

# **ONLINE CLAIMS SUBMISSION**

---

## **INVESTIGATOR**

---

## **USER MANUAL**

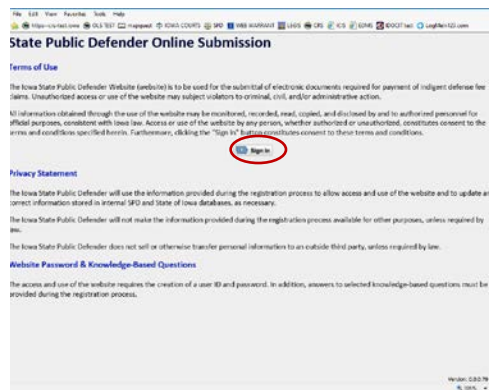
*January 2020*

## **TABLE OF CONTENTS**

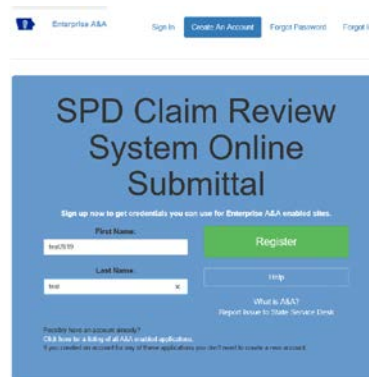
<b>How to request an account if you have never submitted a claim</b>	<b>3</b>
<b>How to request an account if you have previously submitted a paper claim</b>	<b>6</b>
<b>Starting a Claim</b>	<b>9</b>
<b>Vendor Information</b>	<b>10</b>
<b>Claim Type</b>	<b>10</b>
<b>Claim Information</b>	<b>10</b>
<b>Supporting Documentation</b>	<b>11</b>
<b>Submitting a Completed Claim</b>	<b>12</b>
<b>Claims in Process</b>	<b>12</b>
<b>Draft Claims</b>	<b>13</b>
<b>Returned Claims</b>	<b>13</b>
<b>Completed Claims</b>	<b>14</b>
<b>Questions</b>	<b>14</b>

## 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](mailto:firstname.lastname@iowaid). You will need to enter and confirm your email address and then click “Save Account Details”.

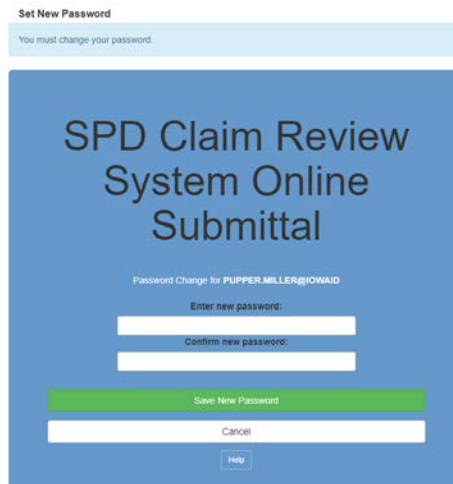


4. You will receive an email at the email address you entered in Step 3. You will need to check that email account and click the appropriate link in the email to confirm/activate your account. Be mindful of the email address you select, because this is where emails will go regarding your A&A account.

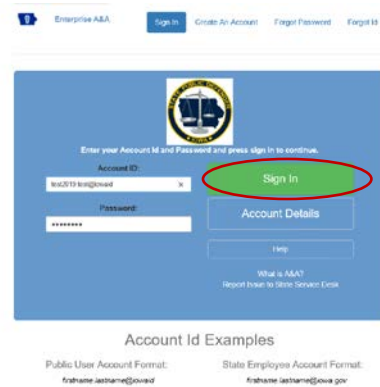


5. The link in the email will take you to a page where you will need to select and answer three identity baseline questions. If ever you forget your password or need assistance, you will need to know the answers to these questions so the IT department can help you, so make sure you write them down or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

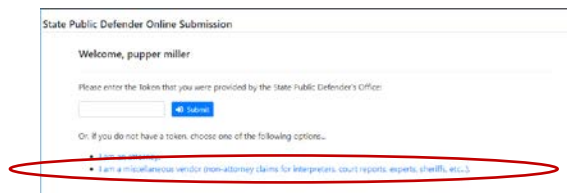
6. You will then be taken to a page to “change your password”. You will enter your password (of your choosing) twice.



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:

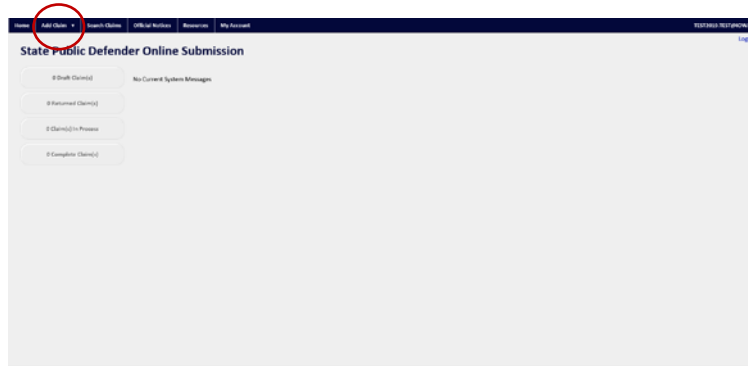


The first time you sign in you will get this page. Select “I am a miscellaneous vendor.”



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](mailto:claims@spd.state.ia.us) if you have questions.

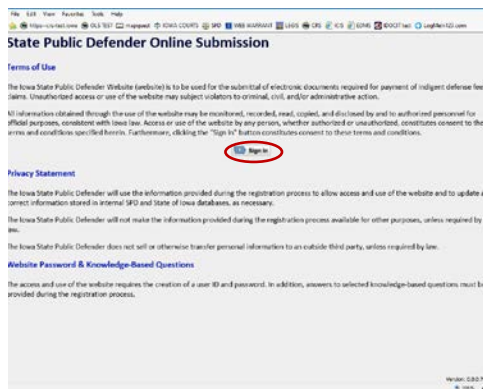
---

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

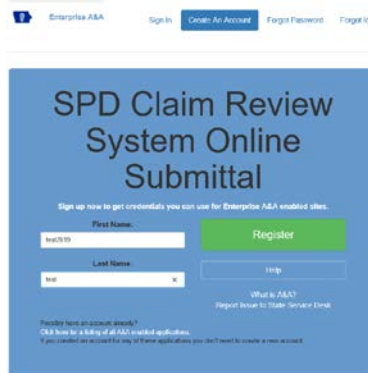
We sent you a “token” via U.S. Mail to complete your login process. The first step in using your token to login is for you to create your username and password. More details on the “token” are provided below.

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](mailto: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](mailto:claims@spd.state.ia.us) if you have questions.

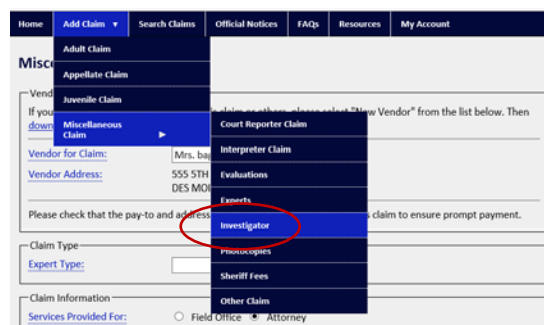
---

## STARTING A CLAIM

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



Slide down to Miscellaneous Claim and then over and click on Investigator 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: Test Test Inc. (22-2222222) ▼

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.

Claim Type

Claim Type: Investigator

## 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.

Claim Information

Services Provided For:  Field Office  Attorney

Attorney First Name:

Attorney Last Name:

Services Requested By:

County:

Court Number:

Client First Name:

Client Middle Name:

Client Last Name:

Client Name Suffix:

Juvenile Case:  Yes  No

Date Services Began:

Date Services Ended:

Previous Billings:  Yes  No

Claimant Invoice Number:

Submission Total Requested: \$

Claim Information

Services Provided For:  Field Office  Attorney

Field Office: 

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  
Waterloo Juvenile

Services Requested By:

County:

Court Number:

Client First Name:

Client Middle Name:

Client Last Name:

Client Name Suffix:

Juvenile Case:  Yes  No

Date Services Began:

Date Services Ended:

Previous Billings:  Yes  No

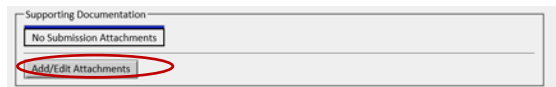
Claimant Invoice Number:

Submission Total Requested: \$

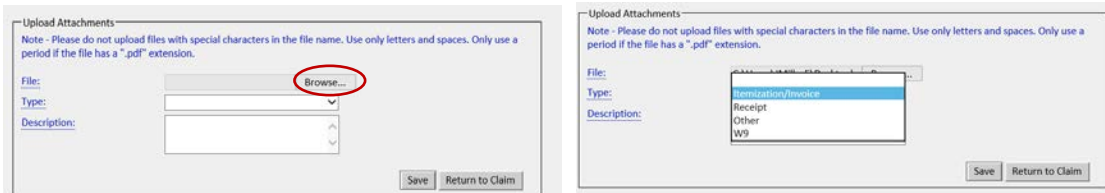
“Services Requested By” is the next drop down menu for you to make a selection from. You should select the person or party that requested your services. You will need to complete the rest of the Claim Information section including the yes/no questions at the bottom. “Claimant Invoice Number” is not a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

## SUPPORTING DOCUMENTATION

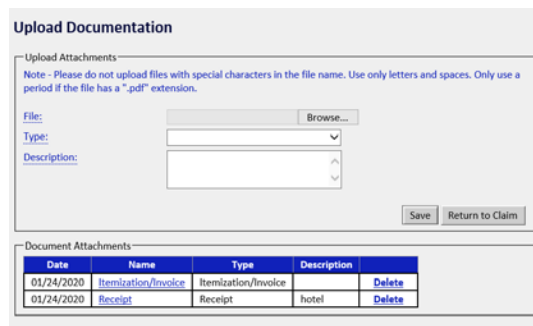
We require documents/attachments to verify the claim. You must attach the application for your services, order authorizing your services, order authorizing a maximum dollar amount you can be paid, attorney appointment order and your invoice. All of these documents/attachments must be uploaded in .pdf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



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.



This is an example of how documents attached are displayed.



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.

The screenshot shows a 'Certification' section with a text box containing a legal disclaimer: '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.' Below this is a note: 'The date of submission will automatically be captured and stamped on the claim record when you click Submit to SPD.' There is a checkbox for 'Request an e-mail receipt of this claim' which is currently unchecked. An 'E-Signature:' field with an empty input box is present. At the bottom are two buttons: 'Save Draft' and '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.

The screenshot shows the 'State Public Defender Online Submission' home screen. At the top, it says 'Successfully submitted claim #1440226'. Below that, there are four buttons representing different claim statuses: '0 Draft Claim(s)', '0 Returned Claim(s)', '1 Claim(s) In Process', and '0 Complete Claim(s)'. The '1 Claim(s) In Process' button is circled in red. To the right of these buttons, it says 'No Current System Messages'.

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	<a href="#">View</a>

[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**

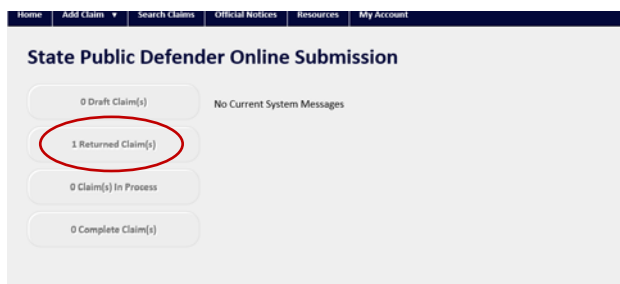
Successfully deleted draft submission D288762

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		<a href="#">View</a>	<a href="#">Delete</a>

[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.



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.

Sub #	Claim #	Invoice #	Claim Type	Pay To Vendor	Client	County	Court Number	Returned	Claim Total	Check Number	Claim Status	Status As Of	View	Reopen	Delete
D288763	1440226	optional	Certified Shorthand Reporter	Test Test Inc.	Client First Client Last Jr.	Boone	SRCR22222	Return - 1/13/2020 12:35 PM	\$276.70		Terminated	1/13/2020			

[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](mailto:claims@spd.state.ia.us) if you have questions.