

Creating a Claim in CMS+

To Begin: Click on the “CLAIMS” tab at the top of the screen

- Select the type of claim and click “New Claim” (e.g. Early Interim, Interim, Supplemental Interim, Final, Supplemental Final.)
- Enter the case number & click “Search”. A list of your appointed cases will appear. Click “Create” to begin.

From this point, the program will lead you through 13 steps necessary to complete your claim. The steps are listed below, with brief summaries. **Important Navigation Tip:** As you progress through the steps, you can click “**Save and Continue**” to proceed to the next step, or “**Save and Return**” to see the checklist of steps. This feature enables you to stop work on the claim, log out, then later pick up where you left off.

For more detailed information on each step, please see the detailed handout – Creating a Claim in CMS+.

Step 1: Case Information Screen

- This screen request general case information, such as the name of the client, type of case, type of appointment, etc. Drop down menus are provided.
- The information is pre-populated by information in ADI’s files. As always, be sure to check the pre-populated information for accuracy.
- There are some new fields reflecting the JCC’s (formerly ADC) request for additional information -- e.g. Termination Type, Client Relationship, etc. These fields are explained further in the detailed handout.

Step 2: Milestones and Superior Courts Information

- Throughout CMS+, you can use the + sign to add information, the pencil icon to edit, or the trash can to delete.
- The ADC is now requesting additional milestones, such as reply brief date, petition for rehearing, petition for writ of habeas corpus, etc.

Step 3: Sentence or Other Disposition Screen

Step 4: Counts of Conviction

- The JCC has a new rule for entering subdivisions where code sections are combined. “Subdivision” is limited to the last subdivision listed in the code section. For example, if you have Penal Code 664(a)/288.2(b)(2), “Section” = 664(a)/228.2 and “Subdivision” = (b)(2).

Step 5: Transcripts Screen

- “Pages Read” is now a required field. The guideline calculation will be based upon the total pages read (e.g. line 2, record review is based on the total pages read, not the total page count).
- If the Preliminary Hearing Transcript was not read, be sure to deduct the page count from the Clerk’s Transcript

Step 6: Hours Worksheet: Enter the claimed hours and add comments for any time claimed over the guidelines.

Step 7: Use of Previous Briefing: Declare any use of previous briefing in this step.

Step 8: Use of Associate Counsel Worksheet: Be sure to claim any use of associate counsel in this step. Claim all of your own hours first and only then any associate counsel hours actually included in the amount entered for Step 6.

Step 9: Expense Worksheet

- Car Travel: must be separately explained on line 6. Indicate the number of miles traveled (e.g. 70 miles) in "Quantity" and the amount claimed (e.g. \$33.95).

Step 10: Summary and Calculations: The rate and totals are automatically calculated. Contact ADI if the rate is incorrect.

Step 11: Additional Comments and Notes

Step 12: Signature Page (Step 12)

- This is automatically completed based on ADI's information. To make changes, contact ADI.
- Please ignore "AOC Unique ID". We will not use this feature until the end of October. (The unique ID will allow ADI to transmit the claim to the AOC without using a social security or tax ID number. A panel alert will be sent in October with further information.)

Step 13: Submit Claim

- You can print the claim by clicking the link "Print the Claim."
- When ready to submit, enter the password you use to log into the panel portal, and click "submit".

This message will appear when the claim has been successfully submitted to ADI:



Correcting Submitted Claims

- If you need to correct a claim after it's been submitted, notify ADI. ADI will unsubmit the claim.