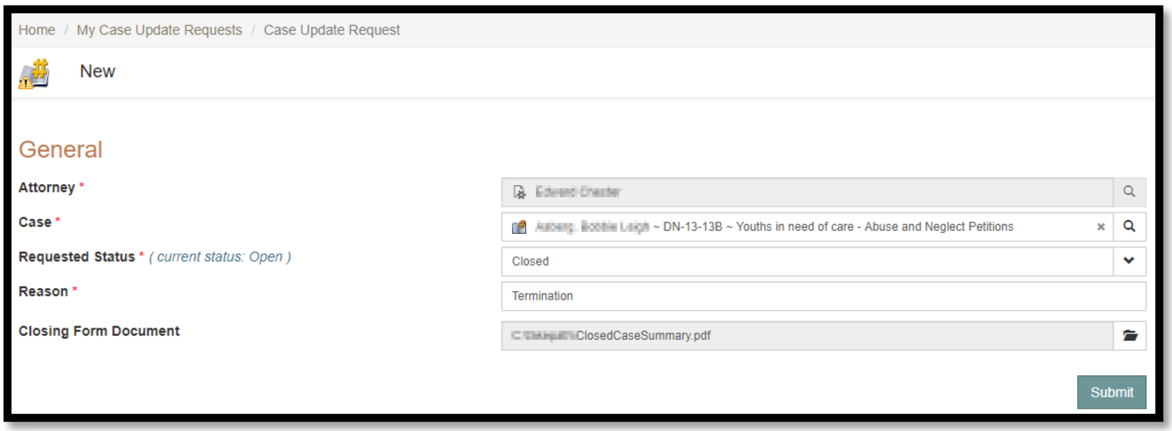
You can then see the status of the request using the bar at the bottom of the section:



My Case Status Update Requests

This section of the claims portal is used for closing cases or requesting a case status change (e.g. client in warrant status and case now inactive). Navigate to *My Case Update Requests* from the top menu and select *+New*.

To close a case, ensure you have a formal judgement or sentencing order, or a completed closing form if you don't have a formal judgement or sentencing order, to upload with the request. If you need a closing form but do not have one, use the appropriate (criminal vs civil) closing form from the [Attorney Resources]() or email the attorney that assigned you the case to request the pre-populated form for the case.



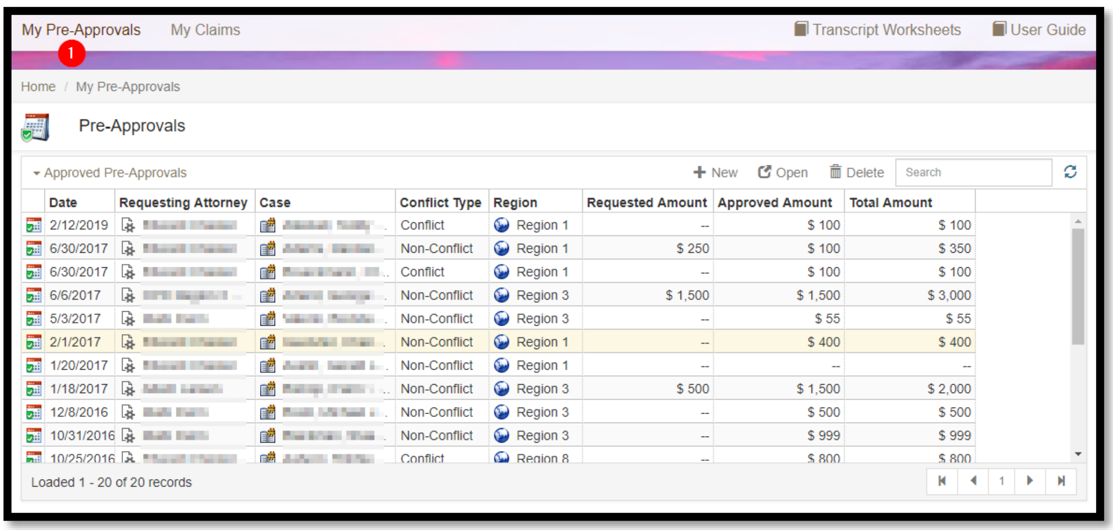
Once you have entered the necessary information, press *Submit* to complete the update request.

Other Service Providers Instructions

This section provides instructions for mental health providers, investigators, transcriptionists, and administrative support

My Pre-Approvals

Pursuant to the Pre-Approval and Claims Procedure, service providers **should not** be working on cases without a pre-approval in the system. Further, service providers are **unable** to bill without an approved pre-approval in the system. To ensure you can bill, the first step in the claim process is to review what pre-approvals are available to you. To do this, navigate to the *My Pre-Approvals* from the top menu, you should be brought to a page that looks similar to this:



If an amount is in the *Requested Amount* column, that either indicates a pending pre-approval or a pending supplemental. Refer to the *Approved Amount* column to determine what is currently approved for your specific task.

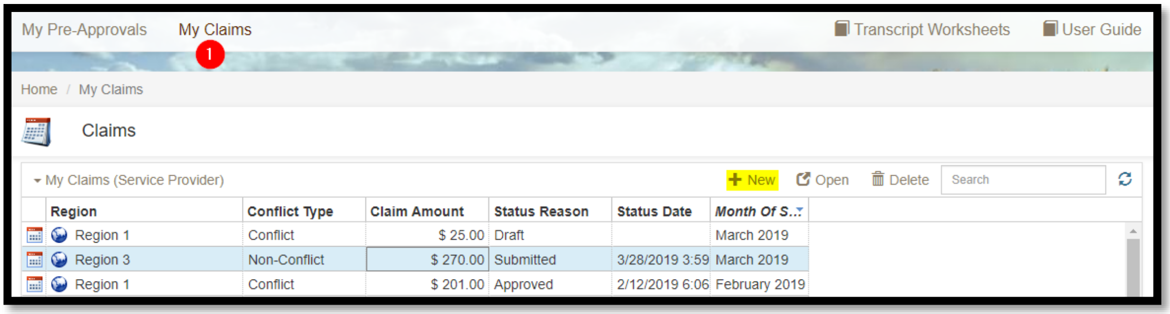
If you do not see the pre-approval you need for a specific case, contact the requesting attorney and ask they enter the pre-approval in the system in order for you to begin work and bill OPD. If you are unable to reach the requesting attorney, email opdclaims@mt.gov.

Once you have determined you have a pre-approval in the system, note the *Conflict Type* and *Region* as you will need both for creating the claim in the next step.

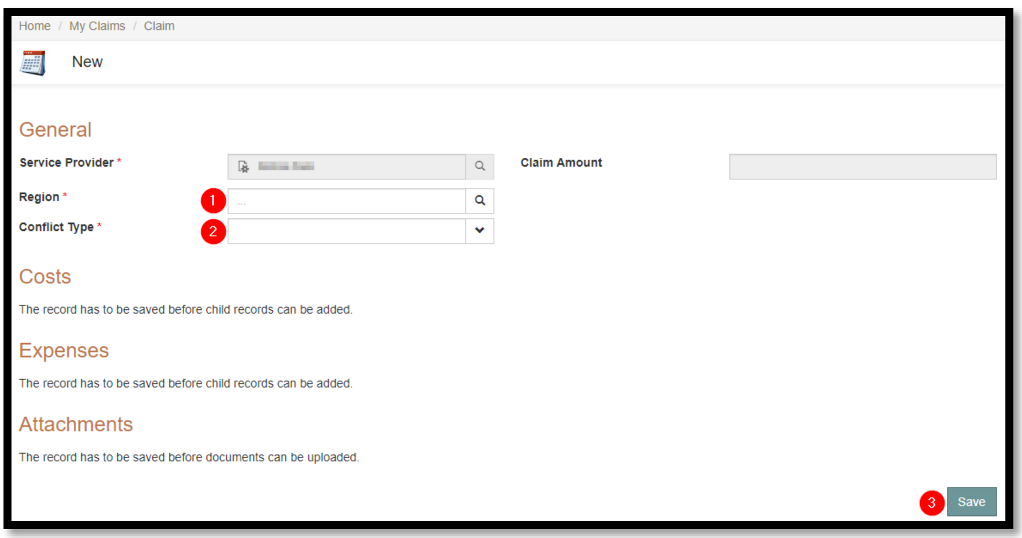
Claim Creation and Viewing

By selecting *My Claims* from the top menu, you will be able to create new claims, view previously drafted and submitted claims, and the details of the claims (e.g. region, conflict type, amount).

To generate a new claim, click the *+New* button as shown below:



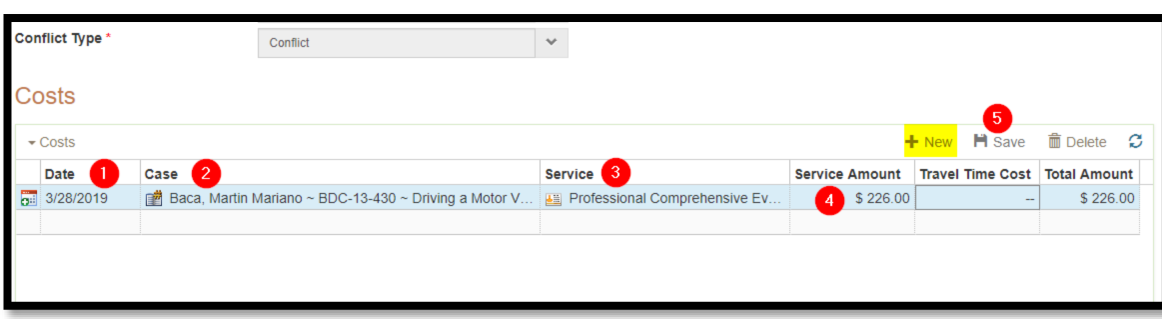
When creating a claim, you will need to divide them by *Regions* and *Conflict Types*. For example, if you have been requested to perform work in Region 1 for one Conflict case and one Non-Conflict case, you will have <u>two</u> separate claims. You can, however, enter multiple cases from the same region and conflict type into one claim. After clicking the *+New* button you will be brought to this screen:



Enter the information required and after saving, you will be brought to the next part of the claim process.

Costs

This is where you are able to enter the specific information for the case and work done. Under the *Costs* section, you will again click the *+New* and then begin entering the required information:

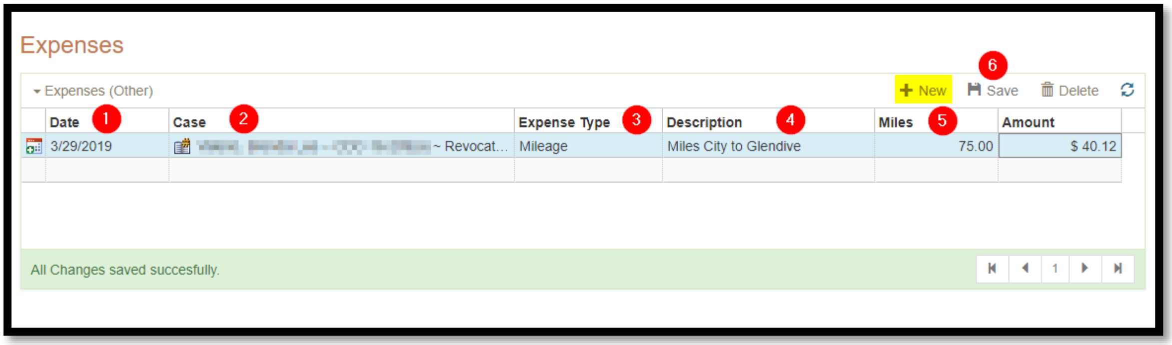


For the *Date*, enter the date of completion for the service provided. If your pre-approval included *Travel Time*, enter the amount for travel time in that column (be sure to refer to the most recent Contractor Compensation Schedule for current rates). After you press *Save*, the *Total Amount* box will populate.

NOTE: Per the Contractor Compensation Schedule, travel hours are only available for services rendered outside a 15-mile radius of the principal place of business.

Expenses

For service providers that have expenses to include with their claim such as mileage, lodging, meals, etc. Enter this information in the same way as the *Cost* section using the *+New* button in the *Expenses* grid, and then entering the specific information (**including the travel details in the description box**):



For mileage expenses, use the MDT Distance Calculator to calculate the miles entered into the *Miles* column. After you click *Save*, the *Amount* field will automatically calculate based on current mileage reimbursement rates.

NOTE: If claiming expenses, be sure your invoice includes the following depending on expense type:

Mileage:

- ✓ All travel details including date of travel, departure location, arrival location, number of miles traveled, and purpose for travel.

Per Diem:

- ✓ If you are claiming per diem for meals, you must include the time you departed your home base and the time you returned.

Lodging:

- ✓ If seeking reimbursement for lodging, airfare, car rentals, parking or other non-client expense, you must include an itemized (room) receipt (not a credit card slip) from the hotel, airline, rental car agency, etc.

NOTE: Per the Contractor Compensation Schedule, travel expenses only apply to services rendered outside a 15-mile radius of the principal place of business.

Attachments

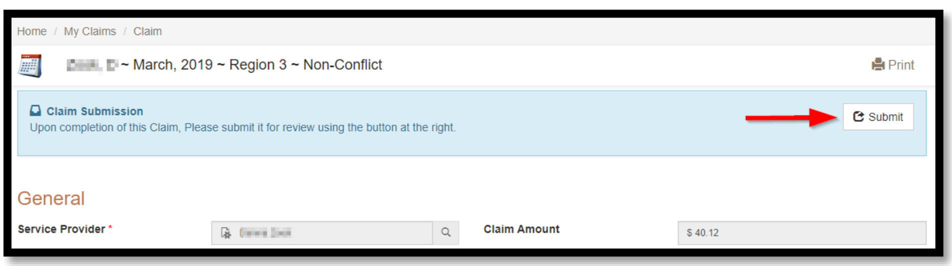
All claims require an attached invoice for work completed. To attach a claim, use the *+New* in the *Attachment* grid. An *Upload Document* window will appear:

Use the *Choose File* button to select the appropriate document, enter comments regarding the attachment and click *Submit*.

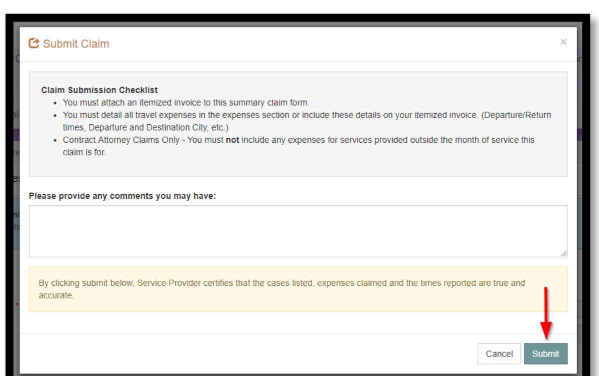
NOTE: The file size limit is 4MB for all attachments. Should your file be larger than this, you will get an error and the file will not be uploaded. If the file is scanned, please ensure it is in black and white. If this does not reduce the size, refer to the [OPD Contractor F.A.Q]().

Claim Submission

After you have entered all *Costs*, *Expenses,* and *Attachments*, as well as carefully reviewed the entered information (**once your claim is being processed, you cannot edit your claim**), then you are ready to submit your claim for processing/approval. To do so, click the *Submit* button at the top of the page:



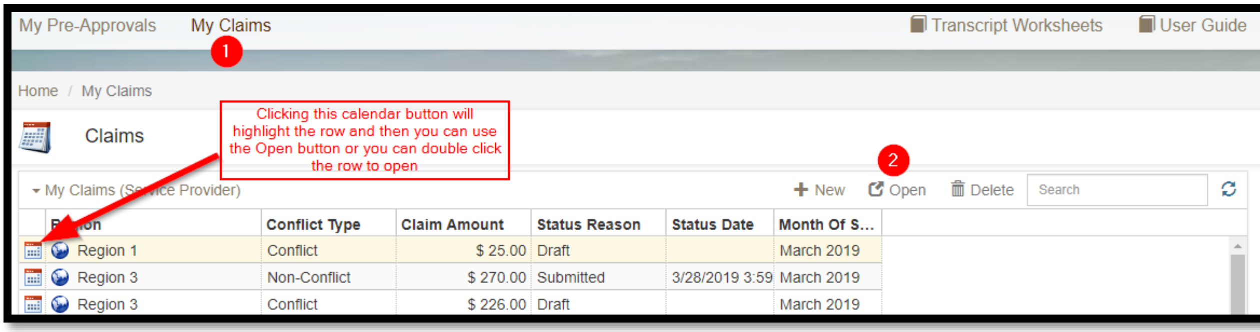
After clicking *Submit*, a new window will pop up with reminders of specific claim requirements. If you wish to include a comment with your claim, enter it in the box. Once satisfied with your claim, again select *Submit* for you claim to be reviewed for processing/payment by OPD Accounting:



Claim Printing, Editing, and Reviewing

Claim Printing

If you would like to print a copy of your submitted claim, use the *My Claims* button from the initial login age and select the claim you wish to print:



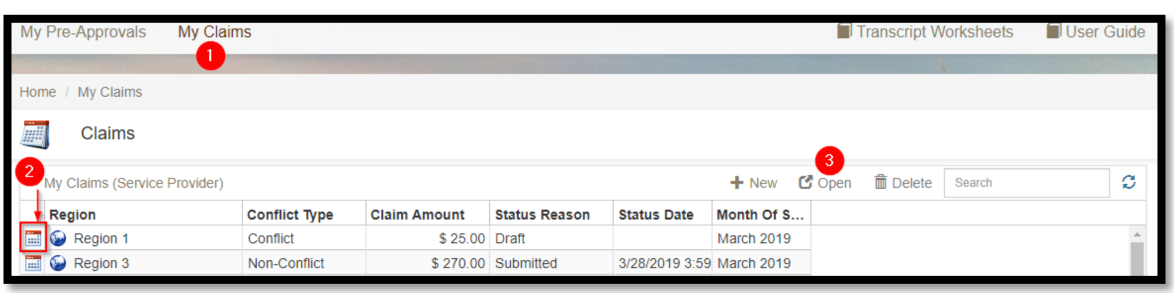
Once opened, you will see a *Print* button on the right of the screen (depending on the browser you are using, after clicking *Print* you will either be prompted to save or open, or it may automatically download a pdf of the claim, depending on your settings):

Claim Editing and Reviewing

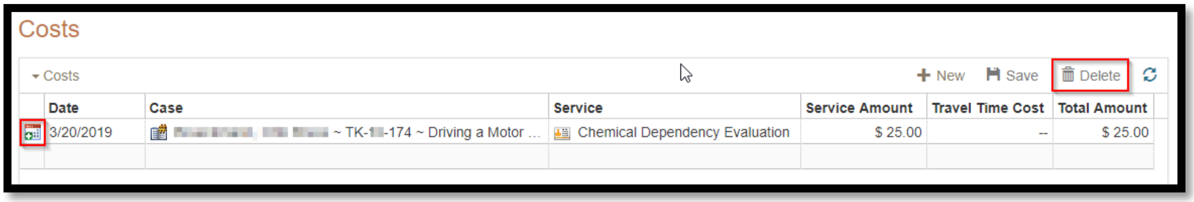
When viewing claims from *My Claims*, you will notice each claim line has a given status:

- 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 requires your attention to resolve the issue
- Processed: Payment has been made

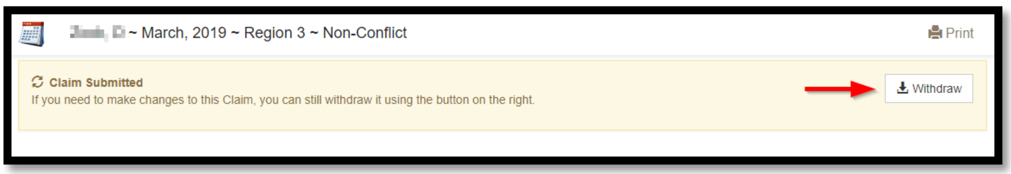
Only claims not in *Submitted* status can be edited*. If your claim is still in *Draft* status and you need to edit the information navigate to the appropriate claim by opening it from *My Claims*. To select a claim line, either double click the claim line to open it or select the icon from the far left to select the row:



Once you have the claim needing editing open, you can edit the appropriate fields (costs, mileage, etc.) needing changed. Simply type into the boxes needing editing or if you wish to delete entire rows, select the row from the far-left icon (see below) and then click delete from the grid menu:



*If you have submitted a claim but the approval/payment processing <u>has not yet begun</u>, you can withdraw the claim to return it to *Draft* status for editing purposes. To determine if you can withdraw a claim, open the specific submitted claim and if given the option below you can withdraw it for editing:



Change History

Within each claim, there is a *Change History* section below the *Attachments* section. When clicked into, this section will show any changes made by an OPD employee with an explanation for the change. Depending on your User Preferences, you will receive an email notifying you of any changes made to your claims.

User Preferences

To review and/or change your User Preferences, click your name from the top of the Claims Portal:

NOTE: The email listed under User Preferences is where notification regarding your claims will be sent, it does not change the email address connected to your Montana ePass account (if they are different). To update the email address associated with your Claims Portal Account, please send an email to opdclaims@mt.gov for assistance.