

ONLINE CLAIMS SUBMISSION

CERTIFIED SHORTHAND REPORTER

USER MANUAL

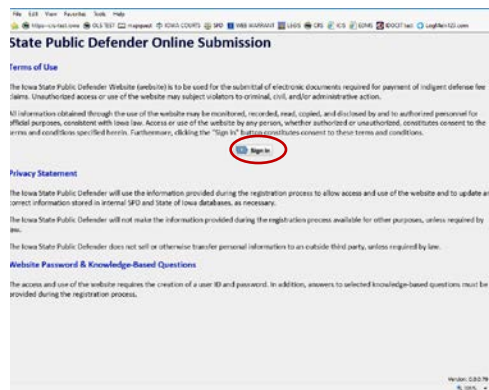
January 2020

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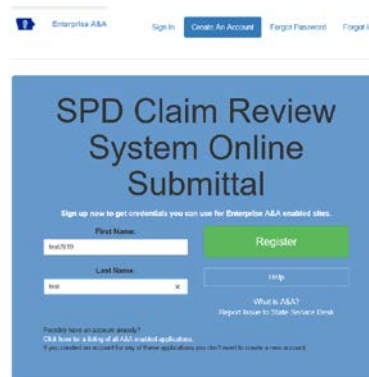
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Instructions for how to request an account if you have never submitted a claim to SPD before.

1. Go to: <https://spdclaims.iowa.gov> and click “Sign In.”



2. Select the “Create an Account” tab at the top of the window. You will enter your first name and last name and then click “Register.”



3. At the top, take note of your account id – this is your username. This is typically firstname.lastname@iowa.gov. You will need to enter and confirm your email address and then click “Save Account Details”.

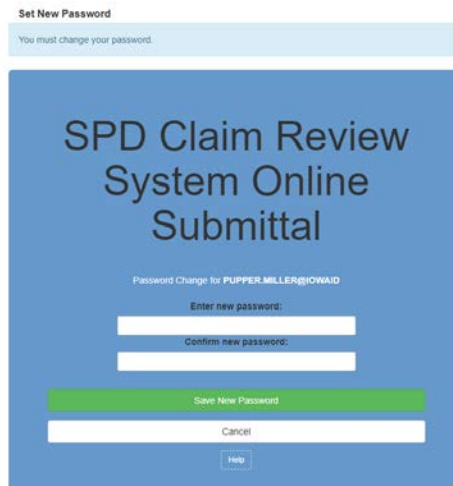


4. You will receive an email at the email address you entered in Step 3. You will need to check that email account and click the appropriate link in the email to confirm/activate your account. Be mindful of the email address you select, because this is where emails will go regarding your A&A account.

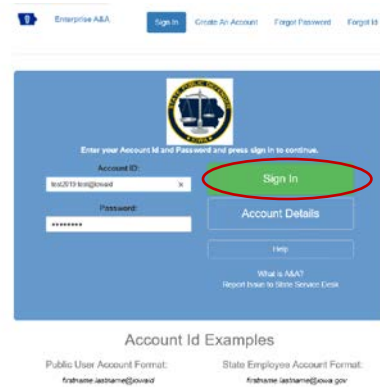


5. The link in the email will take you to a page where you will need to select and answer three identity baseline questions. If ever you forget your password or need assistance, you will need to know the answers to these questions so the IT department can help you, so make sure you write them down or remember them.

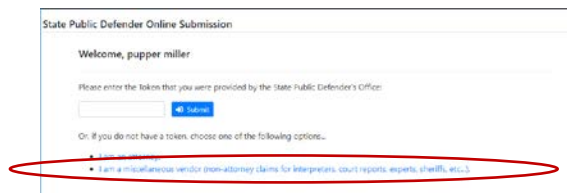
6. You will then be taken to a page to “change your password”. You will enter your password (of your choosing) twice.



7. In order to “sign in” you will need the username and password that you have just created. Then click “sign in.” Now, you will go to the online claims website at <https://spdclaims.iowa.gov/> and sign in using your username and password (as set-up above) into the following page:

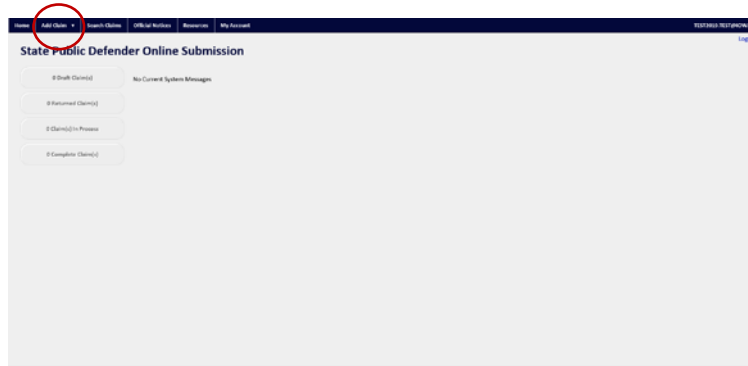


The first time you sign in you will get this page. Select “I am a miscellaneous vendor.”



Once you are signed in you will be required to complete information payment information and submit a W-9 Form to the SPD.

Once that is saved and completed you will be able to go to your home page to start a claim.



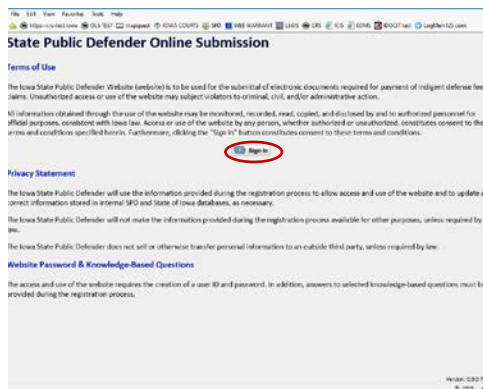
Please feel free to call our office at (515) 242-6158 or email us at claims@spd.state.ia.us if you have questions.

The following instructions are for vendors who have previously submitted a paper claim to the State Public Defender.

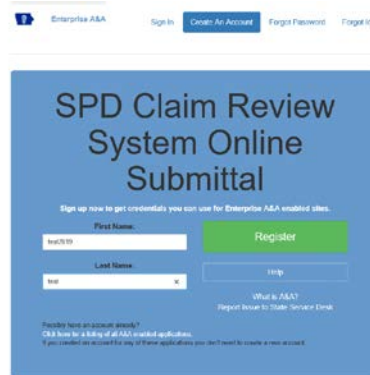
We sent you a “token” via U.S. Mail to complete your login process. The first step in using your token to login is for you to create your username and password. More details on the “token” are provided below.

You will need to get an “A&A” (Authentication & Authorization) username and password. If you sign into other state websites for school alerts, licenses, etc. you may already have an A&A account and can use the same one. If you do not already have one, follow these directions:

1. Go to: <https://spdclaims.iowa.gov> and click “Sign In.”



2. Select the “Create an Account” tab at the top of the window. You will enter your first name and last name and then click “Register.”



3. At the top, take note of your account id – this is your username. This is typically firstname.lastname@iowaid. You will need to enter and confirm your email address and then click “Save Account Details”.



4. You will receive an email at the email address you entered in Step 3. You will need to check that email account and click the appropriate link in the email to confirm your account. Be mindful of the email address you select, because this is where emails will go regarding your A&A account.



5. That link in the email will take you to a page where you will need to select and answer three identity baseline questions. If ever you forget your password or need assistance, you will need to know the answers to these questions so the IT department can help you, so make sure you write them down or remember them.

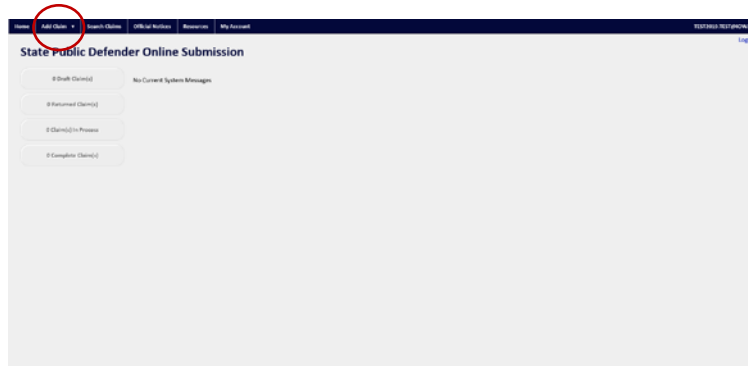
6. You will then be taken to a page to “change your password”. You will enter your password (of your choosing) twice.

7. In order to “sign in” you will need the username and password that you have just created. Now you will go to the online claims website at <https://spdclaims.iowa.gov/> and sign in using your username and password (as set-up above) into the following page:

The first time you sign-in you will get this page:

You will notice that you need to enter a “token.” We will provide you your token in a separate letter sent via U.S. Mail in the near future. After you enter the token above and click

submit, you will be taken to the home page of the Online Claims Submission and you can begin submitting claims.

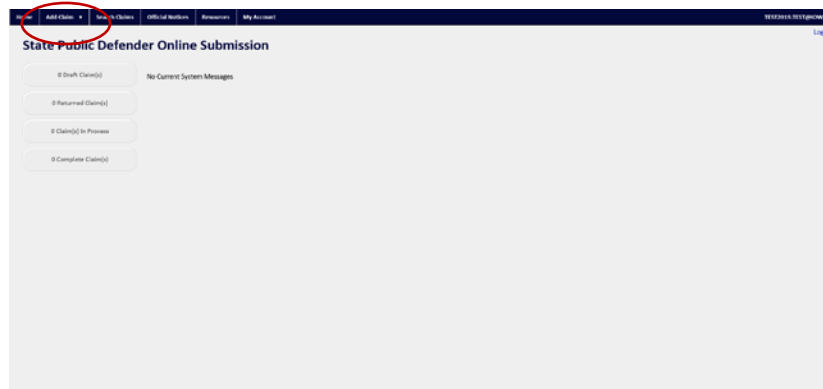


If you need any assistance setting up your A&A account or navigating your A&A account, you can find help here <https://entaa.iowa.gov/entaa/ssohelp.jsp>.

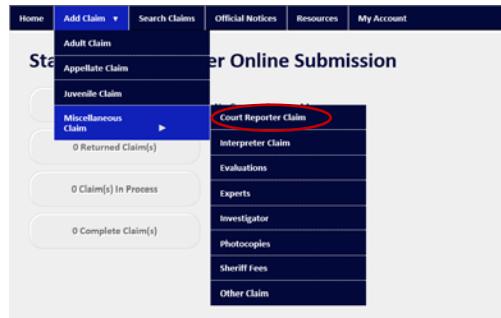
Please feel free to call our office at (515) 242-6158 or email us at claims@spd.state.ia.us if you have questions.

STARTING A CLAIM

To start a court reporter claim, select “add a claim” from the home page.



Slide down to Miscellaneous Claim and then over and click on Court Reporter Claim.



VENDOR INFORMATION

Please review the “Vendor Information” section of the claim. Note that there is a drop down menu for the Vendor Name and tax ID. The active account we have for you will be listed by default along with the associated vendor address. If you want to change the vendor name or address, you will need to select “new vendor” from the drop down menu and complete a W-9. The W-9 with the new information should be attached to the claim in .pdf format when you submit it.

A screenshot of the 'Vendor Information' form. It includes a title 'Vendor Information' and a note: 'If you need to set up a new vendor for this claim or others, please select "New Vendor" from the list below. Then download a W9, fill it out, and attach it to this claim.' The form has two main fields: 'Vendor for Claim:' with a dropdown menu showing 'Test Test Inc. (22-222222)' and 'Vendor Address:' with a text field containing '123 Test Dr. Des Moines, IA 50319'. A note at the bottom says: 'Please check that the pay-to and address you have selected is correct for this claim to ensure prompt payment.'

CLAIM TYPE

The next section is the “Claim Type” make sure this matches with the type of claimant you are. That is, if you are court reporter you should be submitting a claim for certified shorthand reporter. If you are an investigator, you should be submitting a claim for investigator.

A screenshot of the 'Claim Type' form. It has a title 'Claim Type' and a dropdown menu for 'Claim Type:' with 'Certified Shorthand Reporter' selected.

CLAIM INFORMATION

“Claim Information” is the next section you need to complete. It is important that you select who you are providing the service for – a public defender field office or a private attorney. If you select “attorney” you will need to enter that attorney first and last name where indicated. If you select “field office” there will be a drop down menu of field offices to choose from.

The screenshot shows a web form titled "Claim Information". At the top, there are two radio buttons: "Field Office" (unselected) and "Attorney" (selected). Below this, there are several input fields: "Attorney First Name" (text box with "Attorney first"), "Attorney Last Name" (text box with "Attorney last"), "Services Requested By:" (dropdown menu with "Court Appointed Attorney" selected), "County:" (dropdown menu with "Boone" selected), "Court Number:" (text box with "SRCR222222" and up/down arrows), "Client First Name:" (text box with "Client first"), "Client Middle Name:" (text box), "Client Last Name:" (text box with "Client last"), "Client Name Suffix:" (text box with "Jr."), "Juvenile Case:" (radio buttons for "Yes" and "No", with "No" selected), "Previous Billings:" (radio buttons for "Yes" and "No", with "No" selected), and "Claimant Invoice Number:" (text box with "optional" and a clear 'x' button).

“Services Requested By” is the next drop down menu for you to make a selection from. You should select the person or party that requested your services. You will need to complete the rest of the Claim Information section including the yes/no questions at the bottom. “Claimant Invoice Number” is not a required field but for your own use if it would be helpful to you to track your invoices on the claim.

ITEMIZATION OF SERVICES

The court reporter services, transcribed services, cancelled fees, and expenses, are the sections where you will enter the amounts you are billing.

The screenshot shows a form with four sections, each with a title bar and a button: "Court Reporter Services" (button: "No Court Reporter Services", "Add/Edit Court Reporter Services"), "Court Reporter Transcribed Services" (button: "No Court Reporter Transcribed Services", "Add/Edit Court Reporter Transcribed Services"), "Court Reporter Cancelled Fees" (button: "No Court Reporter Cancelled Fees", "Add/Edit Court Reporter Cancelled Fees"), and "Expenses" (button: "No Submission Expenses", "Add/Edit Expenses").

COURT REPORTER SERVICES

To access the Court Reporter Services, click on “add/edit court reporter services.” You will add a service itemization for each date services occurred. Note that there is a drop down menu for the “description” of work performed.

The screenshot shows the 'Court Reporter Services' form with a dropdown menu open for the 'Description' field. The menu options are: Appearance Fee - Non-Transcribed, Appearance Fee - Transcribed, Transcription Fee, and Travel Time. The 'Date of Event' is set to 01/10/2020. There are 'Save', 'Clear', and 'Return to Claim' buttons at the bottom right.

You will need to complete the date field, description, time began, time ended, and hours fields.

The screenshot shows the 'Court Reporter Services' form with all fields filled out: Date of Event: 01/10/2020, Description: Appearance Fee - Transcribed, Time Began: 10:00 am, Time Ended: 11:00 am, and Hours: 1.00. There are 'Save', 'Clear', and 'Return to Claim' buttons at the bottom right.

The button options in the lower right hand corner allow you to either save, clear the itemization window or return to claim. “Save” stores the itemization and opens another itemization window for you to complete. “Clear” deletes the information in the window. “Return to Claim” saves the itemization and takes you out of the court reporter services itemization and back to the claim. This is an example of a saved services itemization.

The screenshot shows a success message: "Successfully saved court reporter service to submission 0288763". Below the form, there is a table of saved services:

Date of Event	Description	Time Began	Time Ended	Number Of Miles	Hours	Rate	Total	Edit	Delete
01/10/2020	Appearance Fee - Transcribed	10:00 AM	11:00 AM		1.00	\$35.00	\$35.00		
					Total:	1.00	\$35.00		

There is a 'Delete All' button at the bottom right of the table.

COURT REPORTER TRANSCRIBED SERVICES

If transcripts are prepared, “Court Reporter Transcribed Services” must be completed. To access the Court Reporter Transcribed Services, click on “add/edit court reporter transcribed services.” You will add a service itemization for each date services occurred. Note that there is a drop down menu for the “description” of work performed.

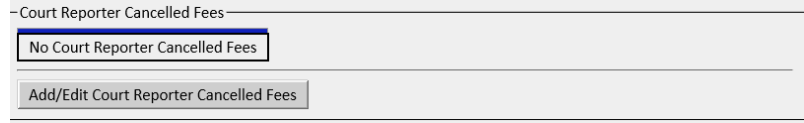
Note that there is a drop down menu for the description of transcript types. Again, the button options in the lower right hand corner allow you to either save, clear the itemization window or return to claim. “Save” stores the itemization and opens another itemization window for you to complete. “Clear” deletes the information in the window. “Return to Claim” saves the itemization and takes you out of the court reporter transcribed services itemization and back to the claim.

This is an example of a saved transcribed services itemization.

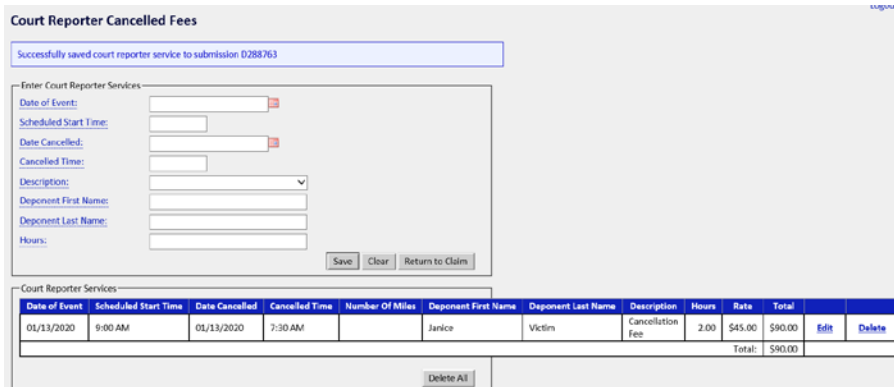
Date of Event	Description	Date Ordered	Date Delivered	Deponent First Name	Deponent Last Name	Number Of Pages	Rate	Total		
01/10/2020	Original + Copy	01/13/2020	01/13/2020	Joe	Victims	43	\$3.50	\$150.50	Edit	Delete
								Total:	\$150.50	

CANCELLED FEES

To access the Court Reporter Cancelled Fees, click on “add/edit court reporter Cancelled Fees.”



You will add a cancellation itemization for each cancellation you are billing for. It is important that you complete all fields in this section. If you do not know the deponent’s first or last name, please type in “unknown.” This is an example of a saved cancellation itemization.



Successfully saved court reporter service to submission 0288763

Enter Court Reporter Services

Date of Event:

Scheduled Start Time:

Date Cancelled:

Cancelled Time:

Description:

Deponent First Name:

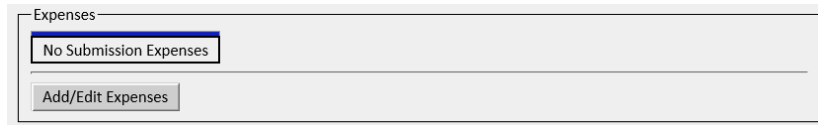
Deponent Last Name:

Hours:

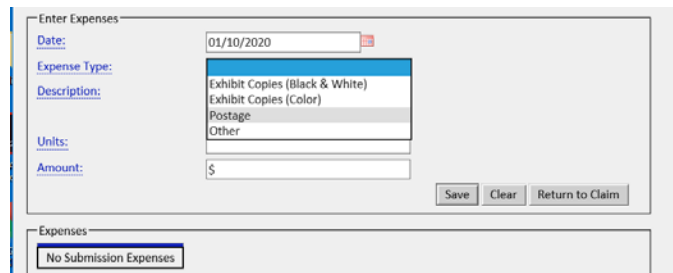
Date of Event	Scheduled Start Time	Date Cancelled	Cancelled Time	Number Of Miles	Deponent First Name	Deponent Last Name	Description	Hours	Rate	Total		
01/13/2020	9:00 AM	01/13/2020	7:30 AM		Janice	Victim	Cancellation Fee	2.00	\$45.00	\$90.00	Edit	Delete
Total:										\$90.00		

EXPENSES

You may incur some expenses and want submit a claim for reimbursement. The “Expenses” section is where this is submitted.



The expense itemization requires entries in the date and expenses type (drop down of payable expenses). Description is not a required field but should be completed when “other” expense type is selected. Units should be entered for color or black and white copies as it auto-calculates the amount. The amount for postage should be entered in the “amount” field by you.



Enter Expenses

Date:

Expense Type:

Description:

Units:

Amount:

Expenses

The button options in the lower right hand corner allow you to either save, clear the itemization window or return to claim. “Save” stores the itemization and opens another itemization window for you to complete. “Clear” deletes the information in the window. “Return to Claim” saves the itemization and takes you out of the expenses itemization and back to the claim.

This is an example of a saved expense itemization.

Date	Type	Description	Units	Amount
01/10/2020	Exhibit Copies (Black & White)		12	\$1.20
Sub Total:				\$1.20

ATTACHMENTS

We require attachments to verify the claim. This section of the claim is where you will upload documents (must be in .pdf format). To start the attachment process you will click on “add/edit attachments.”

You will select to browse to the document on your computer that you want to attach. Select a file type. Be sure to add a description if the file type is “other” or if you believe the attachment needs a little further explanation.

This is an example of documents attached.

Upload Documentation

Successfully uploaded attachment

Upload Attachments

Note - Please do not upload files with special characters in the file name. Use only letters and spaces. Only use a period if the file has a ".pdf" extension.

File: Browse...

Type:

Description:

Save Return to Claim

Document Attachments

Date	Name	Type	Description	
01/13/2020	Attorney Appointment Order	Attorney Appointment Order		Delete
01/13/2020	Order Authorizing Deposition or Transcripts at State Expense	Order Authorizing Deposition or Transcripts at State Expense		Delete
01/13/2020	Other	Other	Can be used for any other docu...	Delete

In the lower right corner of the upload documentation window you have options to save or return to claim. After you select a file and type you need to “save.” The attachment you just uploaded will be displayed in document attachments. Once you have attached all of the required documents, click on “return to claim.”

Be sure to check the State Public Defender website at <https://spd.iowa.gov/other-claimants> for a list of the required attachments and administrative rules that govern submission and payment of your claim.

CLAIM SUMMARY

The final section of the claim is the claim summary where you will find a listing of all of the amounts claimed in the aforementioned sections. If these amounts and the Submission Total are what you want to submit for payment then you do not need to do anything further in this section.

Claim Summary

Court Reporter Service Fee: \$ 35.00
 Request a different amount for court reporter services

Court Reporter Transcribed Service Fee: \$ 150.50
 Request a different amount for court reporter transcribed services

Court Reporter Cancelled Fee: \$ 90.00
 Request a different amount for court reporter cancelled fees

Expense Total: \$ 1.20
 Request a different amount for expense total

Submission Total: \$ 276.70
 Submission Total Requested: \$ 276.70

If you would like to reduce your claim for any reason you would need to select the box for “request a different amount.” You would adjust the amounts and explain how/why the adjustment in the “reason” field. An example of this would be when you transcribed depositions for three co-defendants and the attorneys agreed to equally split the costs three ways. You would submit three separate claims each representing one-third of the total listed in the itemizations.

Claim Summary

Court Reporter Service Fee: \$ 35.00
 Request a different amount for court reporter services
 Court Reporter Service Fee Requested: \$
 Reason:

Court Reporter Transcribed Service Fee: \$ 150.50
 Request a different amount for court reporter transcribed services
 Court Reporter Transcribed Service Fee Requested: \$
 Reason:

Court Reporter Cancelled Fee: \$ 90.00
 Request a different amount for court reporter cancelled fees
 Court Reporter Cancelled Fee Requested: \$
 Reason:

Expense Total: \$ 1.20
 Request a different amount for expense total
 Expense Total Requested: \$
 Reason:

SUBMITTING A COMPLETED CLAIM

The final step in completing and submitting a claim is the “certification” section. If you click on the box in front of “request an e-mail receipt of this claim” then a field will appear where you will enter the email address you want the receipt sent to. Type your name in the E-signature field. At this point you can either save a draft of this claim by selecting “save draft” or you can proceed to submit the claim to the state public defender by selecting “submit to SPD.” By saving a draft the claim is stored in your “drafts” bin on the home page and can be accessed and submitted at a later time. When you submit your claim to the SPD it can no longer be changed by you and is stored in your “claims in process” bin on the home page. You can review the claim in process at any time and see the status of the claim with the public defender.

Certification

I certify under penalty of law that I have had the opportunity to review, in human-readable format, the content of the electronic document to which I here certify and attest, and I further certify under penalty of law that, based on the information and belief formed after reasonable inquiry, the statements and information contained in this submission are true, accurate, and complete.

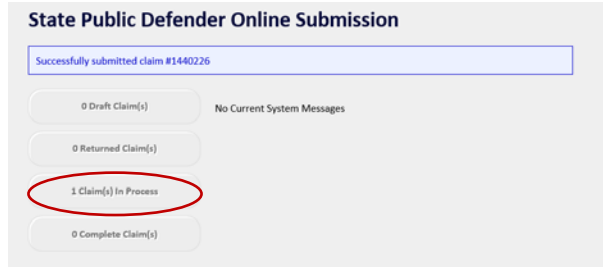
The date of submission will automatically be captured and stamped on the claim record when you click *Submit to SPD*.

Request an e-mail receipt of this claim

E-Signature:

CLAIMS IN PROCESS

In the example below, the home screen displays that there is one claim in the “claims in process” bin.



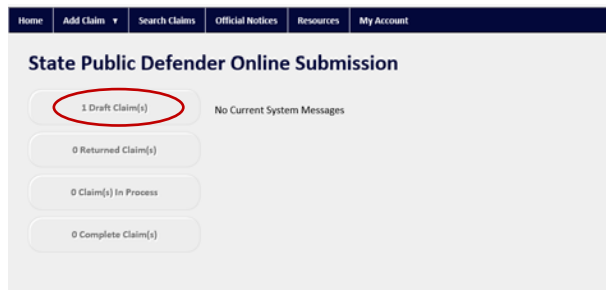
When you select the claims in process bin, the claim is summarized in a grid display. Note the far right column gives you the option to view the claim in process by clicking on the “view” link. You can also check the claim status in this window. The phases that may be displayed are the “preliminary audit” phase where the SPD makes sure all of the attachments are attached and the claim form accurately reflects the attachments. “Attorney audit” is the phase where the SPD makes sure the claim follows the rules and statutes for payment. “Fiscal Audit” is the next phase where the claim awaits payment processing. “Complete” phase is when the payment processing is completed and is good news as you will be receiving payment soon.

In Process Claims											
Sub #	Claim #	Invoice #	Claim Type	Pay To Vendor	Client	County	Court Number	Claim Total	Check Number	Claim Status	Status As Of
D288763	1440226	optional	Certified Shorthand Reporter	Test Test Inc.	Client First Client Last Jr.	Boone	SRCR222222	\$276.70		Preliminary Audit	1/13/2020

[Return to Docket](#)

DRAFT CLAIMS

In the certification section of the claim you are given the option to save a draft of the claim. The following example shows the home screen where one claim is in the draft claims bin.



When you select the draft claims bin, the claim is summarized in a grid display. Note the far right column gives you the option to view the claim in process by clicking on the “view” link or deleting the claim by clicking on the “delete” link.

Draft Claims

Successfully deleted draft submission D288762

Sub #	Invoice #	Claim Type	Pay To Vendor	Client	County	Court Number	Claim Total	Check Number	
D288763	optional	Certified Shorthand Reporter	Test Test Inc.	Client First Client Last Jr.	Boone	SRCR222222	\$275.50		View Delete

[Return to Docket](#)

RETURNED CLAIMS

After you have submitted your claim to the SPD, the SPD may return the claim to you for various reasons (the most common reason a claim is returned is failure to attach a required document!). When the claim is returned, it lands in your returned claims bin on your home page.

Home Add Claim Search Claims Official Notices Resources My Account

State Public Defender Online Submission

0 Draft Claim(s) No Current System Messages

1 Returned Claim(s)

0 Claim(s) In Process

0 Complete Claim(s)

When you select the returned claims bin, the claim is summarized in a grid display. Note the far right column gives you the option to view the claim in process by clicking on the “view” link, reopen the claim by clicking on the “reopen” link, or deleting the claim by clicking on the “delete” link.

This grid provides you with an opportunity to review the reason it was returned. By clicking on the return link in the “returned” column the letter explaining the reason for return is displayed. If it is possible to correct the claim or attachments, then you would click on “reopen” then fix the claim and resubmit it. After you resubmit the claim it moves to claims in process.

Home Add Claim Search Claims Official Notices Resources My Account TEST2019.TEST@HOWARD Logout

Returned Claims

Sub #	Claim #	Invoice #	Claim Type	Pay To Vendor	Client	County	Court Number	Returned	Claim Total	Check Number	Claim Status	Status As Of	
D288763	1440226	optional	Certified Shorthand Reporter	Test Test Inc.	Client First Client Last Jr.	Boone	SRCR222222	Return - 1/13/2020 12:55 PM	\$276.70		Terminated	1/13/2020	View Reopen Delete

[Return to Docket](#)

COMPLETED CLAIMS

Once claims have been paid they are stored in the “complete claims” bin on your home page. When you select the complete claims bin, the claim is summarized in a grid display. Note the far right column gives you the option to view the claim by clicking on the “view” link or deleting the claim by clicking on the “delete” link. Please note that once you delete a complete claim it is really gone from your home page and you cannot retrieve it.

QUESTIONS

Please feel free to call our office at (515) 242-6158 or email us at claims@spd.state.ia.us if you have questions.