ONLINE CLAIMS SUBMISSION

COPIES, SHERIFF FEES, OTHER

USER MANUAL

January 2020

TABLE OF CONTENTS

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

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

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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."

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SPL) Claim	1 Review	
S	vstem	Online	
U	yotom		
	Subm	ittal	
Sign up now b	io get credentials you con use	r for Enterprise A&A enabled sites.	
First	t Name.	Register	
tes(2119			
tractit9	e Name		
lagC319 Last	t Name		

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."

Welco	me, pupper miller			
Please	nter the Token that you were provided b	y the State Public Defender's C	fficei	
	40 Submit			
Or. if yo	u do not have a token, choose one of the	e following options.		
		100 C		

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

Claimant Information			
Salutation Gr	ender	55N	
•	,		
First Name	Middle Initial	Last Name	Sutta
, pupper		edar	
Attorney Number		E-mail Address	
5°		popperhagemilar@gmail.tom	
Phone Number		Fax Number	
d payment will be made to an	n entity other than you personally, please provide	the pay-to name and tax (D)	
		1	
Pay- to reame		Pay-10 cak to	- a cru
Address Information			- 10.201
Address Information Address Line 1		Address Line 2	
Address Information Address Line 1		Address Line 2	
Address Information Address Information Address Information		Address Line 2 State	- 10 AM
Address Information Address line 1 Oty		Address Line 2 State	
Address Information Address Information Ory Zip Color		Address Line 2 State County	

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

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Enternal Christial				
Claim(u) In Process				
Complete Chire(s)				

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."

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State Public Defender Online Submission	
ferms of Use	
The lowa State Public Defender Website (aebsite) is to be used for the submittal of electronic documents required for payment of indigent defense f laims. Unsufficitated access or use of the website may subject violators to orininal, civil, and/or administrative action.	ee .
Winformation obtained through the use of the website may be monitored, recorded, read, copied, and disclosed by and to authorized personnel for difield purpose, consistent with isse law. Access or use of the website by any period, whether authorized or matchingkd, constance consents to arrow and conditions applicable fractionessing data (the "Sign Ir b Batching constances comes) to their terms and conditions.	he
Privacy Statement	
The lows State Public Defender will use the information provided during the registration process to allow access and use of the website and to update correct information stored in internal SPD and State of Iowa databases, as necessary.	e and
The loss State Public Defender will not make the information provided during the registration process available for other purposes, unless required task.	Ŋ
he lows State Public Defender does not sell or otherwise transfer personal information to an outside third party, unless required by law.	
Website Password & Knowledge-Based Questions	
The access and use of the website requires the creation of a user ID and password. In edition, answers to selected knowledge-based questions must provided during the registration process.	be
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4 mm	

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:

	MB
Enter year Account Id an	d Password and press sign in to conditive.
Account ID:	Size In
test2015 test@ionaid	×
Password	Account Details
	What is A&AT Report Insile to Sime Service Desil

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

OLS	Elizonaziaerowała (le togon.
State Public Defender Online Submission	
Welcome, test2019 test	
Environment of the prior were provided by the State Public Defender's Office	
Or, if you do not have a token, choose one of the following options.	
 Law an abuse y Law a minimum containty on attensy claims for interpretex, court reports, experts, shertly, etc.) 	

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.

Draft Calm(x)	No Corvert System Messages		
Returned Claim(x)			
Claim(s) in Process			
Complete Chim(v)			

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

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 claim for photocopies, sheriff fees or other expenses, select "add a claim" from the home page.

None	Add their +	Search Values	Cells and Notices	Resources	My Account
		/			
Sta	ite Publi	c Defend	der Online	Subm	ission
	0 Draft Clai	in(s)	No Carrent Syste	m Messages	
	0 Faturned C	laie(c)			
	0 Claim(s) (n)	Process			
	Ø Complete C	lain(a)			

Slide down to Miscellaneous Claim and then over and click on photocopies, sheriff fees or other claim, whichever claim type it is. These three claim types are handled together in this manual as the claim form and the information required is basically the same.

lome	Add Claim 🔻	Search Claims	Official Notices	FAQs	Resources
Attor	Adult Claim				-
Attor	Appellate Claim	(
Count	Juvenile Claim				~
Court	Miscellaneous		Court Reporter	Claim	
			Interpreter Clair	ŵ	
Client	First Name:		Evaluations		
Client	Middle Name:		Experts		
Client	Last Name:		Investigator		
Client	Name Suffix:	O Yer	Photocopies		
Date S	Services Began:		Sheriff Fees		
Date 5	Services Ended:		Other Claim		
-		0.0	Contract I		

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.

<u>dominoud a 119</u> , na 10 da		
Vendor for Claim:	Test Test Inc. (22-222222)	
Vendor Address:	123 Test Dr.	
	Des Moines, IA 50319	

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.

Photocopies	
	Photocopies

If you are submitting claims under "other" type of claim, then you will be required to descibe what other is.

Claim Type:	Other	
Other Claim:	discovery	

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:	O Yes 🖲 No
Date Services Began:	
Date Services Ended:	3
Previous Billings:	○ Yes ○ No
Claimant Invoice Number:	
Submission Total Requested:	\$

Field Office:		
Services Requested By:	Appellate Burlington	
County:	Cedar Rapids	
Court Number:	Council Bluffs Davenport Des Moines Adult	
Client First Name:	Des Moines Juvenile Dubuque	
Client Middle Name:	Fort Dodge	
Client Last Name:	Marshalltown	
Client Name Suffix:	Mason City Nevada	
Juvenile Case:	Ottumwa Sioux City Adult	
Date Services Began:	Sioux City Juvenile	
Date Services Ended:	Special Defense Unit Waterloo Adult	
Previous Billings:	Waterloo Juvenile	
Claimant Invoice Number:		

"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. For these types of claims you generally must attach the 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.

Supporting Documentation No Submission Attachments	
Add/Edit Attachments	

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.

Upload Attachments	Upload Attachments
Note - Please do not upload files with special characters in the file name. Use only letters and spaces. Only use a	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.	period if the file has a ".pdf" extension.
File: Type: Description: Save Return to Claim	File: Type: Terretactor/mode Type: Receipt Description: Other W9 Save Save

This is an example of how documents attached are displayed.

Upload Attachi	ments					
Note - Please d period if the file	o not upload files with e has a ".pdf" extension	special characters in th n.	e file name. Us	e only letters and spaces. Only use a		
ile:			Browse			
ype:			~			
escription:		^				
			~			
				Save Return to Claim		
ocument Atta	chments					
Date	Name	Type	Description			
01/24/2020	Itemization/Invoice	Itemization/Invoice		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."

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 reciept 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.

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 Claustores

CLAIMS IN PROCESS

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

0 Draft Claim(s) No Current System Messages 0 Returned Claim(s)	
0 Returned Claim(s)	
1 Claim(s) In Process	

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 Proce	ss Claim	IS										
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	View

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.

Home	Add Claim 🔻	Search Claims	Official Notices	Resources	My Account
Sta	te Publi	c Defend	ler Online	Submi	ssion
	1 Draft Clai	im(s)	No Current Syste	em Messages	
	0 Returned C	laim(s)			
	0 Claim(s) In I	Process			
	0 Complete C	claim(s)			

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 cling on the "delete" link.

C	Draft Cla	aims									
[Successful	ly deleted dr	aft submission D288762								
I	Sub #	Invoice #	Claim Type	Pay To Vendor	Client	County	Court Number	Claim Total	Check Number		
C	D288763	optional	Certified Shorthand Reporter	Test Test Inc.	Client First Client Last Jr.	Boone	SRCR222222	\$275.50		View	Delete
8	Return to Do	ocket									

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 A	dd Claim 🔻	Search Claims	Official Notices	Resources	My Account						
State	State Public Defender Online Submission										
	0 Draft Clai	m(s)	No Current Syste	em Messages	\$						
$\boldsymbol{\zeta}$	1 Returned C	laim(s)									
	0 Claim(s) In F	Process									
	0 Complete C	laim(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 Clai	im v	Search Clair	ns Official Notices F	Resources My Accou	at									TEST2019.1	EST@IOW/
Retu	Returned Claims															
			Investor B	Chine Trans	Base Techteradar	Clinat	6	Court Number	Betweed	dialay Total	the distant	dula duta	6			
D288	763 144	40226	optional	Certified Shorthand Repo	rter Test Test Inc.	Client First Client Last Jr.	Boone	SRCR222222	Return - 1/13/2020 12:35 PM	\$276.70	Check Number	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 cling 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.