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MEMORANDUM

DATE: February 25, 2020
TO: All Contract Attorneys
FROM: Chris E. Roberts *CR*
Office of Indigent Defense Services
RE: Instructions for Contract Attorney Monthly Report

Log into the AIDCC website using your current user ID and password.

New to the AIDCC billing website? Follow registration instructions below:

Log into <https://AIDCC.Alabama.gov> using the User ID and temporary password from the invitation email. (NOTE: User ID and temporary password are case-sensitive.) Click on the word "here" in the "Are You Registered?" box. You will be prompted to change the password while registering. The new password must be seven (7) characters and must contain at least one uppercase letter, one lower case letter and one number. Refer to the Case Management Training Video for a demonstration at <https://www.oids.alabama.gov/helpfulLinks.aspx>

Click MY CASES on the navigation bar.

There should be three sections on the screen:

Active Case Claims – a list of any cases that have been activated for billing as an appointed attorney.

Active Contract Cases – a list of any cases that have been activated for reporting as a contract attorney.

Case Claims Not Started – a list of all cases to which the attorney has been appointed in any capacity.

NOTE: Search Options:

Click on the **Name Filter** and a dropdown list will appear showing the names of the clients that you've been appointed to represent. For juvenile and some youthful offender clients, you'll need to search by case number since no defendant name is shown in the list. (NOTE: The Name Filter must be set to "ALL" to search by case number and the Case Filter must be set to "ALL" to search by name.)

Click on **Case Filter** and the last six digits of the case number will appear.

I: STARTING A CONTRACT CASE

TIP: Click on Filing Date twice and the most recent cases will be listed first.

STEP 1: Start Contract Case.

Find the case number by defendant name or case number from the Case Claims Not Started List.
Click on Start Contract.

STEP 2: Select Companion Cases.

Check the box for the Primary Case number. (Refer to the Guidelines for Case Reporting.)
Click Continue.

STEP 3: Verify/Edit Information

Select the Case Type for the primary case number.
Enter the date appointed.

Note: For any appointment received prior to 10/1/2019, counsel must enter the appointment date as 9/30/2019.

Select the Appointing Judge.

Three tabs will appear:

Continue to add the case. If correct, you'll see the message: "Success!"

Cancel to go back and reselect primary or Companion Cases

Exit to return to Case Management. (This will return the case number back to Case Claims Not Started.)

The case should now appear in your Active Contract Cases List.

II. CLOSING A CONTRACT CASE

Click the "Close Case" tab for the case number that closed during the reporting month.

STEP 1: Verify/Edit Contract Case Information –

Enter Final Court Action Date.

Select Disposing Judge.

Select Disposition.

Enter Total Hours Worked on the Case.

SUBMIT.

STEP 2: Final Submit - Check the certification checkbox and SUBMIT.

III. CONTRACT CERTIFICATION

Contract Certification is required at the end of each reporting month and should be done by the 7th of each month. (**IMPORTANT!!** Payment for contract services will not be generated until the certification is submitted.)

Click Contract Certification on the navigation bar.

STEP 1: Update Contract Case Hours

Select the County and reporting Month. (The County and Month will no longer be available after that month has been certified.)

Enter the total number of hours worked under the contract during the reporting month.
SUBMIT.

STEP 2: Review - Review the monthly report document. If not complete and correct, return to STEP 1.

STEP 3: Final Submit - Check the certification checkboxes. SUBMIT.

MY CONTRACT CASE STATUS

This screen shows all cases that have been activated as contract cases and the current status of each. It can be sorted by clicking on the blue Case Number, Appt Date, etc. fields.

MISCELLANEOUS CLAIMS

Miscellaneous claims are filed to request reimbursement for out-of-pocket expenses such as services of expert witnesses, psychological evaluations, transcripts, investigations, mileage for travel outside of the contract county, or other extraordinary expenses. (Refer to Code of Alabama Section 15-12-21(d)(6) for requirements and limitations.)

Contact OIDS to have the "Misc. Claim" tab opened. Once the tab is opened the following instructions apply.

STEP 1: Select the case number by defendant name or case number. Click Misc. Claim.

Select Companion Cases

Check the box for the Primary Case number. (Refer to the attached Guidelines for Case Reporting.) A case number can be removed from the group by unchecking the box under Select for Group. Click Continue.

STEP 2: Verify/Edit Information

- 1) Select the Case Type for the primary case number.
- 2) Enter the date appointed. Enter the contract effective date for cases that you were appointed prior to the contract effective date.
- 3) Enter the Final Court Action. (If the case is still on-going, enter the current date.)
- 4) Select the Appointing Judge and Trial Judge.
- 5) Select the Disposition. (Select "interim" if the case is still on-going.)

Continue to add the case.

Cancel: Reselect Companion Cases

Exit: Return to Case Management. (This will return the case number back to Active Contract Cases.)

The case number will now appear in ACTIVE CASE CLAIMS on the Case Claims Management screen.

STEP 3: Click Edit/File Claim

Mileage:

- 1) Click Mileage tab.
- 2) Click New Mileage Charge Entry
- 3) Enter the date of travel, points of travel, and Reason for Travel.
- 4) Click Calculate. The distance and mileage reimbursement will display.
(Mileage is reimbursed at the applicable rate, in effect at the time of travel, as established by the Internal Revenue Code.
- 5) SUBMIT.
- 6) EXIT.
- 7) Enter additional mileage claims or return to Fee Declaration Charges Menu.

Other Charges:

- 1) Click Create Expenses/Professional Services Entry tab.
- 2) Select Extraordinary Expense for out-of-pocket expenses.
- 3) Select Expert/Prof. Services for experts, investigators, etc.
- 4) Select Work Type and provide work type description.
- 5) Enter date of Court Order expense was approved.
- 6) Enter Date Work was performed or begun.
- 7) Enter Amount.
- 8) SUBMIT
- 9) EXIT
- 10) Enter additional expenses or return to Fee Declaration Charges Menu.

Supporting Documents:

Documentation such as copies of invoices, receipts, court Orders, etc. must be submitted with the claim in order to be reimbursed.

- 1) Click Supporting Documents tab.
- 2) Click Upload A New PDF Document.
- 3) Enter a description of the document, select the document type, and click BROWSE.
- 4) UPLOAD FILE.
- 5) Upload another document or Cancel and return to Fee Declaration Charges Menu.

After all charges and mileage have been entered click the Review and Submit tab.

STEP 4: Verify/Edit Case Claim Information

- 1) Select Final or Interim Billing.
- 2) Select the payment mailing address.
- 3) Enter the Final Court Action or, for interim billing, enter the current date.
- 4) Select the Judge.
- 5) Enter the Disposition.
- 6) SUBMIT

STEP 5: Review - Review and save/print the documents.

STEP 6: Final Submit - Check the certification checkboxes. SUBMIT.

The Miscellaneous Claim will be electronically routed to the disposing judge for certification and then submitted to OIDS for approval and payment. Click on My Fee Declaration Status on the navigation bar to view the status of the claim.