

NM LOPD Expert/Vendor User Guide

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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 <u>Logging in to the LOPD Portal</u> section.

To register your account, perform the following steps:

- 1. <u>Click here</u> 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.

LOPD LAW OFFICES or me PUBLIC DEFENDER	Register Aready registered? Login
	Asterisk (*) indicates required field *Registration Type Expert/Vendor Attorney Personal Details
	First Name Enter First Name here Last Name Enter Last Name here
	Contact Details • Email Address Enter your Email Address
Welcome to the LOPD Portal This portal helps in managing contracts and invoicing for the many legal teams use in advocating for clients and the vendors who do bu with LOPD.	*Confirm Email Address Enter your Email Address *Mobile Number XXX-XXX-XXXX

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.

	6-1	····		Office Phone Number	
	— ,	_		XXX-XXX-XXXX	
ত	e ID		0	Password Details	
				Enter password here	
				*Confirm Password Enter password here	
	Welcome to the LOPD Port	al		Submit	
	This portal helps in managing contracts and legal teams use in advocating for clients and with LOPD.	invoicing for the many experts our d the vendors who do business		Back to Login ? FAQs	

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

D LAW OFFICES of the PUBLIC DEFENDER				? FAQs D)hana Lucky 🕤
elcome to portal helps in mana poating for clients and	the LOPI ging contracts and i the vendors who d	D Portal invoicing for the many experts our legal teams use in o business with LOPD.	n		
				LUNG PA	
		D (-11-			
Contract /	Applicati	on Details		+ New Litigation Contract A	application

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

Hi Hu	issein,
	Welcome to NM LOPD! To get started, go to https://nmlopddemo2024qa.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. <u>Click here</u> 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.

	G	LOPD New MEXICO LAW OFFICES of THE PUBLIC DEFENDER	0 0	
Ę	IJ	Login Hello there, enter your credentials below Asterisk (*) indicates required field * Email Address Enter your Email Address * Password		
		Enter password here Forgot Password? Login Don't have an account? <u>Create Account</u> ? <u>FAQs</u>		

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

Welcome to the LOPD Portal This portal helps in managing contracts and invoicing for the many experts our legal teams use advocating for clients and the vendors who do business with LOPD.	in All and a second		
Contract / Application Details		+ New Litigation	n Contract Application
Contracts Applications		Q Search by Appl	lication Number
Application Number 1, Application Submission Date 1,	Contract Number 1	Status ↑↓	Actions
No Contract A	Sepulations Found		



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.

	? FAQs Dhana Lucky
	U Logout
Welcome to the LOPD Portal	
This portal helps in managing contracts and invoicing for the many experts our legal teams use in advocating for clients and the vendors who do business with LOPD.	aluan duas
All Draft Pending Attorney Approval Attorney Approved	+ New Invoice
Invoice Number 1 Invoice Date 1 Invoice Amount 1	Invoice Status † Actions
This portal helps in managing contracts and invoicing for the many experts our legal teams use in advocating for clients and the vendors who do business with LOPD.	Contact Us litigation.services@lopdnm.us



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.

LOPD THE PUBLIC DEFENDER DATA Lucky V					
		No Contract A	S Pplications Found		
Invoices				+ New Invoice	
All Draft	All Draft Pending Attorney Approval Q. Search by Invoice Number				
Invoice Number 1	Invoice Date ↑↓	Invoice Amount ↑↓	Invoice Status ↑↓	Actions	
LS-INV-000030	7/18/2024	\$0.00	Draft	🖌 Edit 🛛 S Cancel	

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 <u>Litigation.services@lopdnm.us</u>. You can click the **Cancel** button to go to the prior page.

LOPD VEW VIEW OFFICES or the PUBLIC DEFENDER	?] FAQs Dhana Lucky ▼
New Invoice	
① Coversheet	You cannot submit a new invoice because there are no approved Litigation Service Requests (LSRs). For further assistance, please contact litigation.services@lopdnm.us.
2 Itemized Statement	
3 Document Upload	Cancel



- 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.

LOPD NEW MOOD LAW OFFICES or the PUBLIC DEFENDER			? FAQs Dhana Lucky 🔻
New Invoice			
1 Coversheet	Coversheet		
3 Document Upload	Please retain all documentation, re- not a records repository.	ceipts, and other information related to your	invoices for your own records. This invoicing platform is
4 Review and Summary	Bill To Litigation Services, Law Office of the Public D 301 N. Guadalupe St, Santa Fe, NM 87501, 505-395-2888	efender,	
	Mail To litigation.services@lopdnm.us	Invoice Number	Invoice Date
	*Legal Name or Business Name ①	*Phone Number	Supplier ID
	Dhana Lucky	(950) 253-6367	Enter Supplier ID here
	Address Information		
	*Physical Street Address 1	Physical Street Address 2	* City
	Enter Address here		Enter City here

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

LOPD LAW OFFICES of the PUBLIC DEFENDER			? FAQs Dhana Lucky ▼
New Invoice			
1 Coversheet	Address Information		
Ī	*Physical Street Address 1	Physical Street Address 2	* City
2 Itemized Statement	New Whale		Roswell
	* State	*Zip Code	* Country
	NM	32453	New Mexico
		No records found	



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

LOPD NEW MEXAD LOPD PUBLIC DEFENDER			? FAQs Dhana Lucky ▼
New Invoice			
1) Coversheet	Address Information		
	* Physical Street Address 1	Physical Street Address 2	* City
2 Itemized Statement	New Whale		Roswell
Ĭ	*State	*Zip Code	*Country
3 Document Upload	NM	32453	New Mexico
4 Review and Summary	Expert Services		+ New
		No records found	
	Cancel Save & Exit		Save & Next

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.

Asterisk (*) indicates required field			
Case Number		Client Name	
D-202		٩	
D-202-CR-2020-01281			
Description of Service			
Date of Service From		*Date of Service To	
MM/DD/YYYY	Ħ	MM/DD/YYYY	Ē
MM/DD/YYYY	Ħ	MM/DD/YYYY	Ħ

- 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.

Asterisk (*) indicates required field				
*Case Number			Client Name	
D-202-CR-2020-01281		×	LogiTech	
*Description of Service				
Expert advice				
*Date of Service From	*D	ate of Service	То	h
6/28/2024		6/30/2024		Ħ

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.

DPD LAW OFFICES of the PUBLIC DEFENDER				[]	FAQs Dhana Lucky
ew Invoice					
Course to at	Dhana Lucky		(950) 253-6367	Enter Supplier ID here	
Coversneet					
Itemized Statement	Address Information	1			
Designed	Physical Street Address 1 New Whale	Pr	nysical Street Address 2	*City Roswell	
) Document Opload	* State	•z	lip Code	* Country	
Review and Summary	NM		32453	New Mexico	
	Expert Services				+ New
	Case Number	Client Name	Description of Service	Dates of Service	Actions
	D-202-CR-2020-01281	LogiTech	Expert advice	6/28/2024-6/30/2024	
	Cancel Save & Exit				Save & Next



- 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.

PD LAW OFFICES or the PUBLIC DEFENDER	FAQs Dhana Lucky
w Invoice	
Coversheet	Itemized Statement
Itemized Statement	Please retain all documentation, receipts, and other information related to your invoices for your own records. This invoicing platform is not a records repository.
Review and	D-202-CR-2020-01281 LogiTech + Add Itemized Statement
Summary	Billing Type Taxable Rate Units Total Actions
	Billing Sub Total \$0
	*Tax Rate 0.00% Tax Amount : \$0
	Total Amount : \$0
	Total Amount : \$0
	Cancel Save & Exit Save & Next

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.

Add/Edit Item	×
Asterisk (*) indicates required field * Billing Type	
Select Value	
Legal Expert Mileage	
	ian induit . yu



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

Add/Edit Item		
Asterisk (*) indicates required field		
*Billing Type		
Legal Expert		
*Rate Type	Remaining Budgeted Amount	Budget Pending Approval
Hourly Rate	▼ \$2,700.00	\$2,700.00
Remaining Budgeted Units		
18		
*Description of Service		
Legal Advice		

- 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.

NEW MERICO LAW OFFICES or the PUBLIC DEFENDER				? FAQs Dhana Luck
Invoice				
Add/Edit Item				×
Legal advice				
Date/Time of Service Fro	om ①	Date/Time of Service To ①		
Date	9:45 AM	Date Time Option Jun 27, 2024 11:45	5 AM (3)	
*Hourly Rate		*Hours Worked	* Total	
\$150.00		2	300	
Service is Taxable				
Yes				
				Cancel
	Cancel	Save & Exit		Previous Save & Next



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

You can add multiple Billing Types.

New Invoice							
Coversheet	Itemized Statement Asterisk (*) indicates required field						
2 Itemized Statement	Please retain all documentation, receipts, and other information related to your not a records repository.	invoices fo	or your own	records. This	invoicing pl	latform i	is
3 Document Upload	D-202-CR-2020-01281 LogiTech			+ Add	d Itemized Sta	atement	
Summary	Billing Type	Taxable	Rate	Units	Total	Actio	ons
	Legal Expert	Yes	\$150/Hr	2.00 Hours	\$300.00	/	ō
	Mileage	Yes	\$50/Mile	1 Miles	\$50.00	1	ō
			Billi	ng Sub Total	\$350		
	'Tax Rate	e 0.00%		Tax Ar	mount : \$0		
				Total Amou	unt : \$350		
					Total A	mount :	\$350

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

Note: Based on the Tax Rate, the Tax Amount and Total Amount fields will be autopopulated.

20. Click the Save & Next button.

Invoice						
Coversheet	i Please retain all documentation, receipts, a not a records repository.	nd other information related to your invoic	es for your own	records. This	s invoicing pl	atform is
Itemized Statement	D-202-CR-2020-01281 LogiTech			+ Ad	d Itemized Sta	atement
D	Billing Type	Taxabl	e Rate	Units	Total	Actions
Document Upload	Legal Expert	Yes	\$150/Hr	2.00 Hours	\$300.00	/ 0
Summary	Mileage	Yes	\$50/Mile	1 Miles	\$50.00	/ 0
			Bill	ng Sub Total	\$350	
		*Tax Rate 10.0	0% 🔶	Tax Am	nount : \$35	
				Total Amo	unt : \$385	
					Total A	mount : \$385
	Cancel Save & Exit			Previo	us Sa	ve & Next



21. In the Step 3 Document Upload section, perform the following steps:

22. To upload the document, click the **Upload Files** button.

LOP DUBLIC DEFENDER	[?] FAQs Dhana Lucky ▼
New Invoice	
Coversheet Itemized Statement	Document Upload Asterisk (*) indicates required field The allowed formats for file are PDF, DOC, DOCX, XLSX, JPEG, PNG, BMP and file size should be less than 25mb.
3 Document Upload 4 Review and 5 Summary	D-202-CR-2020-01281 LogiTech Lodging Upload File
	▲ Upload Files Or drop files Transportation Upload File ▲ Upload Files Or drop files
	Meals Upload File

An Upload Files pop-up will be displayed.

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

ie al	× Upload Files	ould be
CR-2	Screenshot 2024-06-28 at 7.20.42	
g File	1 of 1 file uploaded	
Uple	oad Files Or drop files	

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.

LOPD NEW ACCES OF INE PUBLIC DEFENDER		? FAQs Dhana Lucky ▼
New Invoice		
Coversheet	Screenshot 2024-06-28 at 7.20.42 PM.png Transportation Unload File	0
Itemized Statement	2. Upload Files Or drop files	
3 Document Upload	Screenshot 2024-06-28 at 7.31.45 PM.png	٥
4 Review and Summary	Meals Upload File	
	Other Upload File	
	Cancel Save & Exit Pr	Save & Next

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

LOPD NO METRO CES de tie LAW OFFICES de tie PUBLIC DEFENDER			[?] FAQs Dhana Lucky ▼
New Invoice			
Coversheet	Review and Summar	у	
V Itemized Statement	Coversheet		🖍 Edit 🛛 🗭 Hide Details 🧄
Document Upload Review and Summary	Bill To Litigation Services, Law Office of the Pul 301 N. Guadalupe St, Santa Fe, NM 875 505-395-2888	blic Defender, 501,	Mail To litigation.services@lopdnm.us
	Invoice Number LS-INV-000220	Invoice Date	Invoice Status Draft
	Legal Name or Business Name Dhana Lucky	Phone Number (950) 253-6367	Supplier ID
	Address Information		
	Business Address New Whale, Roswell, NM, 32453, New M	Mexico	
	Expert Services		

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



28. Click the **Submit** button.

LOPD NUMERO UDPD UBLIC DEFENDER		?] FAQs Dhana Lucky ▼
New Invoice		
Coversheet	Screenshot 2024-06-28 at 7.31.45PM.png Meals No file Uploaded	
Document Upload	Other No file Uploaded	
4 Review and Summary	Attestation	Ø Hide Details ∧
	I certify this is a true and correct invoice and the payment for said invoices has not been not bee	eceived.
	Signature Date D Lucky 6/28/2024	a
	Cancel Save & Exit	Previous Submit

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.

<section-header><section-header> Analytic of submitting your invoice! Your invoice has been received and is currently being processed. Thank you for submitting your invoice! Your invoice has been received and is currently being processed. Thank you for the work you provide for our clients and attorneys. Invoice Number: LS-INV-000068 Please keep this Invoice ID for your records, as it will be used for any future correspondence regarding your application. This is your only opportunity to download this invoice for your records. Litigation Services does not ave access to copies. Our team is thoroughly reviewing your invoice. You will be notified of any needed information or approval for payment. Itigation.services@lopdmr.us 2 Download Invoice </section-header></section-header>	LOPD FUELC DEFENDER	? FAQs Dhana Lucky 🔻
	<section-header> Invoice Submitted Successfully There you for submitting your Invoice! Your Invoice has been received and is currently being processed. Thank you for the for your provide for our clients and attorneys. Invoice Number: LS-INV-000068 Please keep this Invoice ID for your records, as it will be used for any future correspondence regarding your goldetion. This is your only opportunity to download this invoice for your records. Litigation Services does not busine to contact our support team at itigation. services@lopdm.us I you have any inquiries or need further assistance, please feel free to contact our support team at itigation. services@lopdm.us I wonload Invoice I cont Dashboard II </section-header>	PAQs Dhana Lucky •



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.

All Draft	Pending Attorney Approval			Q Search by Invoice Number
Invoice Number 1	Invoice Date ↑↓	Invoice Amount ț	Invoice Status ↑↓	Actions
KS-INV-000220	6/28/2024	\$385.00	Pending Attorney Approval	View O Withdraw

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

						D-202-CR-2020-012	31 D-202-CR-202	0-01281		
Bill To						Billing Type	Tarable	Rate	Units	Total
Litigation Services	Law Office of the	e Public Defender				Legal Expert	Yes	\$150.00/Hr	2.00 Hours	\$300.00
Santa Fe, NM 875	i01					Mileage	Yes	\$50.00/Mile	1.00 Miles	\$50.00
Contact Email litigation.services@	@lopdnm.us	Invoice Number LS-INV-000220	Invoice 06/28/2	e Date 2024				Tax Rate: 10.00	Billing Sul % Tax	b Total: \$350.00 Amount: \$35.00
				10	-				Total A	mount : \$385.00
Dhana Lucky	siness Name	(950) 253-6367	Supplie	er ID					Total	Amount : \$385.0
Business Address 588 Chapmans La	ane, Santa Rosa, I	NM, 88435, United S	States			Uploaded Documer	its			
Business Address 588 Chapmans La Expert Services	s ane, Santa Rosa, I S	NM, 88435, United S	States			Uploaded Documer D-202-CR-2020-012 Lodging Screenshot 2024-06	1ts 31 LogiTech 28 at 7.20.42PM.p	ng		
Business Address 588 Chapmans La Expert Services Case Number	s ane, Santa Rosa, I S Client Name	NM, 88435, United 5 Description of Service	States Dates of Service	Amount		Uploaded Documer	115 31 LogiTech 28 at 7.20.42PM.¢ 28 at 7.31 45PM ¢	ng		
Business Address 588 Chapmans La Expert Services Case Number D-202-CR-2020-01	s Client Name 28Jog/Tech	NM, 88435, United 5 Description of Service Expert advice	Dates of Service 06/28/2024 -06/30/2024	Amount \$385.00		Uploaded Document	115 31 LogiTech 28 at 7.20.42PM.; 28 at 7.31.45PM.;	ing		
Business Address 588 Chapmans La Expert Services Case Number D-202-CR-2020-01	s ane, Santa Rosa, I S Client Name 28Jog/Tech	NM, 88435, United 5 Description of Service Expert advice	Dates of Service 06/28/2024 -06/30/2024	Amount \$385.00		Uploaded Document D-202-CR-2020-012 Lodging Screenshot 2024-06 Meals No files uploaded. Other	tts 31 LogiTech 28 at 7.20.42PM.g 28 at 7.31.45PM.g	ng		
Business Address 588 Chapmans La Expert Services Case Number D-202-CR-2020-01	s S Client Name 128Jog/Tech	NM, 88435, United 5 Description of Service Export advice	Dates of Service	Amount \$385.00		Uploaded Document D-202-CR-2020-012 Lodging Screenshot 2024-06 Transportation Screenshot 2024-06 Meals No files uploaded. Other No files uploaded.	tts 31 LogiTech 28 at 7.20.42PM.; 28 at 7.31.45PM;	ng		
Business Address 588 Chapmans La Expert Services Case Number D-202-CR-2020-01	s S Client Name 1283og/Tech	NM, 88435, United 5 Description of Service Expert advice	Dates of Service 06/28/2024 -06/30/2024	Amount \$385.00		Uploaded Document D-202-CR-2020-012 Lodging Screenshot 2024-06 Transportation Screenshot 2024-06 Meals No files uploaded. Other No files uploaded.	tts 31 LogiTech 28 at 7.20.42PM.g 28 at 7.31.45PM.g	ng		
Business Address 588 Chapmans La Expert Service: Case Number D-202-CR-2020-01	s s Client Name 1283ogTech	NM, 88435, United 5 Description of Service Expert advice	Dates of Service	Amount \$385.00		Uploaded Documer D-202-CR-2020-012 Lodging Screenshot 2024-06 Meals No files uploaded. Other No files uploaded.	tts 31 [LogiTech 28 at 7.20.42PM.¢ 28 at 7.31.45PM.¢	ng		



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*.

All Draft	Pending Attorney Approval	Attorney Approved		R Search by Invoice Number
Invoice Number 🗘	Invoice Date ↑↓	Invoice Amount 🗘	Invoice Status ↑↓	Actions
LS-INV-000220	6/28/2024	\$385.00	Pending Litigation Services Approval	© View

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*.

All Draft	Pending Attorney Approval At	ttorney Approved	Q Se	arch by Invoice Number
Invoice Number 🗘	Invoice Date ↑↓	Invoice Amount 1	Invoice Status 🗘	Actions
LS-INV-000220	6/28/2024	\$385.00	Sent to State for Payment	View



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.

	[?] FAQs Dhana Lucky ▼
and the second	
Welcome to the LOPD Portal This portal helps in managing contracts and invoicing for the many experts our legal teams use in advocating for clients and the vendors who do business with LOPD.	Salar Dorn
Important Communications	
Contract / Application Details	+ New Litigation Contract Application
Contracts Applications	



UPDATING THE INVOICE

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

LS-INV-000220	6/28/2024	\$385.00	Invoice Needs Revisions	🖍 Update
Invoice Number ț	Invoice Date 14	Invoice Amount 1	Invoice Status 14	Actions
LS-INV-000220	6/28/2024	\$385.00	Attorney Changes Requested	💉 Update
Invoice Number 🗘	Invoice Date ↑↓	Invoice Amount ↑↓	Invoice Status 14	Actions

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 🔉 🔤
•	NMLOPD anushka.bansal@mtxb2b.com <u>via</u> 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 Iitigation.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*.

All Draft	Pending Attorney Approval	Attorney Approved		Q Search by Invoice Number
Invoice Number ↑↓	Invoice Date 1	Invoice Amount 1	Invoice Status 14	Actions
LS-INV-000220	6/28/2024	\$385.00	Attorney Changes Requested	💉 Update

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

NUV ARXXXI LANY OFFICES of the PUBLIC DEFENDER		[7] FAQs Dhana Luc
ck to Dashboard		
voice Summary		
Coversheet		ø∕ Hide Details ∧
Bill To Litigation Services, Law Office of the Public Defender, 301 N. Guadalupe St, Santa Fe, NM 87501, 505-395-2888		Mail To litigation.services@lopdnm.us
Invoice Number LS-INV-000220	Invoice Date 2024-06-28	Invoice Status Attorney Changes Requested
Legal Name or Business Name Dhana Lucky	Phone Number (950) 253-6367	Supplier ID

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

OPD LAW OFFICES of the PUBLIC DEFENDER				?	FAQs Dhana Lucky
Business Address New Whale, Roswell, NM, 324	53, New Mexico				
Expert Services					
Changes are pending	for one or more expert s	services. Please review all the ne	ecessary modifications for each service b	efore proceeding.	
Case Number	Client Name	Description of Service	Status	Date of Service	Amount
D-202-CR-2020-01281	LogiTech	Expert advice	Attorney Changes Requested Show Details	6/28/2024-6/30/2024	\$385.00
Total Amount					\$385.00
L					



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

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

ime	Additional Details Required	ł	×
	Upload supporting documents		
		Cancel	dit Invoice

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.

LOPD LOPD PUBLIC DEFENDER		? <u>FAQs</u> Dhana Lucky ▼
New Invoice		
Coversheet	Screenshot 2024-06-28 at 7.20.42 PM.png	D
	Transportation	
Itemized Statement	Upload Files Or drop files	
3 Document Upload	Screenshot 2024-06-28 at 7.31.45 PM.png	0
Review and	Meals	
Gummary	Upload File	
	Other	
	Upload File	

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

3 Document Upload	Meals Upload File	
4 Review and Summary	⊥ Upload Files Or drop files	
	Other Upload File	
	 ✓ Screenshot 2024-06-28 at 7.33.11 PM.png □ 	
	Cancel Save & Exit Save & Next	



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

ew Invoice Coversheet Itemized Statement Document Upload Review and Summary Attestation Itemized invoices has not been received. Signature Date Itemized invoices has not been received. Signature Date Itemized invoices has not been received. Itemized invoices has not has	Dhana Lucky
Coversheet Meals Itemized Statement Other Document Upload Screenshot 2024-06-28 at 7.33.11 PM,png Attestation Screenshot 2024-06-28 at 7.33.11 PM,png Attestation Image: Meals Image:	
Coversheet Meals No file Uploaded Other Document Upload Review and summary Attestation Attestation Signature Date Date Date Duckyl	
Itemized Statement Document Upload Review and Summary Attestation Iterify this is a true and correct invoice and the payment for said invoices has not been received. Signature Date Icertify this is a true and correct invoice and the payment for said invoices has not been received. Signature Date Icertify this is a true and correct invoice and the payment for said invoices has not been received.	
Document Upload Review and summary Attestation I certify this is a true and correct invoice and the payment for said invoices has not been received. Signature Date I Luckyl I Luckyl	
Beview and Summary Attestation I certify this is a true and correct invoice and the payment for said invoices has not been received. Signature Date D Lucky 6/28/2024	
Review and Summary Attestation #Hide I certify this is a true and correct invoice and the payment for said invoices has not been received. Signature Date 6/28/2024	
Attestation I certify this is a true and correct invoice and the payment for said invoices has not been received. *Signature Date 6/28/2024	
I certify this is a true and correct invoice and the payment for said invoices has not been received. *Signature D Lucky D Lucky 6/28/2024	Details 🔨
Signature Date 6/28/2024	
D Lucky	
Cancel Save & Exit Previous	Submit

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

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

Invoice Submitted Successfully	
Thank you for submitting your Invoice! Your Invoice has been received and is currently being processed. We appreciate your interest and will carefully review the information you have provided.	A A
Invoice Number: LS-INV-000220	
 Next Steps Please keep this Invoice ID for your records, as it will be used for any future correspondence regarding your application. Our team is dedicated to ensuring a thorough and fair review of all applications. You will be notified of the outcome as soon as the review process is complete. If you have any inquiries or need further assistance, please feel free to contact our support team at litigation.services@lopdnm.us 	



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*.

All Draft	Pending Attorney Approval	Attorney Approved		୍ Search by Invoice Number
Invoice Number 🗘	Invoice Date ↑↓	Invoice Amount 🗘	Invoice Status 🗘	Actions
LS-INV-000220	6/28/2024	\$385.00	Pending Litigation Services Approval	view

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 🕨 🔤
•	NMLOPD anushka.bansal@mtxb2b.com <u>via</u> 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*.

All Draft	Pending Attorney Approval	Attorney Approved		Q Search by Invoice Number
Invoice Number 1	Invoice Date 🗘	Invoice Amount 🗘	Invoice Status 🗘	Actions
LS-INV-000220	6/28/2024	\$385.00	Invoice Needs Revisions	🖋 Update

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

Diversion Conferences on the PUNIC Defender			? FAQs Dhana Lucky
ack to Dashboard			
nvoice Summary			
Coversheet			Ø Hide Details 🧄
Bill To Litigation Services, Law Office of the Public Defender, 301 N. Guadalupe St, Santa Fe, NM 87501, 505-395-2888		Mail To litigation.services@lopdnm.us	
Invoice Number LS-INV-000220	Invoice Date 2024-06-28	Invoice Status Attorney Changes Requested	
Legal Name or Business Name Dhana Lucky	Phone Number (950) 253-6367	Supplier ID	
Address Information			

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

NEW MEERCO LAW OFFICES of 1946 PUBLIC DEFENDER				?	FAQs Dhana Luck
Address Information					
Business Address New Whale, Roswell, NM, 324	53, New Mexico				
Expert Services					
(i) Changes are pending	for one or more expert s	services. Please review all the nec	essary modifications for each service	before proceeding.	
Case Number	Client Name	Description of Service	Status	Date of Service	Amount
D-202-CR-2020-01281	LogiTech	Expert advice	LOPD Changes Requested	6/28/2024-6/30/2024	
			-		\$385.00



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.

Itemized Statement	D-202-CR-2020-01281 LogiTech	
	Lodging	
3 Document Opioad	Upload File	
4 Review and Summary	Screenshot 2024-06-28 at 7 20.42 PM png	
	Transportation	
	Upload File	
	Screenshot 2024-06-28 at 7.31.45 PM,png	
	Meals Upload File	

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

Other Upload File	
Upload Files Or drop files	
Screenshot 2024-06-28 at 7.33.11 PM.png	đ
Cancel Save & Exit Previo	Save & Next



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

PD LAW OFFICES or the PD PUBLIC DEFENDER		[?] <u>FAQs</u> Dhana Lucky
w Invoice		
	Screenshot 2024-06-28 at 7.31.45 PM.png	
Coversheet	Meals No file Uploaded	
Itemized Statement	Other	
	Screenshot 2024-06-28 at 7.33.11 PM.png	
Document Upload		
Summary	Attestation	ø Hide Details ∧ een received.
	*Signature Date	
	D Lucky 6/28/2024	Ë
	Cancel Save & Exit	Previous

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

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

Invoice Submitted Successfully	
Thank you for submitting your Invoice! Your Invoice has been received and is currently being processed. We appreciate your interest and will carefully review the information you have provided.	A A
Invoice Number: LS-INV-000220	
 Next Steps Please keep this Invoice ID for your records, as it will be used for any future correspondence regarding your application. Our team is dedicated to ensuring a thorough and fair review of all applications. You will be notified of the outcome as soon as the review process is complete. If you have any inquiries or need further assistance, please feel free to contact our support team at litigation.services@lopdnm.us 	



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*.

All Draft	Pending Attorney Approval At	ttorney Approved	Q S	earch by Invoice Number
Invoice Number ঝ	Invoice Date 1	Invoice Amount 1	Invoice Status ↑↓	Actions
LS-INV-000220	6/28/2024	\$385.00	Sent to State for Payment	view



SUBMITTING A NEW LITIGATION CONTRACT APPLICATION

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

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

portal helps in managing contracts and invo ocating for clients and the vendors who do b	bicing for the many experts our legal teams use in usiness with LOPD.	With and the second of the
Contract / Applica	tion Details	+ New Litigation Contract Application
Contract / Applica	tion Details	+ New Litigation Contract Application
Contract / Applica	tion Details	+ New Litigation Contract Application Q. Search by Contract Number Contract Status 12

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.

New Litigation Contract Ap	plication		
1 Litigation Contractor Information	Litigation Contract	or Information	
2 Qualifications	Asterisk (*) indicates required field		
3) Rate Schedule	Litigation Services Contract Application Num	lber	
Ĭ	* Service Type		Do you have a pending Case?
4 Document Upload	Test Service		No
5 Summary			
	• Legal Name or Business Name ①	DBA (if applicable)	* Contact Name
	Test Litigation		UAT ExpertUAT
	*Title	* Phone Number	*Email Address
	Exec	(646) 546-5466	saumya.singh+expert@mtxb2b.com



- 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.

Litigation Contractor Information	Address Information		
	* Physical Street Address 1	Physical Street Address 2	* City
Qualifications	Street Road 456	Church Sreet	Albuquerque
	*State	*Zip Code	• Country
Rate Schedule	NM	87101	US
Document Upload	NM TRD Business Tax Id Number (BTIN NM Taxation and Revenue Department	I) # (AKA Gross Receipt Tax # Business Tax ID Number (BTIN):	
Summary	All contractors will need to apply for a l at https://tap.state.nn.us. For question using the resources on their website or For more information on BTIN and regi business/ and https://www.tax.newme	3TIN, if required by state guidelines, if they do not already s regarding the application or process of obtaining a BTIN at 866-285-2996. stering your business, please visit https://www.tax.newme tico.gov/forms-publications/.	have one. Guidance and the application process can be found onlin number, please contact the NM Taxation and Revenue Department xico.gov/businesses/who-must-register-a-

- 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.

Litigation Contractor Information	Qualification Asterisk (*) indicates required field
Qualifications	*Are you a former or current NM government employee?
	Yes 👻
Rate Schedule	* Are you a retiree of the NM state government?
	No
Document Upload	* Have you done business with the state of NM within the last 12 months?
6	No
Summary	* Detailed Scope of Work
	Test Scope of Work
	* Qualifications to include License Number and Expiration if applicable (Please also attach a Resume/CV on the document upload section)
	Test Qualifications



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

LOPD NY MERCO LAW OFFICES or the PUBLIC DEFENDER				? FAQs UAT ExpertUAT ▼
New Litigation Contract Applica	tion			
Litigation Contractor Information Qualifications Rate Schedule	Rate Schedule Include all rates and services Asterisk (*) indicates required field Expert Services			+ New
4 Document Upload	Description Of Service	Rate Type	Amount	Actions
5 Summary	Carcel	No records found		Provinue Sava & Mart
	Cancel Save & Exit	No records found		Previous Save & Next

- 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.

LOPD RIMMONS PUBLIC DEFENDER		? FAQs UAT ExpertUAT ▼
New Litigation Contract Application	n	
C Litigation Contractor Information Qualifications C Rate Schedule	Add/Edit Service	
4 Document Upload	* Sample Contract Service	+ New
5 Summary	Hourly S100.00 Cancel Save	
	No records found	
	Cancel Save & Exit	Previous Save & Next



16. The added expert service record will be listed.

LOPD RIV HILDOO LAW OFFICES or the PUBLIC DEFENDER				? FAQs UAT ExpertUAT ▼
New Litigation Contract Applic	ation			
Litigation Contractor	Rate Schedule			
Qualifications	Include all rates and services Asterisk (*) indicates required field			
3 Rate Schedule	Expert Services			+ New
4 Document Upload	Description Of Service	Rate Type	Amount	Actions
5 Summary	Sample Contract Service	Hourly	\$100.00	/ 0
	Cancel Save & Exit			Previous Save & Next

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

LOPD HYMHESO LAW OFFICES of the PUBLIC DEFENDER				PAQs UAT ExpertUAT	•
New Litigation Contract Appl	ication				
Litigation Contractor Information Qualifications	Rate Schedule				
(3) Rate Schedule	Expert Services			+ New	1
4 Document Opload	Description Of Service	Rate Type	Amount	Actions	
5 Summary	Sample Contract Service	Hourly	\$100.00	/ 0	
	Test Contract Service	Flat	\$250.00	/ 0	
	Cancel Save & Exit			Previous Save & Next	



- 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.

C EAQs UAT Expe	rtuat 🔻
New Litigation Contract Application	
Litigation Contractor Information Document Upload Asterisk (*) indicates required field	
Qualifications (i) The allowed formats for file are PDF, DOC, DOCX, XLSX, JPEG, PNG, BMP and file size should be less than 25mb.	
Rate Schedule W9 Download Templ	ite
Document Upload Document Upload Document Upload Document Upload	
5 Summary Copy of Current Licensure Upload File	
L Upload Files Or drop files	
Resume / CV Upload File	
the second	
Affidavit for Former or Current State Employee	ite

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

LOPD REWERKED LOPD DUBLIC DEFENDER		FAQs UAT ExpertUAT ▼
New Litigation Contract Appli	cation	
Litigation Contractor Information	Document Upload Asterisk (*) Indicates required field	
Qualifications	(i) The allowed formats for file are PDF, DOC, DOCX, XLSX, JPEG, PNG, BMP and file size should be less than 25mb.	
Rate Schedule	W9 Upload Files	🛃 Download Template
Document Upload	Upload File NM-SUBSTITUTE-W9.pdf	
5 Summary	Copy of Curre Upload File	
	2, Upload Files Or drop files	
	Resume / CV Upload File	
	ئ Upload Files Or drop files	
	Affidavit for Former or Current State Employee	لع Download Template
	Upload File	



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.

LOPD NY HINKS LOPD DUBLIC DEFENDER	Success X File Uploaded NM-SUBSTITUTE-W9.pdf	PAQs UAT ExpertUAT ▼
New Litigation Contract App	plication	
Litigation Contractor Information	Document Upload Asterisk (`) indicates required field	
Qualifications	(i) The allowed formats for file are PDF, DOC, DOCX, XLSX, JPEG, PNG, BMP and file size should be less than 25mb.	
Rate Schedule	W9 Upload File	🛓 Download Template
Document Upload	1 Upload Files Or drop files	
5 Summary	MM-SUBSTITUTE-W2.pdf	•
	Copy of Current Licensure Upload File	
	1. Upload Files Or drop files	
	Resume / CV Upload File	
	2. Upload Files Or drop files	
	Affidavit for Former or Current State Employee	🕁 Download Template

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

	NEW HEIXED LAW OFFICES of the PUBLIC DEFENDER		? FAQs UAT ExpertUAT ▼
Nev	v Litigation Contract App	lication	
	Litigation Contractor	⊥ Upload Files Or drop files	
	Information	✓ datajpeg	0
	Qualifications	Resume / CV Upload File	
	Rate Schedule		
4	Document Upload	Affidavit for Former or Current State Employee Upload File	🛃 Download Template
5	Summary		
8		Campaign Contribution Disclosure Form Upload File	🛓 Download Template
		▲ Upload Files Or drop files	
		✓ data2.png	D
		Cancel Save & Exit	Previous Save & Next



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.

LOPD RIVERDOO LAW OFFICES or IN PUBLIC DEFENDER			EAQ₅ UAT ExpertUAT ▼
New Litigation Contract Applic	ation		
Litigation Contractor Information	Summary		
Qualifications	Litigation Contractor Inform	ation	🖌 Edit 🛛 🖉 Hide Details 🥆
Rate Schedule	Litigation Sevice Contract Application Nu CA-00058	umber	
Document Upload	Service Type Test Service		Do you have pending cases? No
5 Summary	Business Information		
	Legal Name or Business Name Test Litigation	DBA(if Applicable)	Contact Name UAT ExpertUAT
	Title Exec	Phone (646) 546-5466	Email Address saumya.singh+expert@mtxb2b.com
	Address Information		
	Business Address Street Road 456, Church Sreet, Albuquer	que, NM, 87101, US	
	NM TRD Business Tax ID Number (BTIN) BTIN-56456985432	# (AKA Gross Receipt Tax #)	

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

LOPD NUMEROSES of the PUBLIC DEFENDER		<u>FAQs</u> UAT ExpertUAT ▼
New Litigation Contract Appli	cation	
Litigation Contractor	Document Uploads	🖌 Edit 🛛 🥬 Hide Details 🧄
Qualifications	W9	
Rate Schedule	Copy of Current Licensure	
Document Upload	🤝 datajzes	
5 Summary	Resume / CV No file Uploaded Affidavit for Former or Current State Employee No file Uploaded Campaign Contribution Disclosure Form Cancel Save & Exit	Previous



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.

Contract / Ap	oplication Details			+ New Litigation Contract Application
Contracts Applicati	ions			Q Search by Application Number
Application Number 🗘	Application Submission Date 🗘	Contract Number 🗘	Status ↑↓	Actions
CA-00045			Draft	🖌 Edit
CA-00058	8/5/2024		Application Submitted	⊖ Withdraw [●] View
CA-00057	8/5/2024	2025.280.0193	Contract Fully Executed	© View
CA-00055	8/5/2024		Application Submitted	O Withdraw View
CA-00027	8/5/2024		Application Submitted	⊖ Withdraw [●] View
CA-00040	7/30/2024		Under Review	View
CA-00028	7/29/2024		Under Review	View



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.

dvocating for clients and the vendors who do business with LOPD.	Ma	and a new rather
Important Communications Application Needs Additional Info on contract application CA-00058		

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*.

cating for clients and the ven	racts and invoicing for the many experts our dors who do business with LOPD.	legal teams use in	an a	and all
Contract / Ap	oplication Details			+ New Litigation Contract Application
Contracts Applicat	ions			Q Search by Application Number
Contracts Applicat	Application Submission Date 🏞	Contract Number ↑↓	Status †↓	Q Search by Application Number Actions
Contracts Applicat Application Number 14 CA-00045	ions Application Submission Date 🍕	Contract Number 🍾	Status †↓ Draft	Q. Search by Application Number Actions Edit
Contracts Applicat Application Number 12 CA-00045 CA-00058	Application Submission Date 14	Contract Number 🍾	Status 14 Draft Application Needs Additional Info	Q. Search by Application Number Actions Edit Edit Edit
Contracts Applicat Application Number 1 CA-00045 - CA-00058 - CA-00057 -	Application Submission Date 14 8/5/2024 8/5/2024	Contract Number 1	Status 1. Draft Application Needs Additional Info	Q. Search by Application Number



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.

OPD LAW OFFICES of the PUBLIC DEFENDER		☐ FAQs UAT ExpertUAT ▼
Welcome to the LC his portal helps in managing contracts and dvocating for clients and the vendors who	DPD Portal Linvoicing for the many experts our legal teams use in do business with LOPD.	allanda.
Important Comm	nunications	
Application Needs Additional In	nfo on contract application <u>CA-00058</u>	
Application Needs Additional In Contract / Applic	nfo on contract application <u>CA-00058</u>	+ New Litigation Contract Application
Application Needs Additional In Contract / Applications	nfo on contract application CA-00058	+ New Litigation Contract Application Q. Search by Contract Number

- 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*.

LAW OFFICES of the PUBLIC DEFENDER				<u>FAQs</u> UAT ExpertUAT
Welcome to th his portal helps in managing con dvocating for clients and the ven	The LOPD Portal tracts and invoicing for the many experts our dors who do business with LOPD.	r legal teams use in		
Contract / A	pplication Details			+ New Litigation Contract Application Q. Search by Application Number
Application Number 🗘	Application Submission Date 🗘	Contract Number 🗘	Status †↓	Actions
CA-00045			Draft	💉 Edit
CA-00058	8/5/2024		Application Needs Additional Info	🖉 Edit 🔫
	8/5/2024	2025.280.0193	Contract Fully Executed	View
CA-00057				
CA-00057 CA-00055	8/5/2024		Application Submitted	O Withdraw @ View



- 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.

New Litigation Contract Application									
1 Litigation Contractor Information	Litigation Contractor Information								
2 Qualifications	Asterisk (*) indicates required field								
3 Rate Schedule	Upload the updated CV Document for approval								
4 Document Upload	Litigation Services Contract Application Number CA-00058								
	*Service Type	* Do you have a pending Case?							
5 Summary	Test Service	No	•						
	Business Information								

 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.

Litigation Contractor Information	Document Upload	
Qualifications	Asterisk (*) indicates required field	
	Upload the updated CV Document for approval	
Rate Schedule	The allowed formats for file are PDF, DOC, DOCX, XLSX, JPEG, PNG, BMP and file size should be less than 25mb.	
Document Upload	Wa	
	Upload File	🛃 Download Templati
Summary	⊥ Upload Files Or drop files	
	NM-SUBSTITUTE-W9.ndf	c
	Copy of Current Licensure	
	S datajoes	c
	Resume / CV	
	Upload File	



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.

	PEAQS UAT ExpertU/
ication	
Resume / CV Upload File	
data2.png Affidavit for Former or Current State Employee	
Upload File	 DOWnivau rempiate
Campaign Contribution Disclosure Form	4. Download Template
Upload File	
✓ data2.png	٥
Cancel Save & Evit	Previous Save & Next
	Ileation Resume / CV Upload File ① Upload File ② data2.ppg Affidavit for Former or Current State Employee Upload File ① Upload File ① Upload File ① Upload File ① Upload Files Or drop files Campaign Contribution Disclosure Form Upload File ① Upload File ① Upload File ③ data2.ppg

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.

LOPD KEY WIXES		PAQs UAT ExpertUAT ▼
New Litigation Contract Applic	cation	
Litigation Contractor	Document Uploads	
Qualifications	we	
	MM-SUBSTITUTE-W9.pdf	
Rate Schedule	Copy of Current Licensure	
Document Upload	Resume / CV	
5 Summary	Jata2.png	
	Affidavit for Former or Current State Employee No file Uploaded	
	Campaign Contribution Disclosure Form	
	I data2.png	
	Cancel Save & Exit	Previous Submit



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

Application Submitted Successfully	~
Thank you for submitting your Application! Your Application has been received and is currently being processed. We appreciate your interest and will carefully review the information you have provided.	
Application Number: CA-00058	
 Next Steps Please keep this Application ID for your records, as it will be used for any future correspondence regarding your application. Our team is dedicated to ensuring a thorough and fair review of all applications. You will be notified of the outcome as soon as the review process is complete. If you have any inquiries or need further assistance, please feel free to contact our support team at litigation.services@lopdnm.us 	
Go to Dashboard →	

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

Contract / Ap	oplication Details			+ New Litigation Contract Application
Contracts Applicati	ions			$\ensuremath{\mathbb{Q}}$ Search by Application Number
Application Number 1	Application Submission Date 🗘	Contract Number 🗘	Status ↑↓	Actions
CA-00045			Draft	🖌 Edit
CA-00058	8/5/2024		Application Submitted	⊖ Withdraw @ View
CA-00057	8/5/2024	2025.280.0193	Contract Fully Executed	View
CA-00055	8/5/2024		Application Submitted	O Withdraw O View
CA-00027	8/5/2024		Application Submitted	O Withdraw O View
CA-00040	7/30/2024		Under Review	View
	7/00/0004		Under Davieur	



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.

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.

Please review the documents below.	FINISH OTHER ACTIONS	
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START	In State Expert Services Budget Professional Hours \$200.00 hr Travel Time (1/2 hourly) \$100.00 hr The rate for Mileage is set by DFA at the Judicial State \$ To be determined mile	
	Per Diem (100 miles fom home, one way) \$150.00' overnight OR OR Hotels and/or Meals: To be approved, Hotels \$215.00 might max. (Invoice may not exceed average hotel rate for the area.) Requires pre-approval of the Deputy Chief. Page 1 of 15 Contract Form Updated \$/23/2024 Contractor initial	
	2025.280.0196docx 1 of 15 2025.280.0196docx 1 of 15 Docusign Envelope ID: 691872CA-DB3A-420F-A177-E3D5A1DBFE35 DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE 999.31d Avs. Subt T00 - Seattle - Washington 9104 - (206) 219-0200	
	If approved, receipts will be required for reimbursement.) Meals \$45,00/day max (if traveling multiple days, then the daily average is not to exceed the equivalent of \$45,00/day) Airfare To be determined (requires Deputy Chief Approval)	
e docusign	🔀 Change Language - English (US) 🔻 Terms Of Use & Privacy 🔻 Copyright © 2024 Docusign Inc. V2F	2



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.

Select the sign field to create and add your cionature		
Adopt Your Signature	×	
Confirm your name, initials, and signature.		
Signed by: Expert G60660D89E4A454		
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purpose when I (or my agent) use them on documents, including legally binding contracts.	25	
If approved, receipts will be required for reimbursement) Airfare To be determined (requires Deputy Chef Approval)		
Out of State Expert Services Rudget		
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6. Your signature will be applied.

Select the sign field to create and add your	signature.		FINISH	OTHER ACTIONS -
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	that the work assigned to be performed by amount stated herein. The parties do not in without compensation when the total compen- for notifying the AGENCY (by emailing: under this contract reach the total compen- CONTRACTOR be paid for services provid Contract being amended in writing prior to being provided.	CONTRACTOR under this CONTRACT shall equal the attend for the CONTRACTOR to continue to provide services ation amount is reached. The CONTRACTOR is responsible liftgation.services?ibpdnm.us) when the services provided astion amount before it is exceeded. In an overst will the ded in excess of the total compensation amount without this to those services in excess of the total compensation amount Budget		
	Professional Hours	\$200.00/hr		
NEXT	Processorial roots Traved Time (1/2 hourly) The rate for Mileage is set by DFA at the Judicial State Agency Rate at the time work is completed. Per Diem (100 miles from home, one way) OR Hotels and/or Meals: (Requires pre-approval of the Deputy Chief. Pag Contract Form Updated 5/23/2024	Scool of a store of the spectral store of the spectres store of the spectres store of the spectres store of t		
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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.

Enter your title							FINISH	OTHER ACTIONS 🔻
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	date is the date of appro	val by the Ch	ief Public	Defender	or th	he last dated signature set out hereinafter.		
	STATE OF NEW MEXICO LAW OFFICES OF THE PUBL	LIC DEFENI	DER:	_		CONTRACTOR: Test Litigation		
	Ву:			By	: .	Expert Required - Title		
FILL IN	Bennett J. Baur, Chief Pul	blic Defender		Tit	le:	Q		
	Law Offices of the Public	Defender		Da	te: _	8/6/2024		
	Date:		-			Sign		
	By: Debbie O'Dell, Chief Fin Law Offices of the Public	ancial Officer Defender						
	Date:							
	AGENCY LEGAL COUNSEL I	REVIEW:						
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8. After reviewing & signing the document, click the **Finish** button to complete.

Done! Select Finish to send the completed	document.						FINISH	OTHER ACTIONS \bullet	
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	STATE OF NEW MEXICO LAW OFFICES OF THE PUBL	IC DEFE	NDER:			CONTRACTOR: Test Litigation			
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	Bennett J. Baur, Chief Pu	blic Defend	der		Title:	Contractor			
	Law Offices of the Public	Defender			Date:	8/6/2024			
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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.
- 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.

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CA-00045 CA-00058 CA-00057 CA-00055	8/5/2024 8/5/2024 8/5/2024	2025.280.0193	Draft Application Needs Additional Info Contract Fully Executed Application Submitted	 Edit Edit View Withdraw



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.

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