

ONLINE CLAIMS SUBMISSION

EXPERT

USER MANUAL

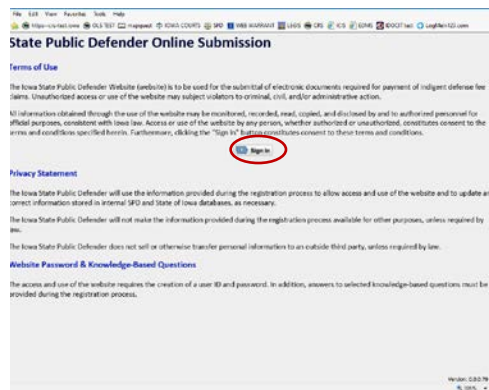
January 2020

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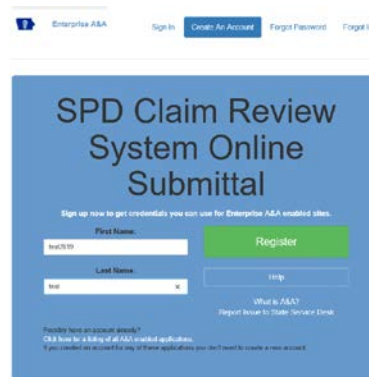
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Instructions for how to request an account if you have never submitted a claim to SPD before.

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@iowaid. You will need to enter and confirm your email address and then click “Save Account Details”.

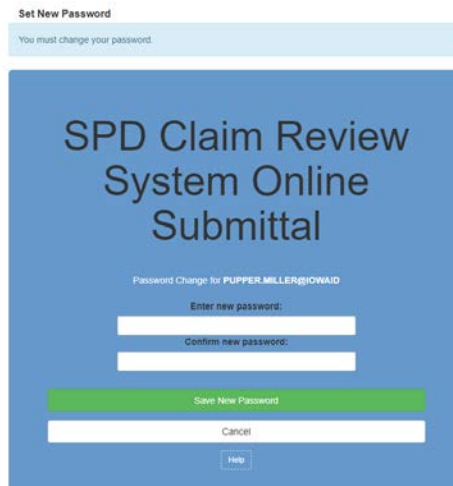


4. You will receive an email at the email address you entered in Step 3. You will need to check that email account and click the appropriate link in the email to confirm/activate your account. Be mindful of the email address you select, because this is where emails will go regarding your A&A account.

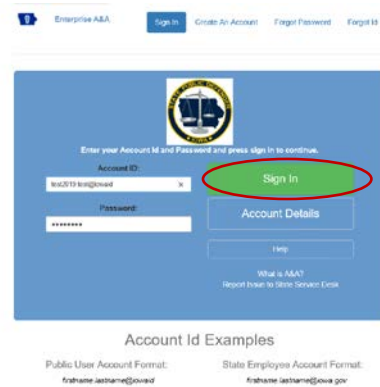


5. The link in the email will take you to a page where you will need to select and answer three identity baseline questions. If ever you forget your password or need assistance, you will need to know the answers to these questions so the IT department can help you, so make sure you write them down or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

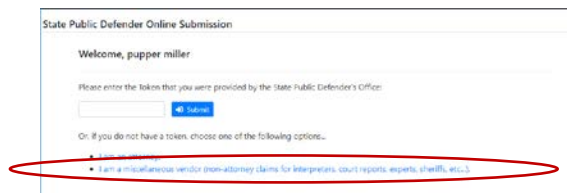
6. You will then be taken to a page to “change your password”. You will enter your password (of your choosing) twice.



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:

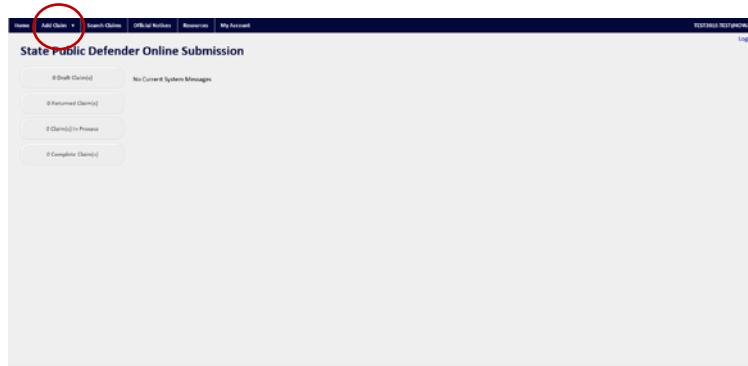


The first time you sign in you will get this page. Select “I am a miscellaneous vendor.”



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.



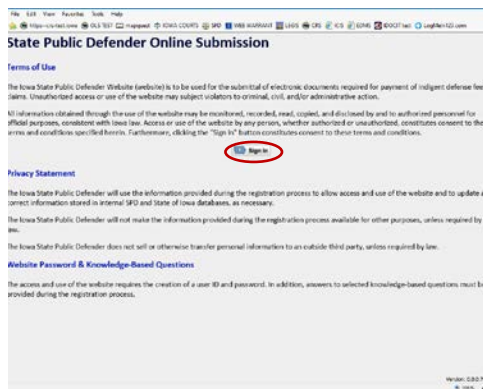
Please feel free to call our office at (515) 242-6158 or email us at claims@spd.state.ia.us if you have questions.

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

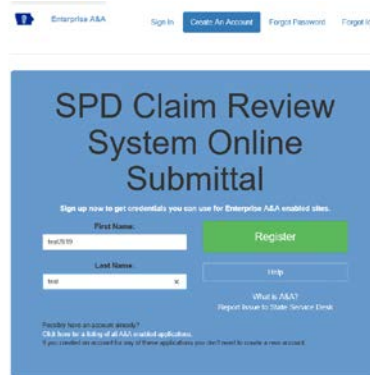
We sent you a “token” via U.S. Mail to complete your login process. The first step in using your token to login is for you to create your username and password. More details on the “token” are provided below.

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>.

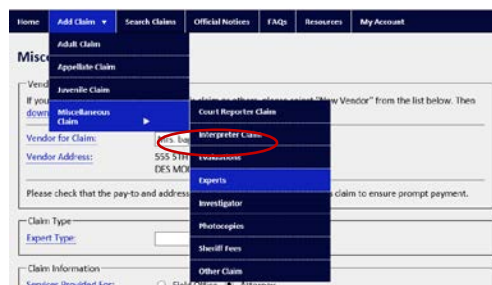
Please feel free to call our office at (515) 242-6158 or email us at claims@spd.state.ia.us if you have questions.

STARTING A CLAIM

To start an Expert claim, select “add a claim” from the home page.

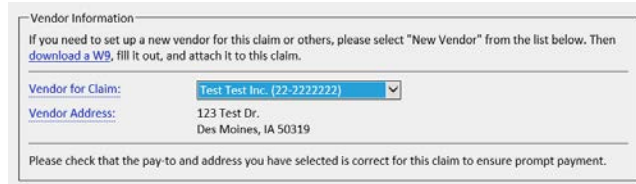


Slide down to Miscellaneous Claim and then over and click on Expert Claim.



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.



Vendor Information

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.

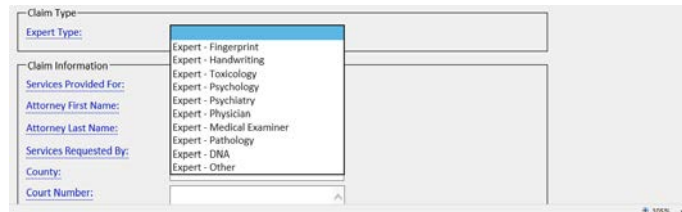
Vendor for Claim:

Vendor Address: 123 Test Dr.
Des Moines, IA 50319

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 an expert, then you should be submitting a claim for an Expert. If you are an investigator, you should be submitting a claim for investigator. Next to Expert type you will see a drop down menu where you must select the type of expert.



Claim Type

Expert Type:

Claim Information

Services Provided For:

Attorney First Name:

Attorney Last Name:

Services Requested By:

County:

Court Number:

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 the 'Claim Information' form. The 'Services Provided For:' section has two radio buttons: 'Field Office' and 'Attorney'. The 'Attorney' radio button is selected and circled in red. Below this are several text input fields for 'Attorney First Name', 'Attorney Last Name', 'Client First Name', 'Client Middle Name', and 'Client Last Name'. There are also dropdown menus for 'Services Requested By:', 'County:', and 'Court Number:'. At the bottom, there are checkboxes for 'Juvenile Case:' (Yes/No) and a 'Submission Total Requested:' field with a dollar sign.

The screenshot shows the 'Claim Information' form with the 'Field Office' radio button selected and circled in red. A dropdown menu is open, displaying a list of field offices including Appellate, Burlington, Cedar Rapids, Council Bluffs, Davenport, Des Moines Adult, Des Moines Juvenile, Dubuque, Fort Dodge, Iowa City, Marshalltown, Mason City, Nevada, Ottumwa, Sioux City Adult, Sioux City Juvenile, Special Defense Unit, Waterloo Adult, and Waterloo Juvenile. The 'Attorney' radio button is also visible but not selected.

“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.

SUPPORTING DOCUMENTATION

We require documents/attachments to verify the claim. You must attach the application for your services, order authorizing your services, order authorizing a maximum dollar amount you can be paid, attorney appointment order and your invoice. All of these documents/attachments must be uploaded in .pdf format. To upload attachments, you select “add/edit attachments” in the supporting documentation of your claim.

The screenshot shows the 'Supporting Documentation' section with two buttons: 'No Submission Attachments' and 'Add/Edit Attachments'. The 'Add/Edit Attachments' button is circled in red.

You will select browse and go 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.

The screenshot shows the 'Upload Attachments' form. It includes a note about file naming conventions. There are fields for 'File:', 'Type:', and 'Description:'. The 'Browse...' button next to the 'File:' field is circled in red. At the bottom, there are 'Save' and 'Return to Claim' buttons.

The screenshot shows the 'Upload Attachments' form with a dropdown menu open for the 'Type:' field. The menu options are 'Administration/Invoice', 'Receipt', 'Other', and 'W9'. The 'Administration/Invoice' option is selected. At the bottom, there are 'Save' and 'Return to Claim' buttons.

This is an example of how documents attached are displayed.

Date	Name	Type	Description	Delete
01/24/2020	Itemization/Invoice	Itemization/Invoice		Delete
01/24/2020	Receipt	Receipt	hotel	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.

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.

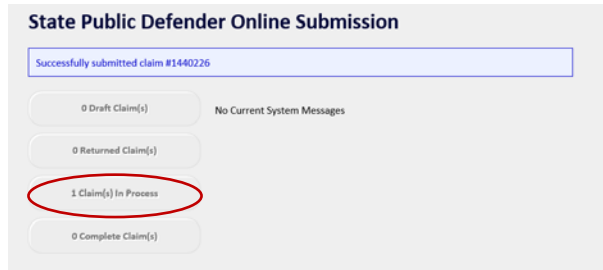
Request an e-mail receipt of this claim

E-Signature:

Save Draft Submit To SPD

CLAIMS IN PROCESS

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



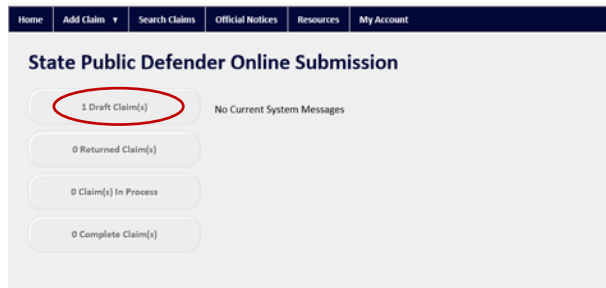
When you select the claims in process bin, the claim is summarized in a grid display. Note the far right column gives you the option to view the claim in process by clicking on the “view” link. You can also check the claim status in this window. The phases that may be displayed are the “preliminary audit” 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 12:35 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.