NM LOPD

Expert/Vendor User Guide

Version 1, August 14, 2024

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PURPOSE

This user guide provides support to the Expert/Vendor user in performing required actions on the New Mexico Law Offices of the Public Defender (NM LOPD) Portal.

PERSONAS

Personas	Responsibilities
Expert/Vendor	• Registering to the portal • Logging in to the portal • Creating invoice • Creating coversheet • Uploading documents • Updating invoice • Submitting contract applications • Editing and resubmitting the contract applications • Reviewing and Signing the contract documents

INTRODUCTION

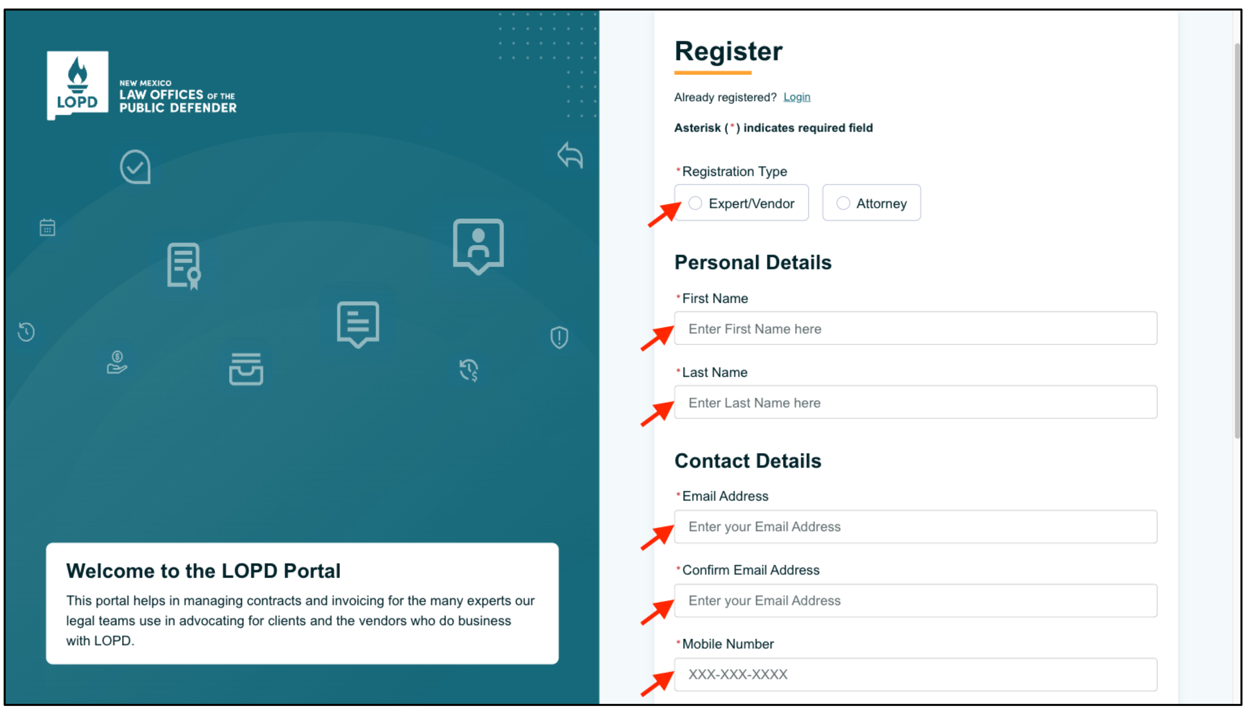
The NM LOPD portal helps manage contracts and invoices for the many experts our legal teams use to advocate for clients and vendors who do business with LOPD.

REGISTERING TO THE NM LOPD PORTAL

While using the NM LOPD Portal for the first time, you must register your Expert/Vendor Account. If you already have an account, follow the steps from Logging in to the LOPD Portal section.

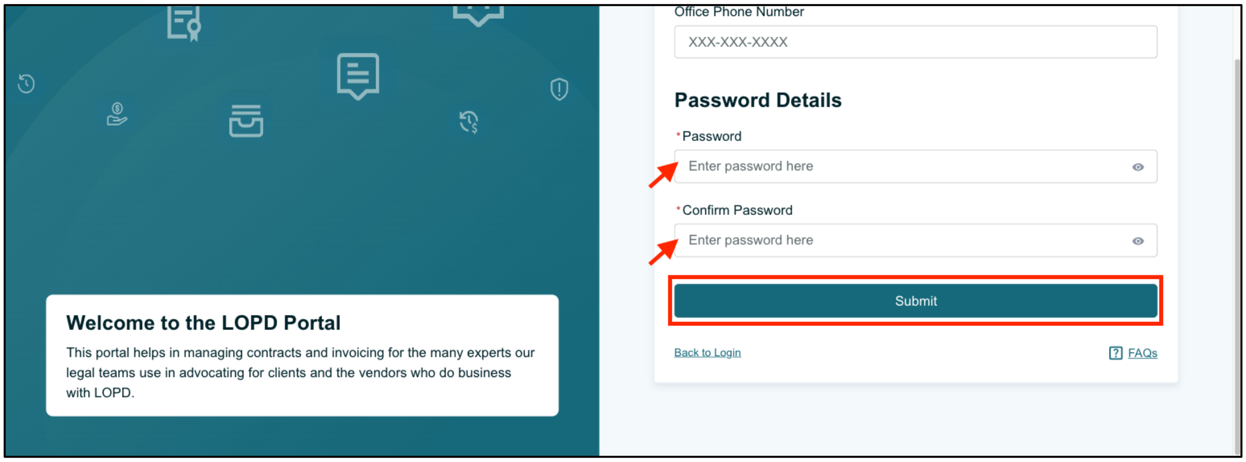
To register your account, perform the following steps:

1. **Click here** to access the NM LOPD Portal registration page.
1. Select the **Registration Type** as *Expert/Vendor*.
2. Under the Personal Details section, enter your **First Name** and **Last Name**.
3. Under the Contact Details section:
   a) Enter your email in the **Email Address** and **Confirm Email Address** text boxes.
   b) Enter your Mobile Number.

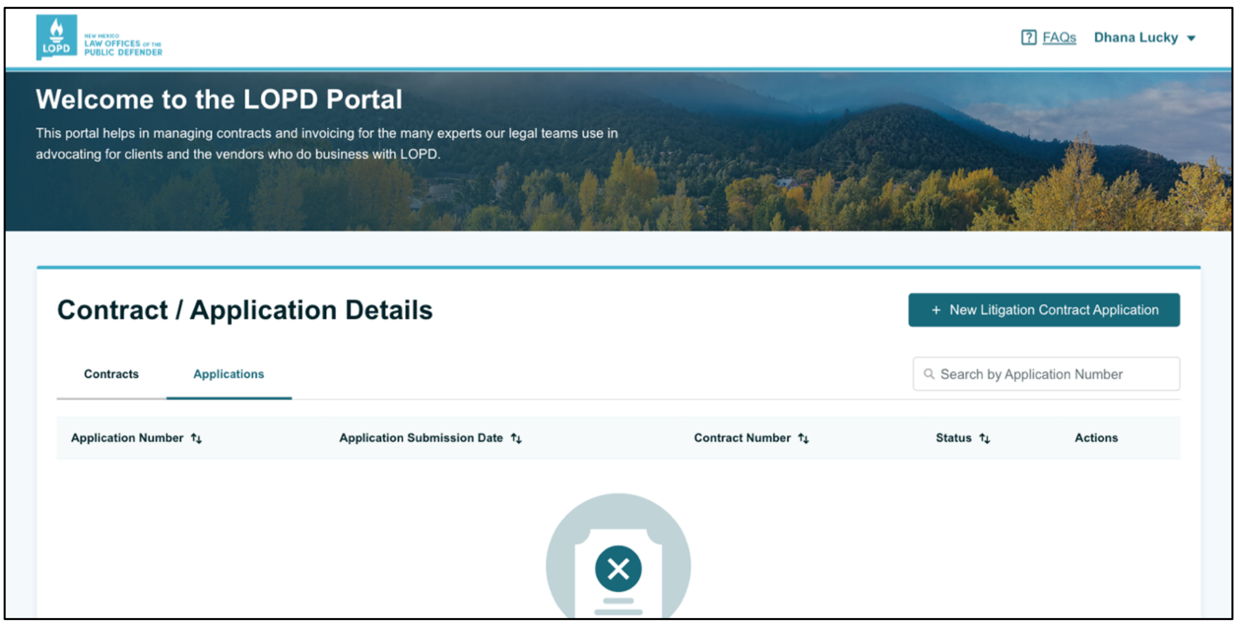


4. Under the Password Details section, enter your password in the **Password** and **Confirm Password** text boxes.

5. After entering the required details, click the **Submit** button.



After submitting the registration, you will be directed to the LOPD Portal Dashboard page.



You will also receive a welcome email with a username associated with your registered email address.

Hi Hussein,

Welcome to NM LOPD! To get started, go to https://nmlopddemo2024--qa.sandbox.my.site.com/nmlopd

Please use your registered email address and password to login.

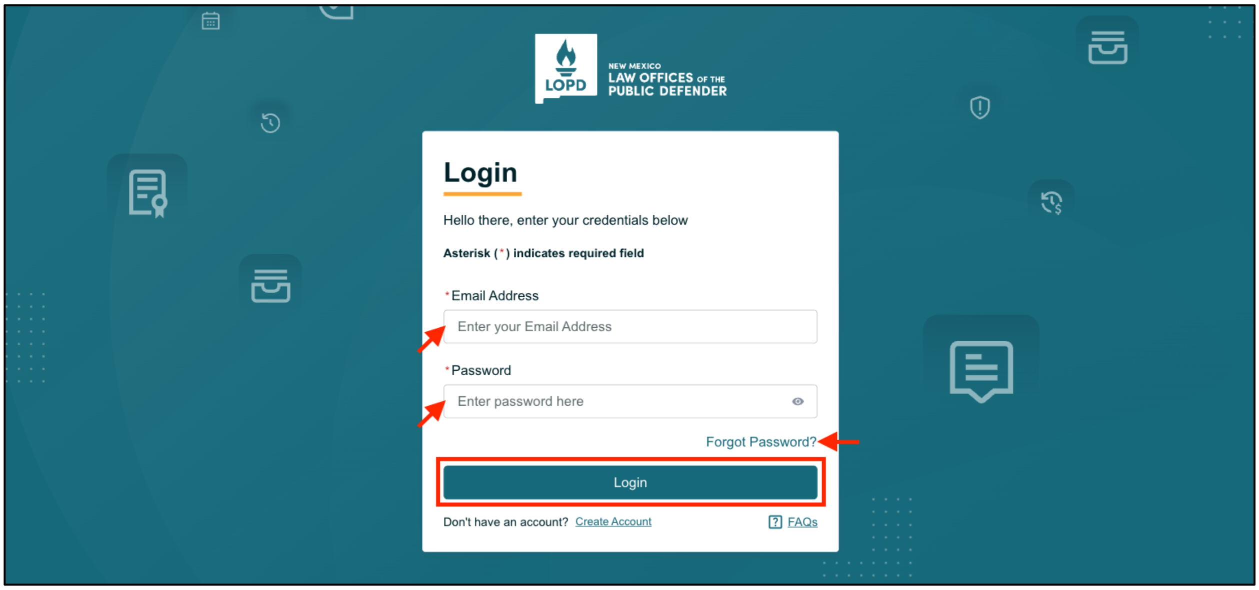
Thanks,
New Mexico Public Defender

LOGGING IN TO THE LOPD PORTAL

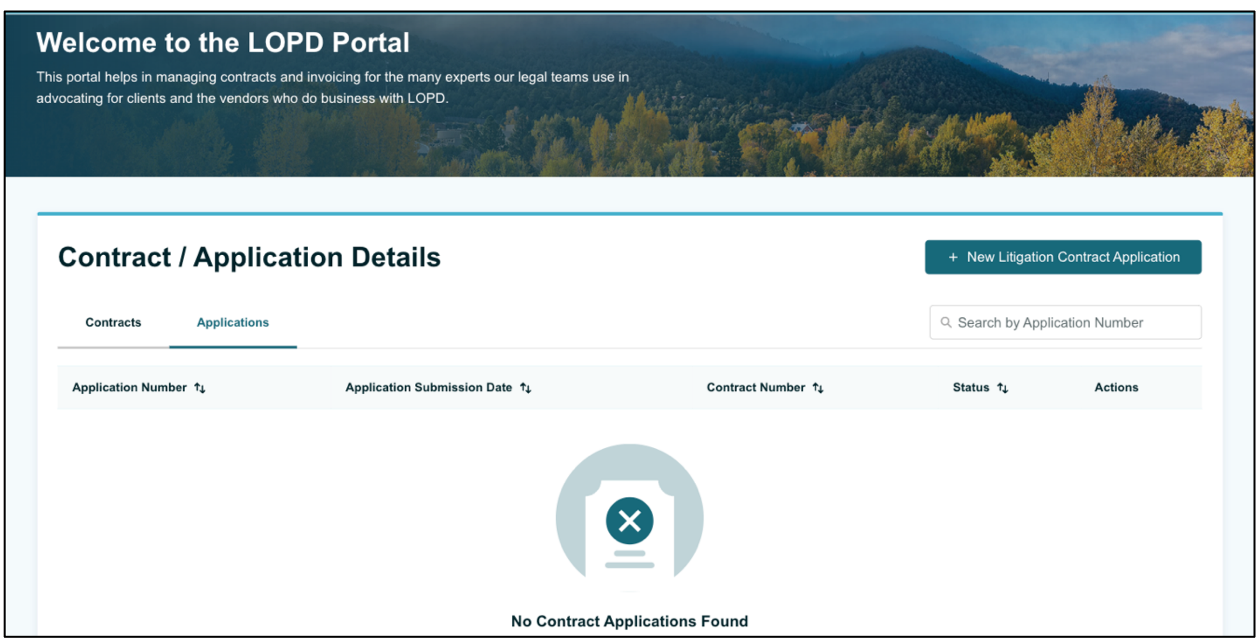
To log in to the LOPD Portal, perform the following steps:

1. Click here to access the NM LOPD Portal login page.
2. Enter your registered email in the **Email Address** textbox.
3. Enter your password in the **Password** field.
4. Click the **Login** button.

   Note: If you forgot your password, you can click the Forgot Password link and follow the displayed instructions.



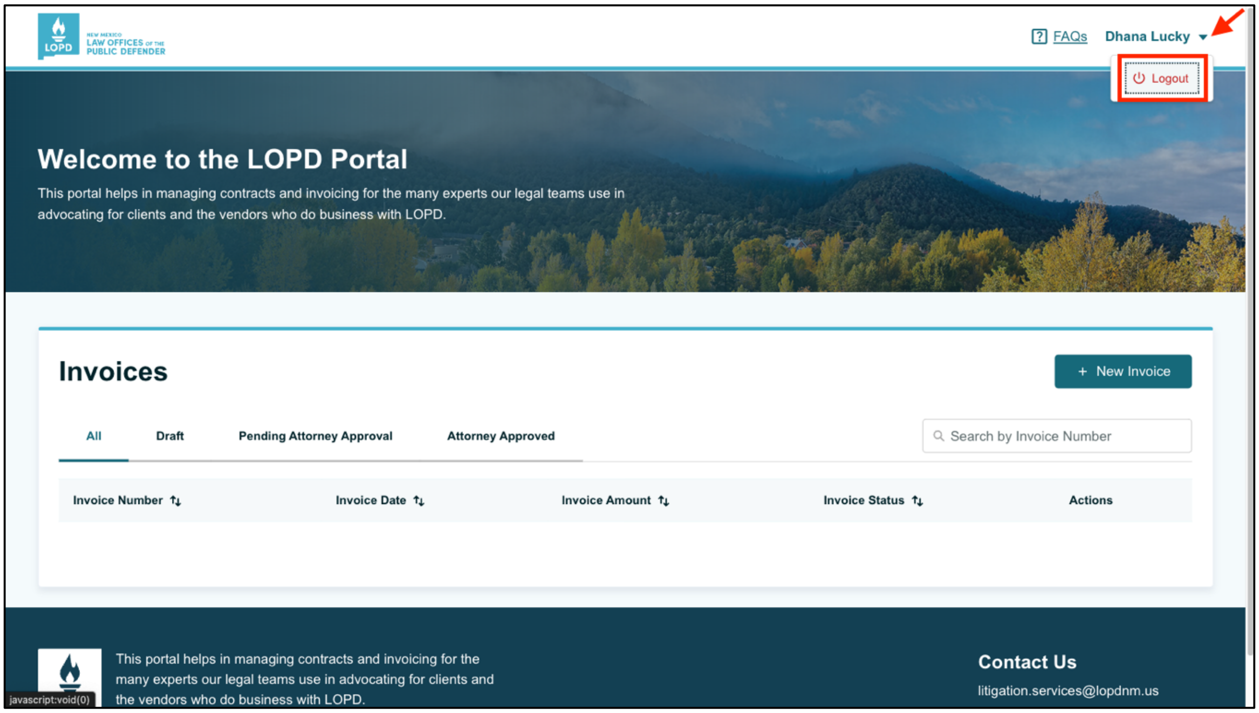
After logging in, you will be directed to the LOPD Portal Dashboard page.



LOGGING OUT OF THE LOPD PORTAL

To log out from the LOPD Portal, perform the following steps:

1. On the Dashboard page, click the down arrow beside the profile name.
2. Click the **Log Out** button.

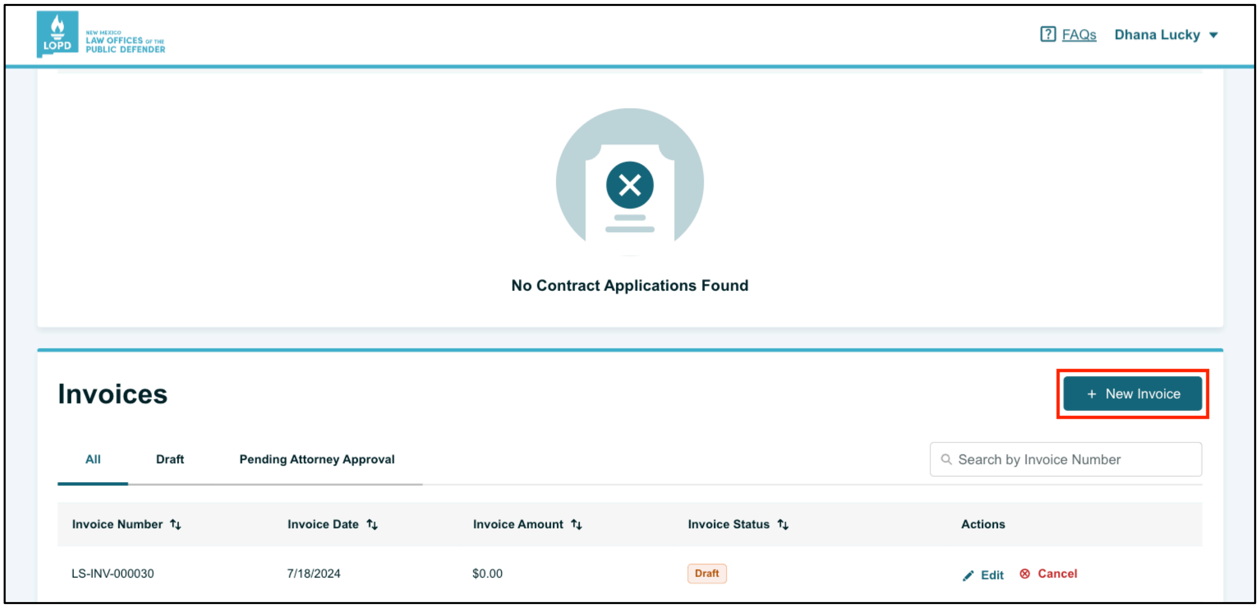


CREATING A NEW INVOICE

Prerequisite: Before creating an invoice, ensure that Litigation Service for Request (LSR) and LSR line items are added and approved on your account by LOPD staff.

To create a new invoice, perform the following steps:

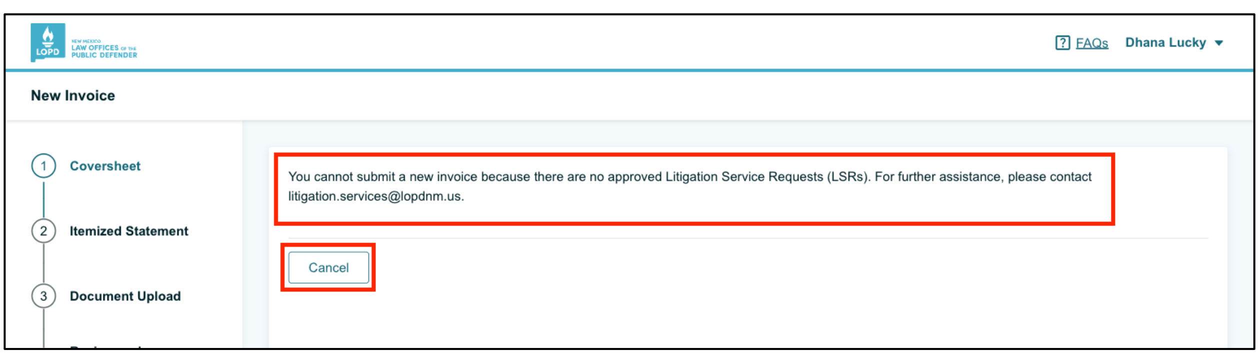
1. On the Dashboard page, scroll to the Invoices section, then click the **New Invoice** button.



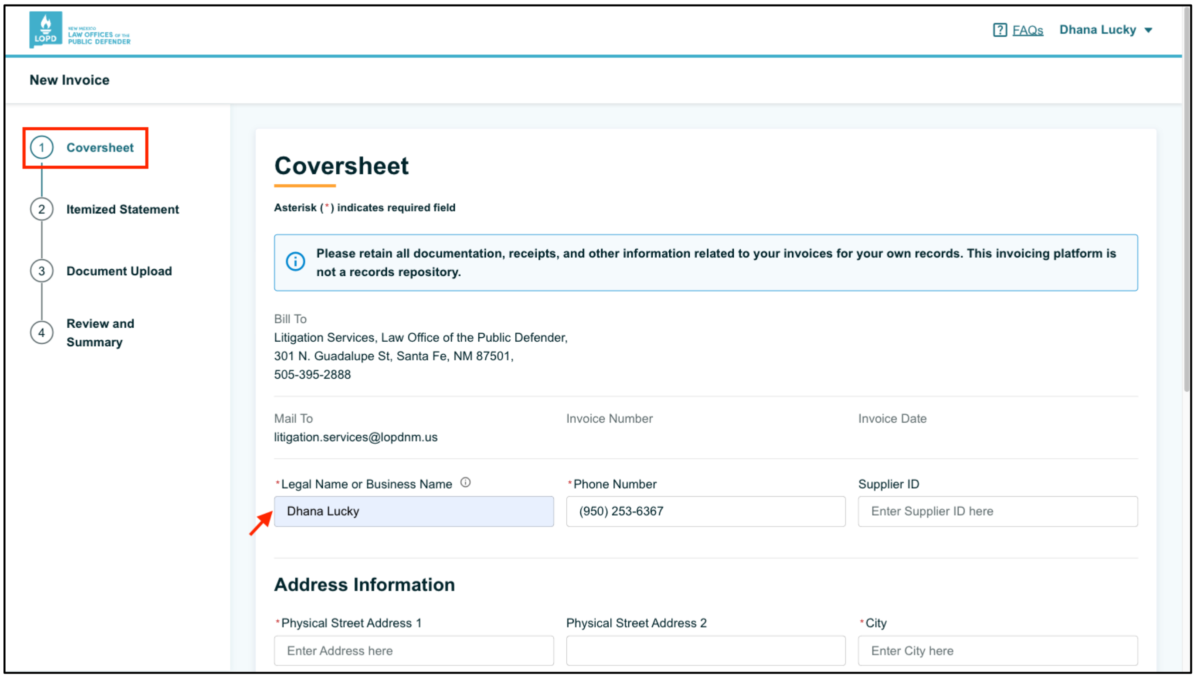
You will be directed to the **New Invoice** form page.

Notes:

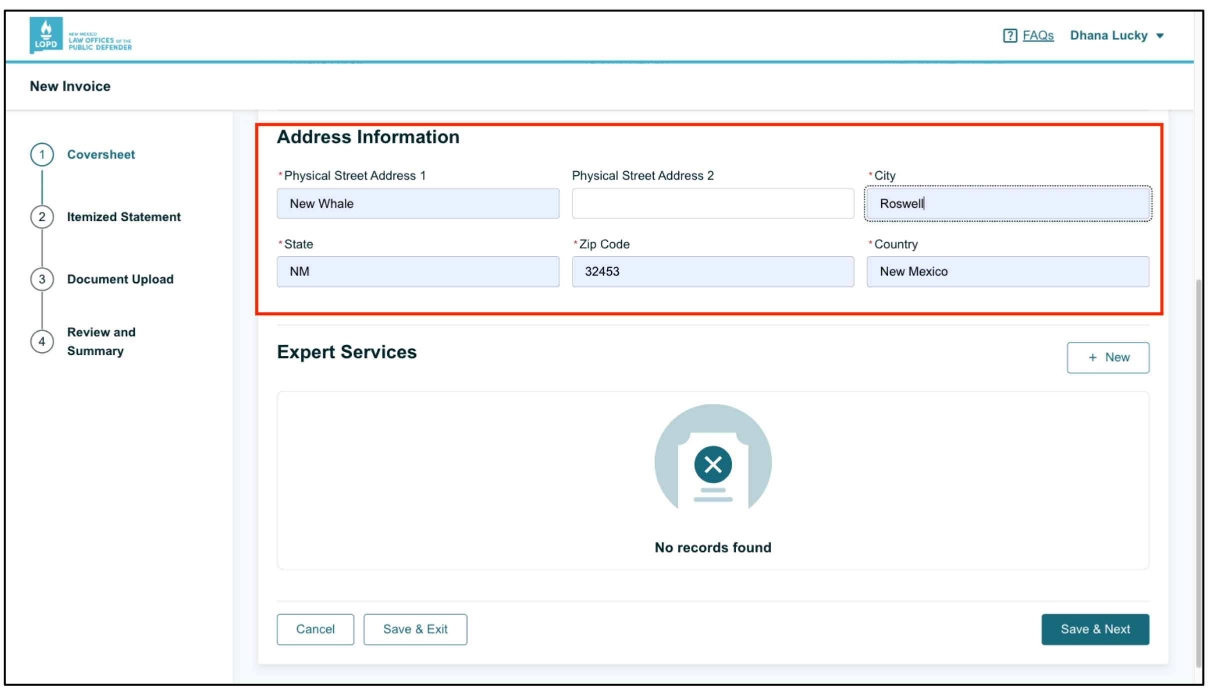
- Fields marked with a red asterisk (*) are mandatory.
- If the LSR or LSR line items are not created on your account after clicking the New Invoice button, you will see an error message on the screen. For further assistance, please contact Litigation.services@lopdnm.us. You can click the **Cancel** button to go to the prior page.



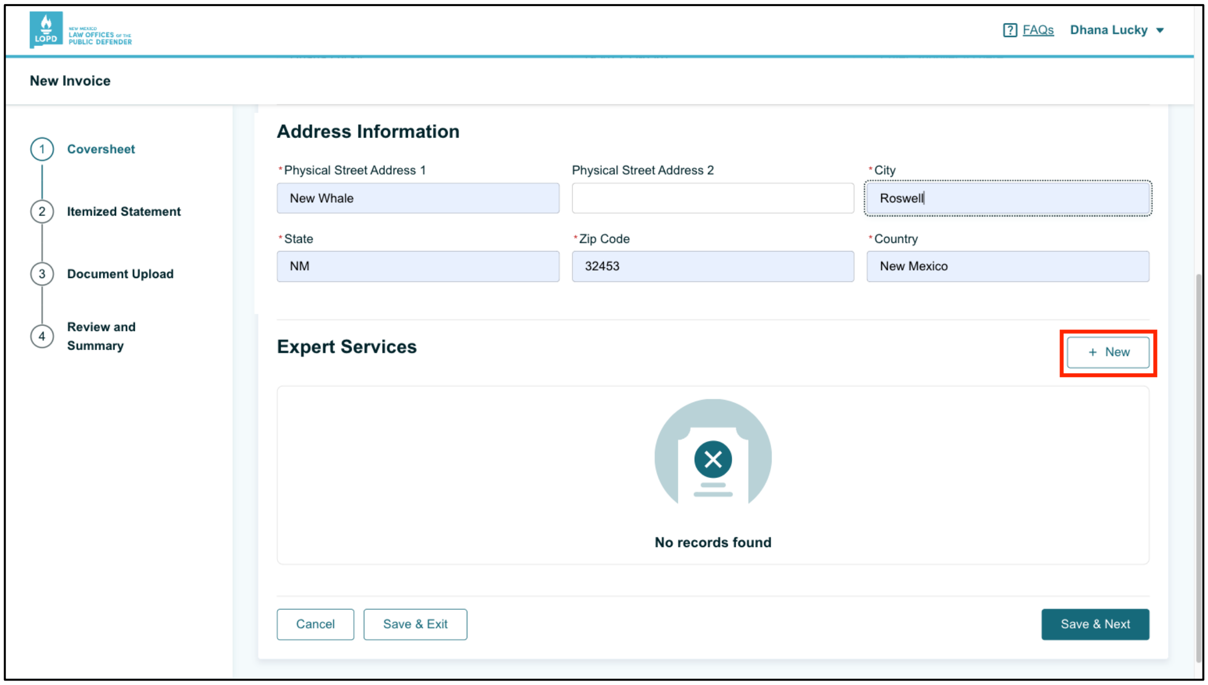
2. In the Step 1 **Coversheet** section, perform the following steps:
   Note: During the process, you can use the **Save & Exit** button to save and exit the new invoice form.
3. Enter the name in the **Legal Name or Business Name** textbox.



4. In the **Address Information** section, enter the address details.

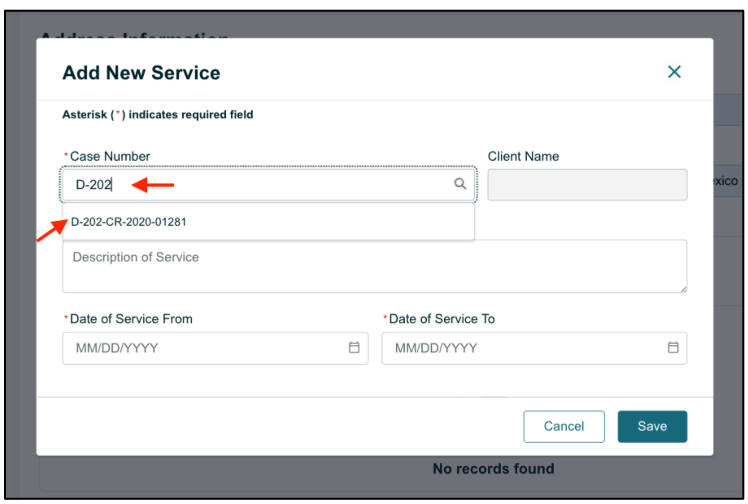


5. To add a new Expert Service, click the **New** button.



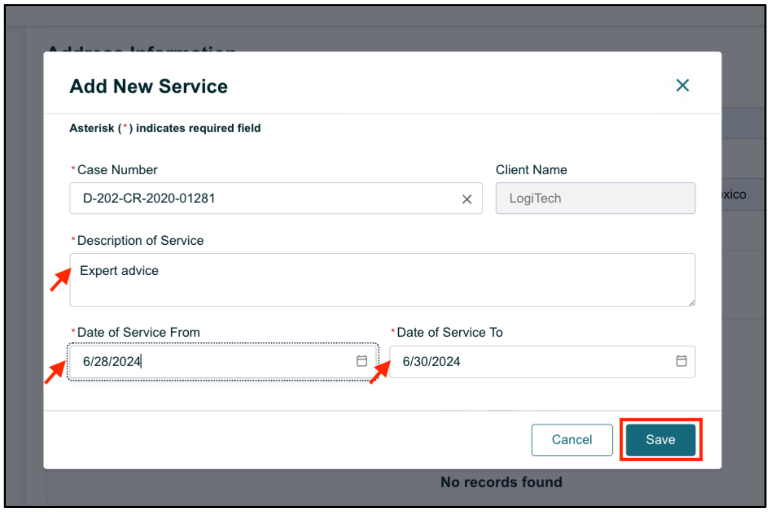
An **Add New Service** pop-up will be displayed.

6. Enter the *number* in the **Case Number** field, then select the required *Case Number* from the search results.



7. Enter the *description* in the **Description of Service** textbox.
8. Select the *date* in the **Date of Service From** field.
9. Select the *date* in the **Date of Service To** field.

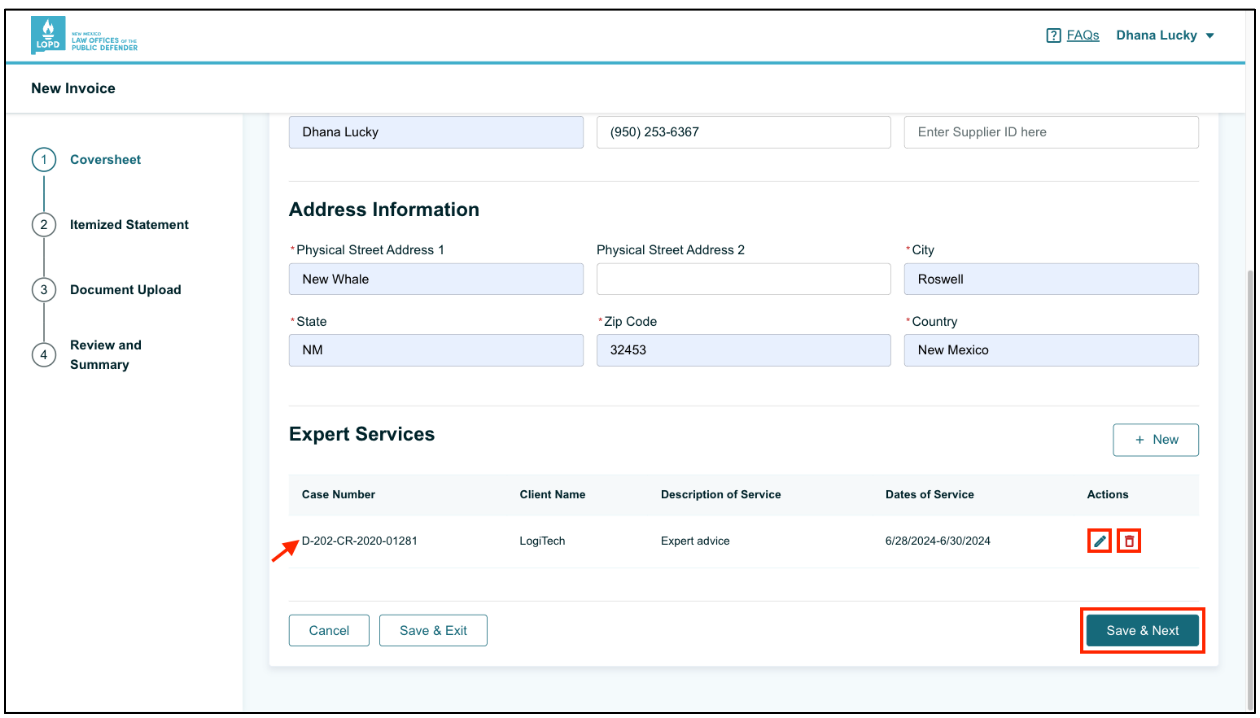
10. After entering the required details, click the **Save** button.



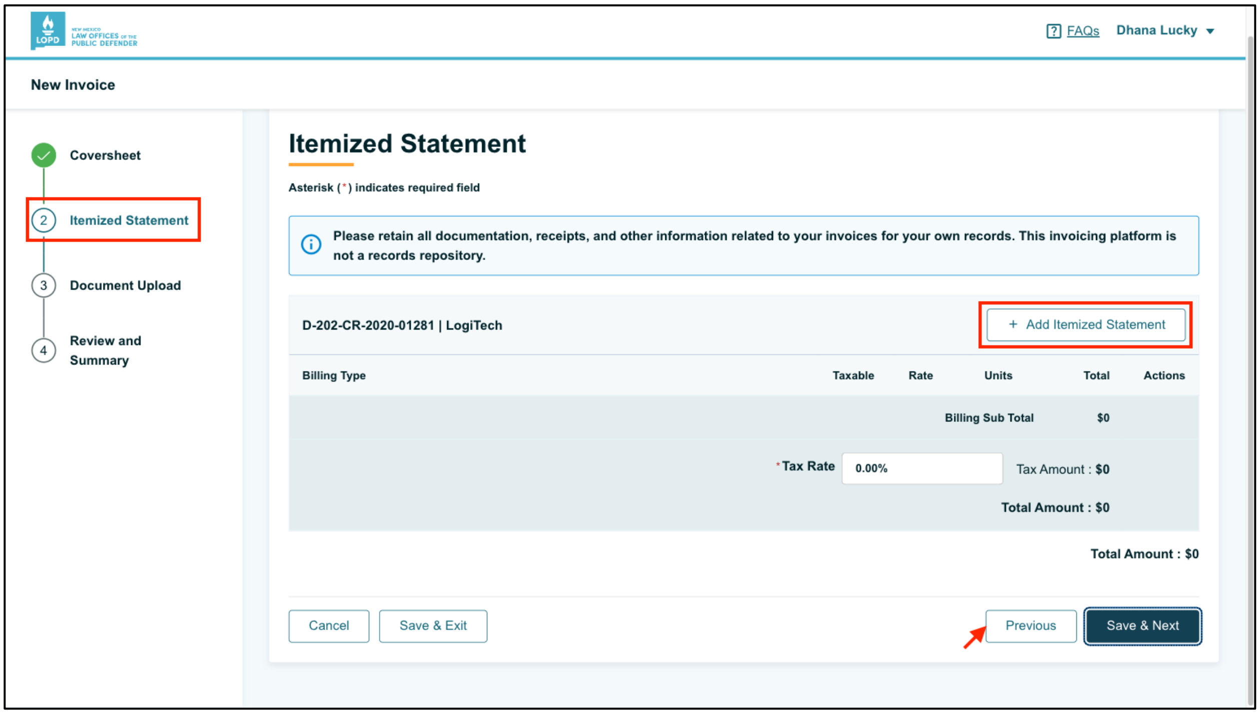
After saving, the Expert Service will be displayed in this section.

Note: You can use the **Edit** and **Delete** icons under the Action column to edit or delete the Case Number accordingly.

11. Click the **Save & Next** button.

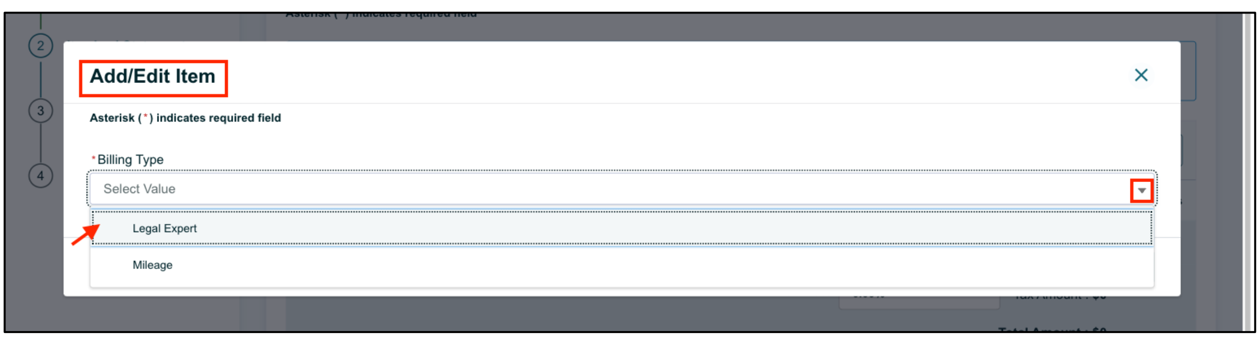


12. In the Step 2 **Itemized Statement** section, perform the following steps:
    Note: From this step onwards, you can click the **Previous** button to go back to the previous steps.
13. To add an itemized Statement, click the **Add Itemized Statement** button.

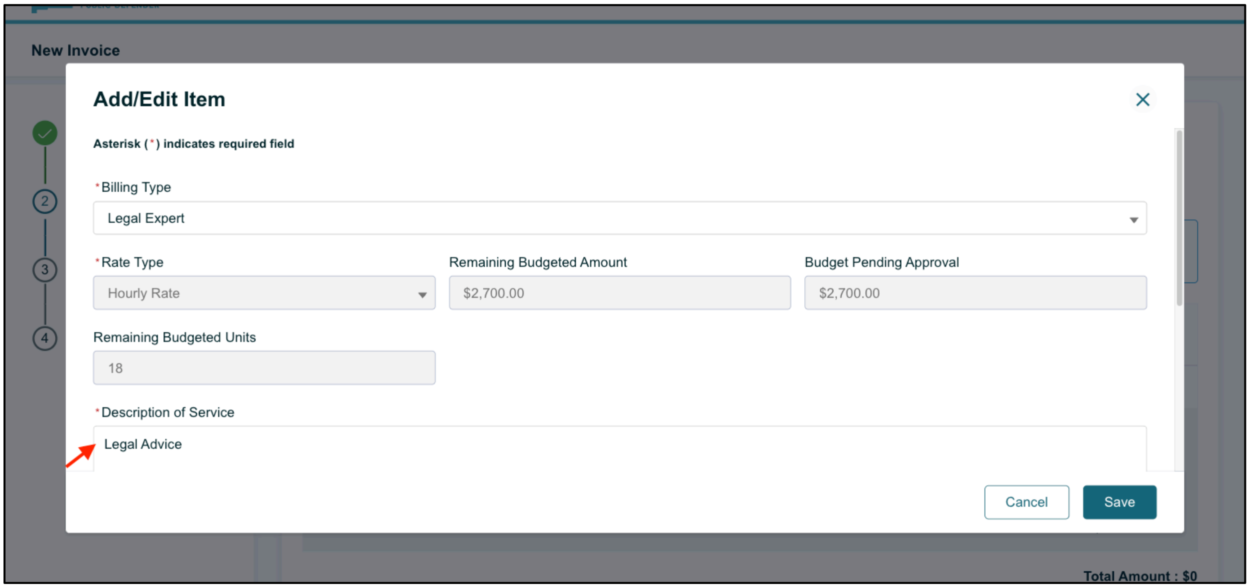


An **Add/Edit Item** pop-up will be displayed.

14. Select the required option from the **Billing Type** drop-down list (Legal Expert billing type is shown here as an example).
    Note: Based on your selected billing type, the fields in the next steps may differ.



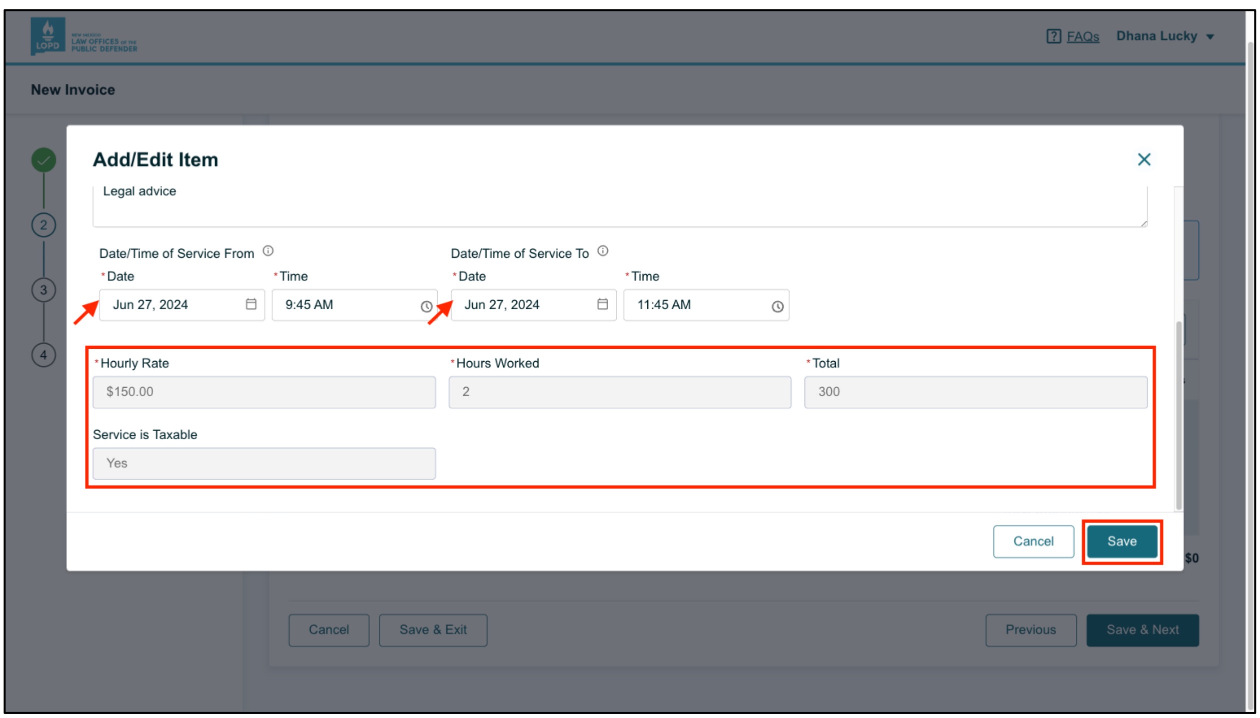
15. Enter the *description* in the **Description of Service** textbox.



16. Select the *date* in the **Date of Service From** field.
17. Select the *date* in the **Date of Service To** field.

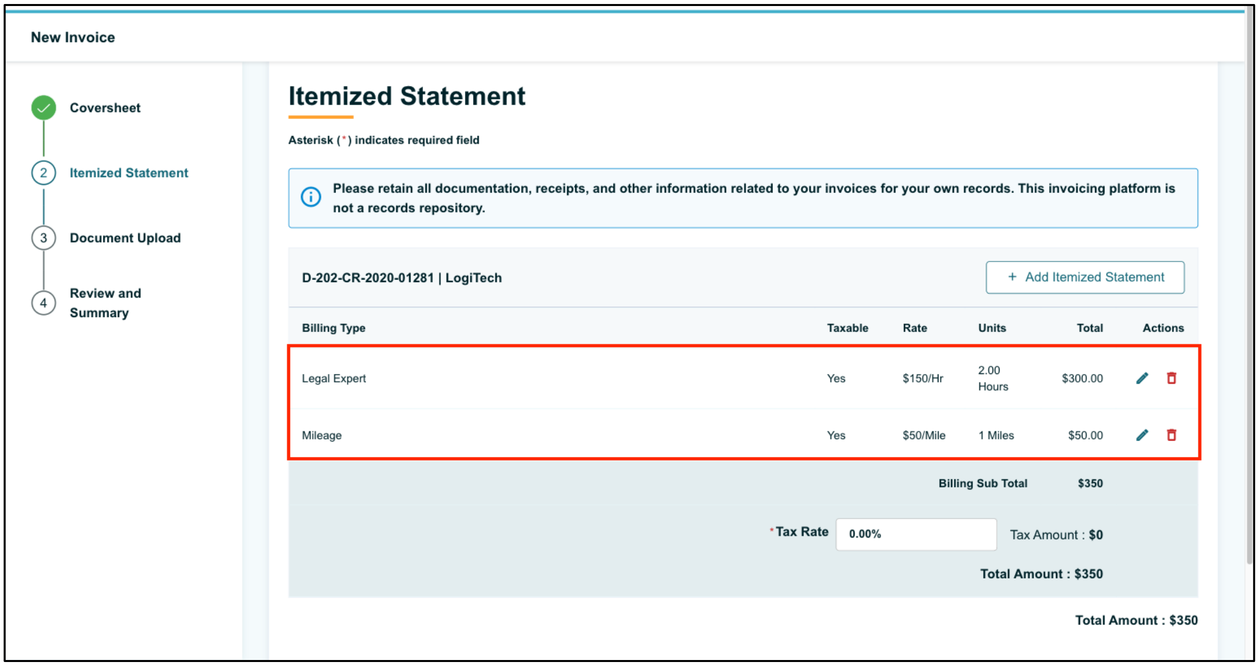
Based on your inputs, **Rate**, **Total**, and **Service is Taxable** fields will be auto-populated.

18. After entering the required details, click the **Save** button.



After saving, the Billing Types will be displayed in the Itemized Statement section.

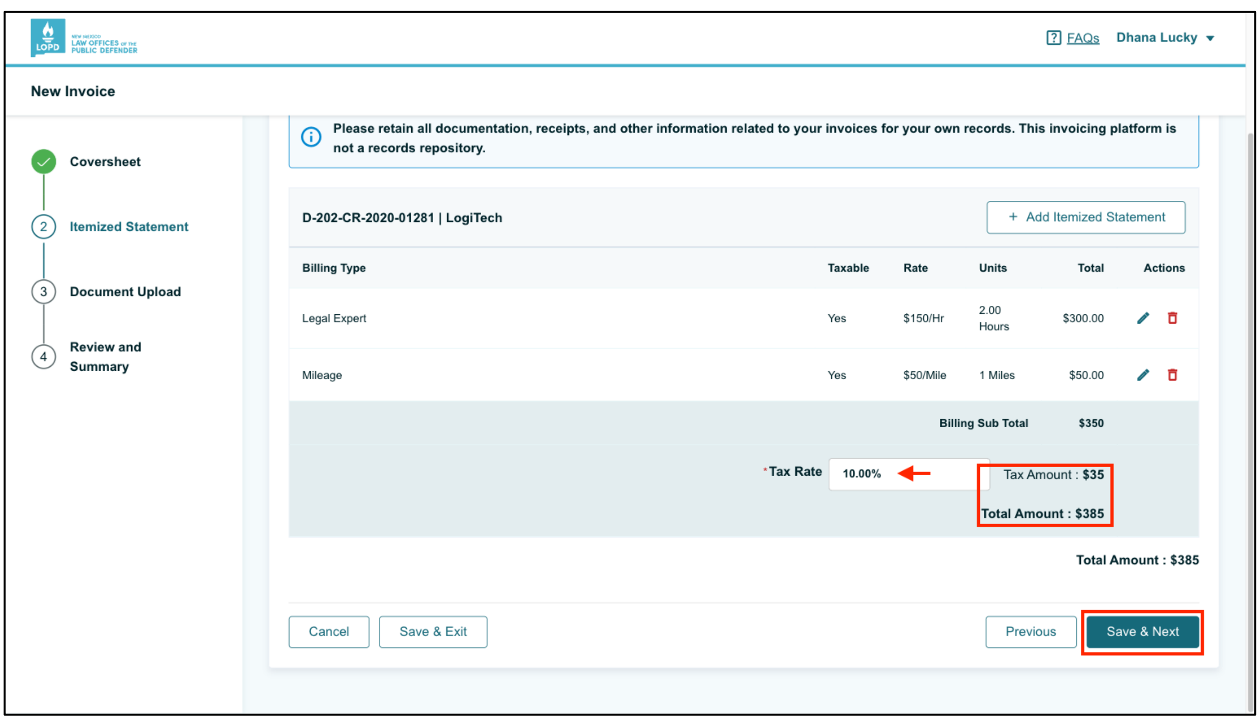
You can add multiple Billing Types.



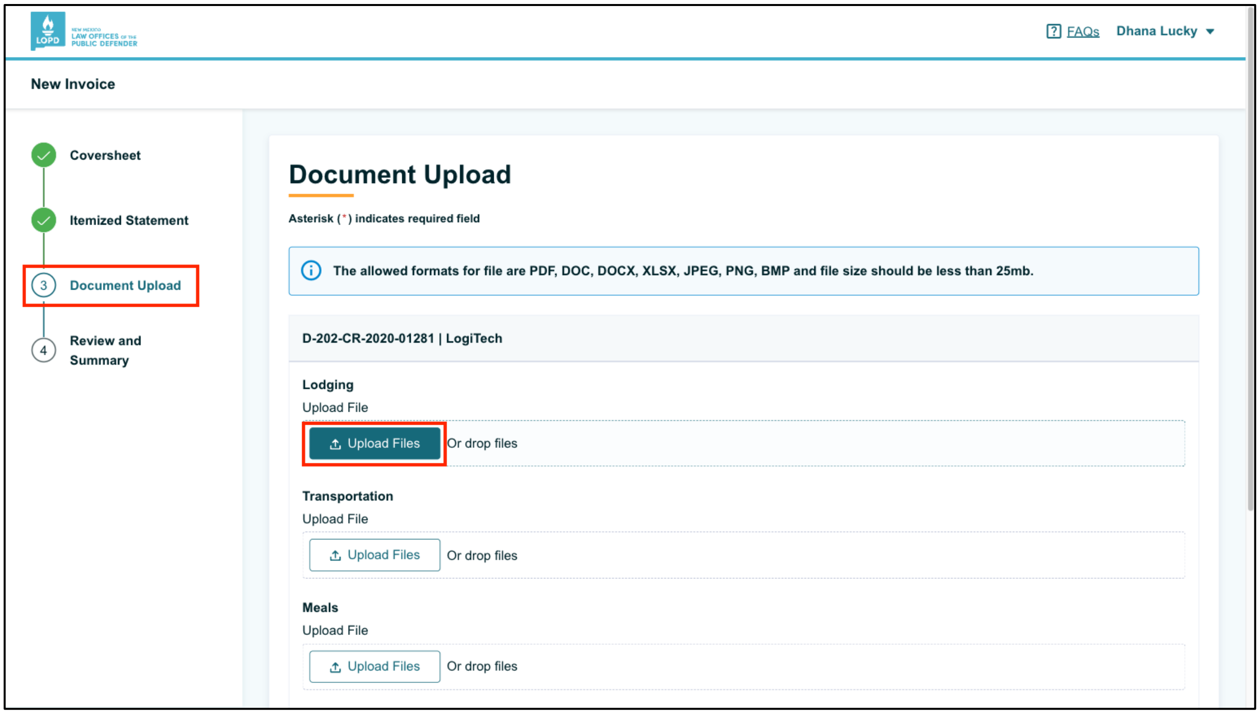
19. Enter the *percentage* in the **Tax Rate** field.

    Note: Based on the Tax Rate, the Tax Amount and Total Amount fields will be auto-populated.

20. Click the **Save & Next** button.

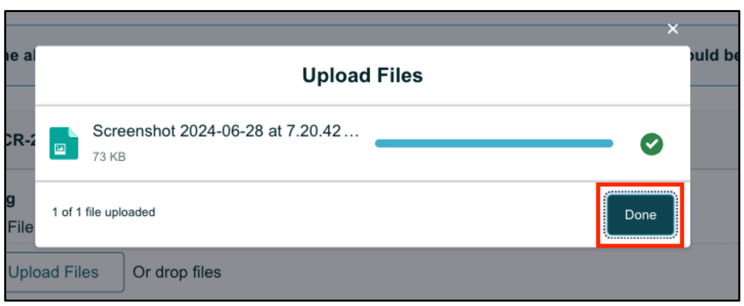


21. In the Step 3 **Document Upload** section, perform the following steps:
22. To upload the document, click the **Upload Files** button.



An Upload Files pop-up will be displayed.

23. After uploading the required document from your local folder, click the **Done** button.

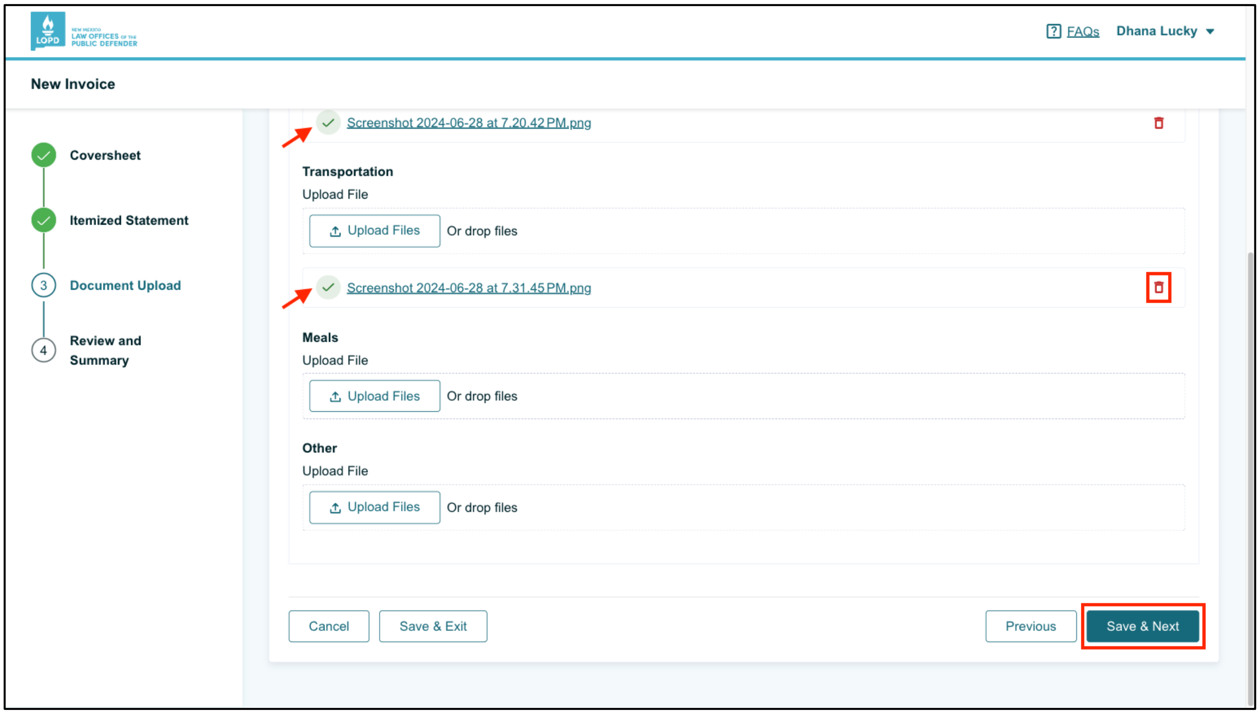


The uploaded documents will be displayed under the individual document type sections.

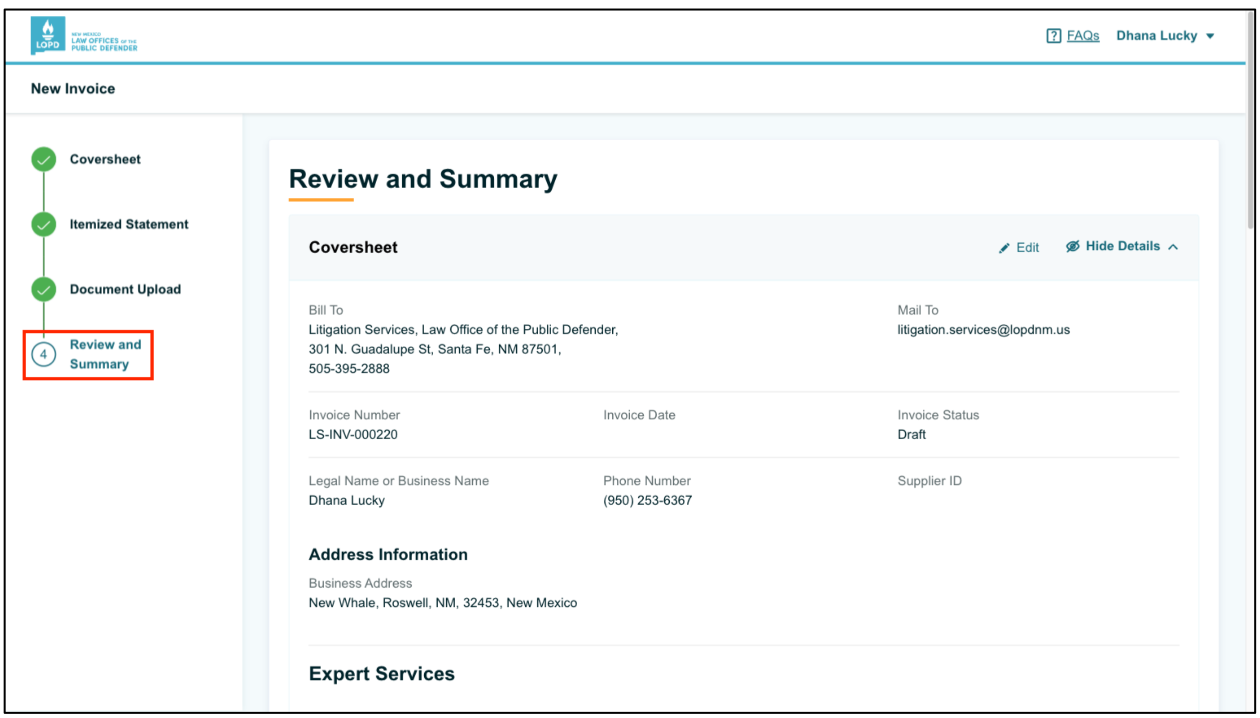
Notes:

- You can use the **Delete** bin icon to delete the uploaded documents.
- You can add multiple documents under a document type section.

24. After uploading the required documents, click the **Save & Next** button.

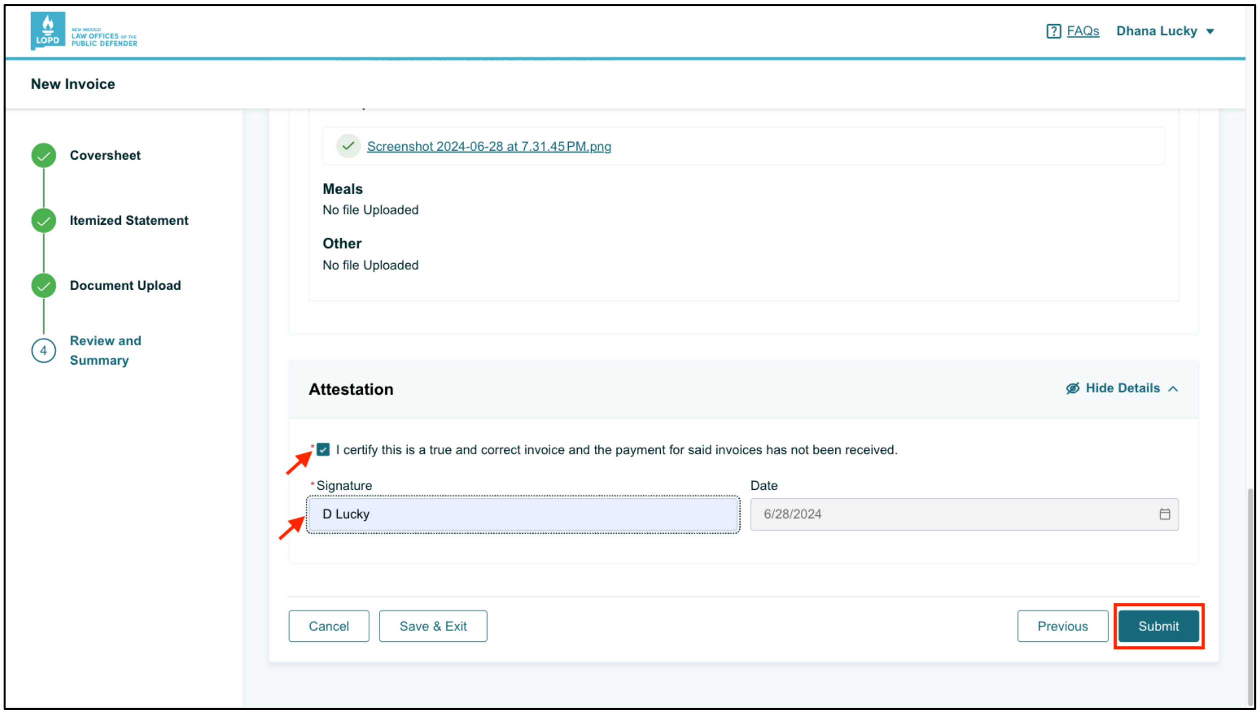


25. In the Step 4 **Review and Summary** section, review the details entered in all the sections.



26. Scroll to the Attestation section, then select the **Attestation** checkbox.
27. Enter the *Signature* in the **Signature** field.

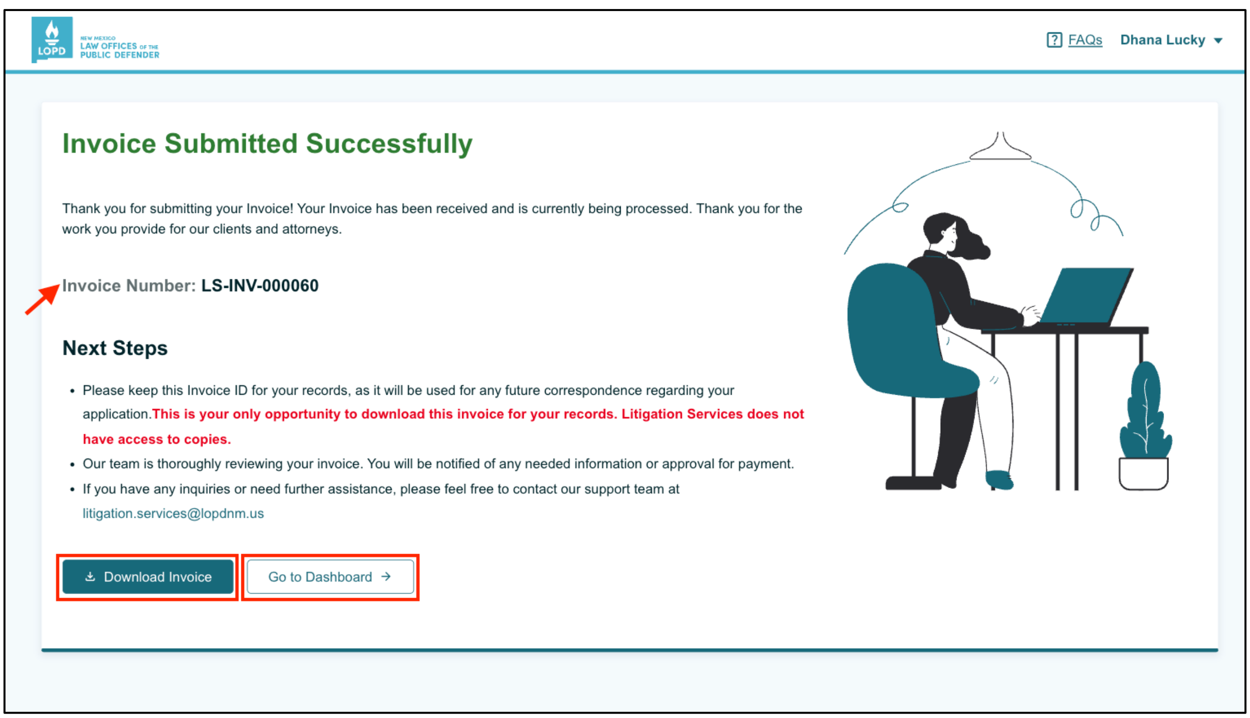
28. Click the **Submit** button.



After submitting, a success page will be displayed with a new Invoice Number.

Note: You can download the invoice by clicking the **Download Invoice** button.

29. To go to the Dashboard, click the **Go to Dashboard** button.

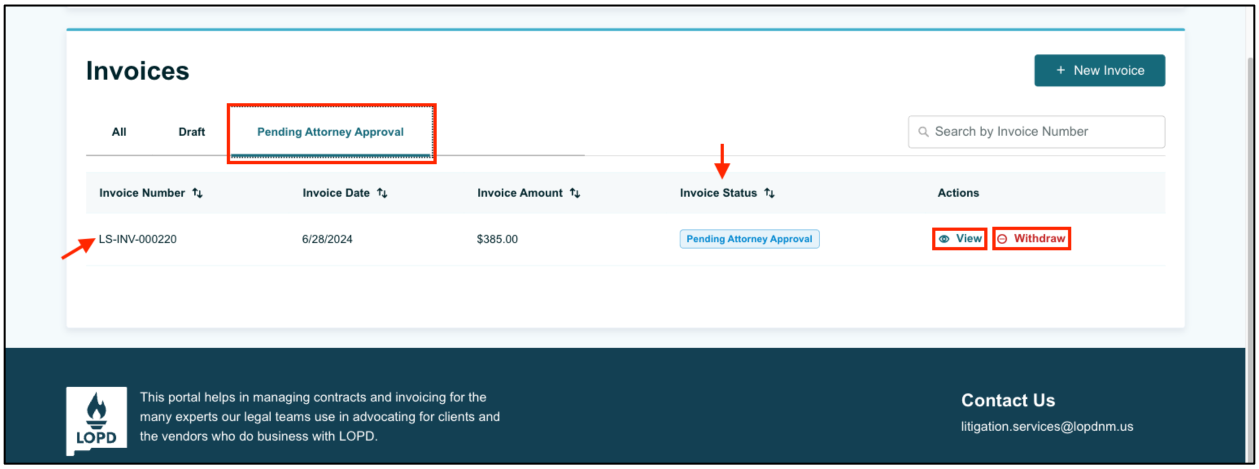


30. On the Dashboard page, scroll to the **Invoices** section.

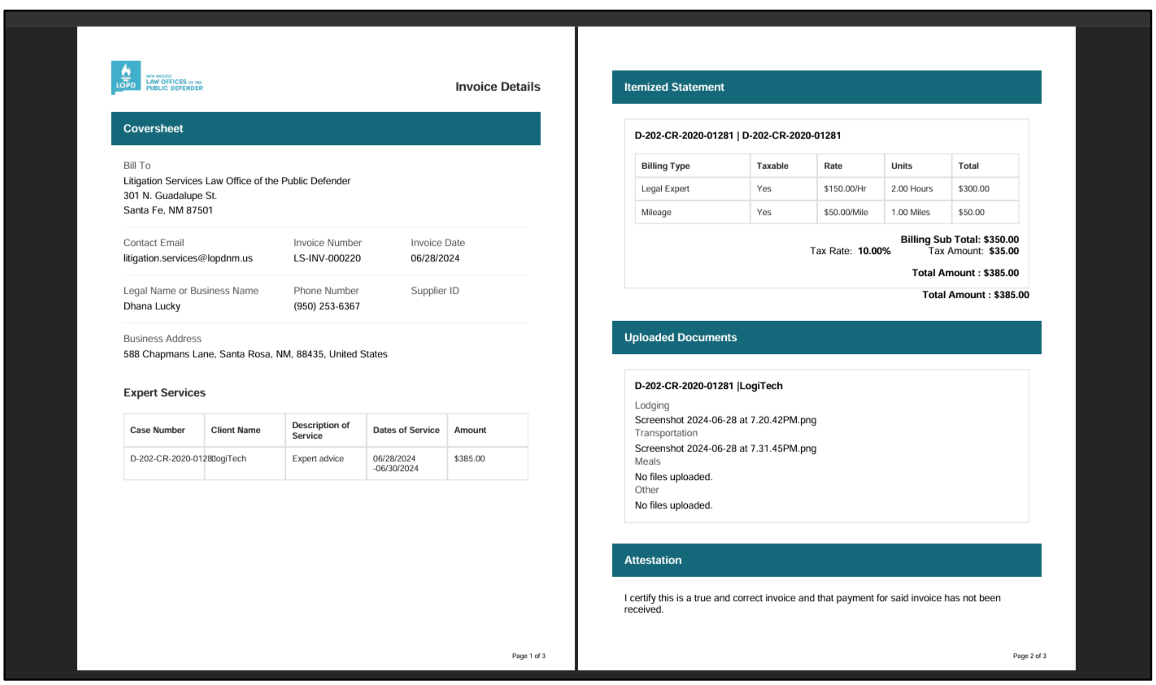
The newly created invoice will be displayed under the **Pending Attorney Approval** tab as well as the **All** tab.

Notes:

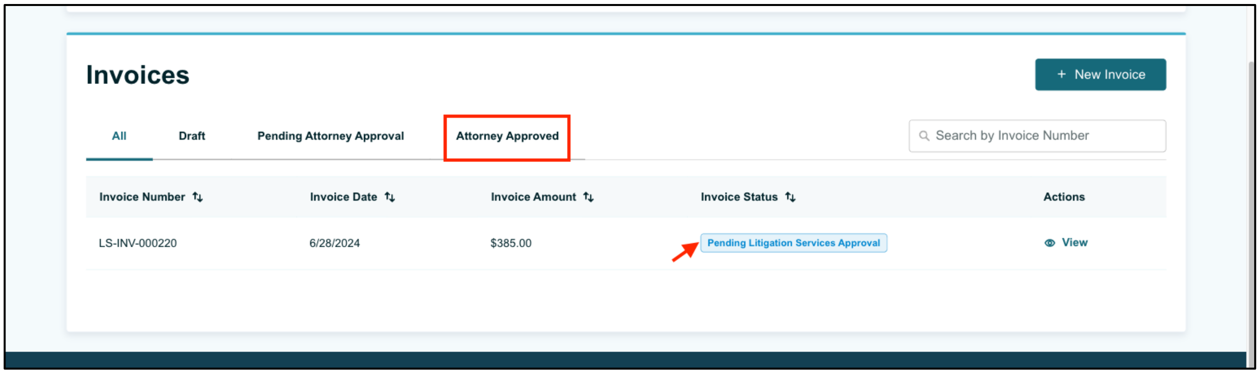
- You can view the PDF version of the invoice by clicking on the **View** button.
- When the Invoice Status is Pending Attorney Approval, you can use the **Withdraw** button to withdraw your invoice.



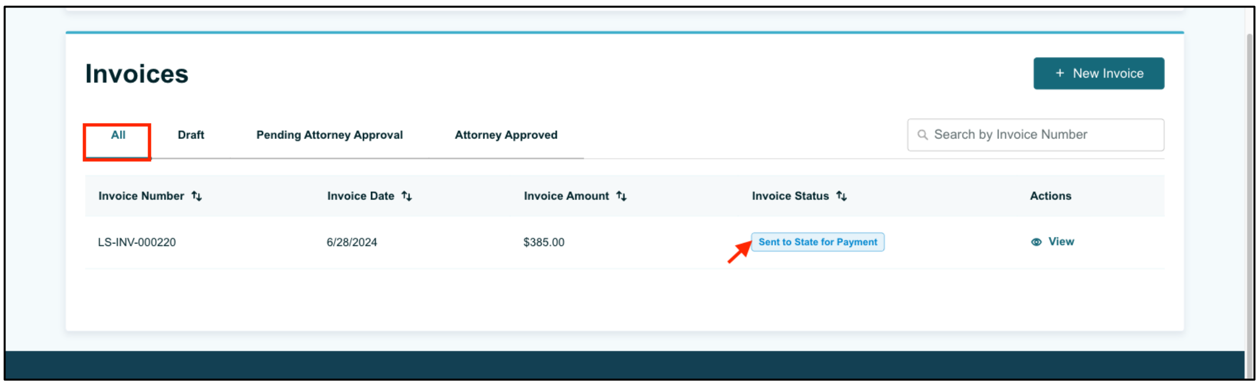
The PDF version of the invoice is shown in the below image.



After the Attorney approves the invoice, you can see the Invoice under the Attorney Approved tab, and the **Invoice status** will be updated to *Pending Litigation Services Approved*.



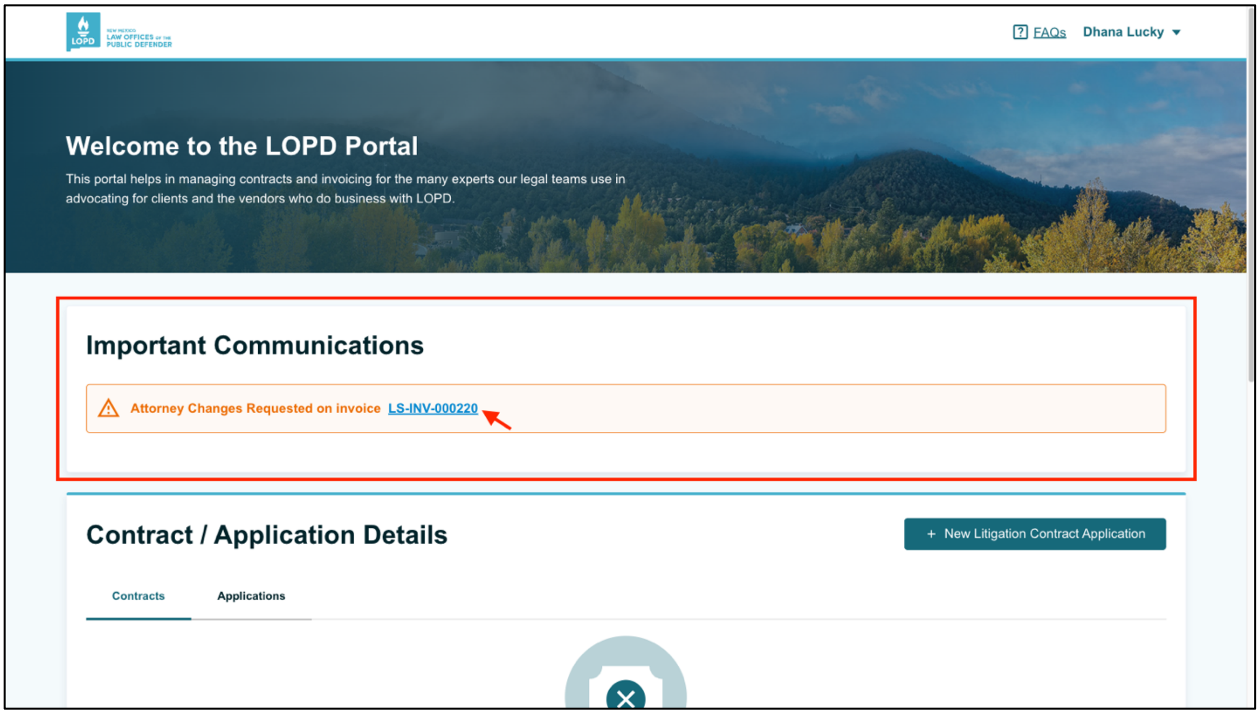
After the LOPD Staff approves the invoice, you can see the Invoice under the All tab, and the **Invoice status** will be updated to *Sent to State for Payment*.



IMPORTANT COMMUNICATIONS - INVOICE

Important communication sections on the Dashboard assist you in viewing notifications and pending actions to be carried out on the Portal.

Note: You can click the **Invoice Number link** to go to the Invoice Summary page.



UPDATING THE INVOICE

You can update the invoice only when the **Invoice Status** is draft, *Attorney Changes Requested,* or *Invoice Needs Revisions*.

Invoice Number	Invoice Date	Invoice Amount	Invoice Status	Actions
LS-INV-000220	6/28/2024	$385.00	Attorney Changes Requested	Update

Invoice Number	Invoice Date	Invoice Amount	Invoice Status	Actions
LS-INV-000220	6/28/2024	$385.00	Invoice Needs Revisions	Update

Updating Invoice (Status as Attorney Changes Requested)

When the Attorney requests the changes on the invoice, you will receive a notification email, and the **Invoice Status** on the Portal will be updated to *Attorney Changes Requested*.

Sandbox: Additional information needed on your invoice Inbox ×

NMLOPD anushka.bansal@mtxb2b.com via rjzfd7vu5lv746te.9vskug2.d7-o9bnmaa.cs283.bnc.sandbox.salesforce.com
to rahul.inavolu+dhana@mtxb2b.com, anushka.bansal@mtxb2b.com

Hello,

Dhana Attorney, attorney on D-202-CR-2020-01281 for LogiTech, has requested additional information before approving LS-INV-000220.

Upload supporting documents

Please log-in to LOPD's Invoice Management System to provide the needed information.

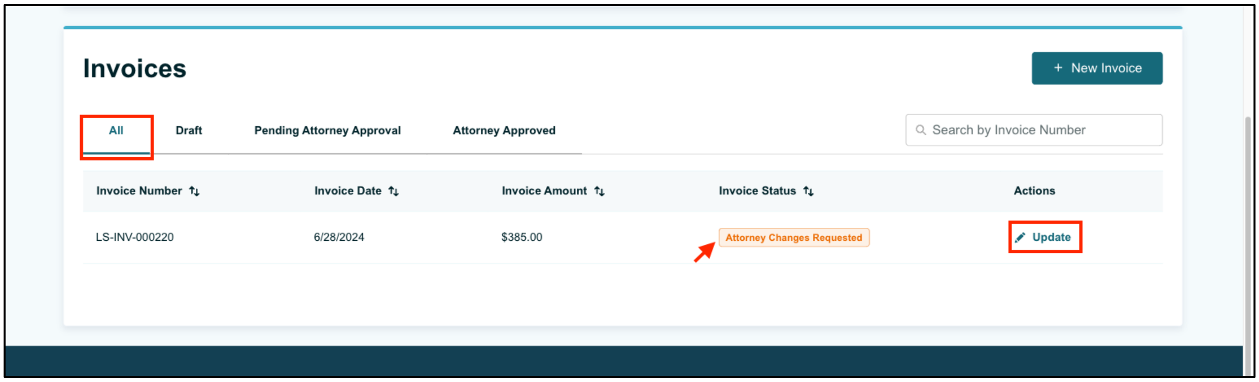
Thank you!

Litigation Services
litigation.services@lopdnm.us

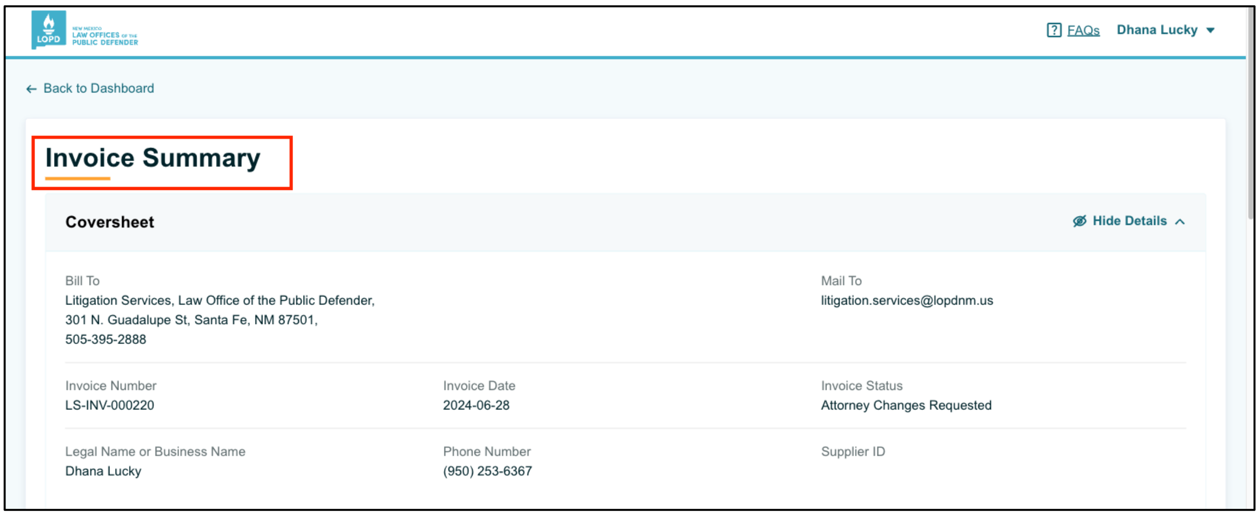
To update the Invoice, perform the following steps:

1. On the Dashboard page, scroll to the Invoices section.

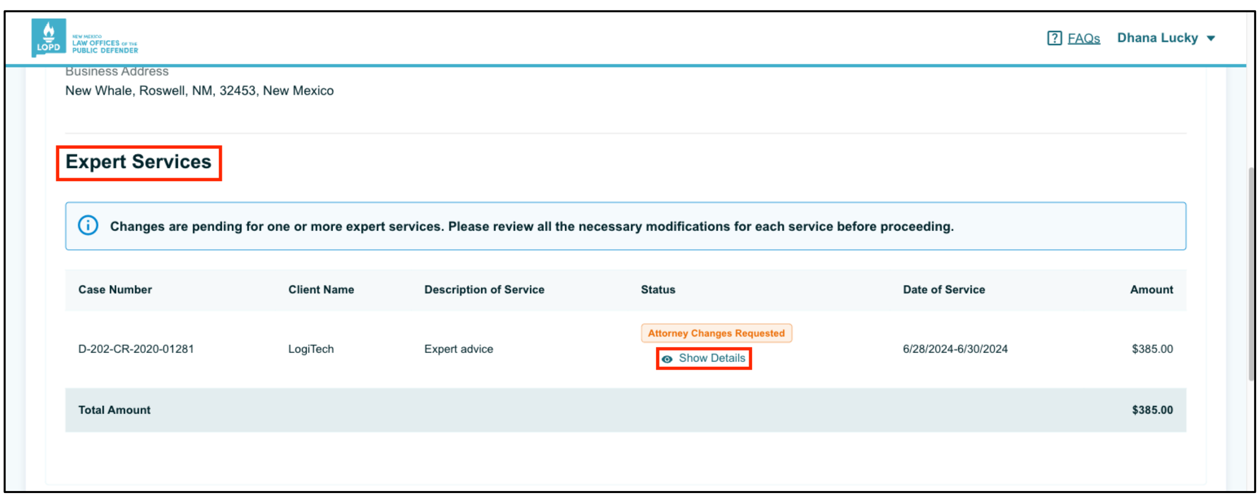
2. Go to the **All** tab and click the **Update** button of the invoice with **Invoice Status** as *Attorney Changes Requested*.



You will be directed to the **Invoice Summary** page.

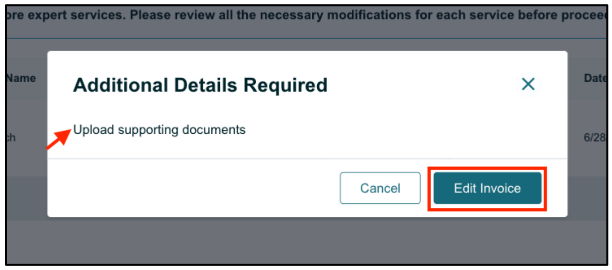


3. Scroll to the **Expert Services** section, then click the **Show Details** button.



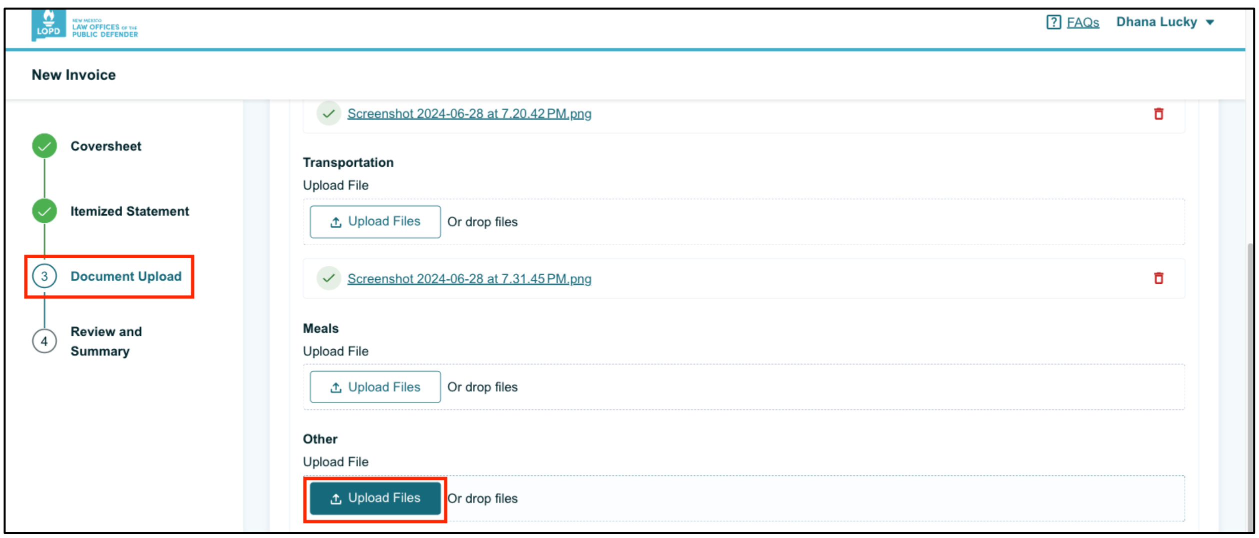
An Additional Details Required pop-up will be displayed with the comments.

4. Click the **Edit Invoice** button.

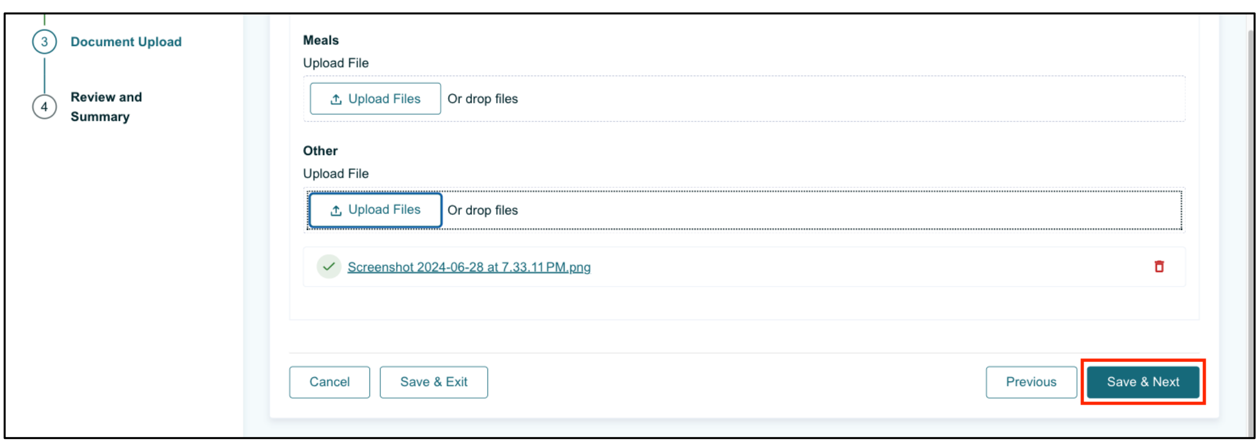


You will be directed to the New Invoice page.

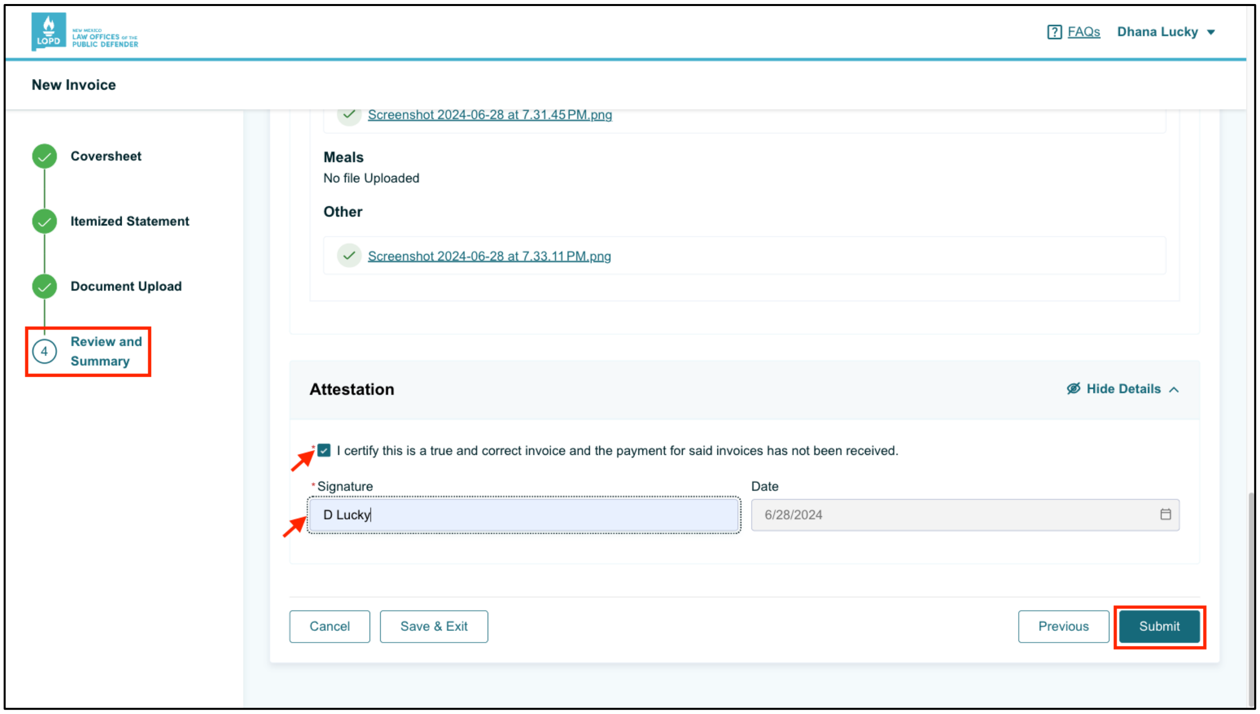
5. Go to the required section and update the changes as mentioned in the comments on the **Additional Details Required** pop-up window (Comment: Upload supporting documents, is shown as an example).
6. Go to the **Document Upload** section and upload the required documents.



7. After uploading the required documents, click the **Save & Next** button.

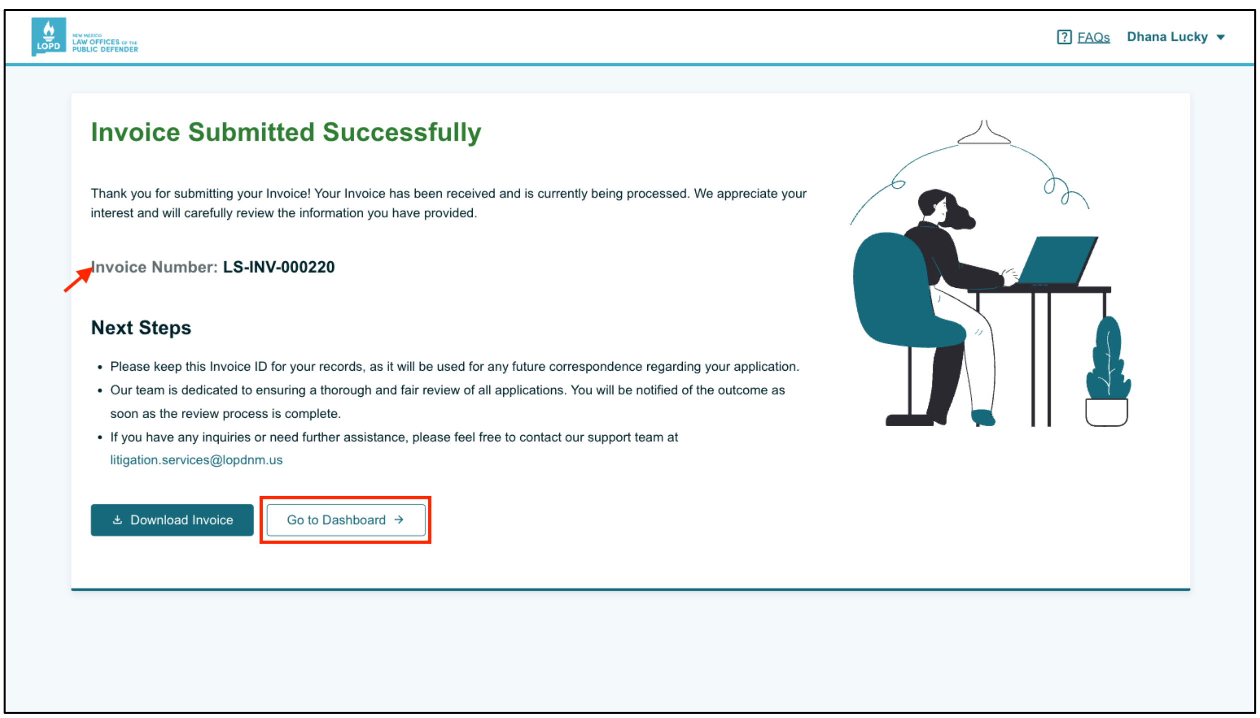


8. Go to the **Review and Summary** section, select the Attestation **checkbox**, enter your **Signature**, and click the **Submit** button.

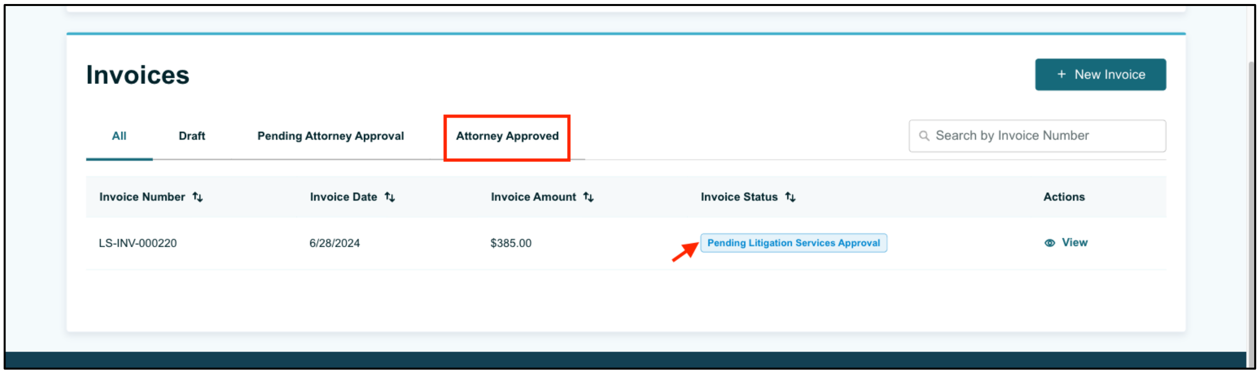


After submitting, a success page will be displayed with the Invoice Number.

9. To go to the Dashboard, click the **Go to Dashboard** button.

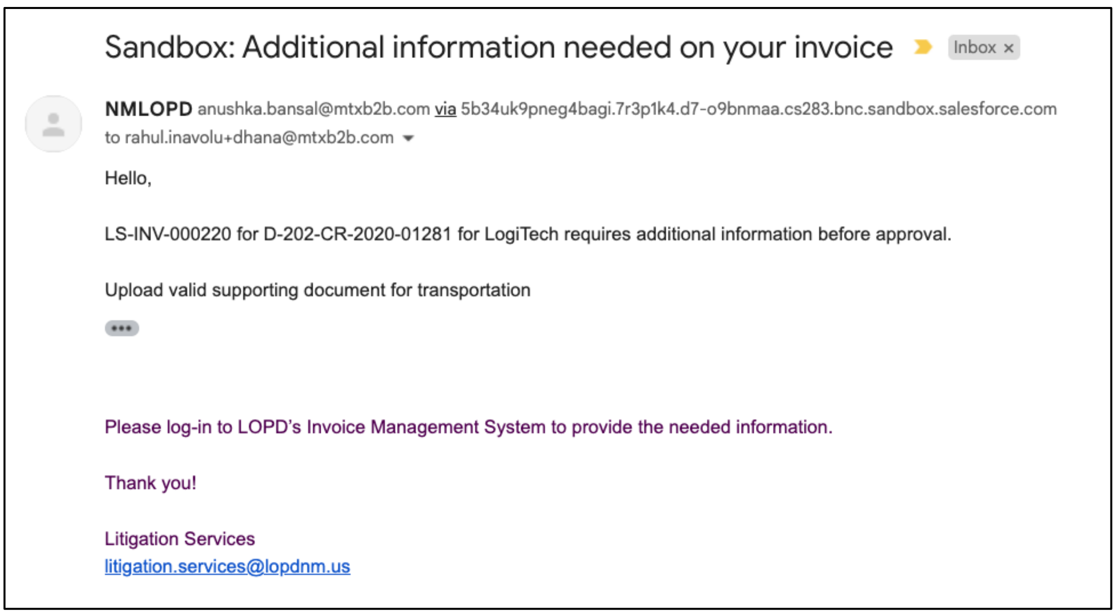


After the Attorney approves the invoice, you can see the Invoice under the Attorney Approved tab, and the **Invoice status** will be updated to *Pending Litigation Services Approved*.



Updating Invoice (Status as Invoice Needs Revision)

When the LOPD staff requests the changes on the invoice, you will receive a notification email, and the **Invoice Status** on the Portal will be updated to *Invoice Needs Revision*.



Sandbox: Additional information needed on your invoice Inbox ×

NMLOPD anushka.bansal@mtxb2b.com via 5b34uk9pneg4bagi.7r3p1k4.d7-o9bnmaa.cs283.bnc.sandbox.salesforce.com
to rahul.inavolu+dhana@mtxb2b.com

Hello,

LS-INV-000220 for D-202-CR-2020-01281 for LogiTech requires additional information before approval.

Upload valid supporting document for transportation

Please log-in to LOPD's Invoice Management System to provide the needed information.

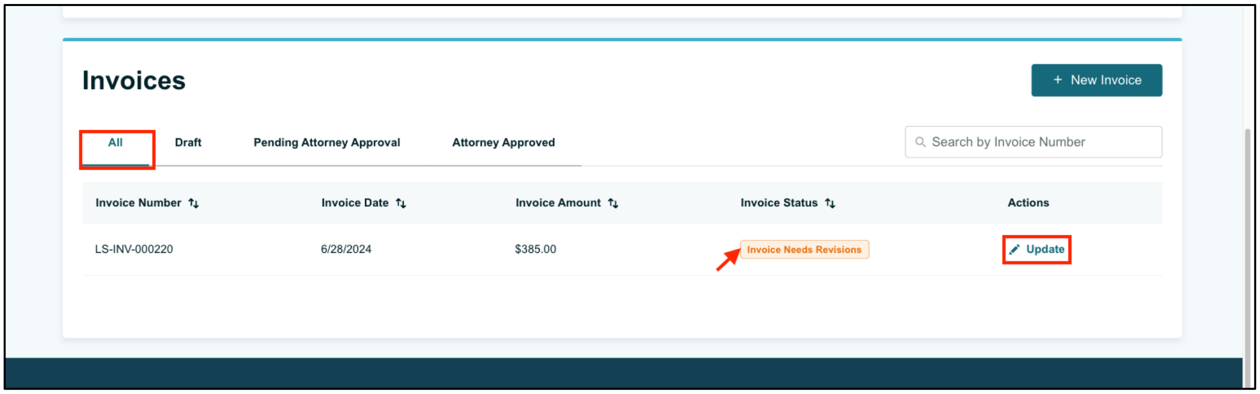
Thank you!

Litigation Services
litigation.services@lopdnm.us

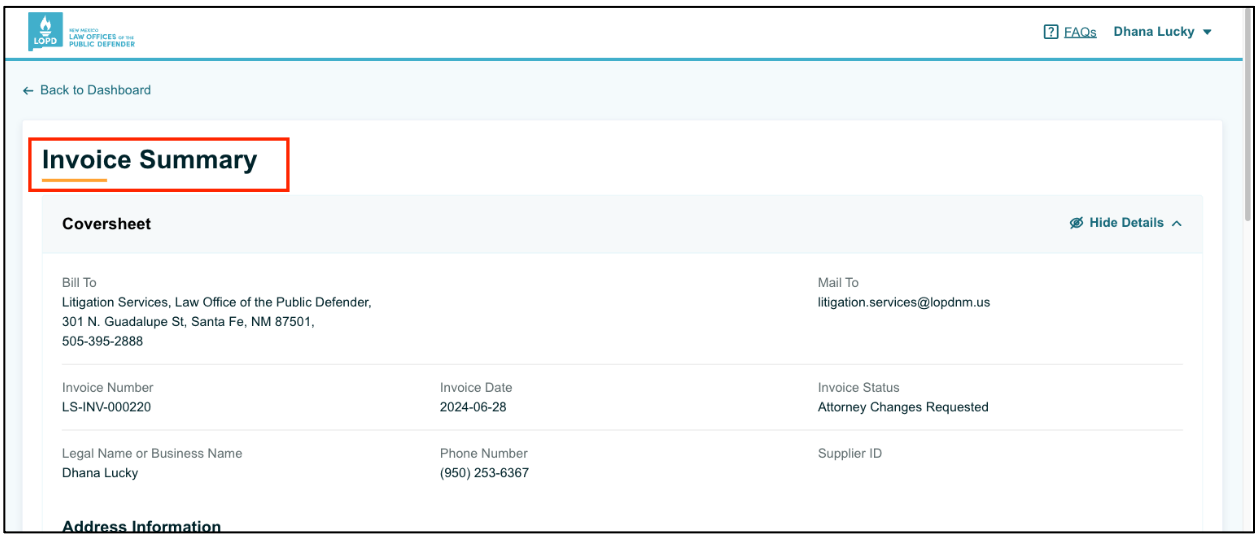
To update the Invoice, perform the following steps:

1. On the Dashboard page, scroll to the Invoices section.

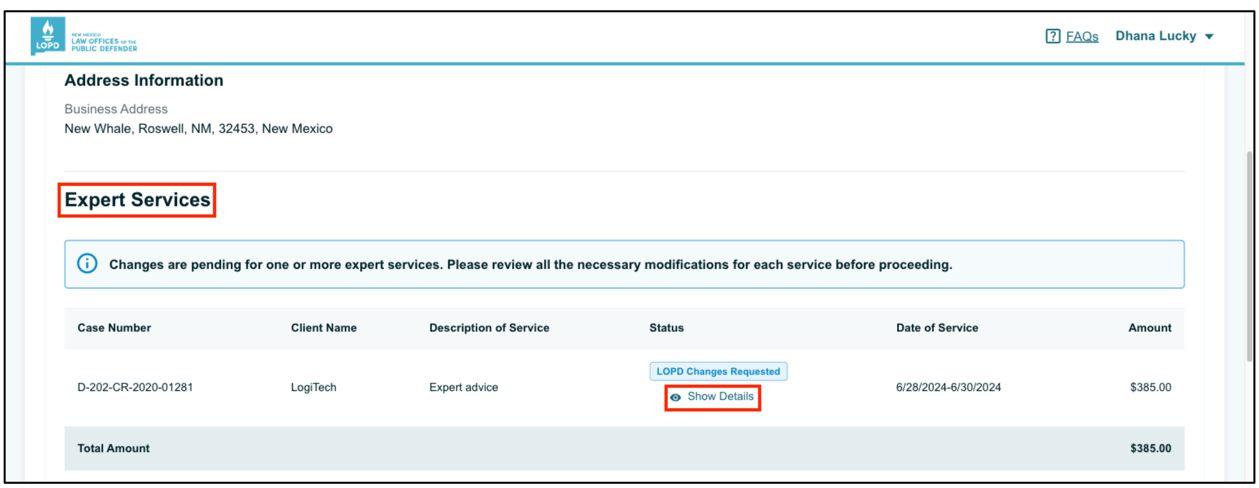
2. Go to the **All** tab and click the **Update** button of the invoice with **Invoice Status** as *Invoice Needs Revisions*.



You will be directed to the **Invoice Summary** page.

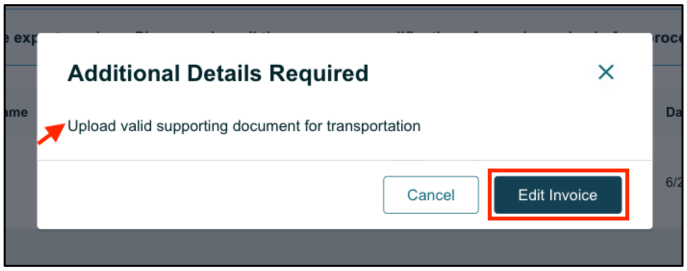


3. Scroll to the **Expert Services** section, then click the **Show Details** button.



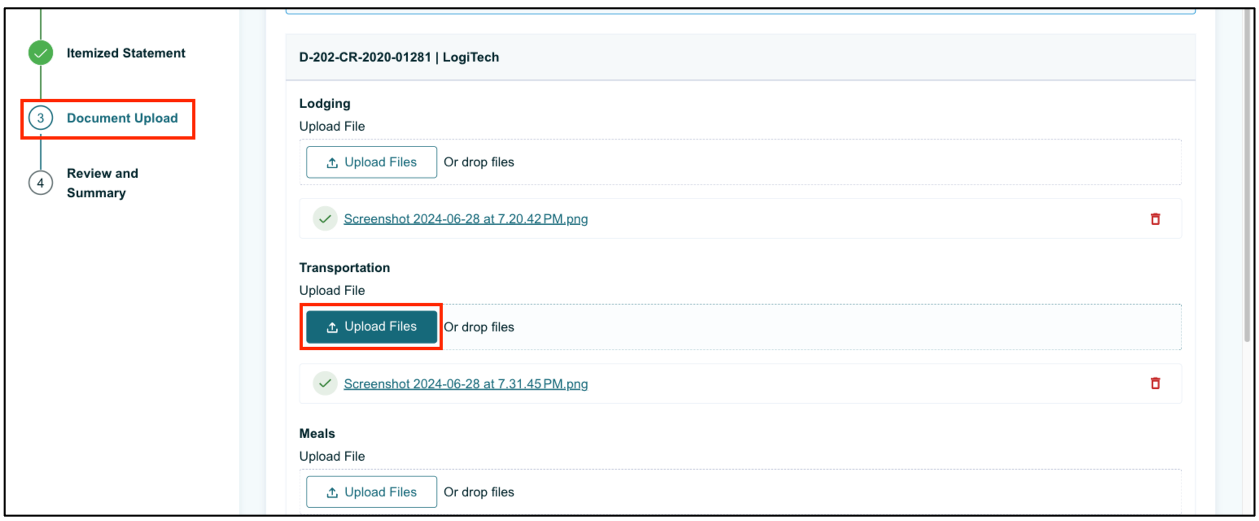
An Additional Details Required pop-up will be displayed with the comments.

4. Click the **Edit Invoice** button.

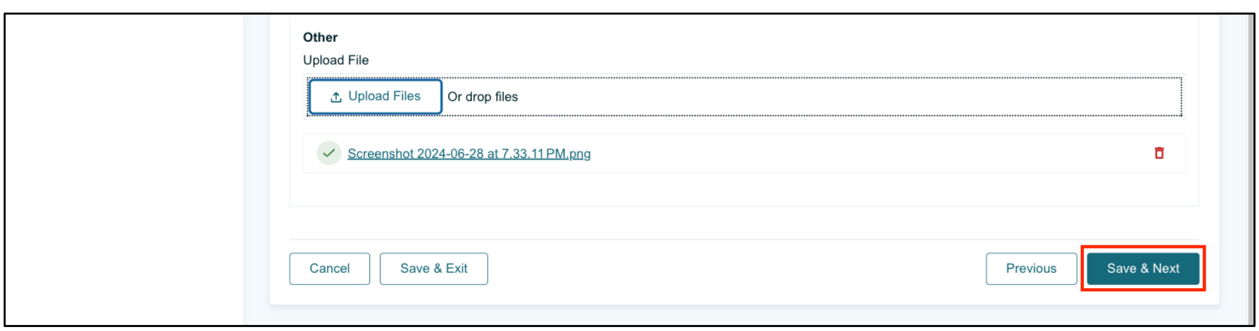


You will be directed to the New Invoice page.

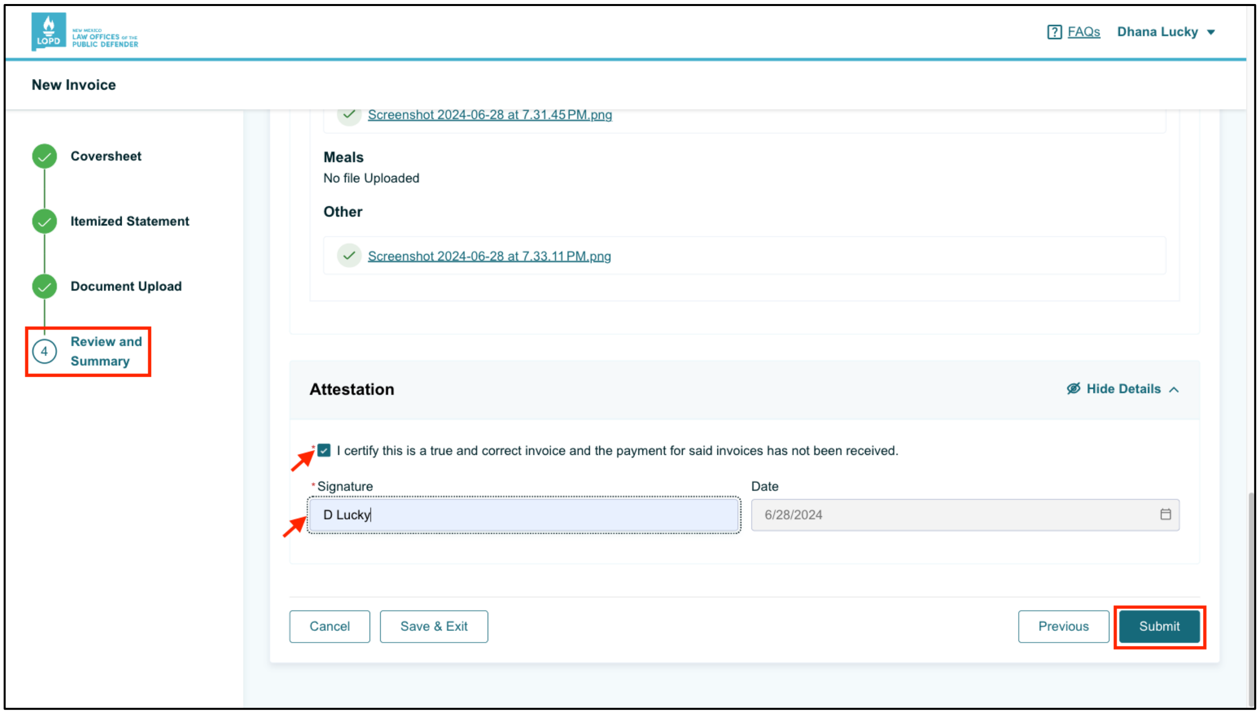
5. Go to the required section and update the changes as mentioned in the comments on the **Additional Details Required** pop-up window (Comment: Upload valid supporting document for transportation, is shown as an example).
6. Go to the **Document Upload** section and upload the required documents.



7. After uploading the required documents, click the **Save & Next** button.

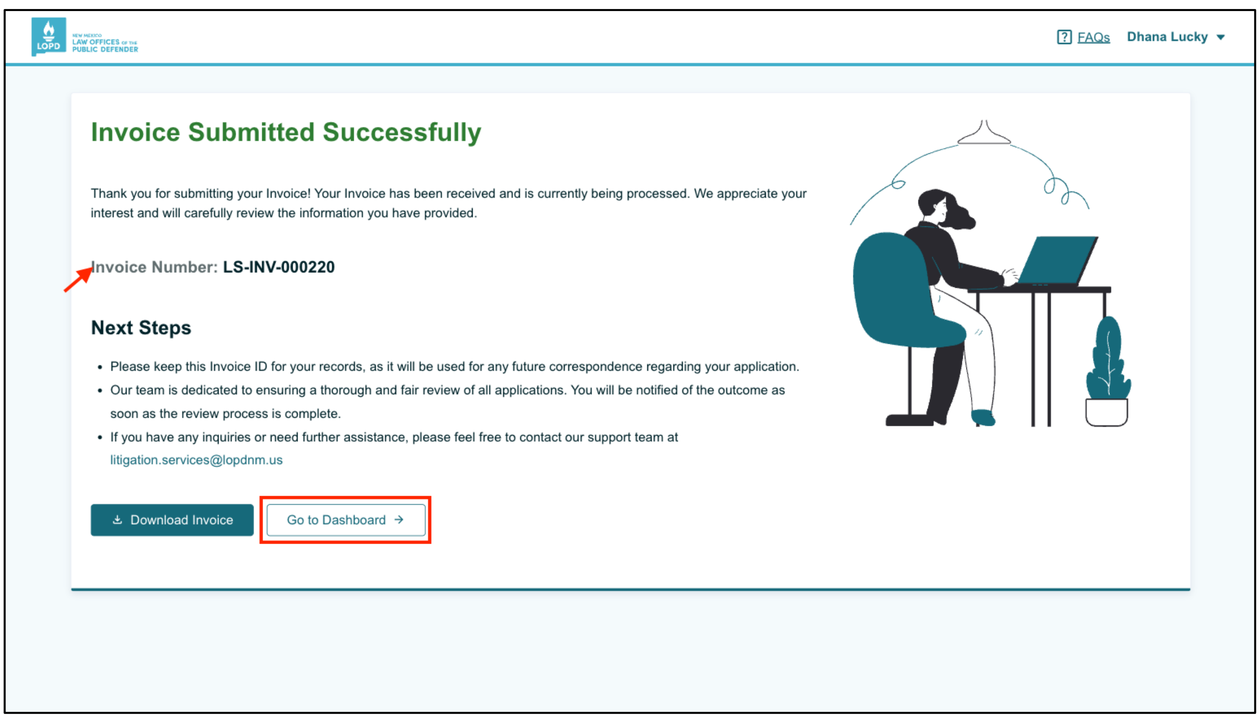


8. Go to the **Review and Summary** section, select the Attestation **checkbox**, enter your **Signature**, and click the **Submit** button.

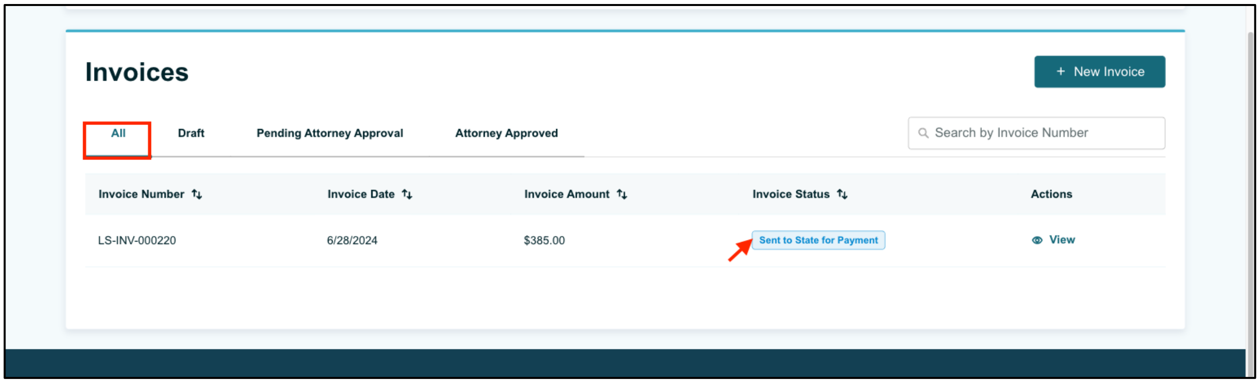


After submitting, a success page will be displayed with the Invoice Number.

9. To go to the Dashboard, click the **Go to Dashboard** button.



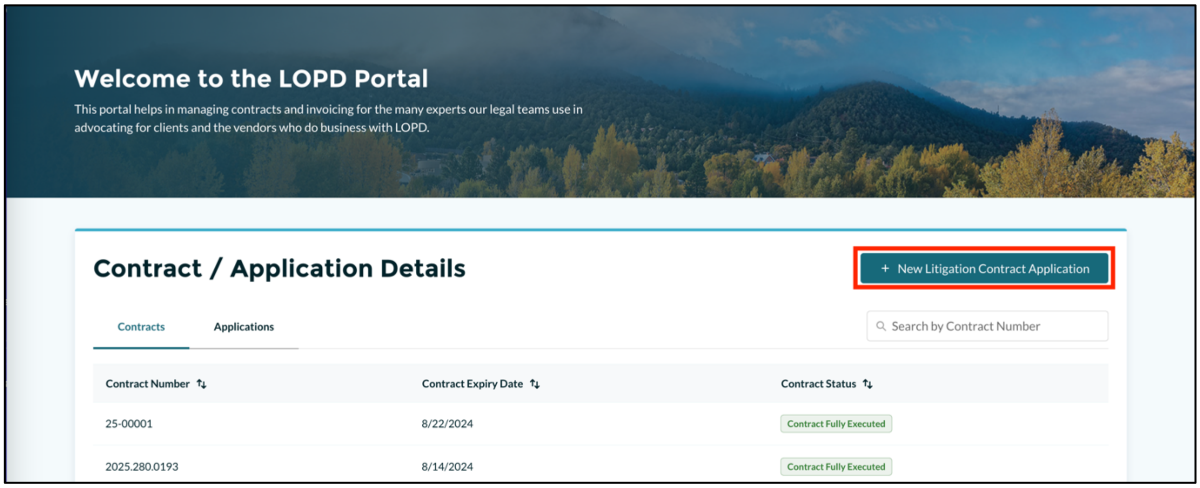
After the LOPD Staff approves the invoice, you can see the Invoice under the All tab, and the **Invoice status** will be updated to *Sent to State for Payment*.



SUBMITTING A NEW LITIGATION CONTRACT APPLICATION

To submit a new litigation contract application, perform the following steps:

1. On the Dashboard page, scroll to the **Contract/Application Details** section, then click the **+New Litigation Contract Application** button.



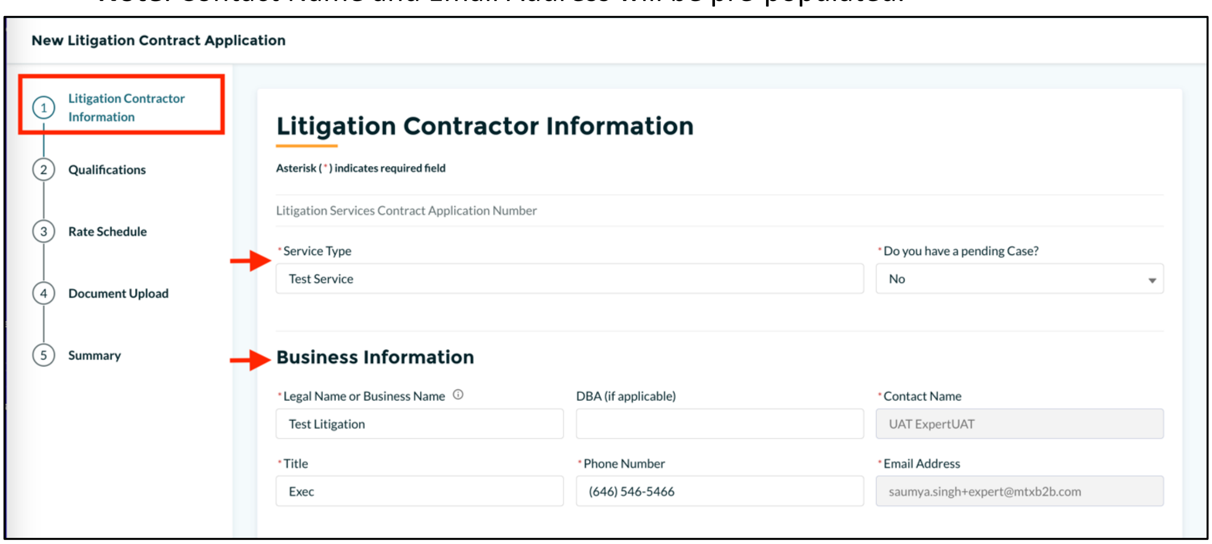
You will be directed to the **New Litigation Contract Application** form page.

Notes:

- Complete each step of the form by entering all necessary information.
- Fields marked with a red asterisk (*) are mandatory.

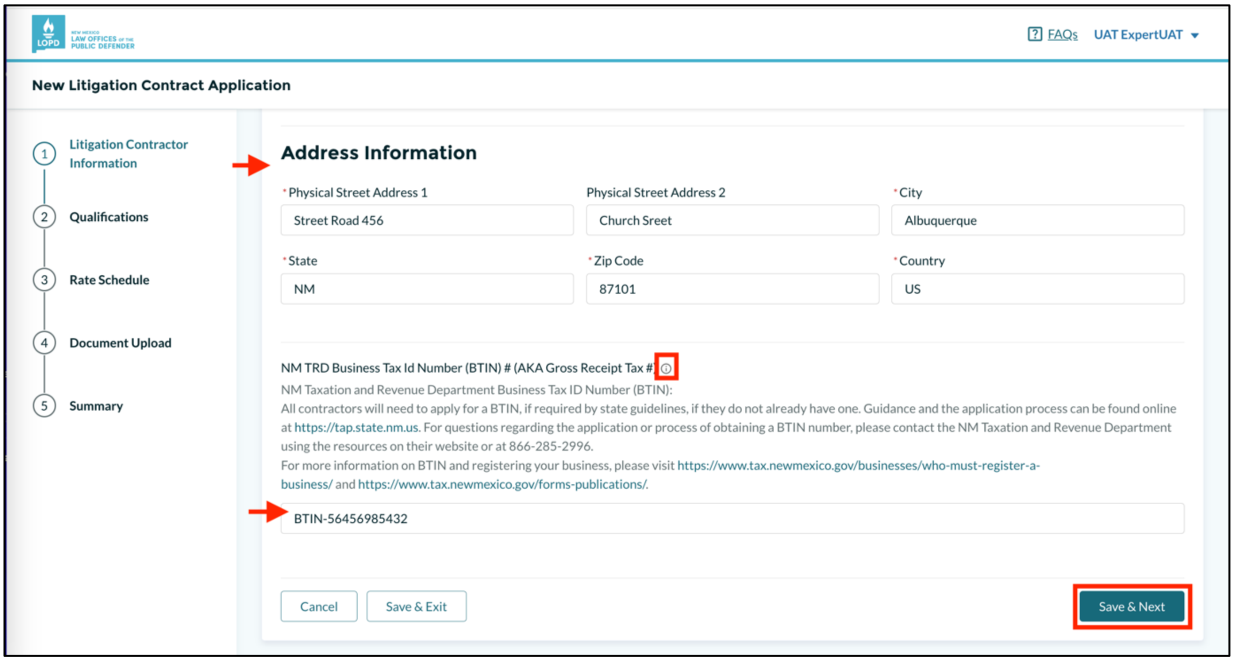
2. In the Step 1 **Litigation Contractor information** section, fill in all the required details.
3. Enter the **Service Type** in the textbox and Select **Yes/No** from the drop-down for the question *Do you have a pending case?*
4. Fill in all the required details in the **Business Information** section.

   Note: Contact Name and Email Address will be pre-populated.

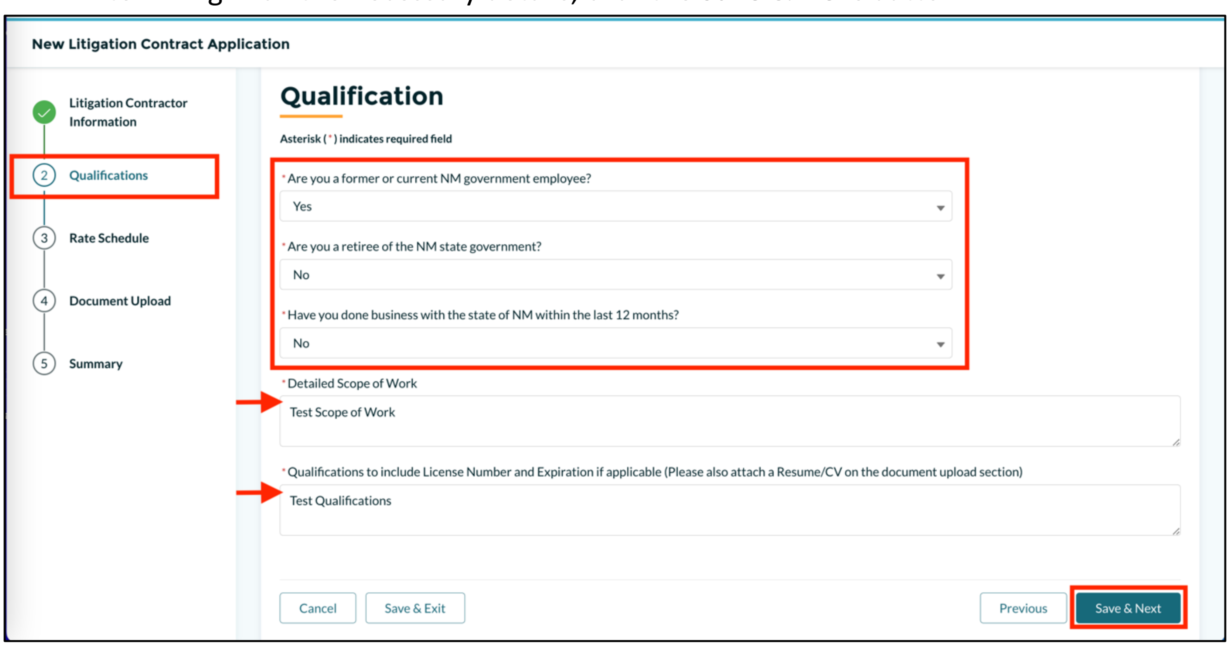


5. Fill out the details in the **Address Information** section.
6. Enter the TRD Business Tax Id Number (BTIN)# if available.

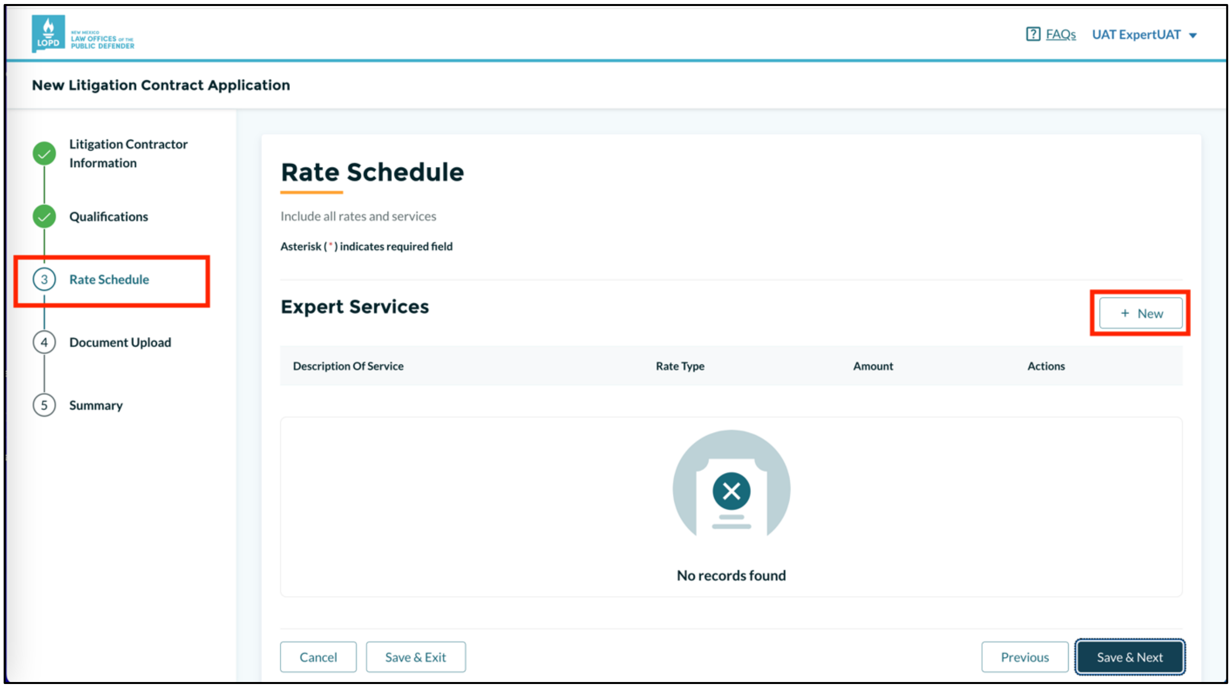
   Note: Click the **information icon** help text to view additional details.
7. After filling all the necessary details, click the **Save & Next** button.



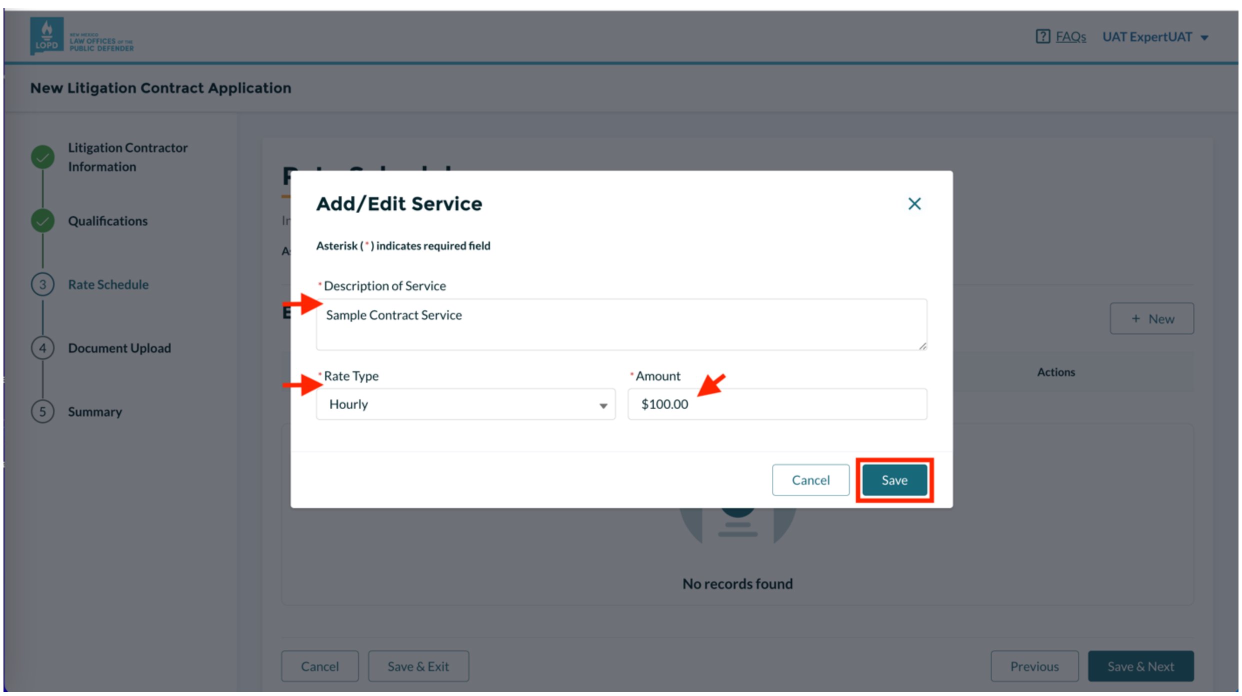
8. In the Step 2 **Qualification** section, fill in all the required details.
9. From the drop-down, select **Yes/No** for all the questions related to qualification.
10. Provide the **Detailed Scope of Work** in the text box.
11. After filling in all the necessary details, click the **Save & Next** button.



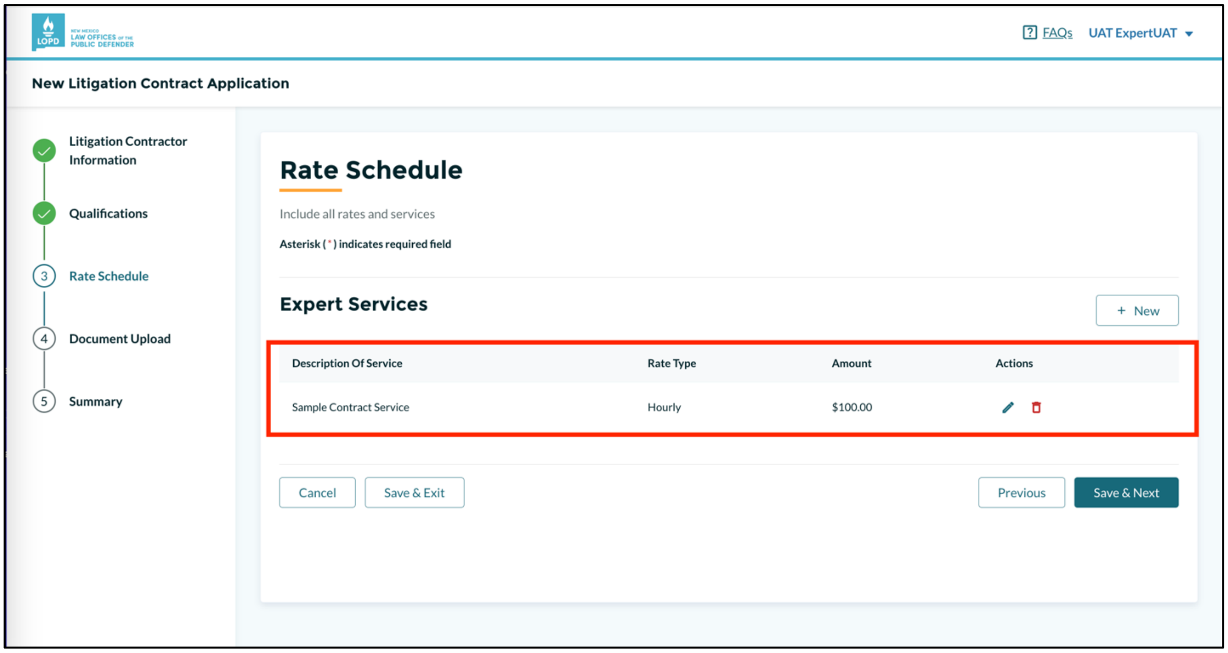
12. In the Step 3 Rate Schedule section, add the Expert Services details.
13. To add a new expert service, click the **+New** button.



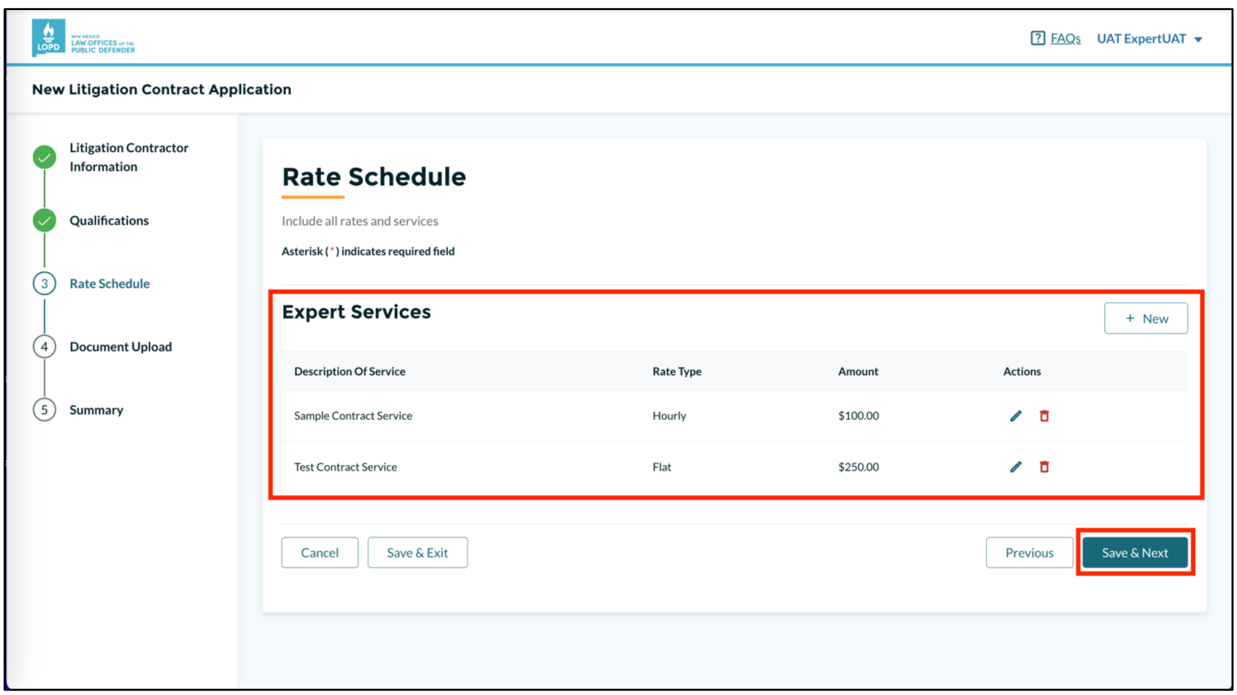
14. In the **Add/Edit Service** pop-up, enter the **Description of Service**, select the **Rate Type** from the drop-down and then enter the appropriate **Amount**.
15. To save the expert service details, click the Save button.



16. The added expert service record will be listed.

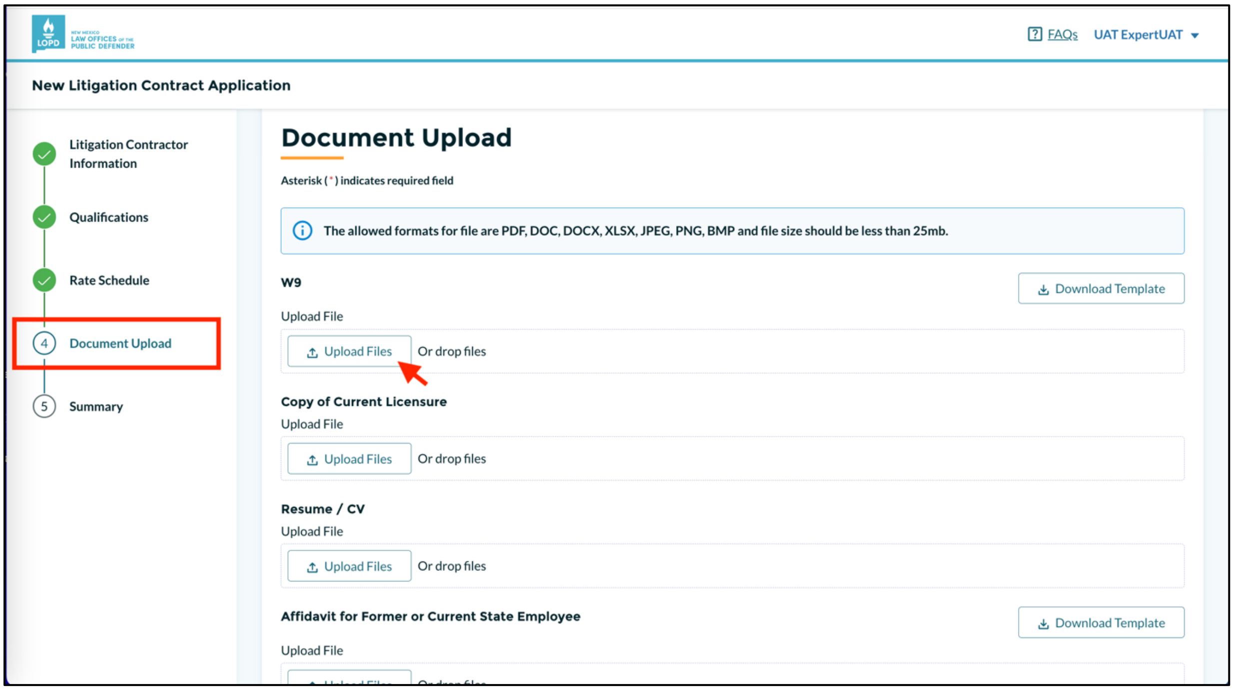


17. Similarly, multiple expert services can be added. After adding the expert services, click the **Save & Next** button to go to the next step.

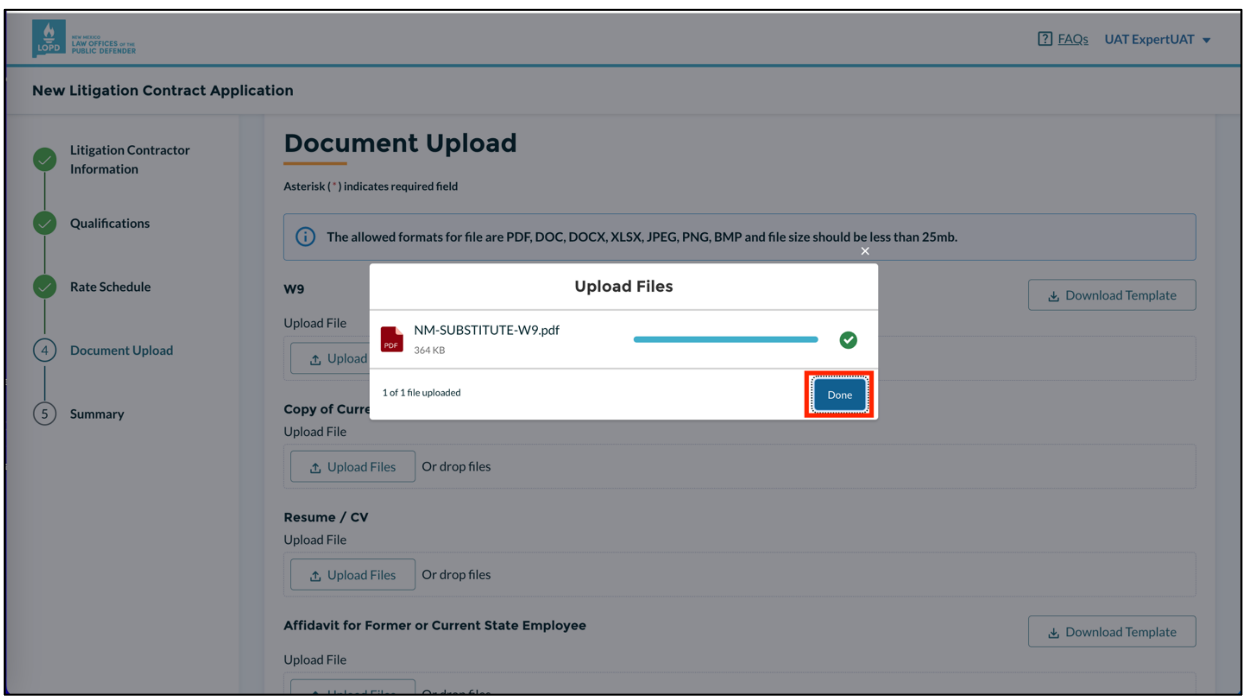


18. In the Step 4 **Document Upload** section upload all the requested documents.
19. To upload the document, click the **Upload Files** button.

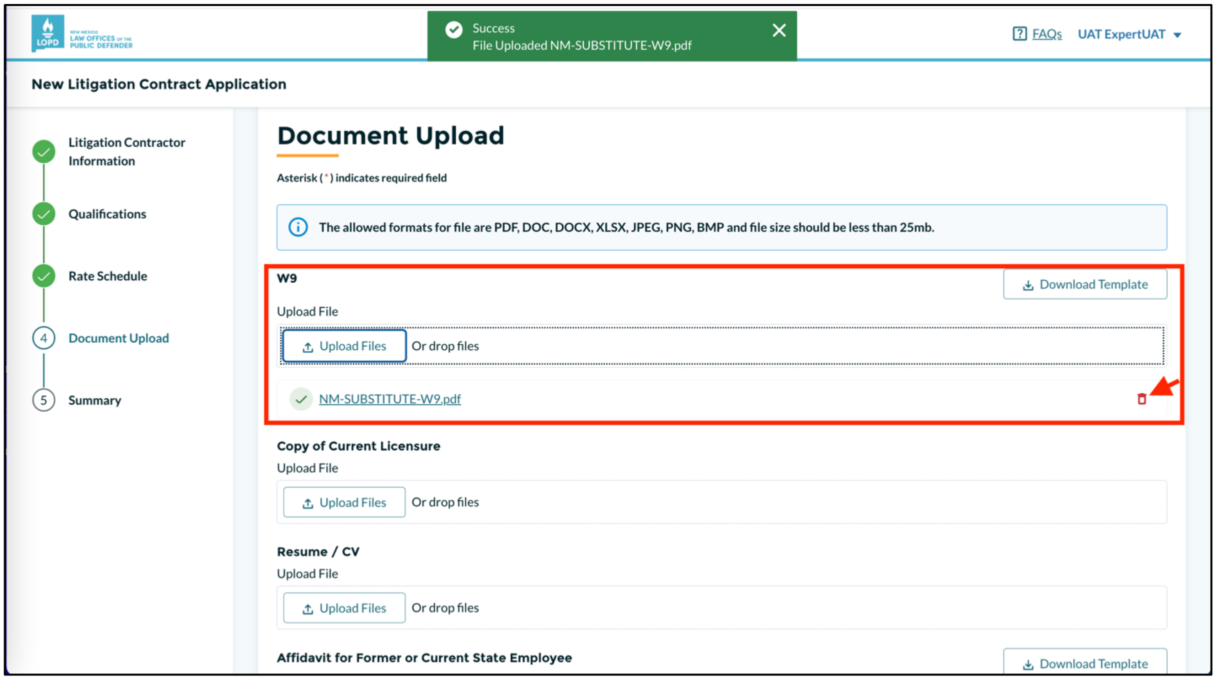
    Note: Few documents will have a template to follow; download the template by clicking the **Download Template** button in the right corner.



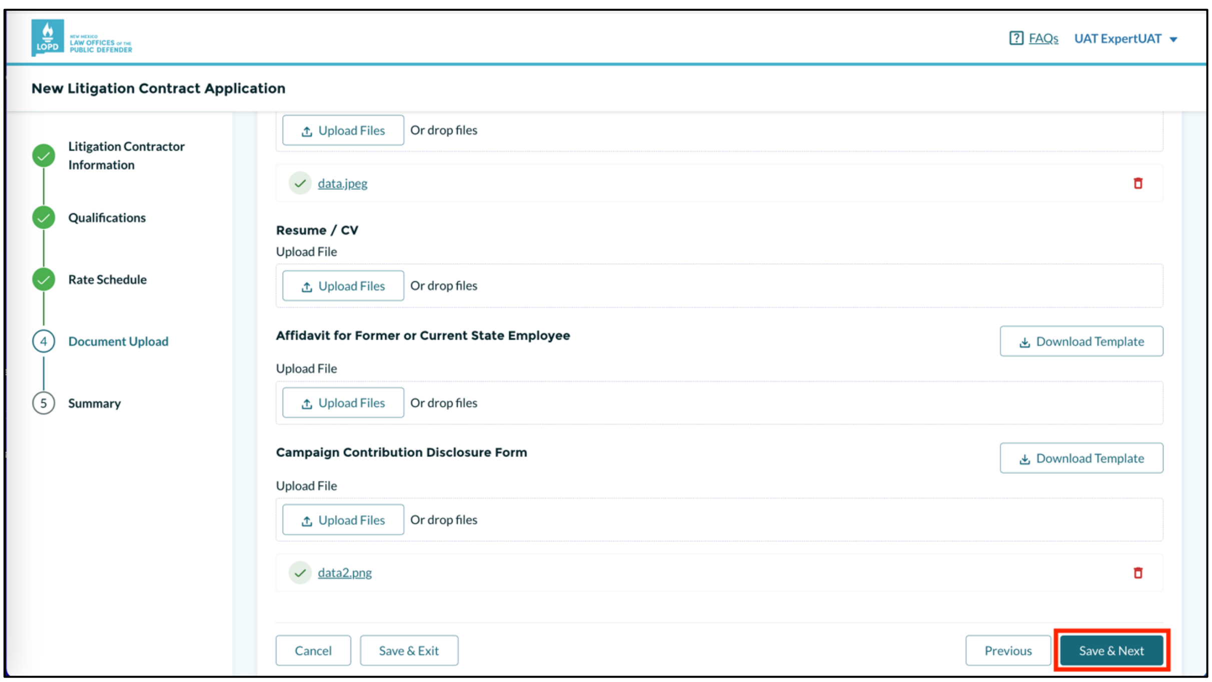
20. After uploading the required document from your local folder, click the **Done** button



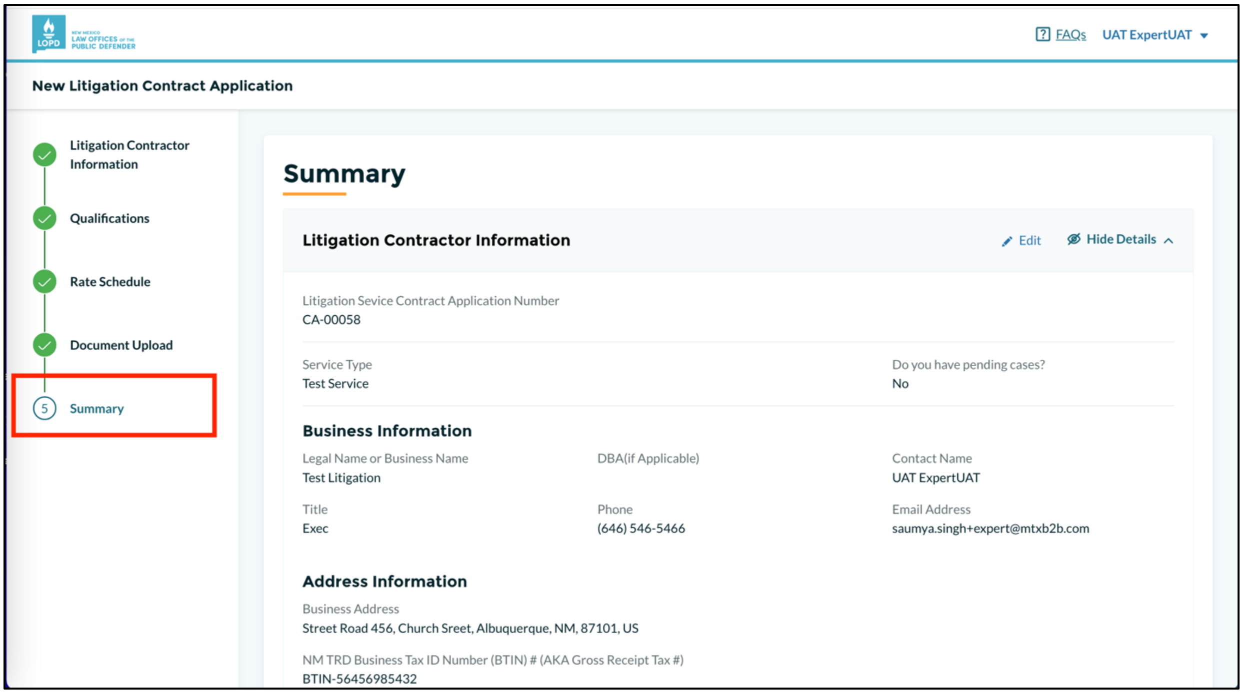
21. The uploaded documents will be displayed under the individual document type sections.
    Note: You can use the **Delete** bin icon to delete the uploaded documents.



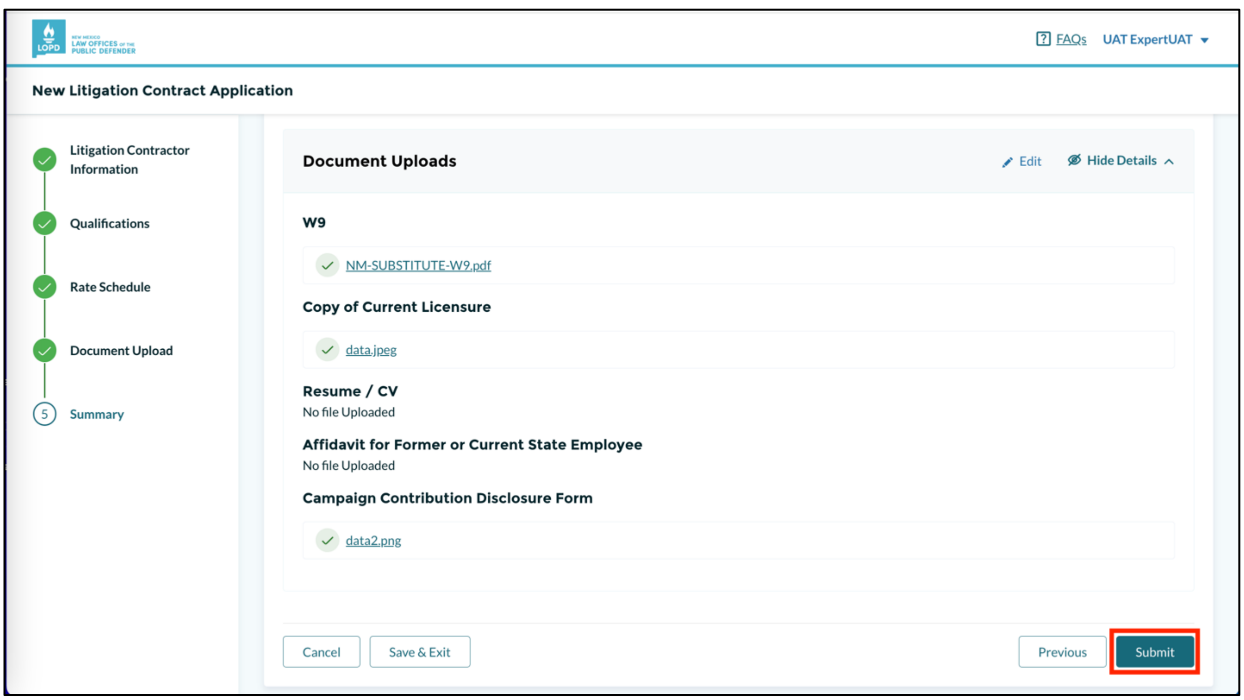
22. After uploading the required documents, click the **Save & Next** button.



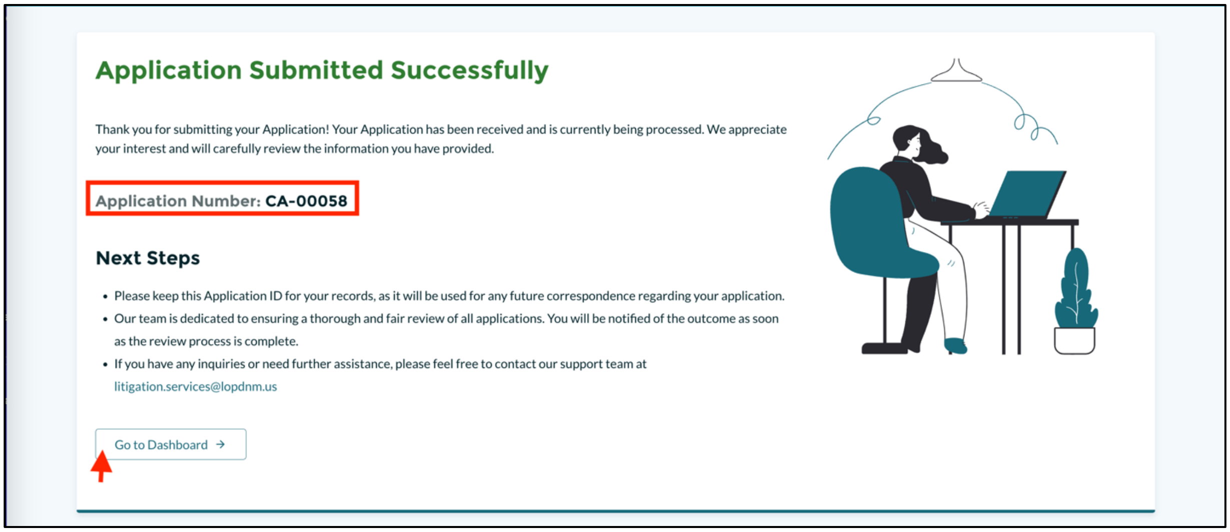
23. In the Step 5 **Summary** section, review the details entered in all the sections.
    Note: To edit any of the section's details, click the **Edit** pencil icon beside it.



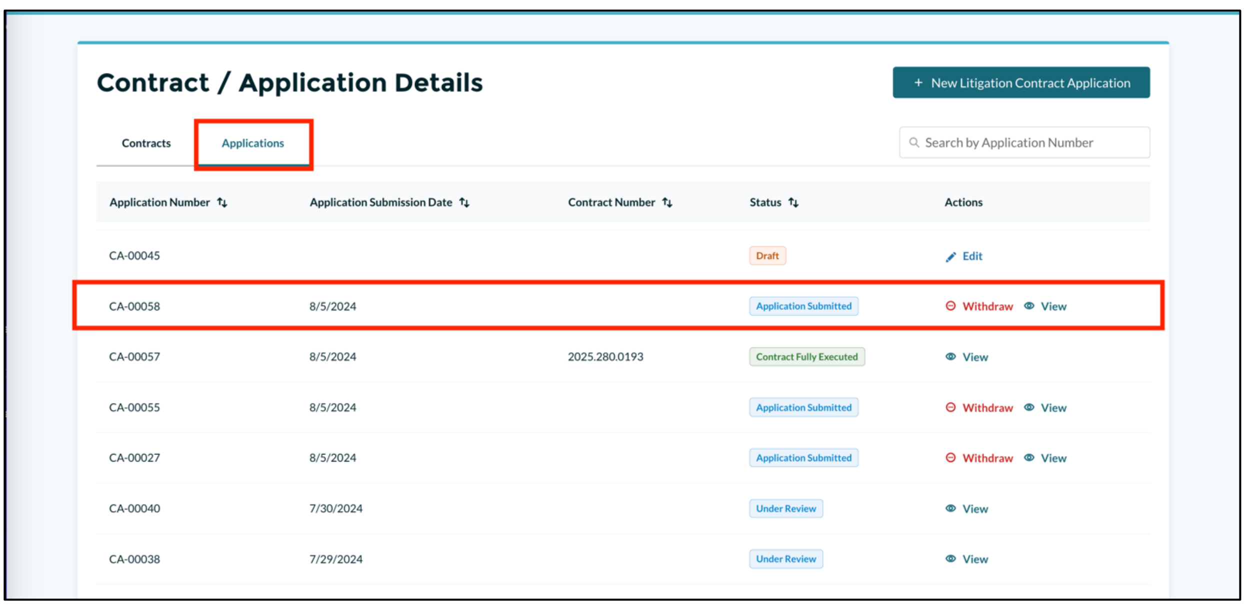
24. After reviewing the summary, click the **Submit** button to submit the litigation contract application.



25. After submitting, a success message will be displayed with the application number.
    Note: To go to the dashboard, click the **Go to Dashboard** button.



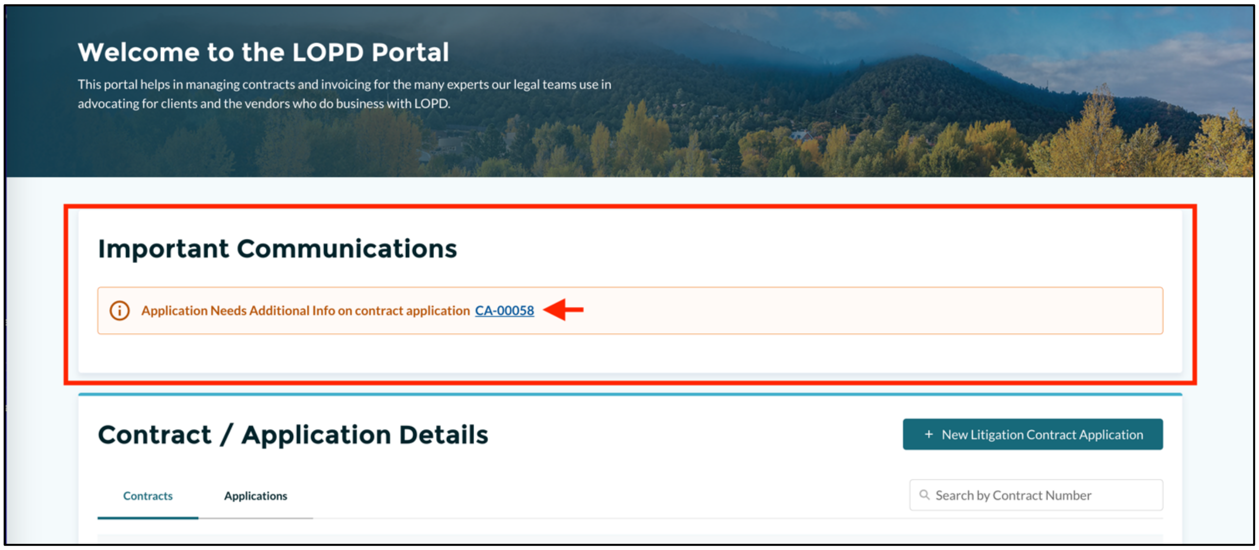
26. On the dashboard page, scroll to the **Contract/Application** Details section.
27. The newly submitted litigation contract application will be displayed under the **Applications** tab.
    Notes:
    - The status of the submitted application will be *Application Submitted*.
    - You can view the PDF version of the submitted application by clicking on the **View** button.
    - When the application status is *Application Submitted*, you can use the **Withdraw** button to withdraw your contract application.



IMPORTANT COMMUNICATIONS - CONTRACTS

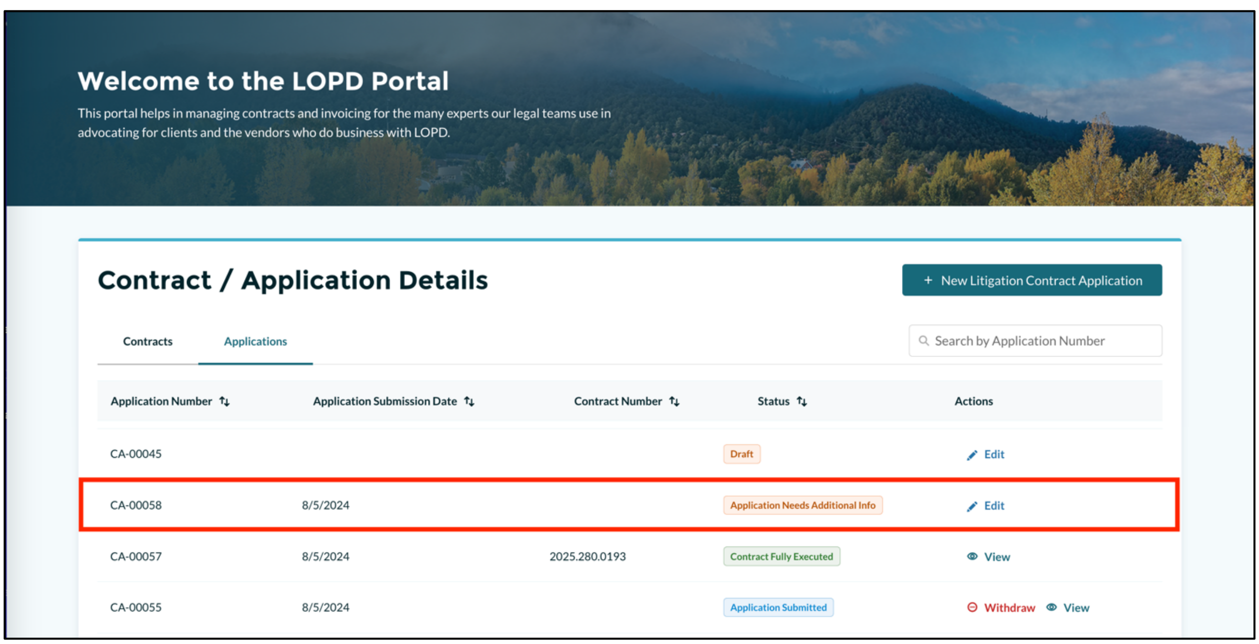
Important communications section on the Dashboard assists you in viewing notifications and pending actions to be carried out on the Portal.

Note: You can click the **Contract Application Number link** to go to the application form and to edit/update the information as requested.



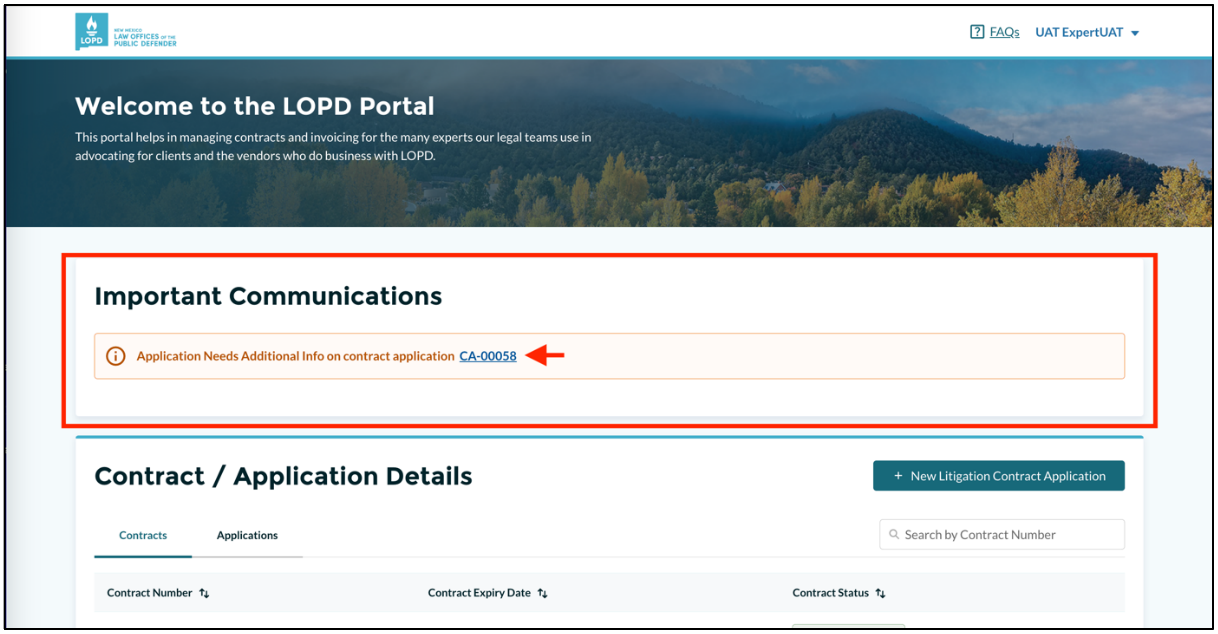
Editing and Resubmitting the Contracts Application

When the Contract Specialist requests the changes/additional information on the submitted contract application, you will receive a notification email, and the Contracts Application **Status** on the Portal will be updated to *Application Needs Additional Info*.



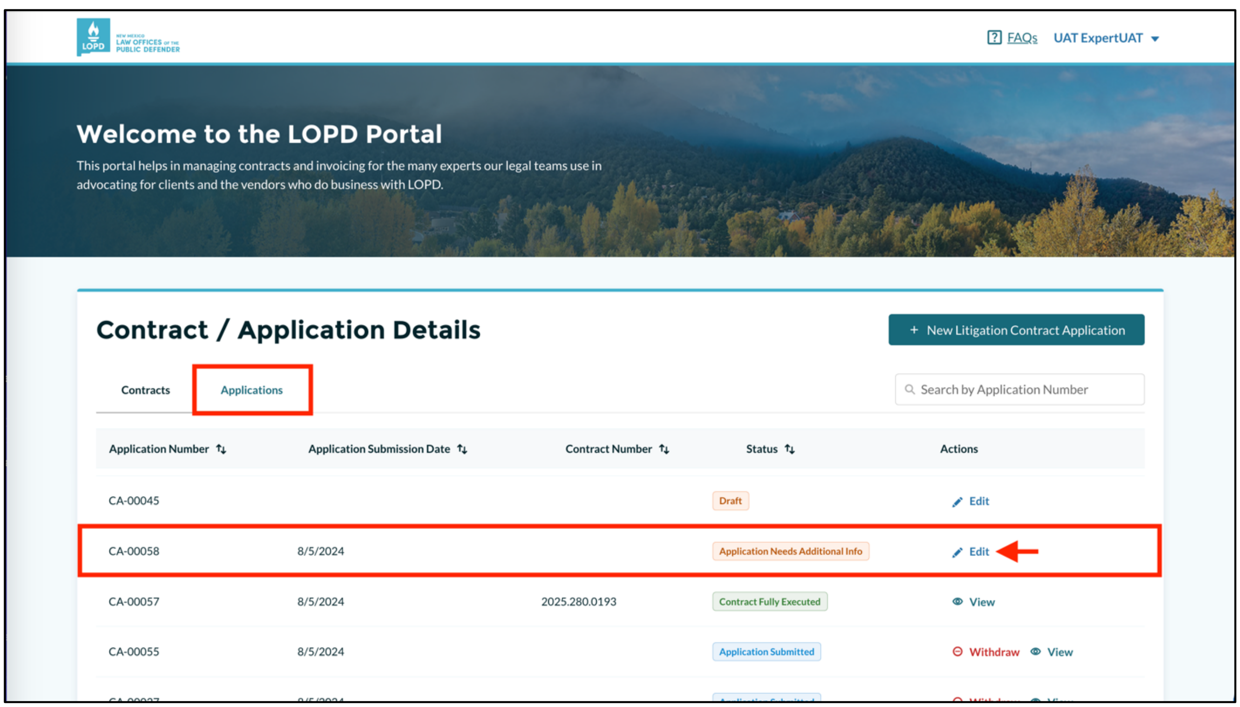
To edit and resubmit the contract application, perform the following steps:

1. On the Dashboard page, go to the **Important communications** section. Click the **Contract Application Number link** and edit/update the information as requested.



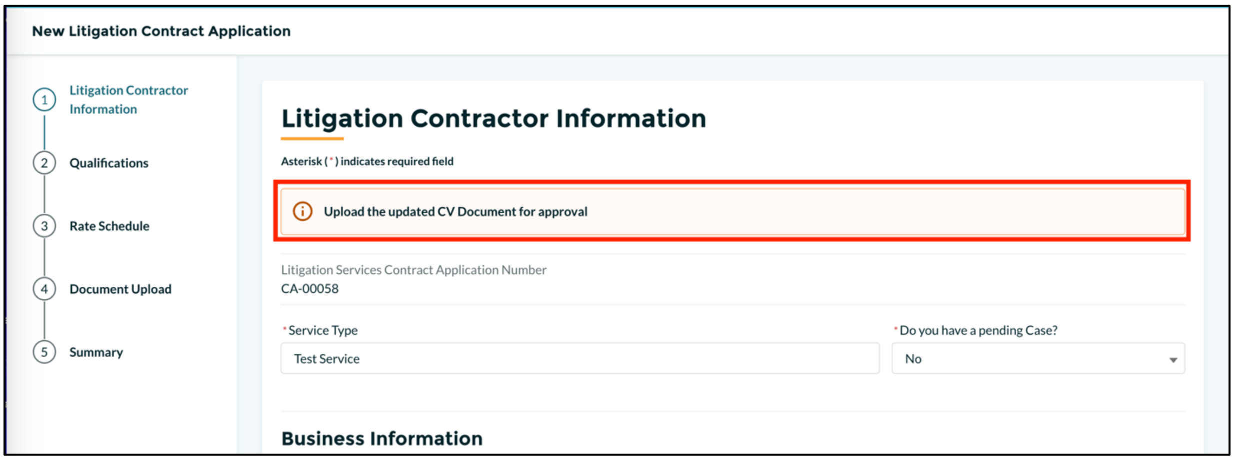
Or

2. On the Dashboard page, scroll to the **Contract/Application** Details section. Go to the **Applications** tab and then click the **Edit** button of the contract application with Status as *Application Needs Additional info*.



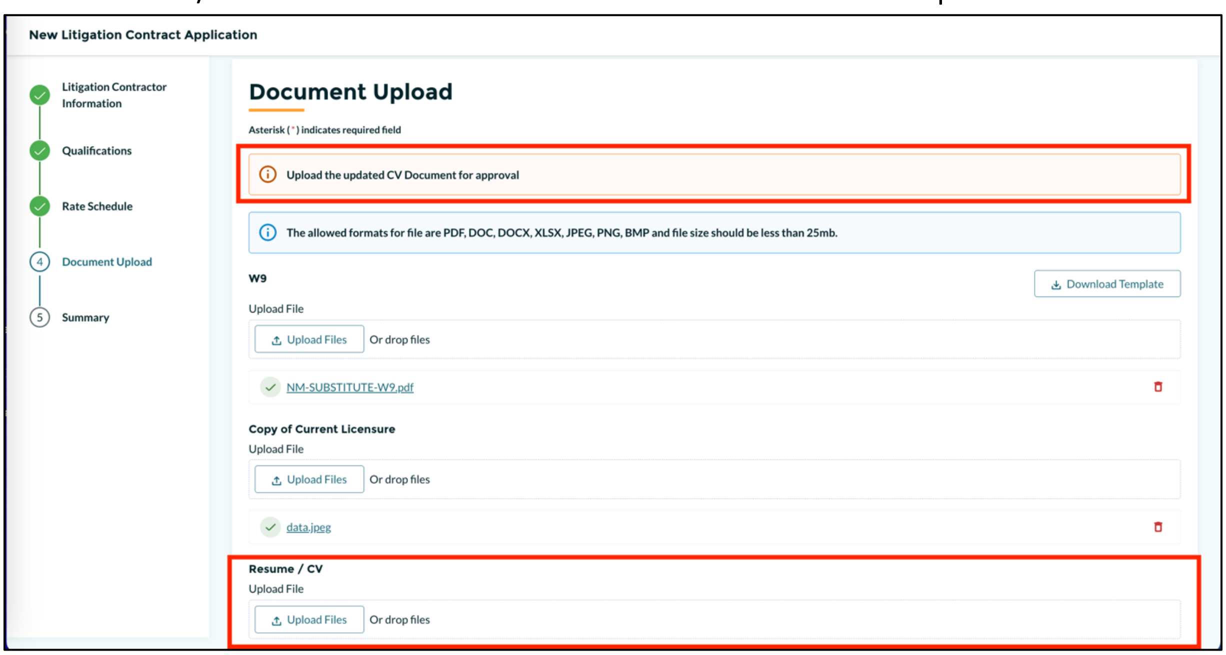
3. You will be directed to the Step 1 **Litigation Contractor information** section. The details in the application form will be populated as you previously filled in when submitting the application.
4. View the contract specialist's notes on the top of the page for requested additional information changes.

   Notes:
   - The notes from the contract specialist will be displayed in each of the steps.
   - Go to the step that needs changes/modification as per the contract specialist notes.

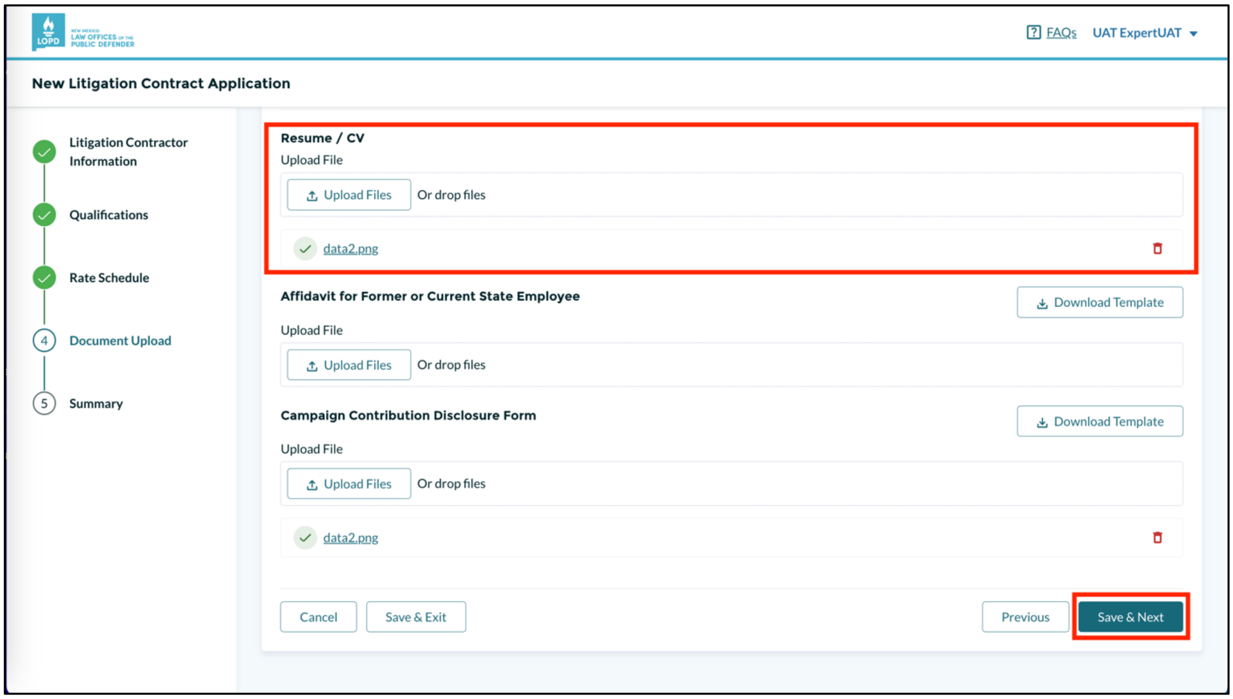


5. The contract specialist has requested that the CV be uploaded, thus we will go to the **Document Upload** section (see figure below).

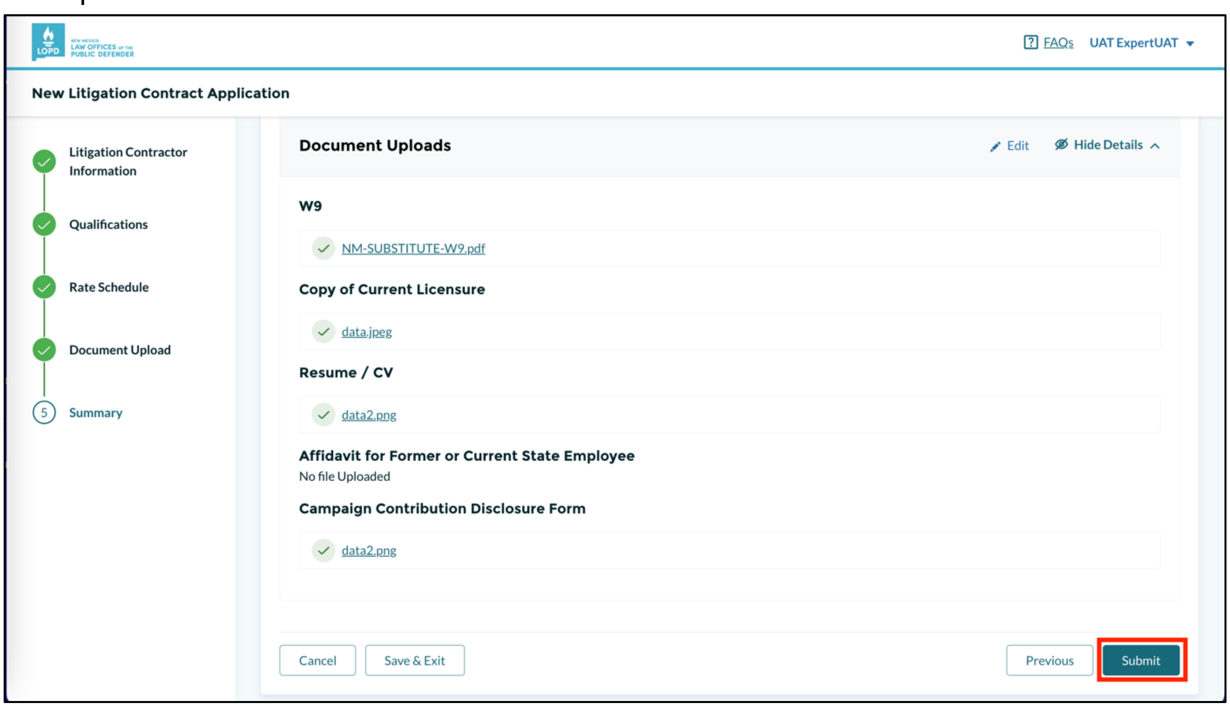
   Note: Edit/add the information on the sections based on contract specialists' notes.



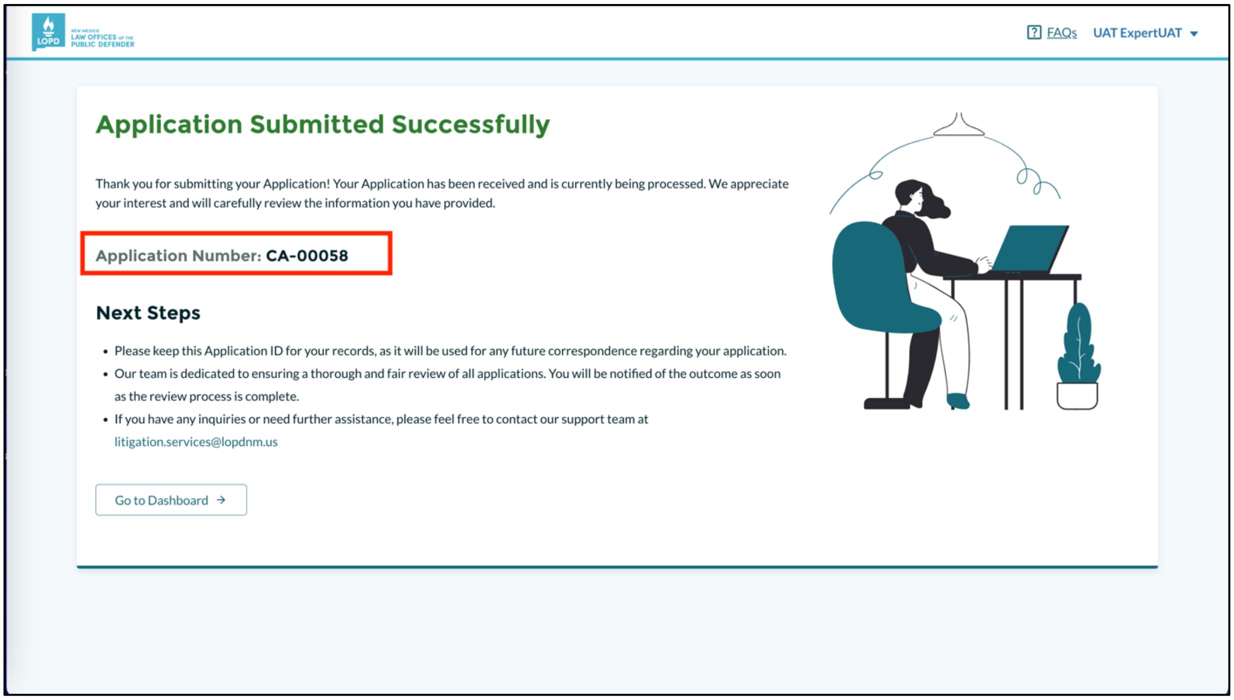
6. Click the **Upload Files** button and upload the requested document and then click **Save & Next** button.
   Note: Click the **Delete** bin icon next to the uploaded document to remove it before uploading the new one again.



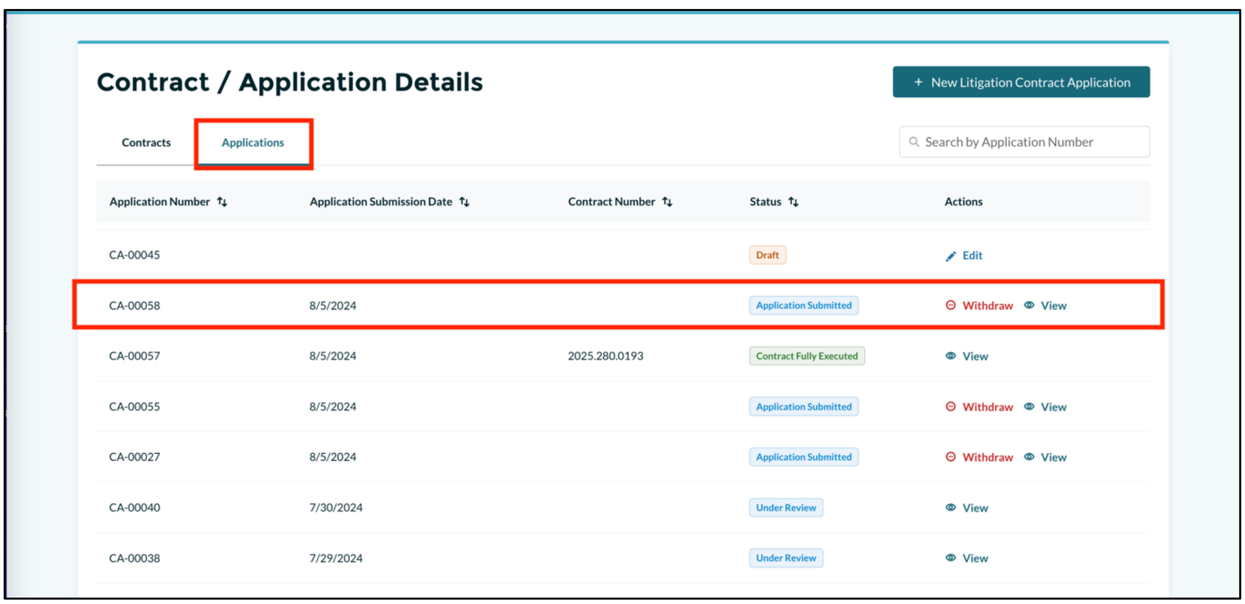
7. In the **Summary** step, review all the changes made to the application as per the contract specialist notes and then click the **Submit** button.



8. After submitting, a success message will be displayed with the application number.
   Note: To go to the dashboard, click the **Go to Dashboard** button.



After making all the required changes and resubmitting the contract application, the status changes to *Application Submitted* from *Application Needs Additional Info*.

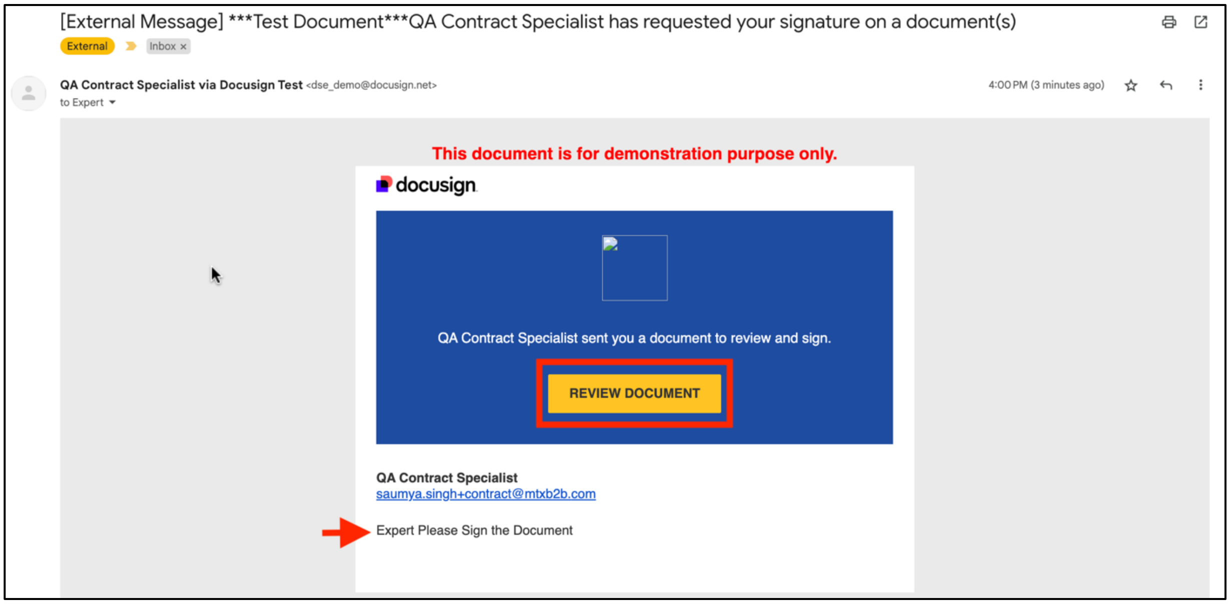


REVIEWING AND SIGNING THE LITIGATION SERVICE CONTRACT DOCUMENT USING DOCUSIGN

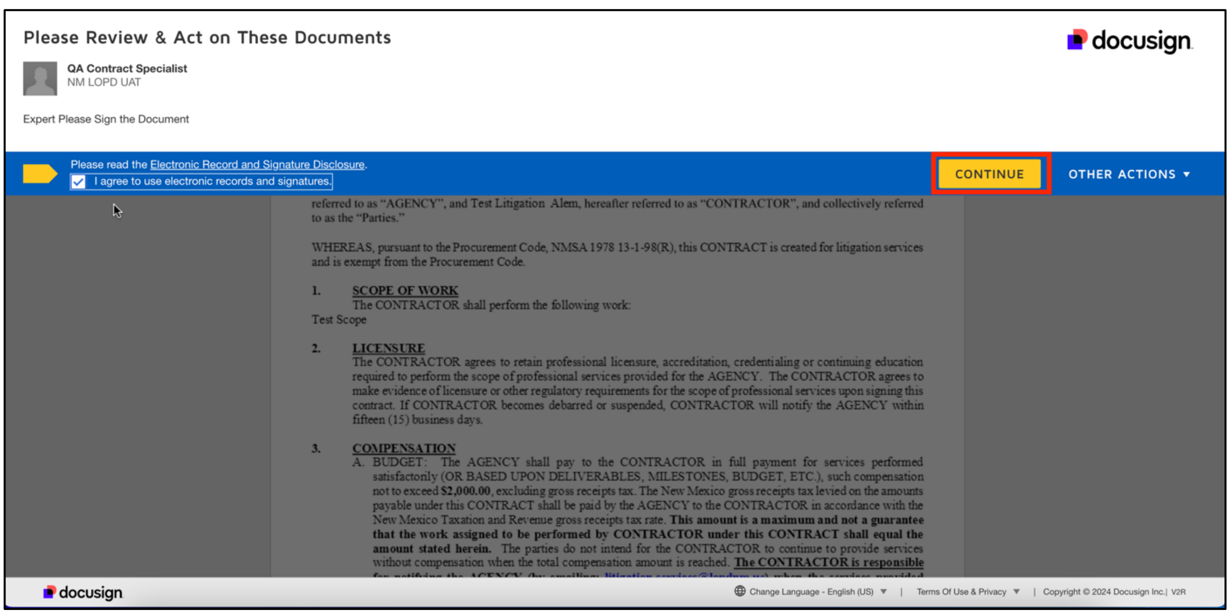
DocuSign offers solutions based on digital signature technology, making it easy to digitally sign documents. They provide an interface for sending and signing documents online.

An Expert will receive an email notification to review and sign the litigation service contract document using DocuSign.

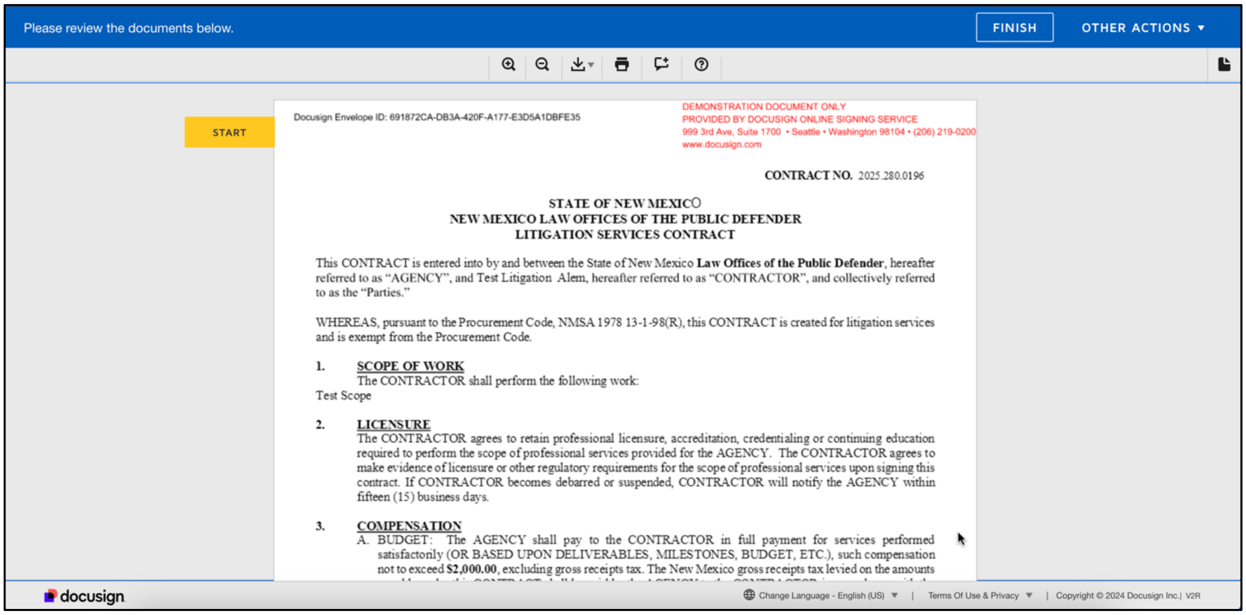
1. Open the Email, click the **Review Document** button to review and sign the document. **Note**: The email may also include notes for the expert for the reference.



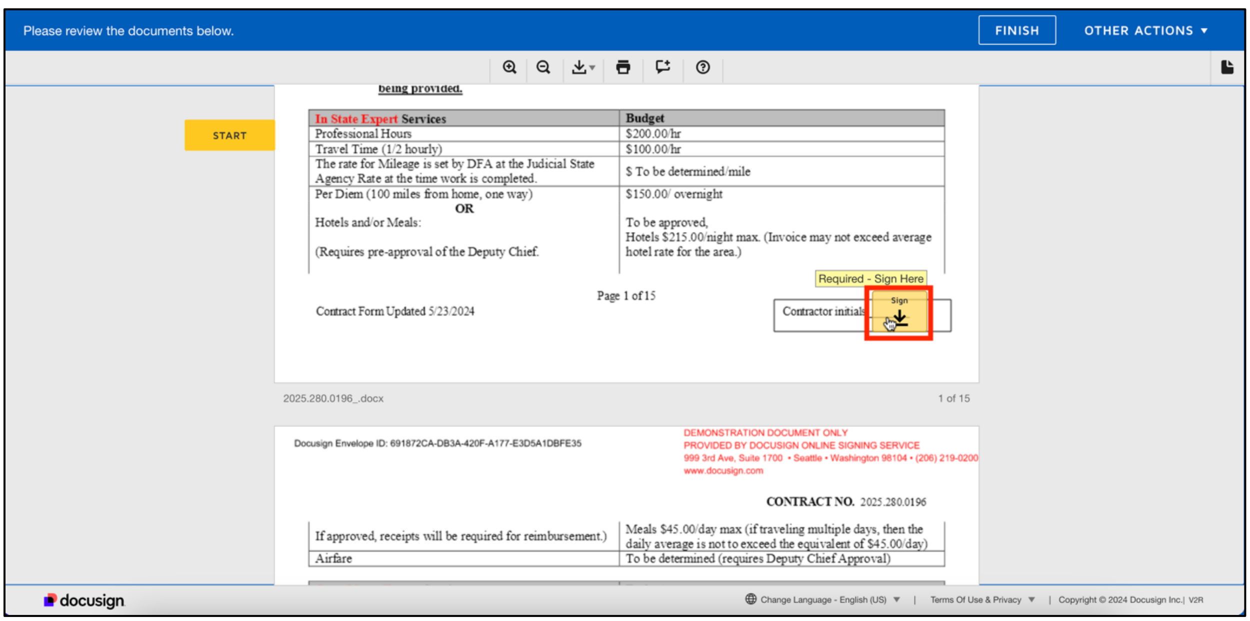
2. You will be taken to the document page, click the **Continue** button to get started.



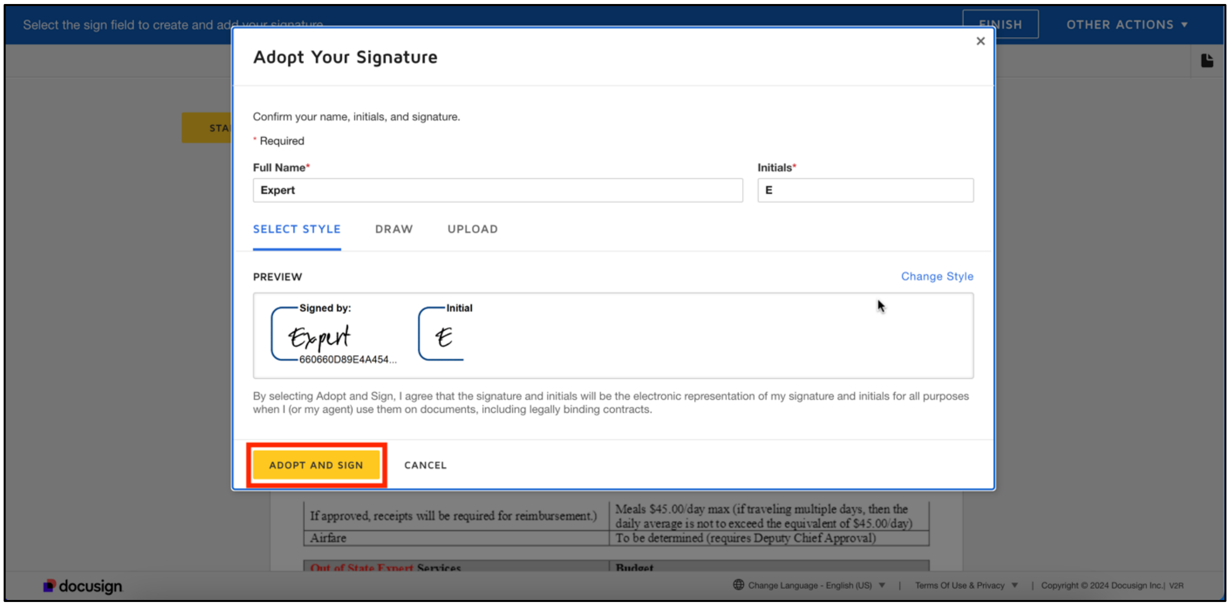
3. Scroll down to begin reviewing the document.



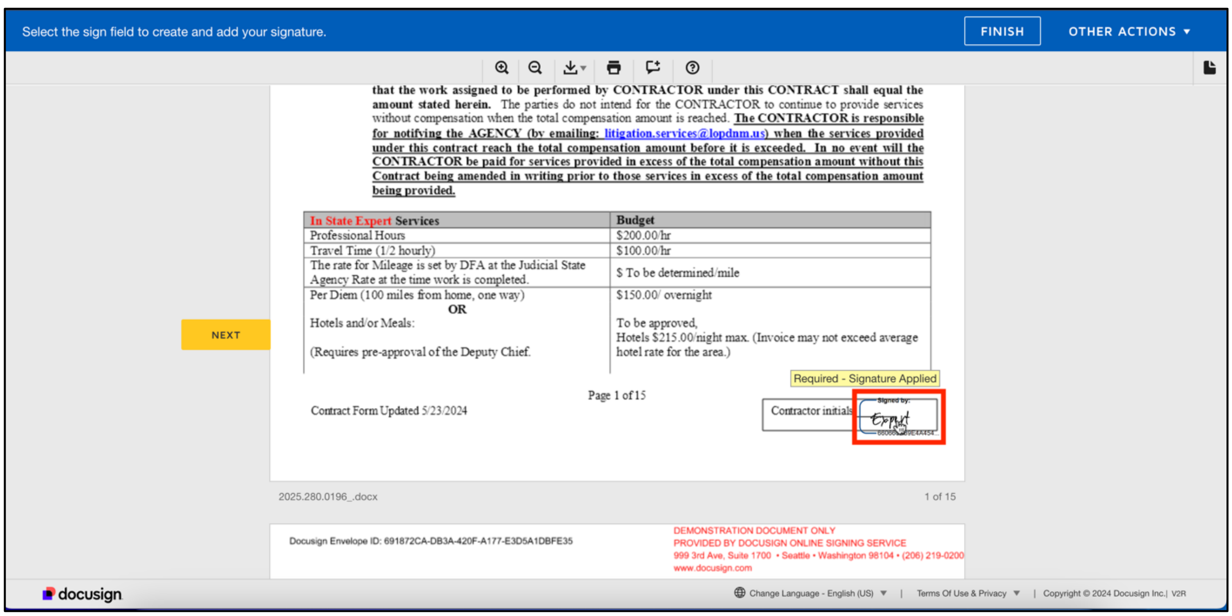
4. It is necessary for you to sign the document wherever signatures are requested. Click the **Sign Here** icon to sign the document.



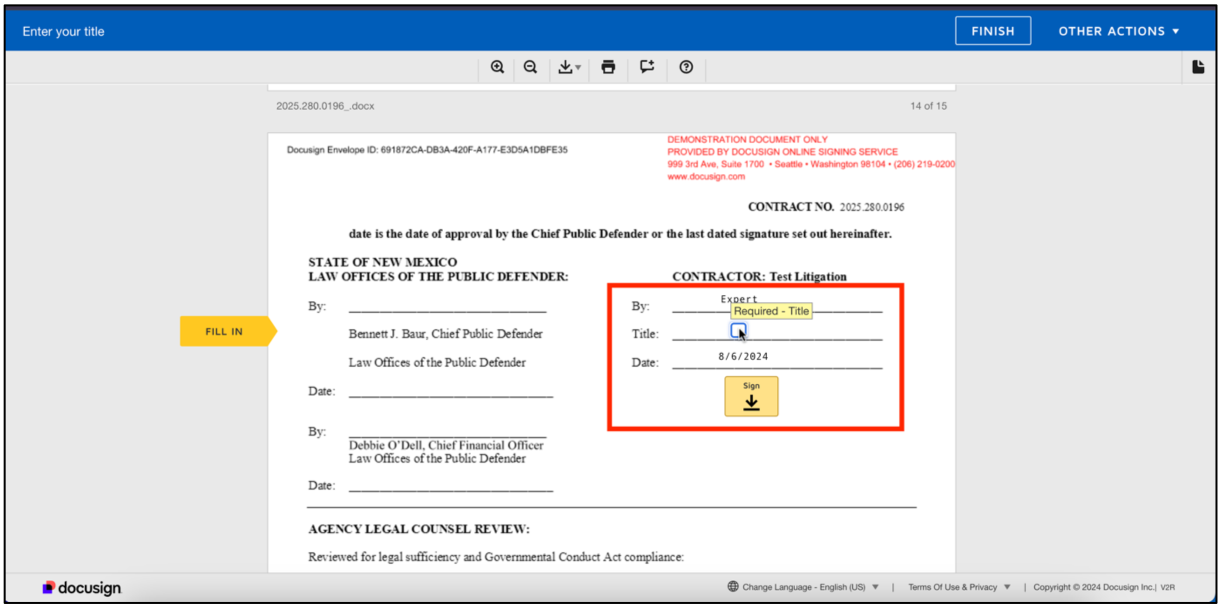
5. On the **Adopt Your Signature** pop-up, Enter the **Full Name** and **Initials**. After selecting style, preview the signature and then click on the **Adopt and Sign** button.



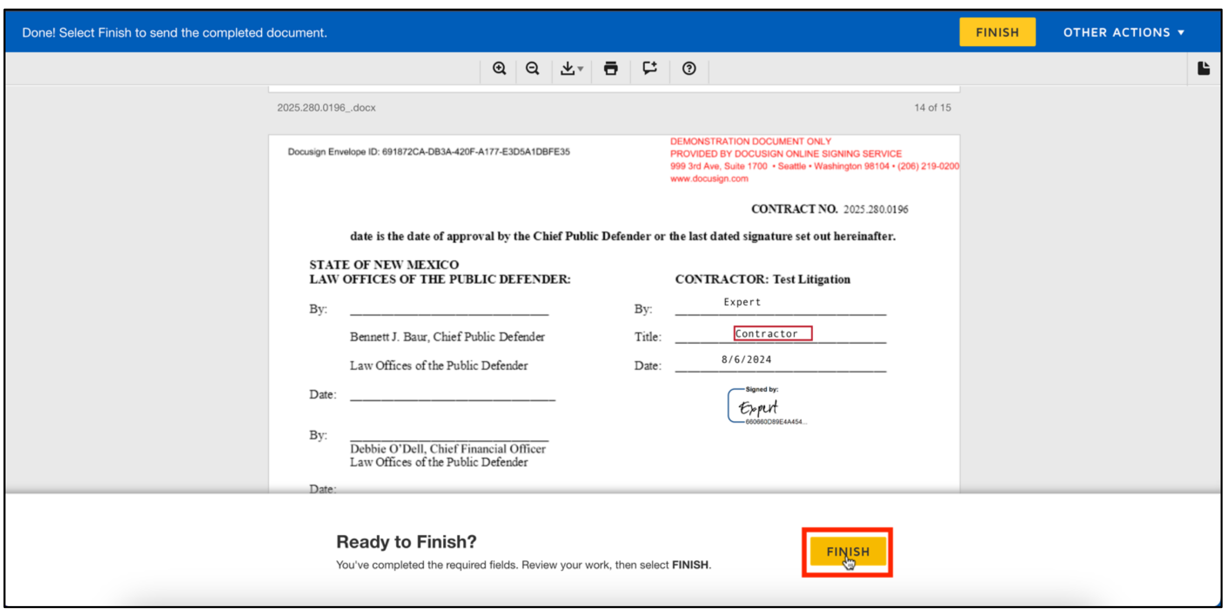
6. Your signature will be applied.



7. Scroll through the document, after reviewing, apply the signature in all the requested areas.
   Note: If asked, you might need to enter specific information or dates in the provided text boxes.



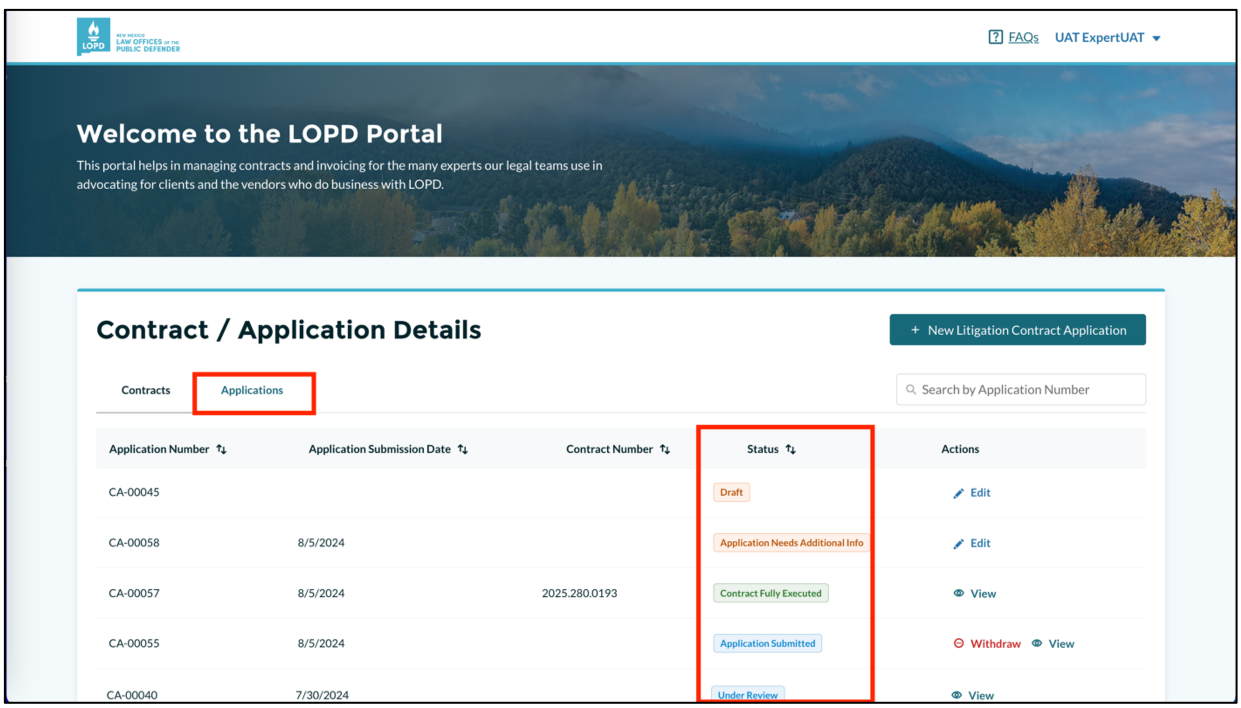
8. After reviewing & signing the document, click the **Finish** button to complete.



CONTRACT APPLICATION STATUSES - OVERVIEW

On the Dashboard page, scroll to the **Contract/Application Details** section. Go to the **Applications** tab to view the status of the contract applications (Contract Application Numbers).

1. Contract applications in the *Draft* status are those that have not been fully completed and submitted.
   Note: To resume completing draft applications, click the **Edit** pencil action button.
2. Contract applications in the *Application Submitted* status are those that have been submitted for execution.
   Note: To withdraw the submitted application, click the **Withdraw** action button. To preview the submitted application, click the **View** action button.
3. Contract applications in the *Under Review* status are those being reviewed by the contract specialists.
4. Contract applications in the *Application Needs Additional Info* status require revisions/changes as requested by contract specialists.
   Note: Click the **Edit** pencil action button to revise or make changes to the contract application.
5. Contract applications in the *Contract Fully Executed* status are those that have been reviewed, successfully executed and signed.
   Note: Every fully executed contract will be issued a unique contract number.



VIEWING ALL CONTRACTS

On the Dashboard page, scroll to the **Contract/Application Details** section. Go to the **Contracts** tab to view the fully executed contracts.

Note: Every fully executed contract will be issued with a unique contract number along with the contract expiration dates.