



# NM LOPD

## Expert/Vendor User Guide

---

Version 1, August 14, 2024

## Table of Contents

<b>Purpose .....</b>	<b>1</b>
<b>Personas .....</b>	<b>1</b>
<b>Introduction.....</b>	<b>2</b>
<b>Registering to the NM LOPD Portal .....</b>	<b>2</b>
<b>Logging in to the LOPD Portal.....</b>	<b>4</b>
<b>Logging out of the LOPD Portal .....</b>	<b>5</b>
<b>Creating a New Invoice .....</b>	<b>6</b>
<b>Important Communications - Invoice .....</b>	<b>18</b>
<b>Updating the Invoice.....</b>	<b>19</b>
Updating Invoice (Status as Attorney Changes Requested) .....	19
Updating Invoice (Status as Invoice Needs Revision).....	23
<b>Submitting a New Litigation Contract Application .....</b>	<b>28</b>
<b>Important Communications - Contracts .....</b>	<b>36</b>
Editing and Resubmitting the Contracts Application .....	36
<b>Reviewing and Signing the Litigation Service Contract Document Using DocuSign.....</b>	<b>41</b>
<b>Contract Application Statuses - Overview .....</b>	<b>45</b>
<b>Viewing all Contracts .....</b>	<b>46</b>

## 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	<ul style="list-style-type: none"><li>• Registering to the portal</li><li>• Logging in to the portal</li><li>• Creating invoice</li><li>• Creating coversheet</li><li>• Uploading documents</li><li>• Updating invoice</li><li>• Submitting contract applications</li><li>• Editing and resubmitting the contract applications</li><li>• Reviewing and Signing the contract documents</li></ul>

## INTRODUCTION

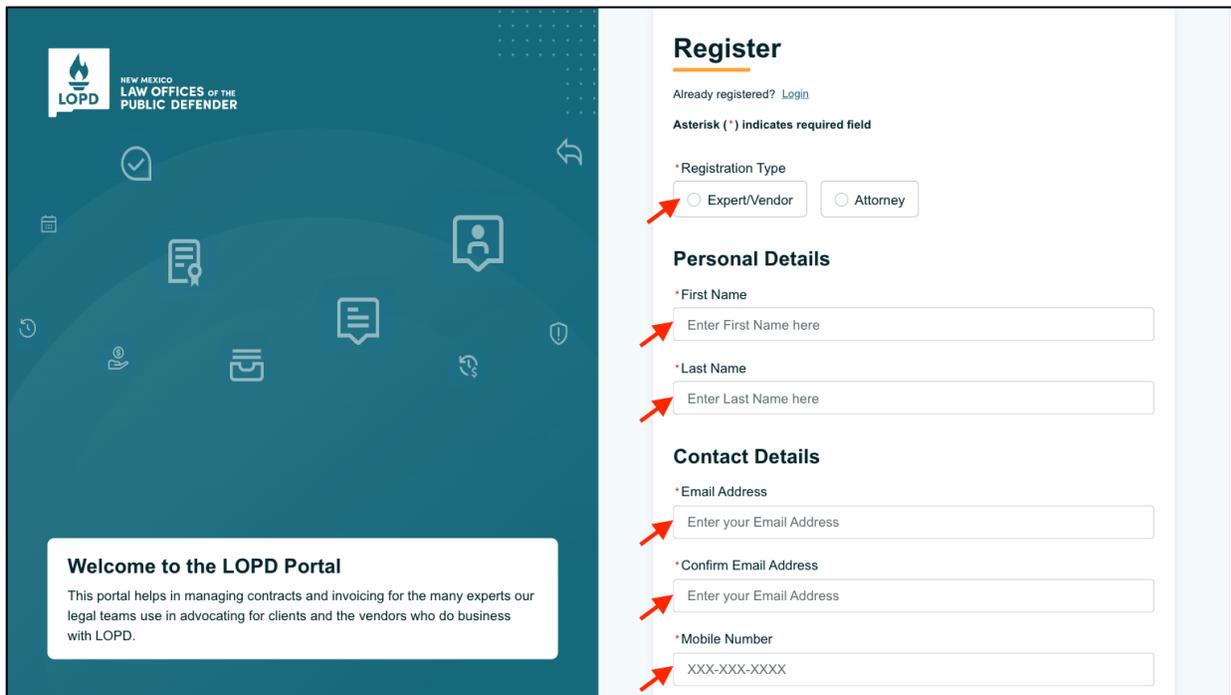
The NM LOPD portal helps manage contracts and invoices for the many experts our legal teams use to advocate for clients and vendors who do business with LOPD.

## 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.



**Register**

Already 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

\*Confirm Email Address

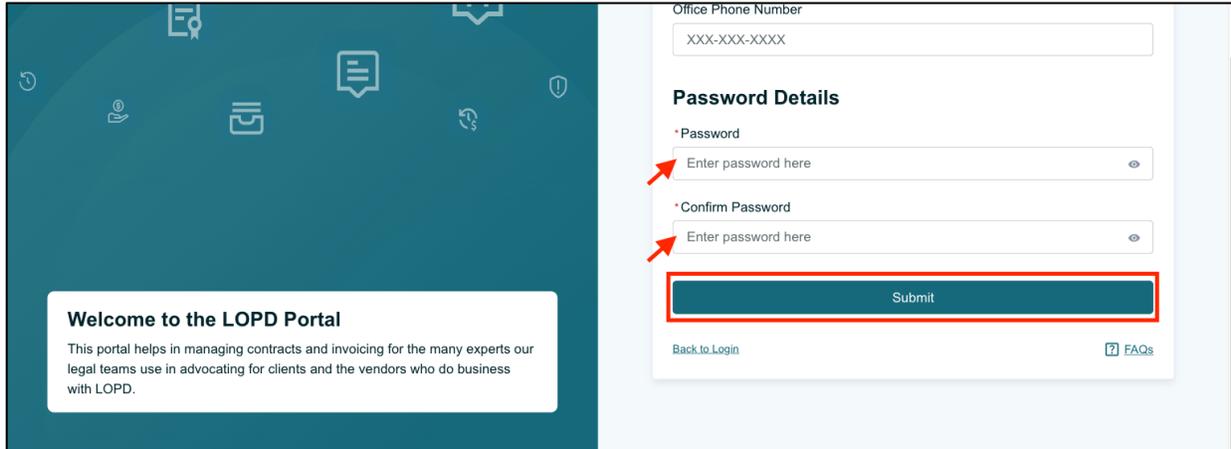
Enter your Email Address

\*Mobile Number

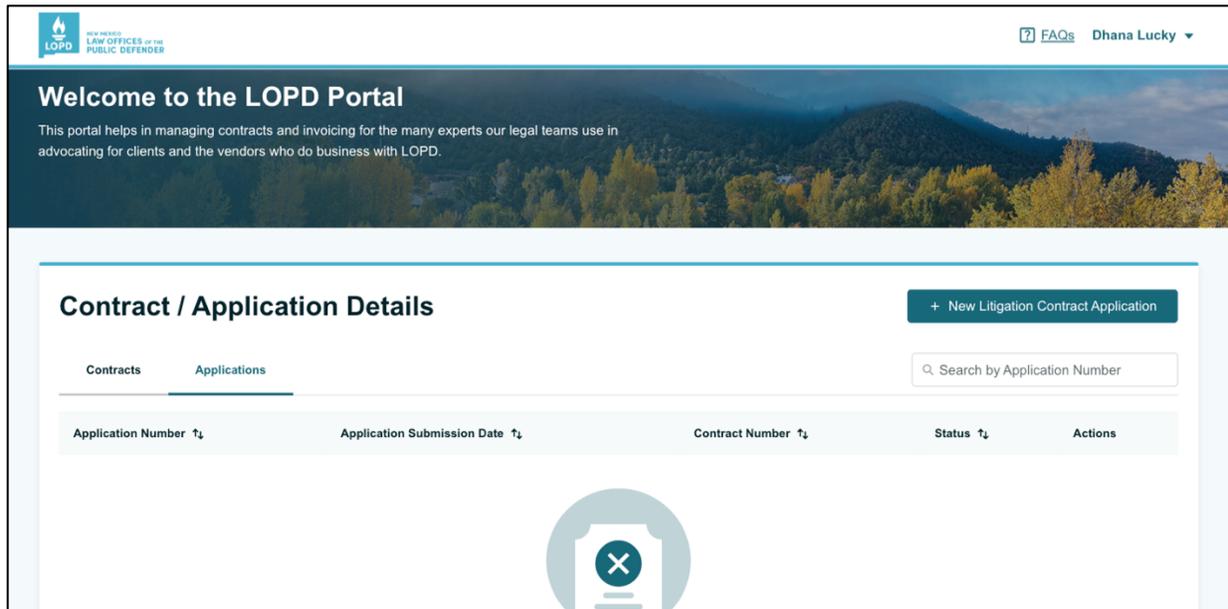
XXX-XXX-XXXX

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

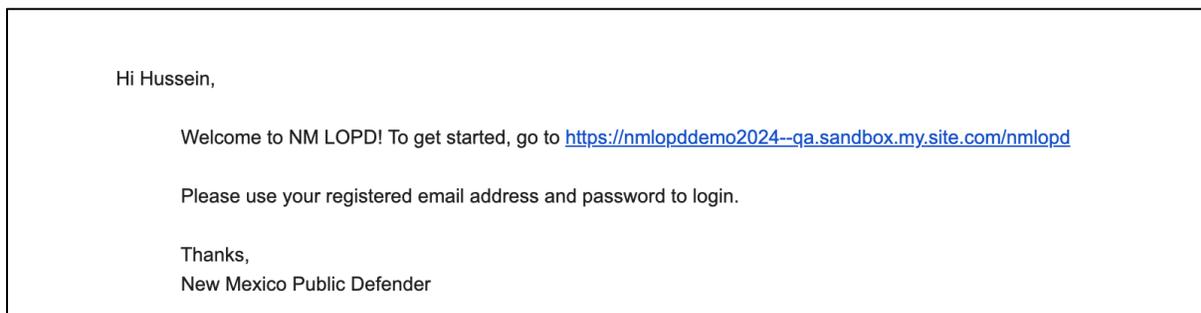
5. After entering the required details, click the **Submit** button.



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.

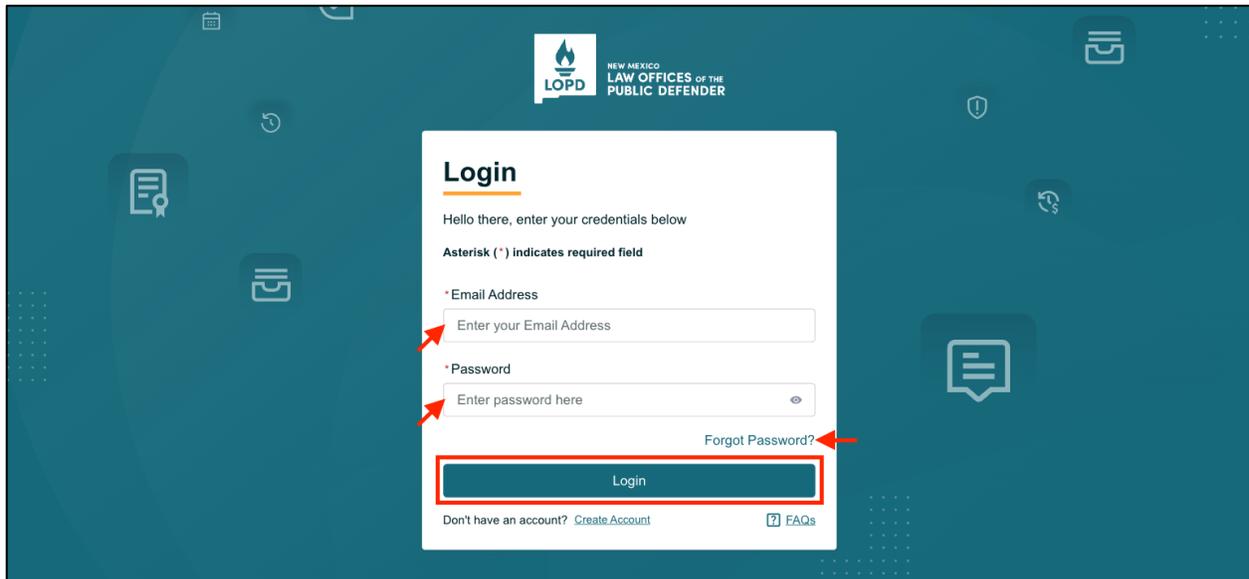


## LOGGING IN TO THE LOPD PORTAL

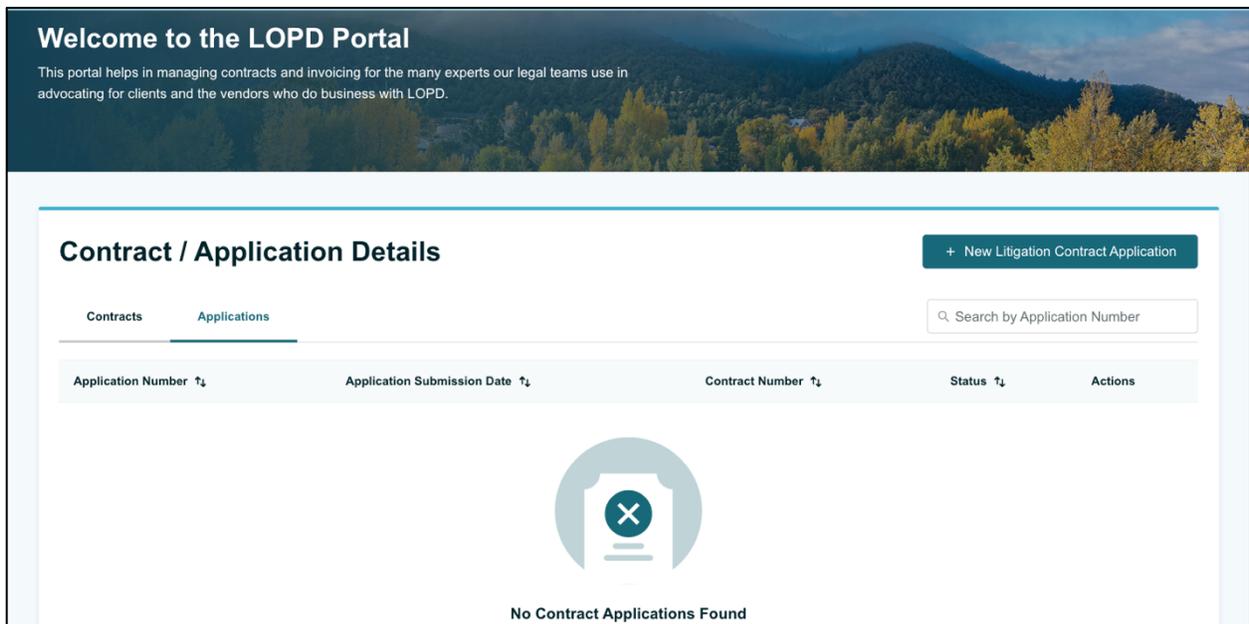
To log in to the LOPD Portal, perform the following steps:

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.



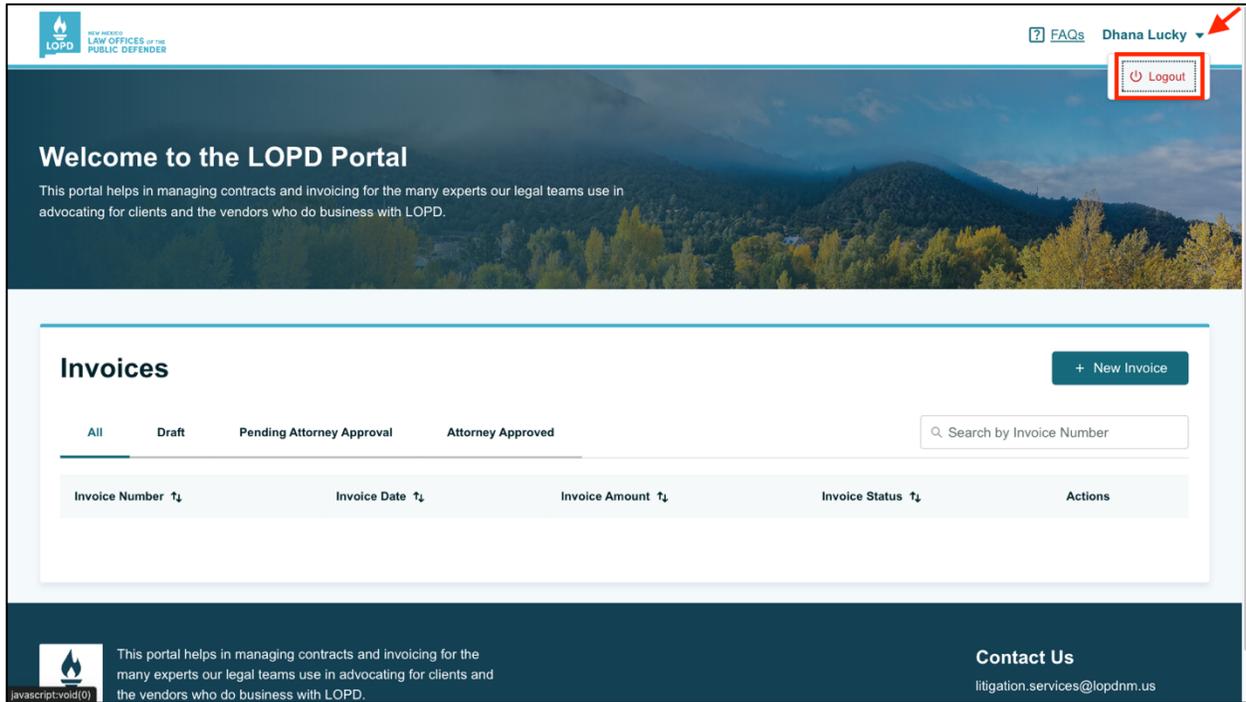
After logging in, you will be directed to the LOPD Portal Dashboard page.



## 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.

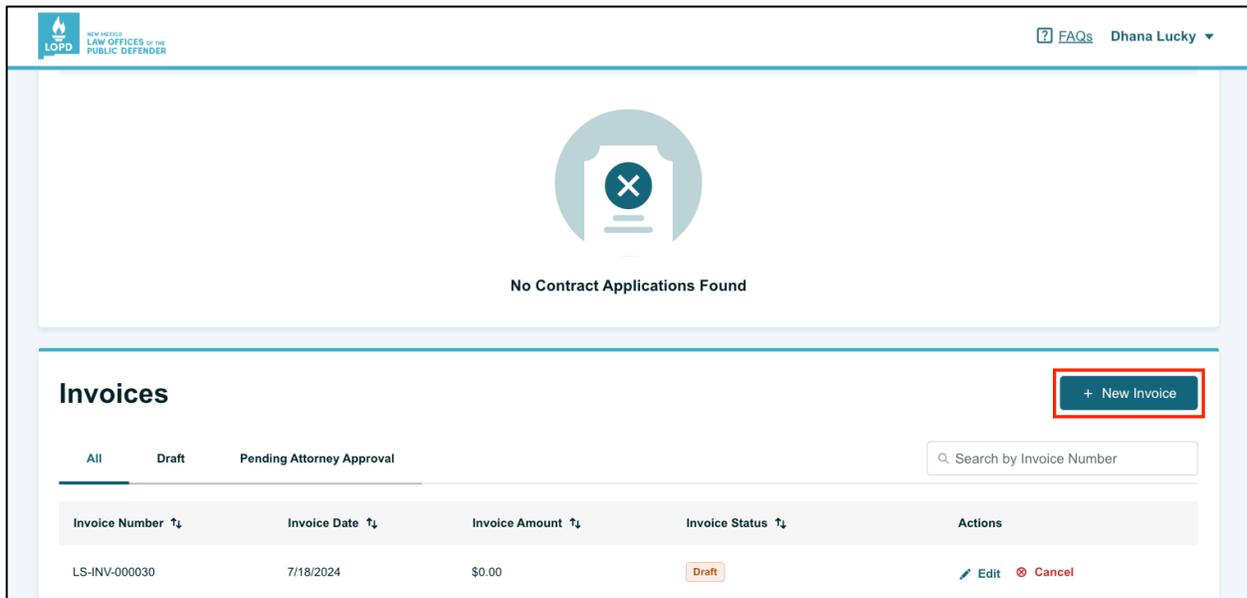


## CREATING A NEW INVOICE

**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@lopdm.us](mailto:litigation.services@lopdm.us). You can click the **Cancel** button to go to the prior page.



- 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.
- Enter the name in the **Legal Name or Business Name** textbox.

**New Invoice**

1 **Coversheet**

2 Itemized Statement

3 Document Upload

4 Review and Summary

### Coversheet

Asterisk (\*) indicates required field

Please retain all documentation, receipts, and other information related to your invoices for your own records. This invoicing platform is not a records repository.

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:      Invoice Date:

\*Legal Name or Business Name: Dhana Lucky      \*Phone Number: (950) 253-6367      Supplier ID: Enter Supplier ID here

### Address Information

\*Physical Street Address 1: Enter Address here      Physical Street Address 2:      \*City: Enter City here

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

**New Invoice**

1 **Coversheet**

2 **Itemized Statement**

3 Document Upload

4 Review and Summary

### Address Information

\*Physical Street Address 1: New Whale      Physical Street Address 2:      \*City: Roswell

\*State: NM      \*Zip Code: 32453      \*Country: New Mexico

### Expert Services

+ New

No records found

Cancel      Save & Exit      Save & Next

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.

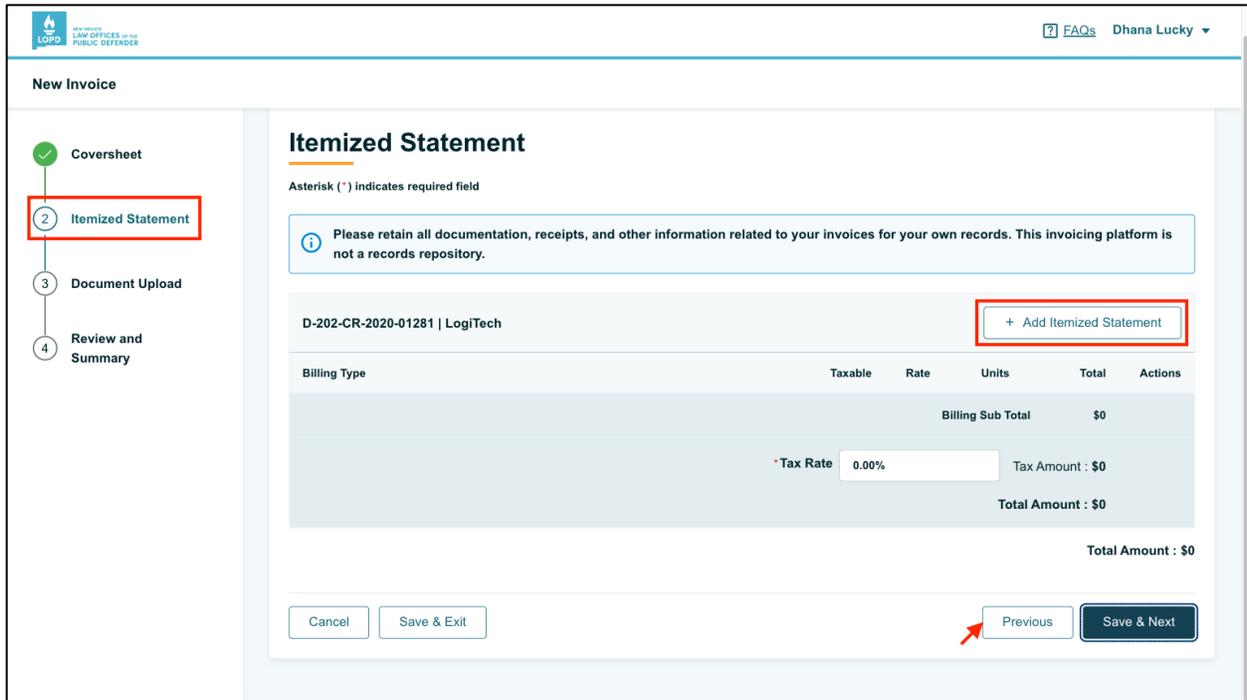
After saving, the Expert Service will be displayed in this section.

**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.

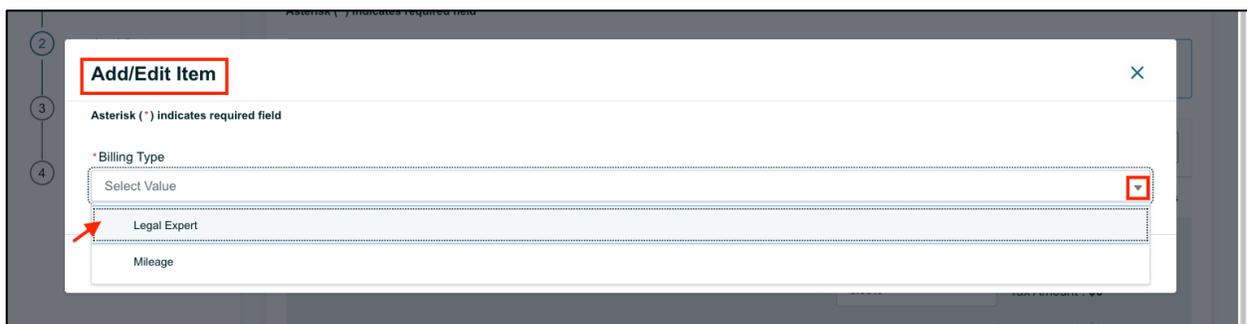
Case Number	Client Name	Description of Service	Dates of Service	Actions
D-202-CR-2020-01281	LogiTech	Expert advice	6/28/2024-6/30/2024	

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.

**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

Cancel Save

Total Amount : \$0

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.

**Add/Edit Item**

Legal advice

Date/Time of Service From Date/Time of Service To  
\*Date \*Time \*Date \*Time  
Jun 27, 2024 9:45 AM Jun 27, 2024 11:45 AM

\*Hourly Rate \*Hours Worked \*Total  
\$150.00 2 300

Service is Taxable  
Yes

Cancel Save

Cancel Save & Exit Previous Save & Next

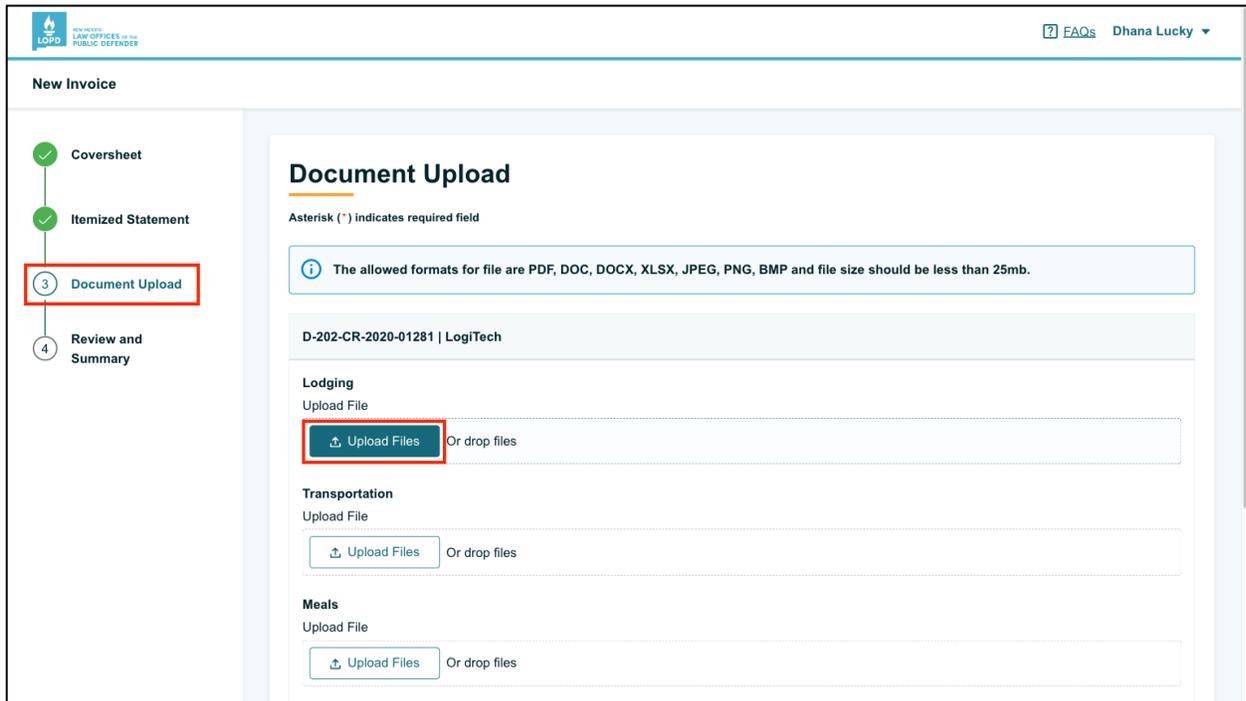
After saving, the Billing Types will be displayed in the Itemized Statement section.  
 You can add multiple Billing Types.

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.

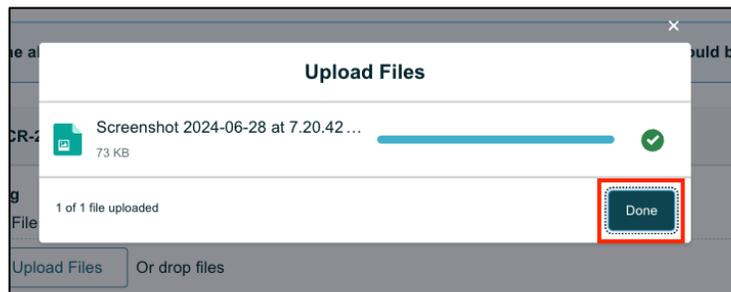
20. Click the **Save & Next** button.

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.

The screenshot shows the 'New Invoice' form with a progress indicator on the left. The steps are: 1. Coversheet (checked), 2. Itemized Statement (checked), 3. Document Upload (active), and 4. Review and Summary. The main content area shows two document upload sections: 'Transportation' and 'Meals', each with an 'Upload File' button and 'Or drop files' text. Below these is an 'Other' section with another 'Upload File' button. At the bottom right, the 'Save & Next' button is highlighted with a red box. There are also 'Cancel', 'Save & Exit', and 'Previous' buttons.

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

The screenshot shows the 'Review and Summary' section of the 'New Invoice' form. The progress indicator on the left shows 'Review and Summary' as the active step, highlighted with a red box. The main content area is titled 'Review and Summary' and contains the following information:

- Coversheet** (with 'Edit' and 'Hide Details' options)
- 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@lopdm.us
- Invoice Number:** LS-INV-000220
- Invoice Date:** (empty field)
- Invoice Status:** Draft
- Legal Name or Business Name:** Dhana Lucky
- Phone Number:** (950) 253-6367
- Supplier ID:** (empty field)
- Address Information:** Business Address: New Whale, Roswell, NM, 32453, New Mexico
- Expert Services:** (empty field)

26. Scroll to the Attestation section, then select the **Attestation** checkbox.

27. Enter the *Signature* in the **Signature** field.

28. Click the **Submit** button.

The screenshot shows the 'New Invoice' form. On the left is a progress sidebar with steps: Coversheet, Itemized Statement, Document Upload, and Review and Summary (current step). The main form area includes a file upload section with a 'Screenshot2024-06-28 at 7.31.45PM.png' file. Below are sections for 'Meals' and 'Other', both showing 'No file Uploaded'. The 'Attestation' section contains a checked checkbox with the text 'I certify this is a true and correct invoice and the payment for said invoices has not been received.' Below this are input fields for 'Signature' (containing 'D Lucky') and 'Date' (containing '6/28/2024'). At the bottom right, the 'Submit' button is highlighted with a red box.

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.

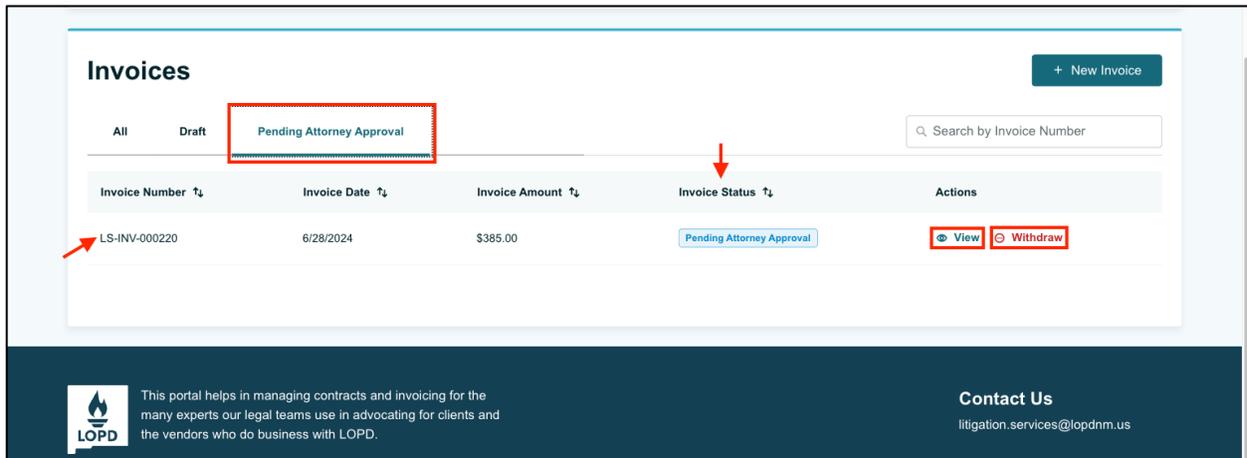
The screenshot shows the 'Invoice Submitted Successfully' page. It features a green heading and a thank-you message. A red arrow points to the 'Invoice Number: LS-INV-000060'. Below is a 'Next Steps' section with three bullet points. At the bottom, two buttons are highlighted with red boxes: 'Download Invoice' and 'Go to Dashboard →'. An illustration of a person working at a laptop is on the right side of the page.

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

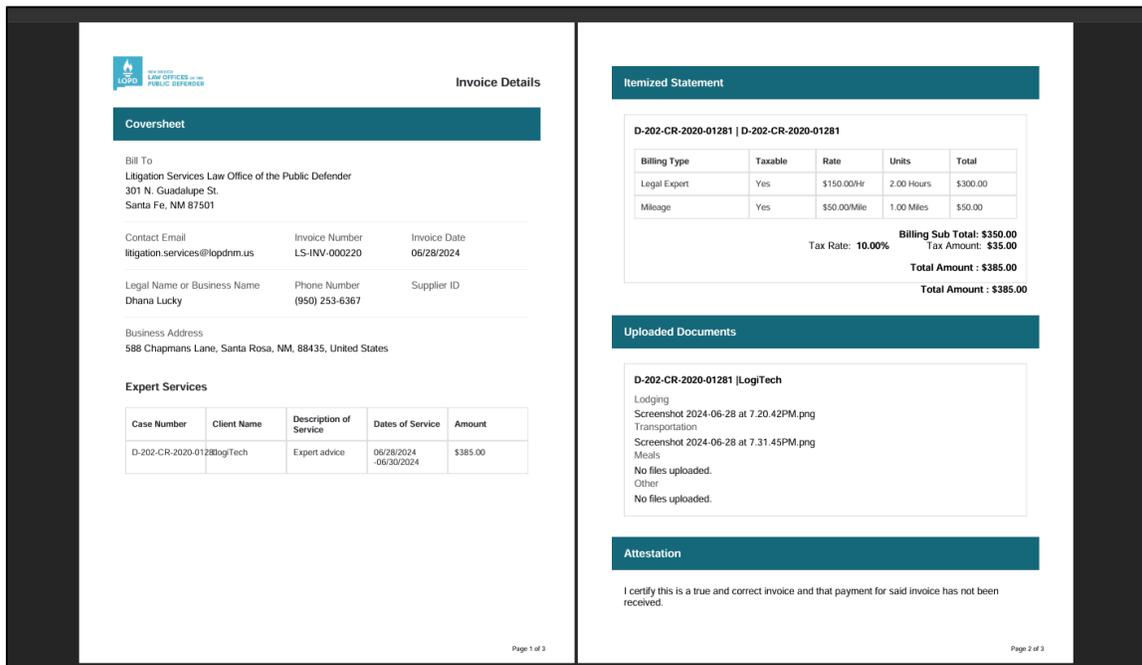
The newly created invoice will be displayed under the **Pending Attorney Approval** tab as well as the **All** tab.

**Notes:**

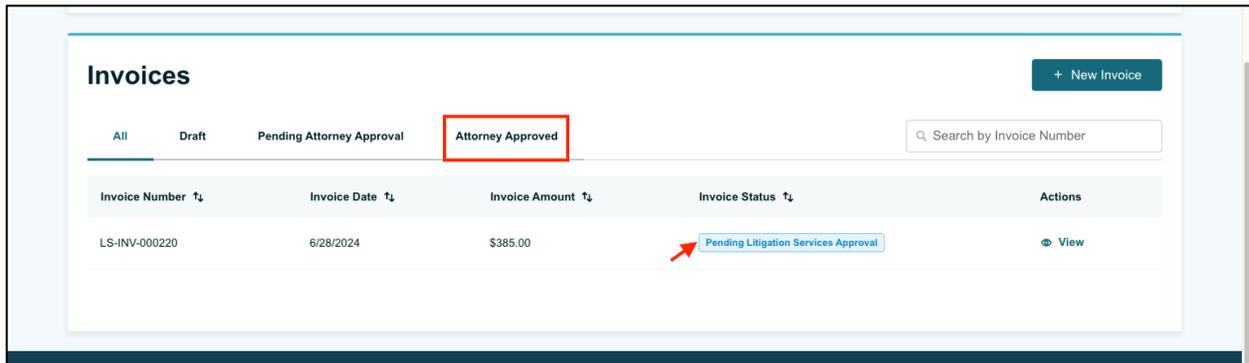
- You can view the PDF version of the invoice by clicking on the **View** button.
- When the Invoice Status is Pending Attorney Approval, you can use the **Withdraw** button to withdraw your invoice.



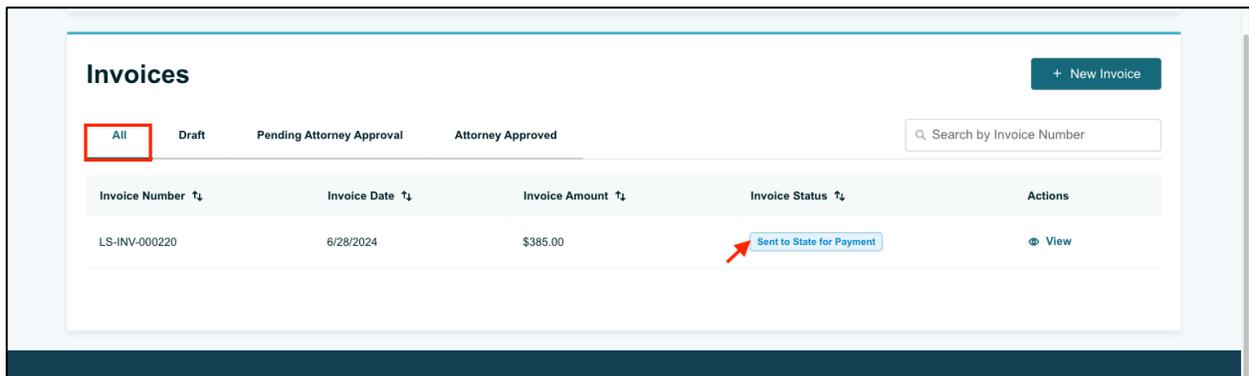
The PDF version of the invoice is shown in the below image.



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*.



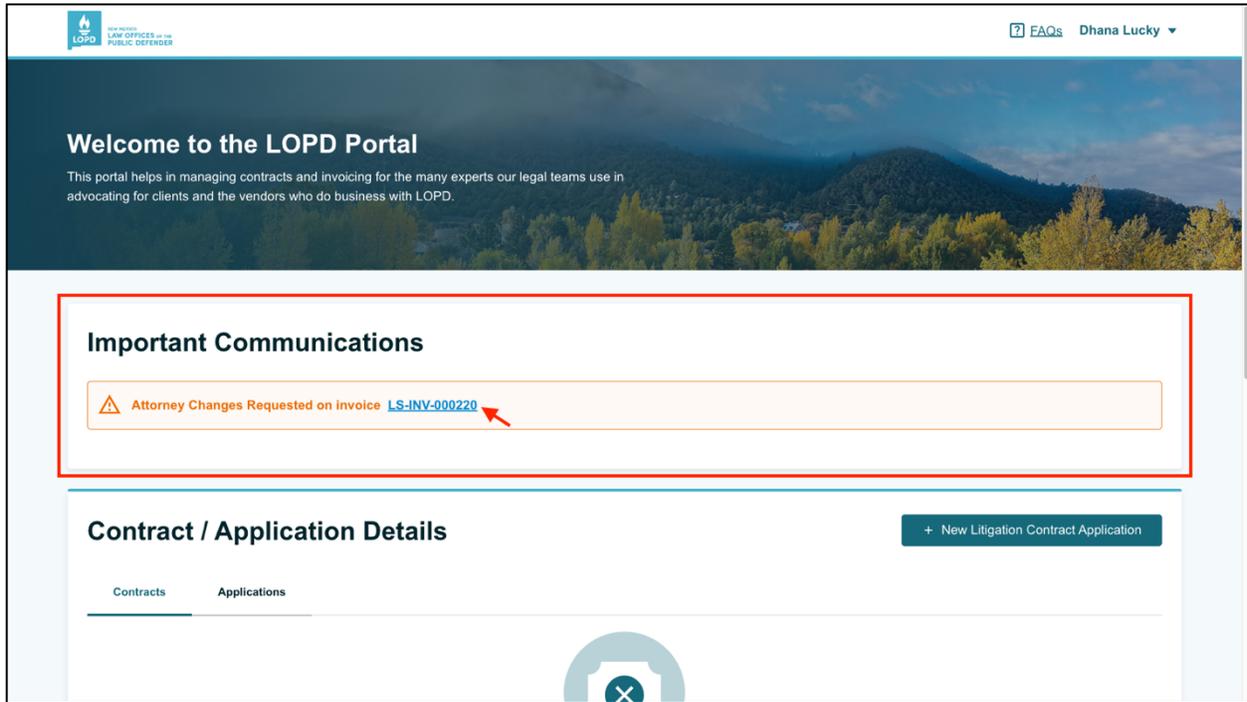
After the LOPD Staff approves the invoice, you can see the Invoice under the All tab, and the **Invoice status** will be updated to *Sent to State for Payment*.



## 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

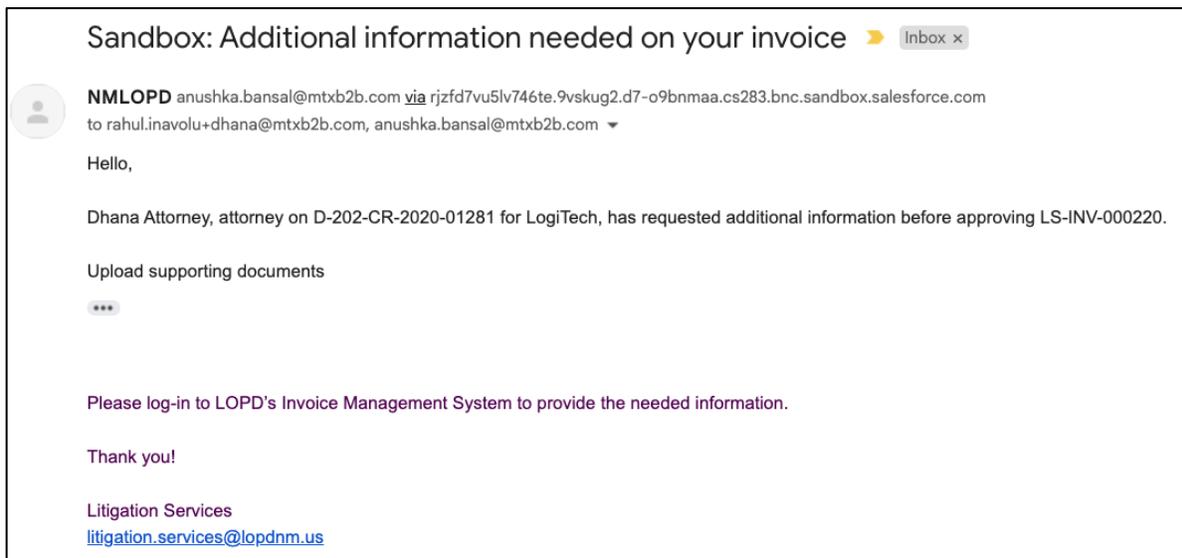
You can update the invoice only when the **Invoice Status** is draft, *Attorney Changes Requested*, or *Invoice Needs Revisions*.

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)

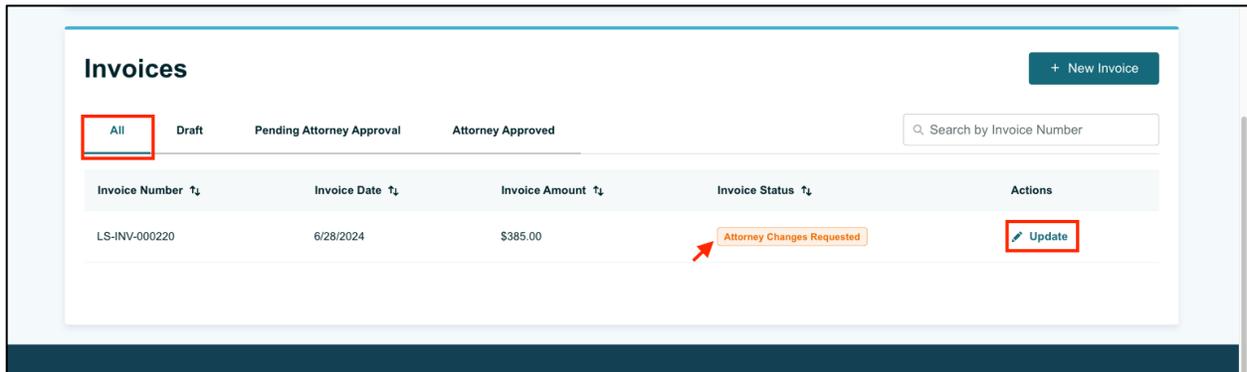
When the Attorney requests the changes on the invoice, you will receive a notification email, and the **Invoice Status** on the Portal will be updated to *Attorney Changes Requested*.



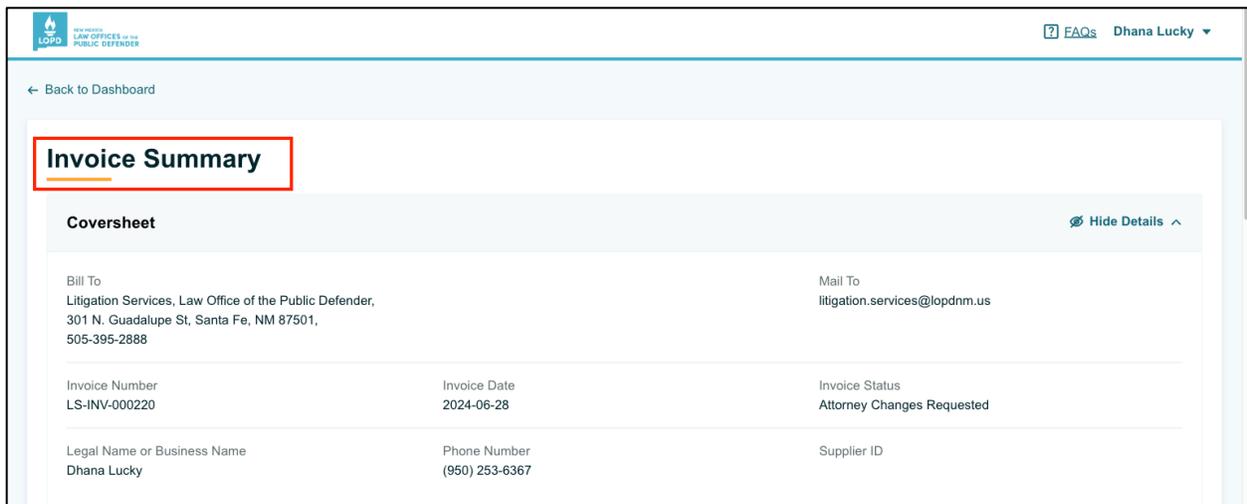
To update the Invoice, perform the following steps:

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

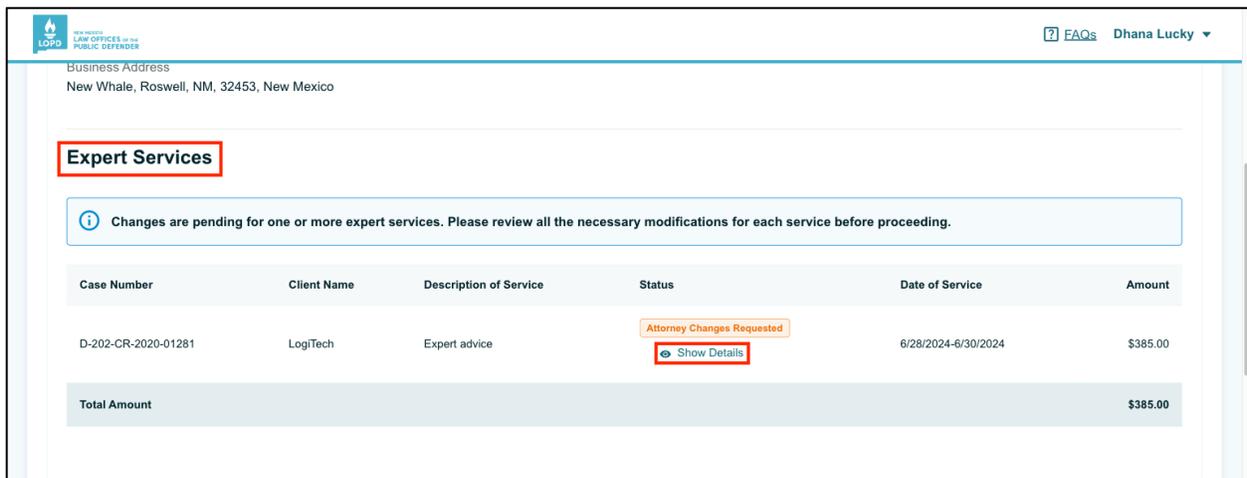
- Go to the **All** tab and click the **Update** button of the invoice with **Invoice Status** as *Attorney Changes Requested*.



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

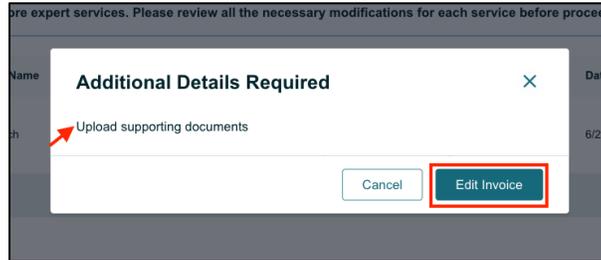


- Scroll to the **Expert Services** section, then click the **Show Details** button.



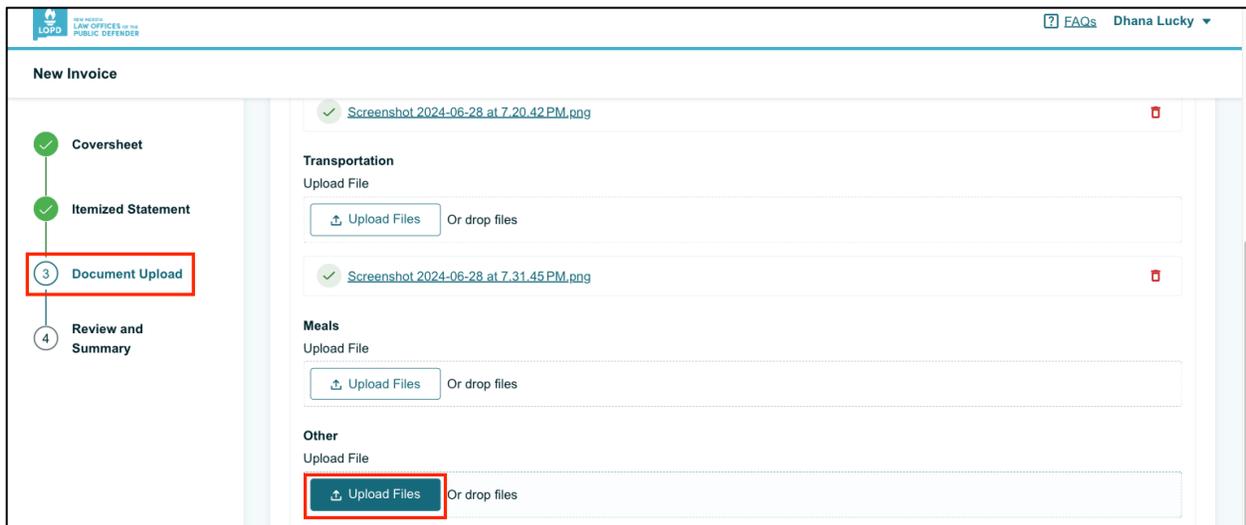
An Additional Details Required pop-up will be displayed with the comments.

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

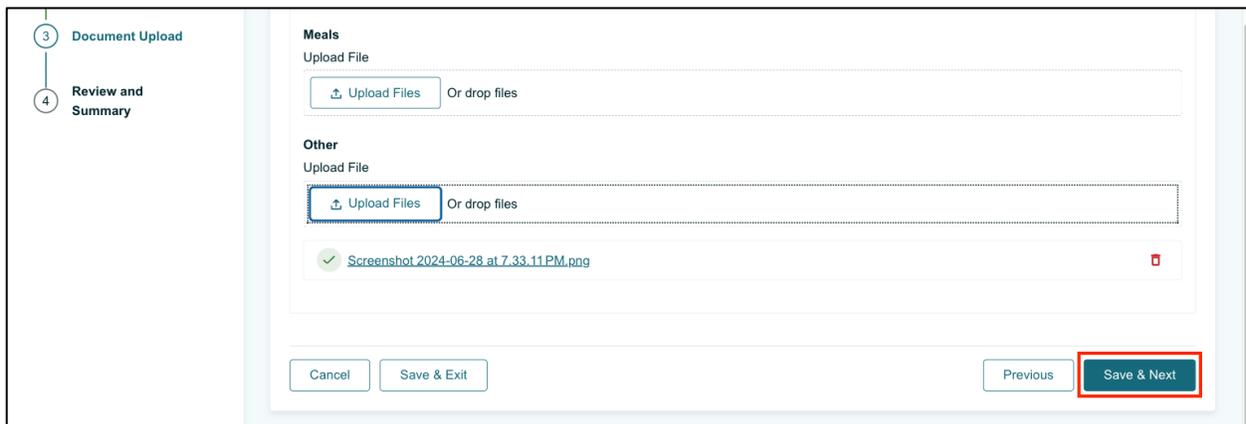


You will be directed to the New Invoice page.

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.

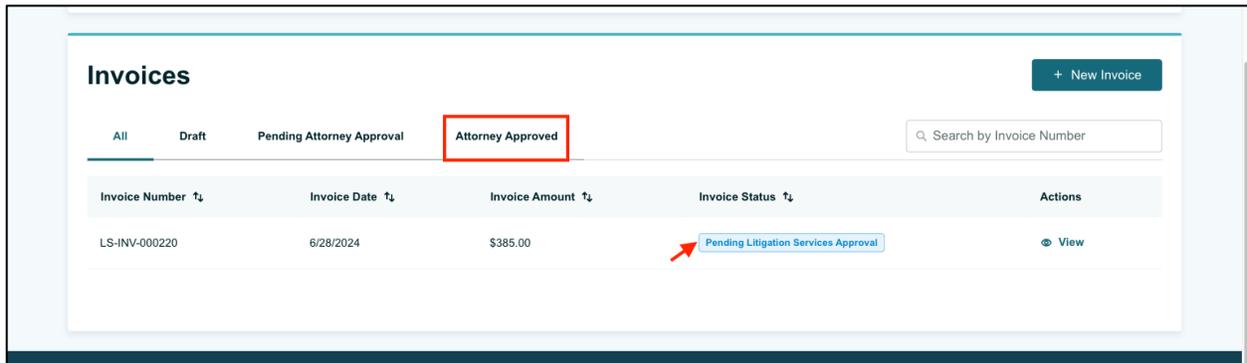


- Go to the **Review and Summary** section, select the Attestation **checkbox**, enter your **Signature**, and click the **Submit** button.

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

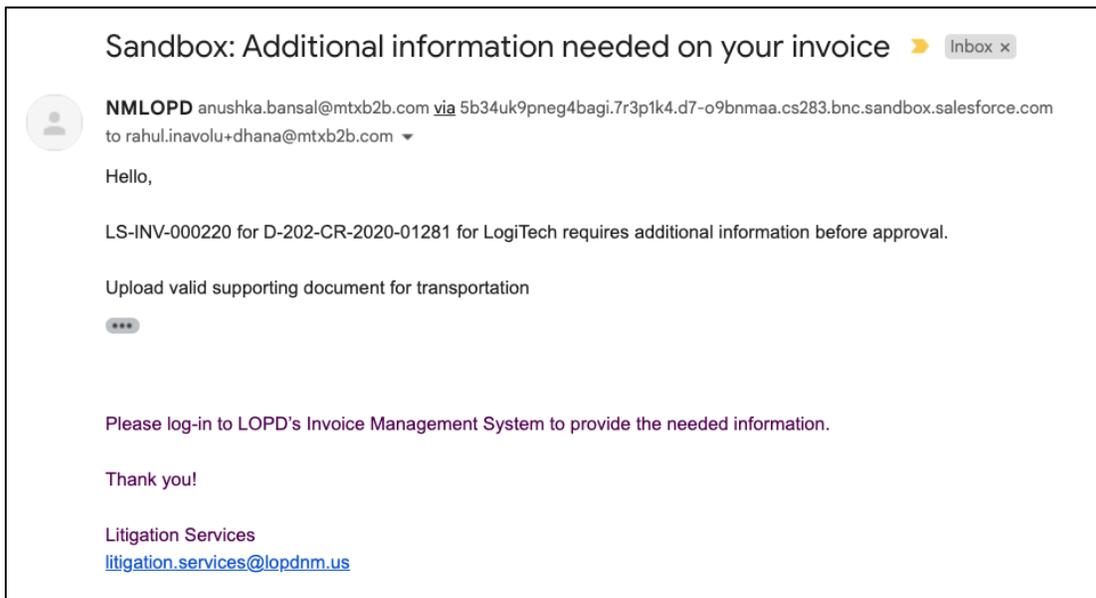
- To go to the Dashboard, click the **Go to Dashboard** button.

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)

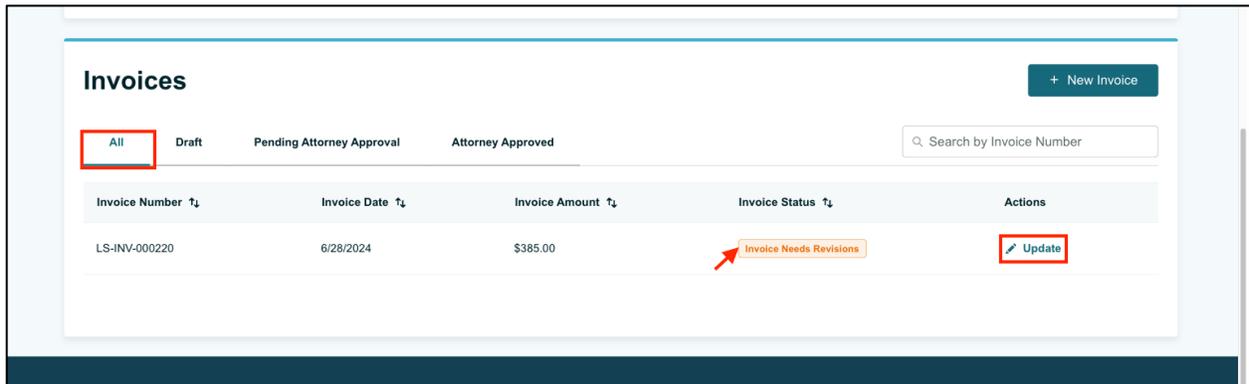
When the LOPD staff requests the changes on the invoice, you will receive a notification email, and the **Invoice Status** on the Portal will be updated to *Invoice Needs Revision*.



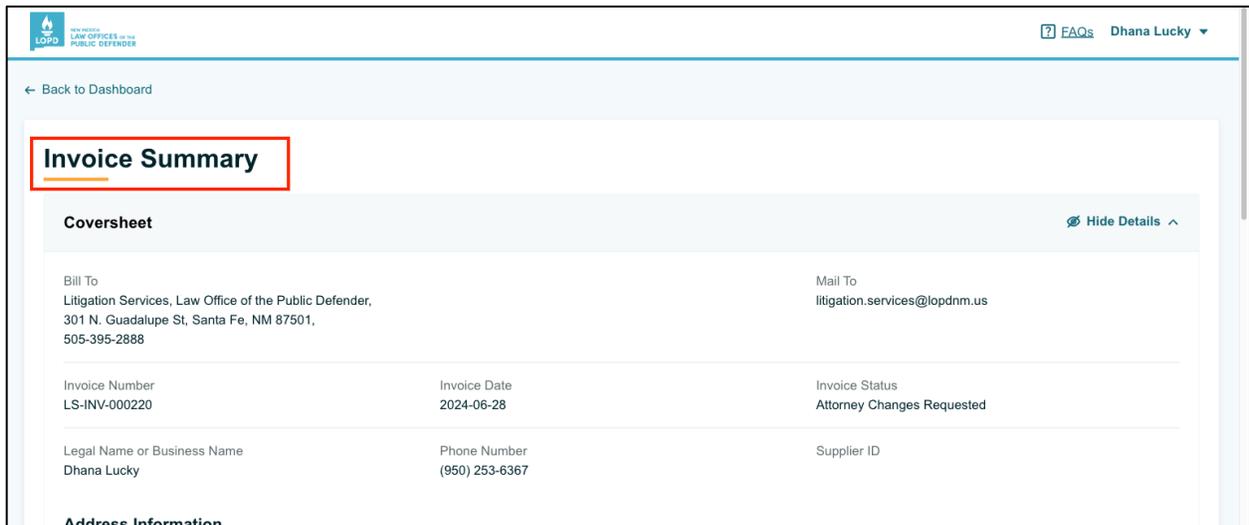
To update the Invoice, perform the following steps:

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

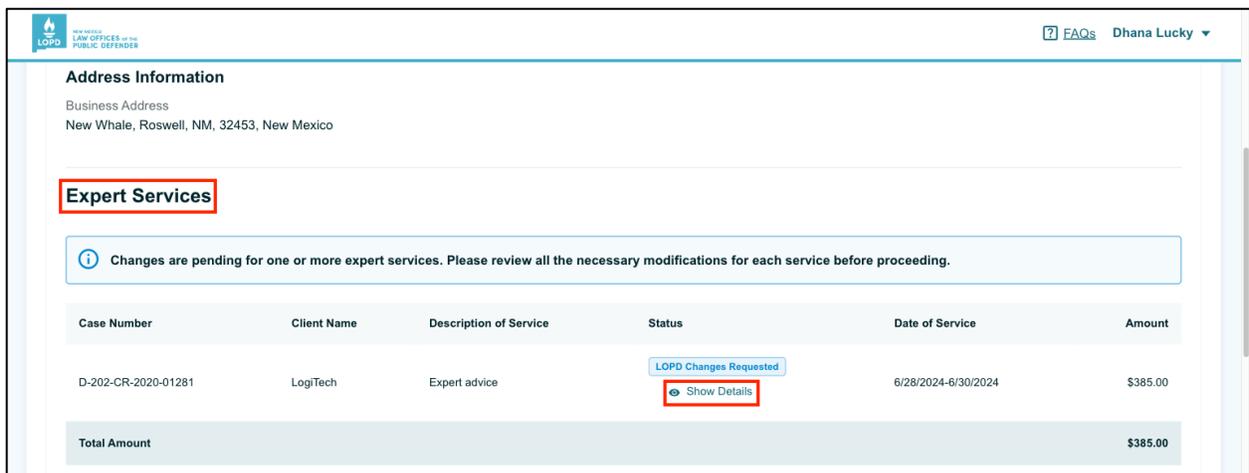
- Go to the **All** tab and click the **Update** button of the invoice with **Invoice Status** as *Invoice Needs Revisions*.



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

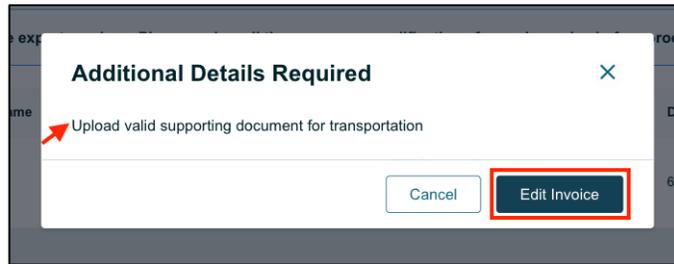


- Scroll to the **Expert Services** section, then click the **Show Details** button.



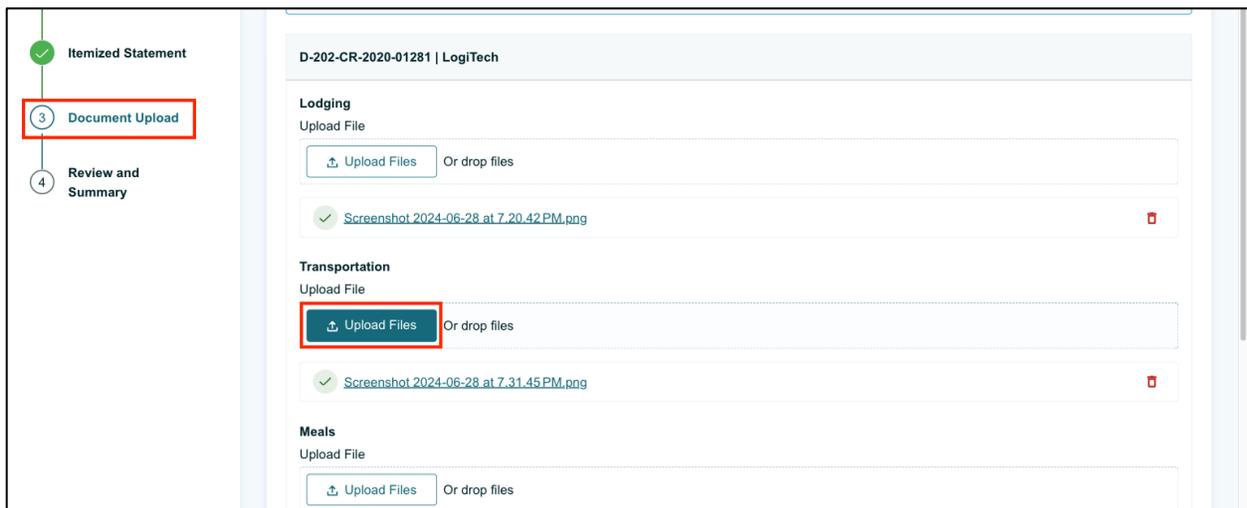
An Additional Details Required pop-up will be displayed with the comments.

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

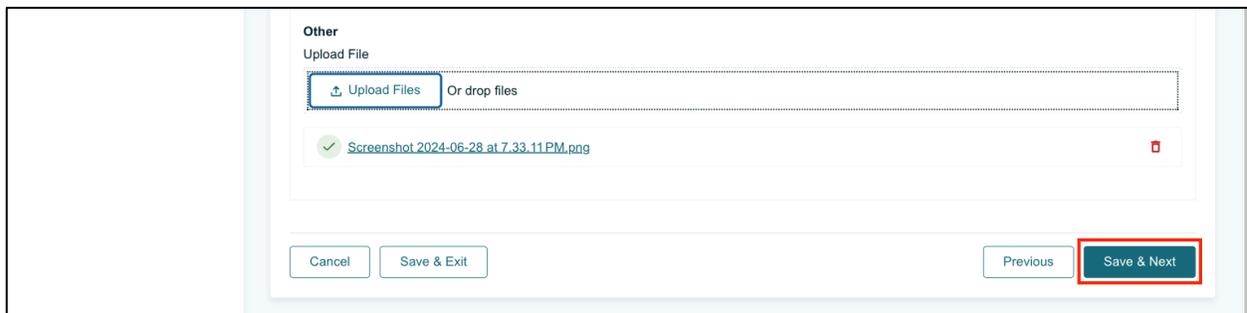


You will be directed to the New Invoice page.

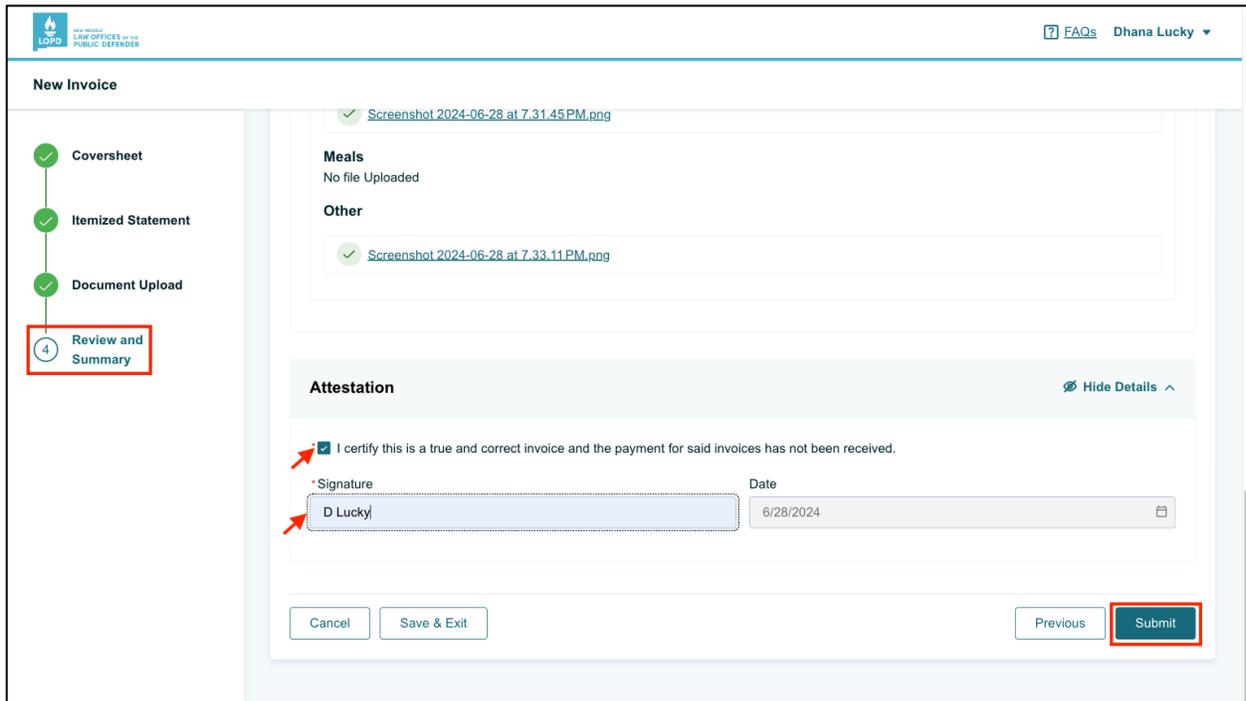
5. Go to the required section and update the changes as mentioned in the comments on the **Additional Details Required** pop-up window (Comment: Upload valid supporting document for transportation, is shown as an example).
6. Go to the **Document Upload** section and upload the required documents.



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

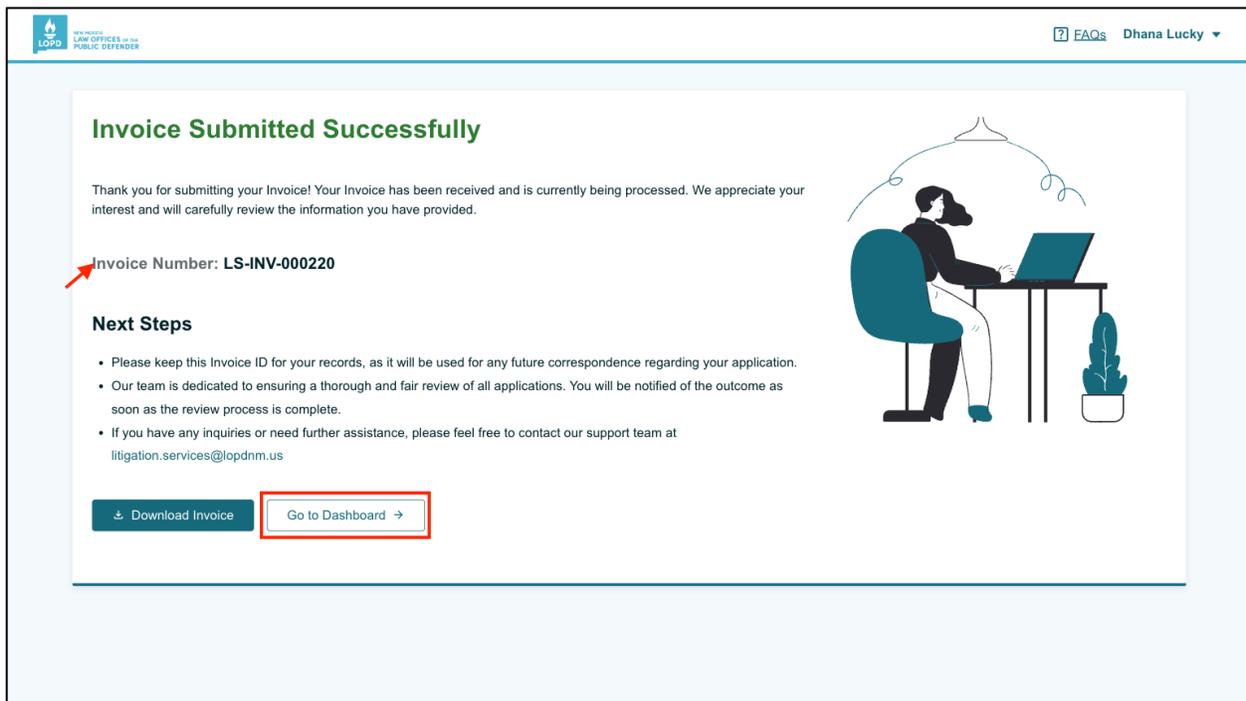


- 8. Go to the **Review and Summary** section, select the Attestation **checkbox**, enter your **Signature**, and click the **Submit** button.

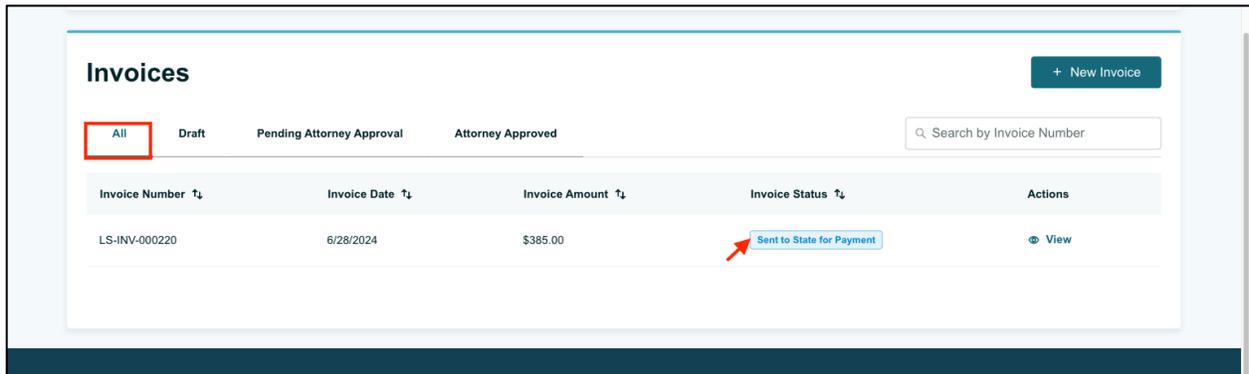


After submitting, a success page will be displayed with the Invoice Number.

- 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*.



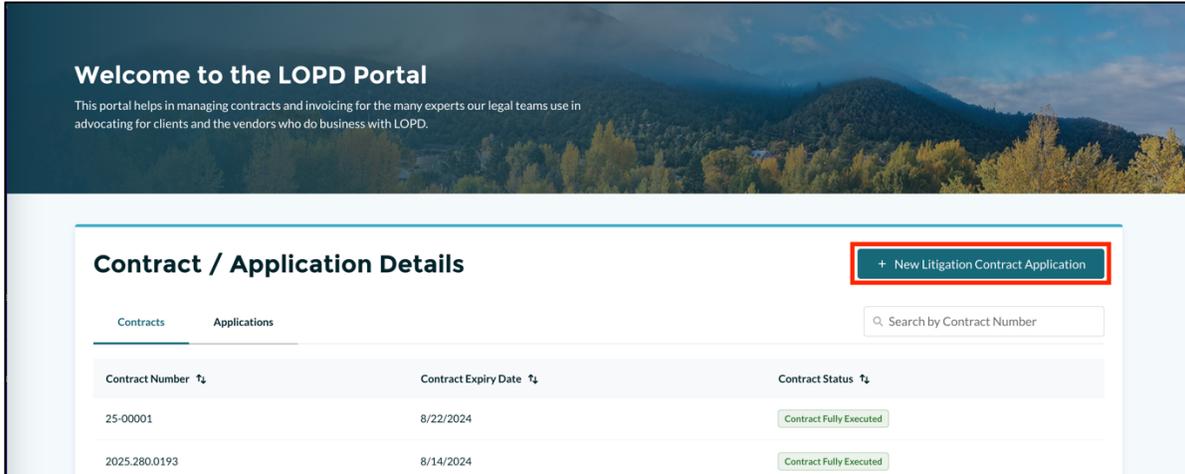
The screenshot displays the 'Invoices' management interface. At the top right, there is a '+ New Invoice' button. Below it, a search bar is labeled 'Search by Invoice Number'. The main area features a tabbed interface with four tabs: 'All', 'Draft', 'Pending Attorney Approval', and 'Attorney Approved'. The 'All' tab is selected and highlighted with a red box. Below the tabs is a table with the following columns: 'Invoice Number', 'Invoice Date', 'Invoice Amount', 'Invoice Status', and 'Actions'. A single row is visible in the table with the following data: Invoice Number 'LS-INV-000220', Invoice Date '6/28/2024', Invoice Amount '\$385.00', Invoice Status 'Sent to State for Payment' (indicated by a red arrow), and an 'Actions' column containing a 'View' link.

Invoice Number	Invoice Date	Invoice Amount	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:

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.

The screenshot shows the 'New Litigation Contract Application' form. On the left is a vertical navigation menu with five steps: 1. Litigation Contractor Information (highlighted with a red box), 2. Qualifications, 3. Rate Schedule, 4. Document Upload, and 5. Summary. The main form area is divided into two sections: 'Litigation Contractor Information' and 'Business Information'. Red arrows point to the 'Service Type' field in the first section and the 'Business Information' header in the second section. The 'Litigation Contractor Information' section includes a text input for 'Litigation Services Contract Application Number', a dropdown for '\* Service Type' (with 'Test Service' selected), and a dropdown for '\* Do you have a pending Case?' (with 'No' selected). The 'Business Information' section includes fields for '\* Legal Name or Business Name' (pre-filled with 'Test Litigation'), 'DBA (if applicable)', '\* Contact Name' (pre-filled with 'UAT ExpertUAT'), '\* Title' (pre-filled with 'Exec'), '\* Phone Number' (pre-filled with '(646) 546-5466'), and '\* Email Address' (pre-filled with '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.

**New Litigation Contract Application**

1 Litigation Contractor Information  
 2 Qualifications  
 3 Rate Schedule  
 4 Document Upload  
 5 Summary

**Address Information**

\* Physical Street Address 1: Street Road 456  
 \* Physical Street Address 2: Church Sreet  
 \* City: Albuquerque  
 \* State: NM  
 \* Zip Code: 87101  
 \* Country: US

NM TRD Business Tax Id Number (BTIN) # (AKA Gross Receipt Tax #) ⓘ  
 NM Taxation and Revenue Department Business Tax ID Number (BTIN):  
 All contractors will need to apply for a BTIN, if required by state guidelines, if they do not already have one. Guidance and the application process can be found online at <https://tap.state.nm.us>. For questions regarding the application or process of obtaining a BTIN number, please contact the NM Taxation and Revenue Department using the resources on their website or at 866-285-2996.  
 For more information on BTIN and registering your business, please visit <https://www.tax.newmexico.gov/businesses/who-must-register-a-business/> and <https://www.tax.newmexico.gov/forms-publications/>.

BTIN-56456985432

Buttons: Cancel, Save & Exit, Save & Next

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.

**New Litigation Contract Application**

1 Litigation Contractor Information  
 2 Qualifications  
 3 Rate Schedule  
 4 Document Upload  
 5 Summary

**Qualification**

Asterisk (\*) indicates required field

\* Are you a former or current NM government employee?  
 Yes

\* Are you a retiree of the NM state government?  
 No

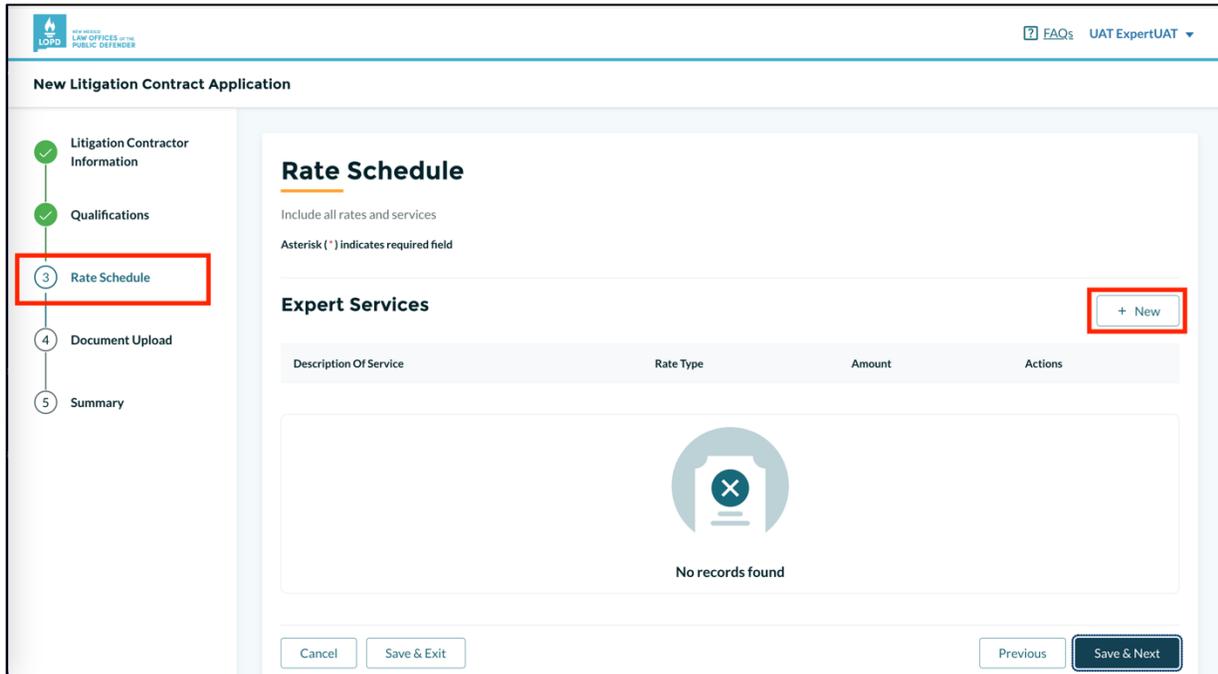
\* Have you done business with the state of NM within the last 12 months?  
 No

\* Detailed Scope of Work  
 Test Scope of Work

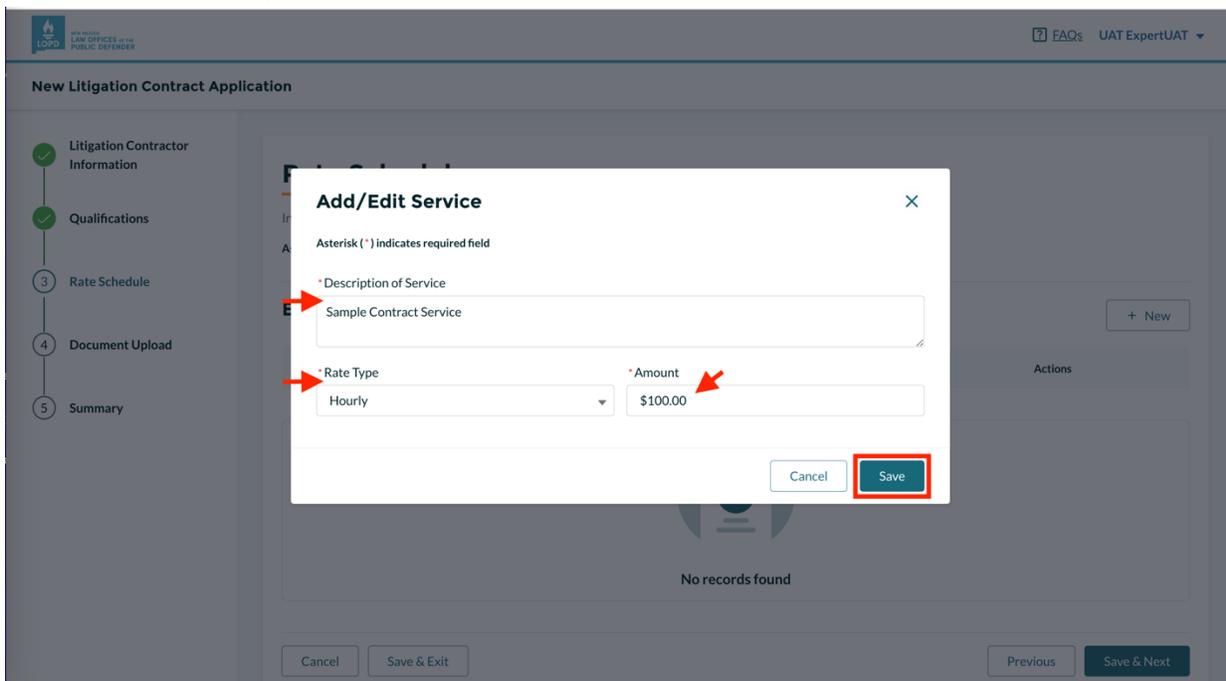
\* Qualifications to include License Number and Expiration if applicable (Please also attach a Resume/CV on the document upload section)  
 Test Qualifications

Buttons: Cancel, Save & Exit, Previous, Save & Next

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.

The screenshot shows the 'Rate Schedule' section of a 'New Litigation Contract Application'. On the left, a progress bar indicates the current step is 'Rate Schedule' (3), with previous steps 'Litigation Contractor Information' (1) and 'Qualifications' (2) completed, and subsequent steps 'Document Upload' (4) and 'Summary' (5) pending. The main content area is titled 'Rate Schedule' and includes instructions: 'Include all rates and services' and 'Asterisk (\*) indicates required field'. Below this is a table titled 'Expert Services' with a '+ New' button. The table contains one row: 'Sample Contract Service' with a 'Hourly' rate type and an amount of '\$100.00'. Each row has edit and delete icons in the 'Actions' column. At the bottom, there are buttons for 'Cancel', 'Save & Exit', 'Previous', and 'Save & Next'.

Description Of Service	Rate Type	Amount	Actions
Sample Contract Service	Hourly	\$100.00	[Edit] [Delete]

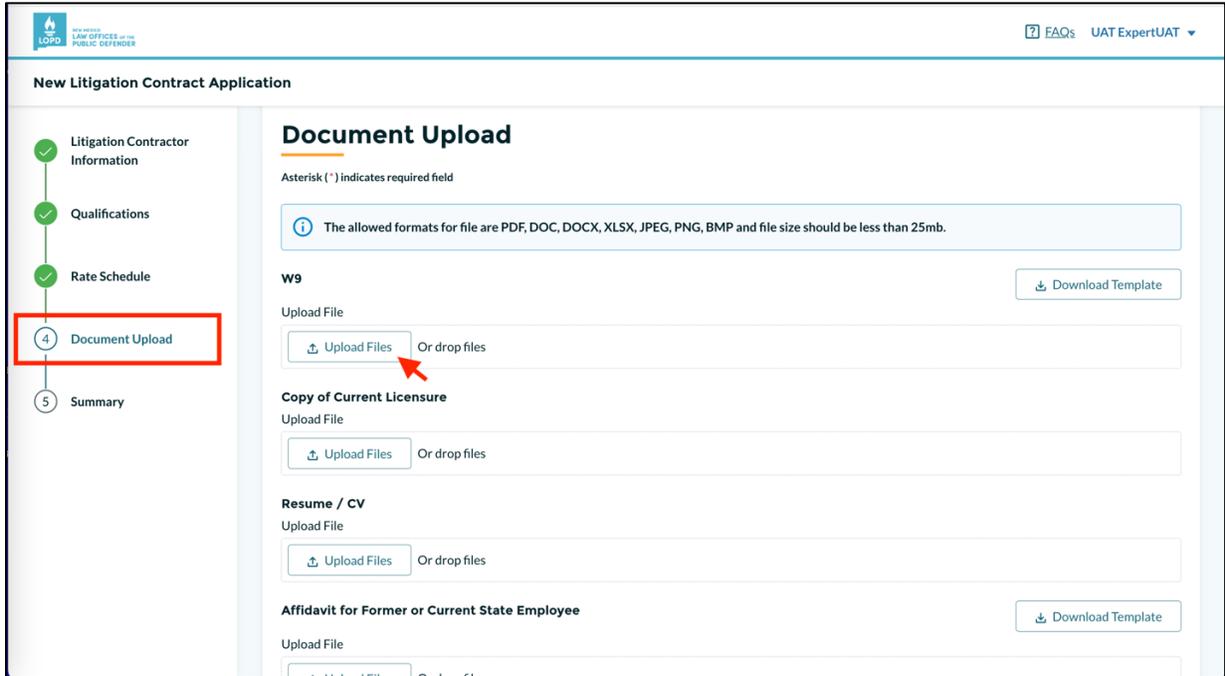
17. Similarly, multiple expert services can be added. After adding the expert services, click the **Save & Next** button to go to the next step.

This screenshot is similar to the previous one but shows two rows in the 'Expert Services' table. The second row is 'Test Contract Service' with a 'Flat' rate type and an amount of '\$250.00'. The 'Save & Next' button at the bottom right is highlighted with a red box, indicating the next step in the process.

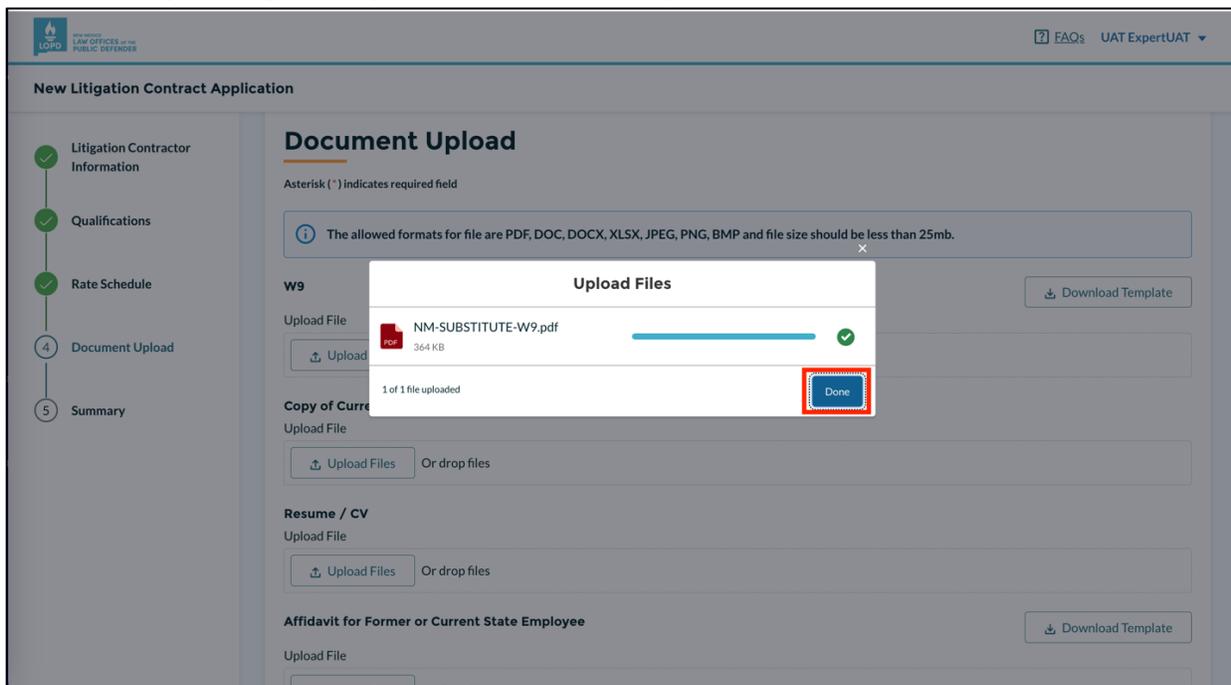
Description Of Service	Rate Type	Amount	Actions
Sample Contract Service	Hourly	\$100.00	[Edit] [Delete]
Test Contract Service	Flat	\$250.00	[Edit] [Delete]

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

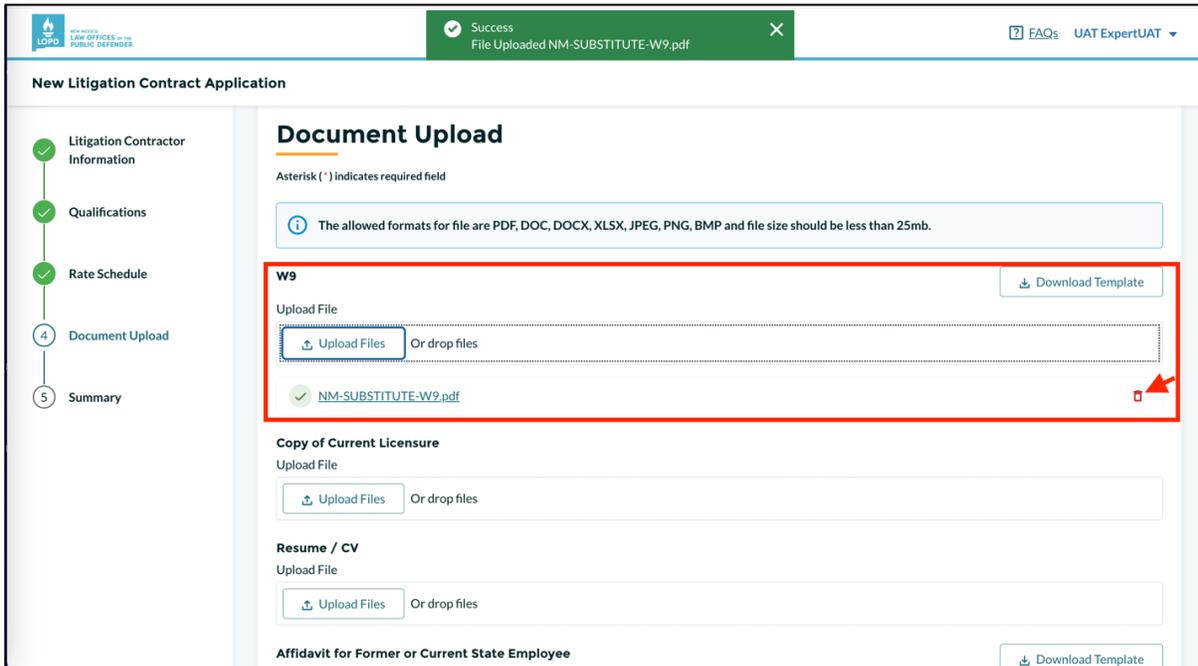
**Note:** Few documents will have a template to follow; download the template by clicking the **Download Template** button in the right corner.



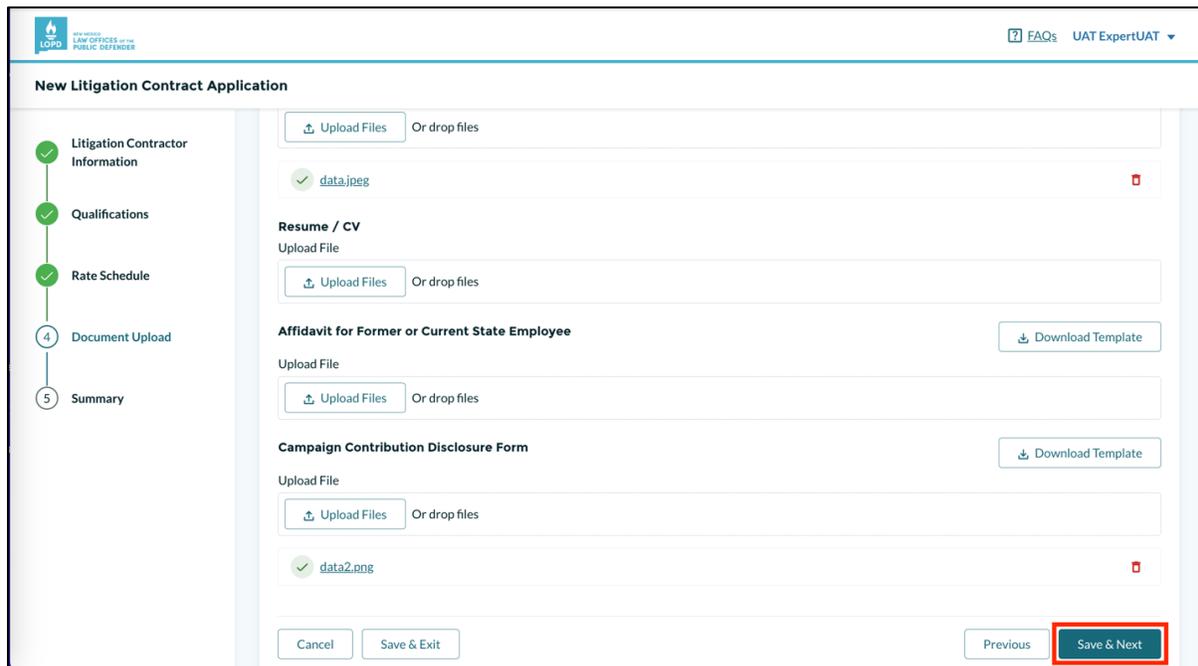
20. After uploading the required document from your local folder, click the **Done** button



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.

**New Litigation Contract Application**

FAQs UAT ExpertUAT

**Summary**

**Litigation Contractor Information** [Edit](#) [Hide Details](#)

Litigation Service Contract Application Number  
CA-00058

Service Type: Test Service | Do you have pending cases?: No

**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, Albuquerque, NM, 87101, US

NM TRD Business Tax ID Number (BTIN) # (AKA Gross Receipt Tax #)  
BTIN-56456985432

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

**New Litigation Contract Application**

FAQs UAT ExpertUAT

**Document Uploads** [Edit](#) [Hide Details](#)

**W9**

[NM-SUBSTITUTE-W9.pdf](#)

**Copy of Current Licensure**

[data.jpeg](#)

**Resume / CV**  
No file Uploaded

**Affidavit for Former or Current State Employee**  
No file Uploaded

**Campaign Contribution Disclosure Form**

[data2.png](#)

Cancel Save & Exit Previous **Submit**

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.

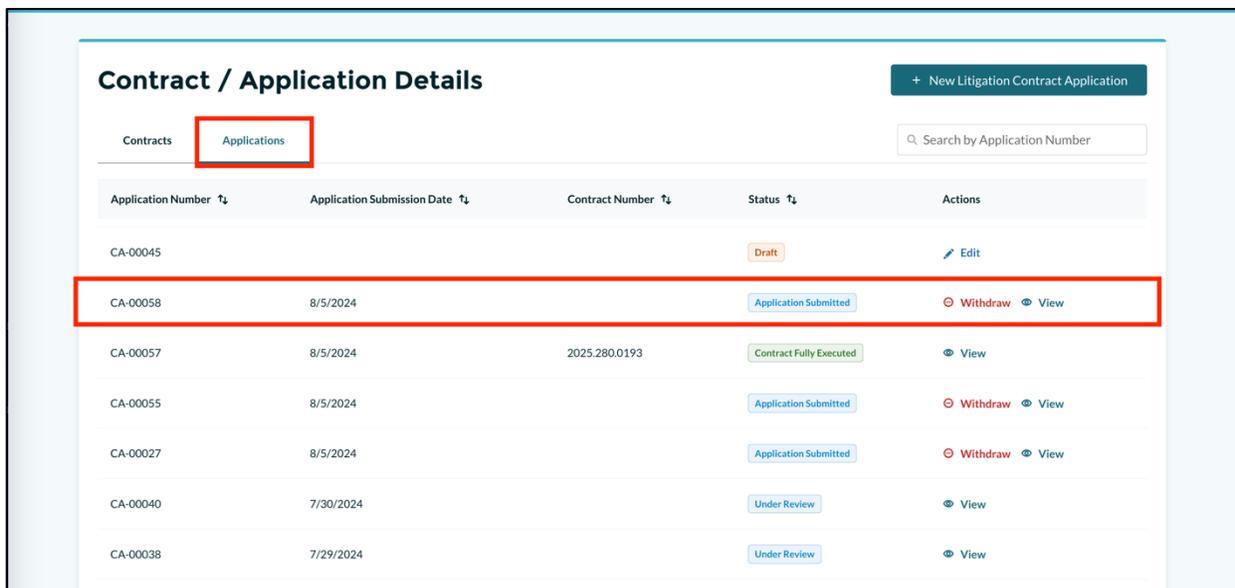


26. On the dashboard page, scroll to the **Contract/Application** Details section.

27. The newly submitted litigation contract application will be displayed under the **Applications** tab.

**Notes:**

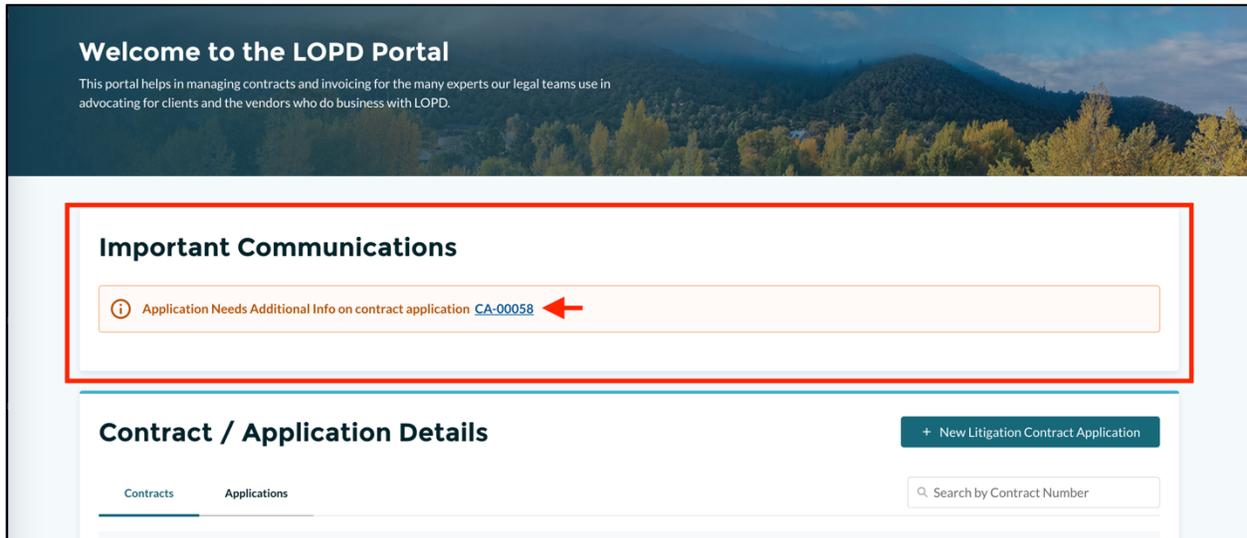
- The status of the submitted application will be *Application Submitted*.
- You can view the PDF version of the submitted application by clicking on the **View** button.
- When the application status is *Application Submitted*, you can use the **Withdraw** button to withdraw your contract application.



## IMPORTANT COMMUNICATIONS - CONTRACTS

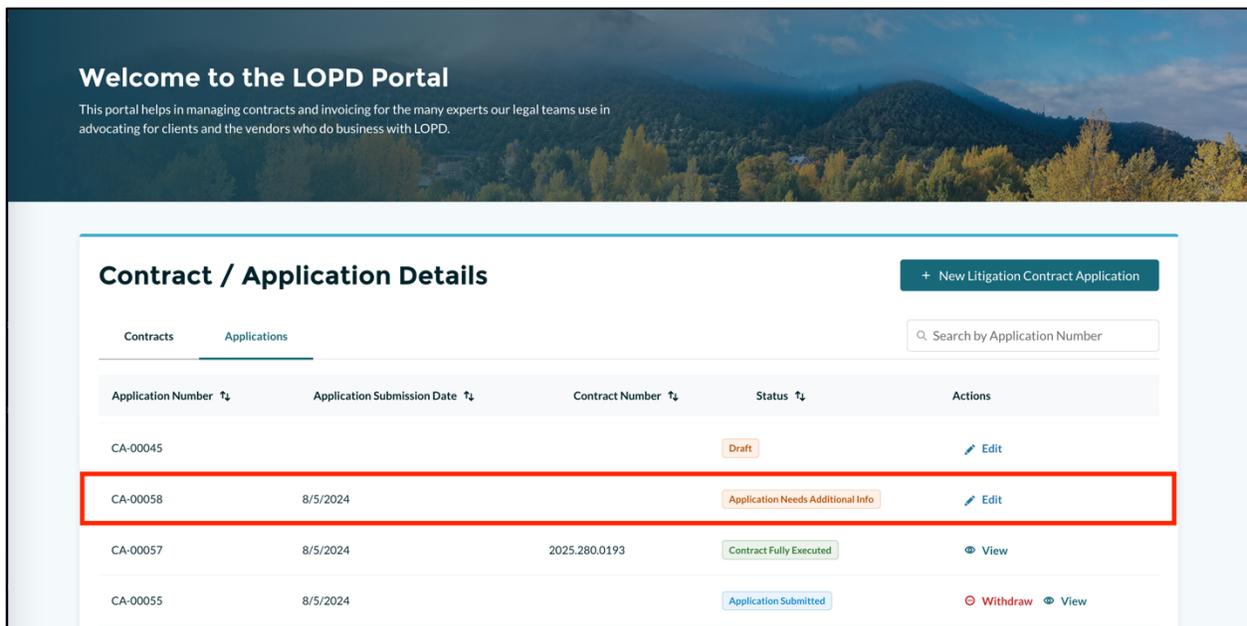
Important communications section on the Dashboard assists you in viewing notifications and pending actions to be carried out on the Portal.

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



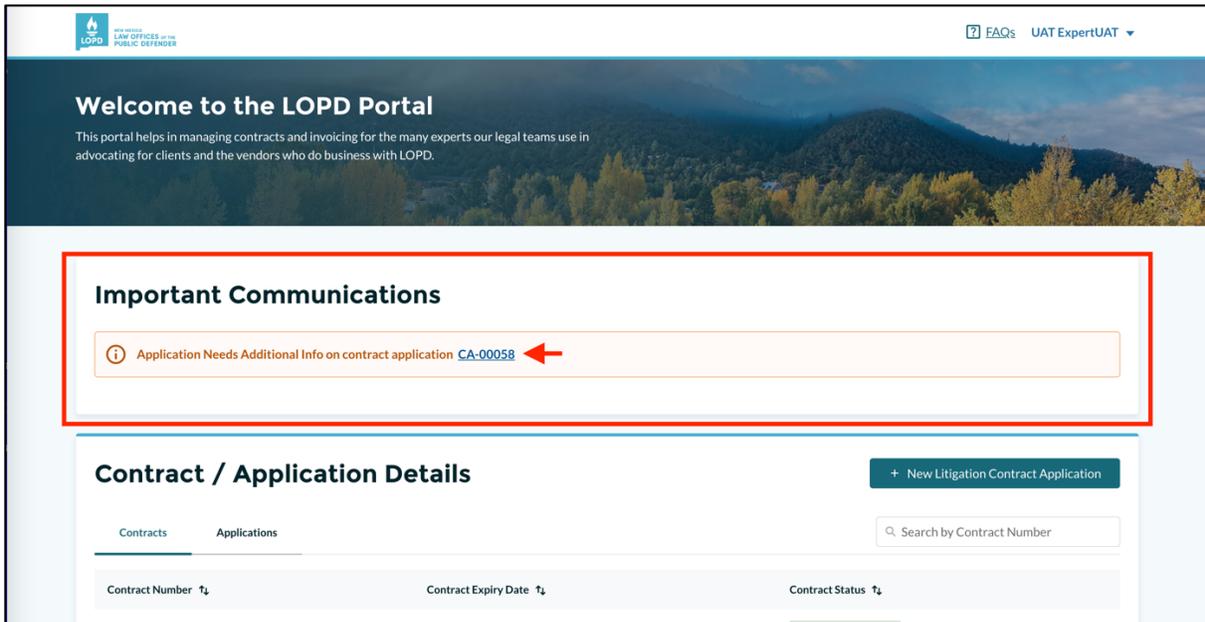
### Editing and Resubmitting the Contracts Application

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*.



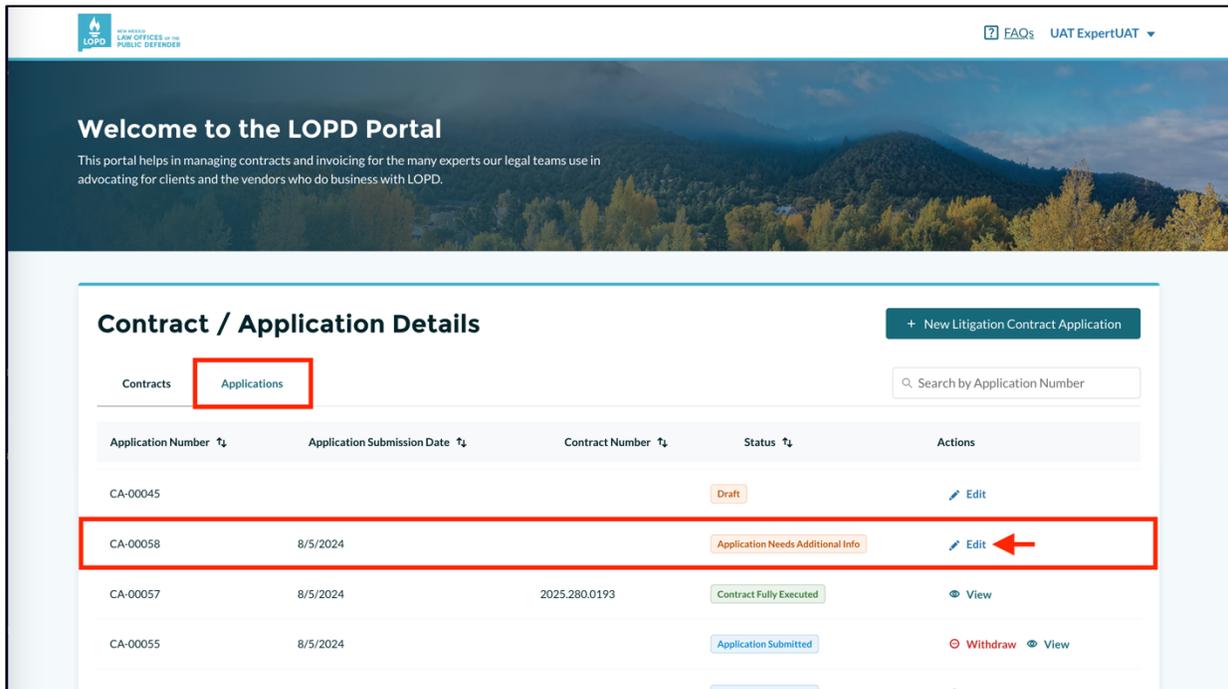
To edit and resubmit the contract application, perform the following steps:

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

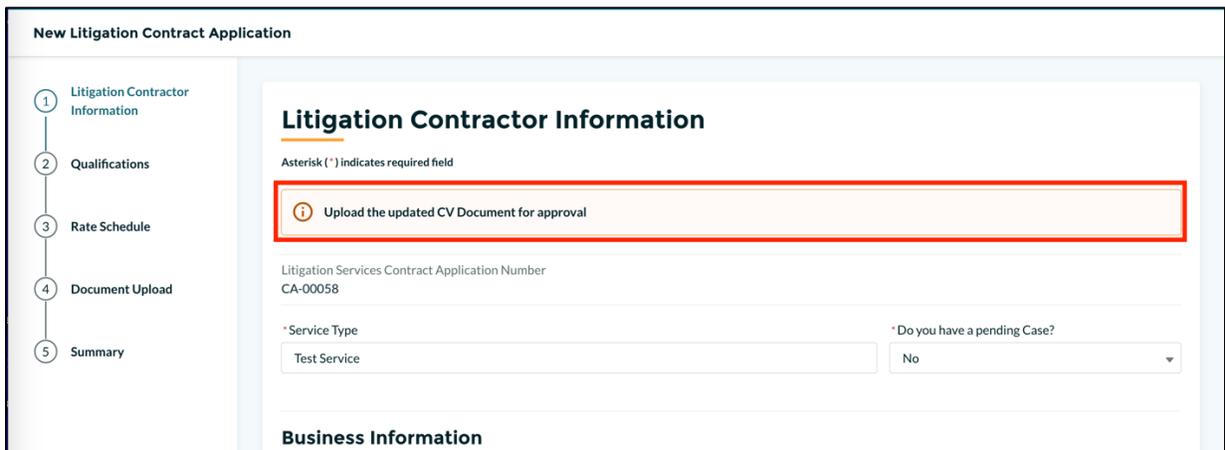
2. On the Dashboard page, scroll to the **Contract/Application** Details section. Go to the **Applications** tab and then click the **Edit** button of the contract application with Status as *Application Needs Additional info*.



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.



**New Litigation Contract Application**

**Litigation Contractor Information**

Asterisk (\*) indicates required field

**Upload the updated CV Document for approval**

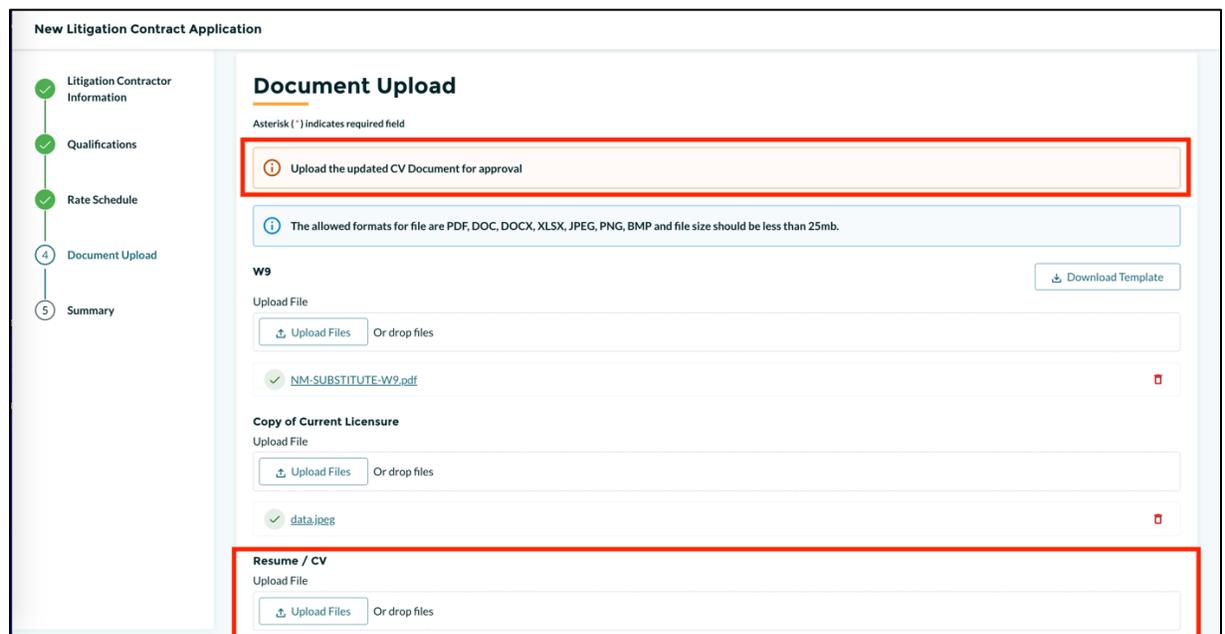
Litigation Services Contract Application Number  
CA-00058

\*Service Type: Test Service      \*Do you have a pending Case?: No

**Business Information**

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.



**New Litigation Contract Application**

**Document Upload**

Asterisk (\*) indicates required field

**Upload the updated CV Document for approval**

The allowed formats for file are PDF, DOC, DOCX, XLSX, JPEG, PNG, BMP and file size should be less than 25mb.

**W9** [Download Template]

Upload File

Upload Files Or drop files

NM-SUBSTITUTE-W9.pdf

**Copy of Current Licensure**

Upload File

Upload Files Or drop files

data.jpeg

**Resume / CV**

Upload File

Upload Files Or drop files

- 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.

**New Litigation Contract Application**

FAQs UAT ExpertUAT

**Document Upload**

**Resume / CV**  
Upload File  
Upload Files Or drop files  
data2.png

**Affidavit for Former or Current State Employee**  
Download Template  
Upload File  
Upload Files Or drop files

**Campaign Contribution Disclosure Form**  
Download Template  
Upload File  
Upload Files Or drop files  
data2.png

Cancel Save & Exit Previous **Save & Next**

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

**New Litigation Contract Application**

FAQs UAT ExpertUAT

**Summary**

**Document Uploads** Edit Hide Details

**W9**  
NM-SUBSTITUTE-W9.pdf

**Copy of Current Licensure**  
data.jpeg

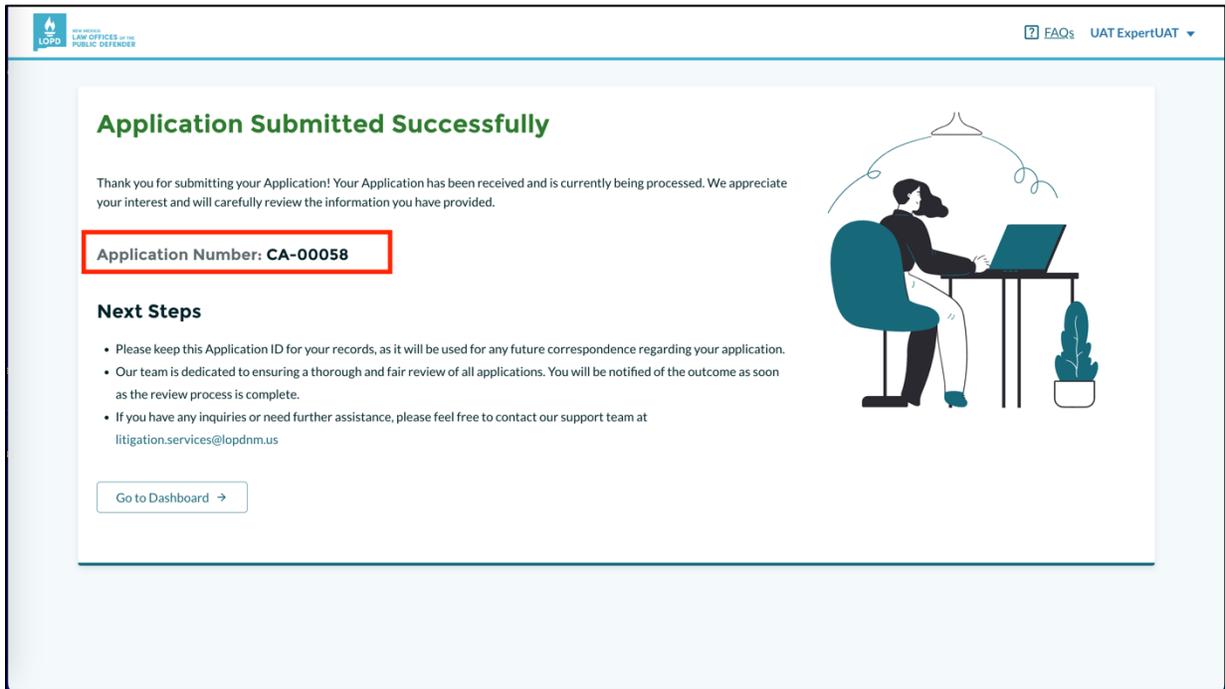
**Resume / CV**  
data2.png

**Affidavit for Former or Current State Employee**  
No file Uploaded

**Campaign Contribution Disclosure Form**  
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.



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

**Contract / Application Details** + New Litigation Contract Application

Contracts Applications 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	Withdraw View
CA-00027	8/5/2024		Application Submitted	Withdraw View
CA-00040	7/30/2024		Under Review	View
CA-00038	7/29/2024		Under Review	View

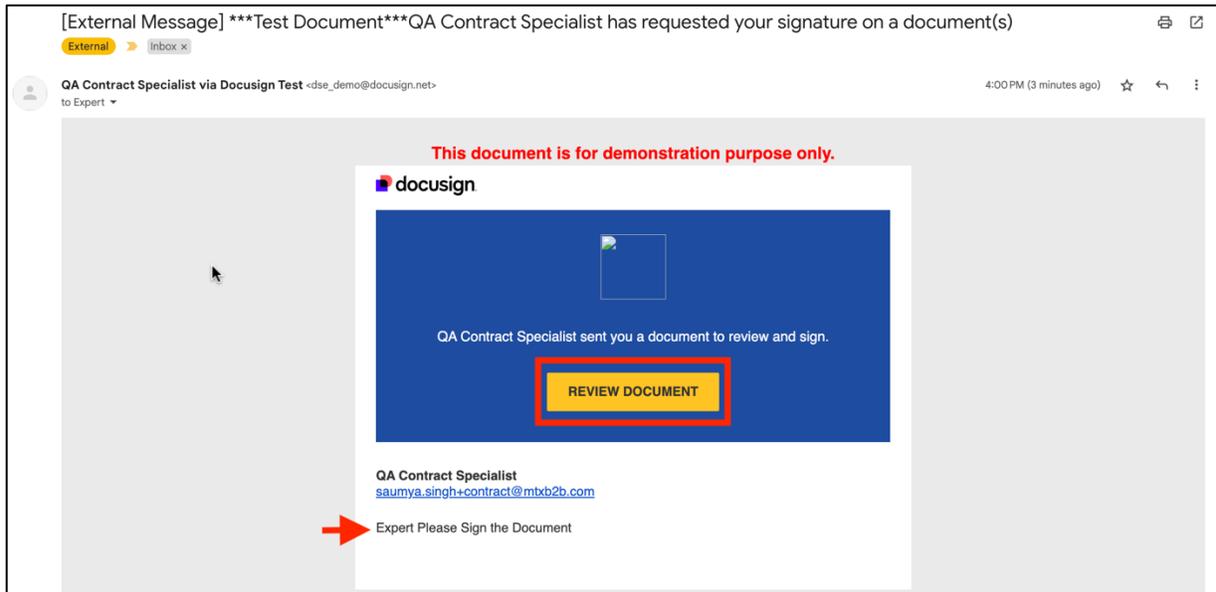
## REVIEWING AND SIGNING THE LITIGATION SERVICE CONTRACT DOCUMENT USING DOCUSIGN

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.

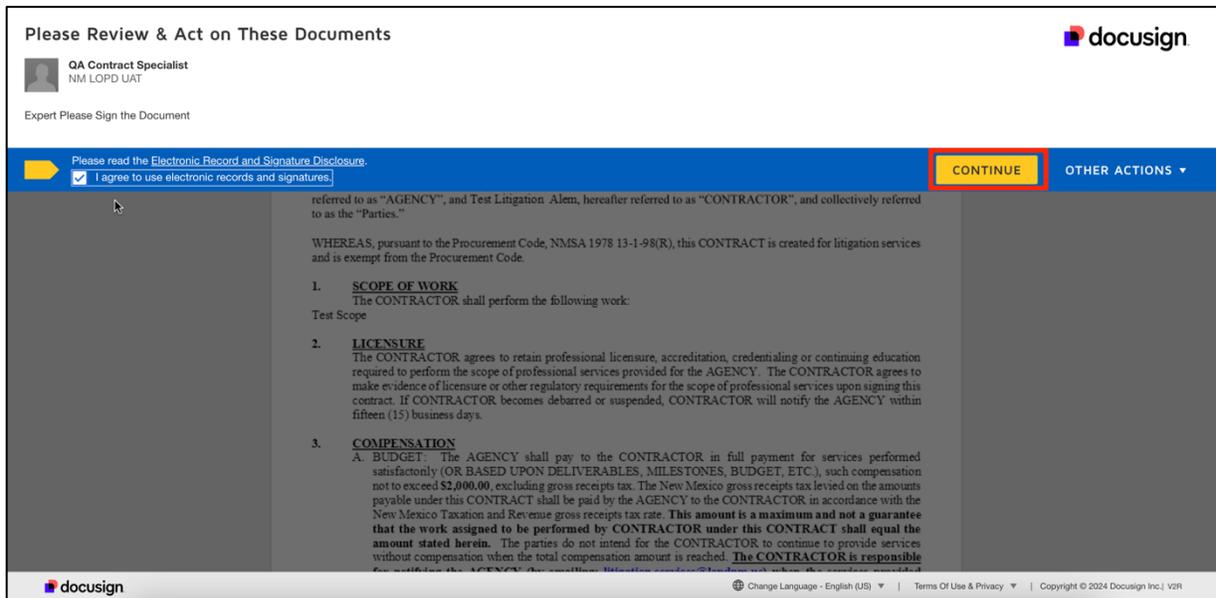
An Expert will receive an email notification to review and sign the litigation service contract document using DocuSign.

1. Open the Email, click the **Review Document** button to review and sign the document.

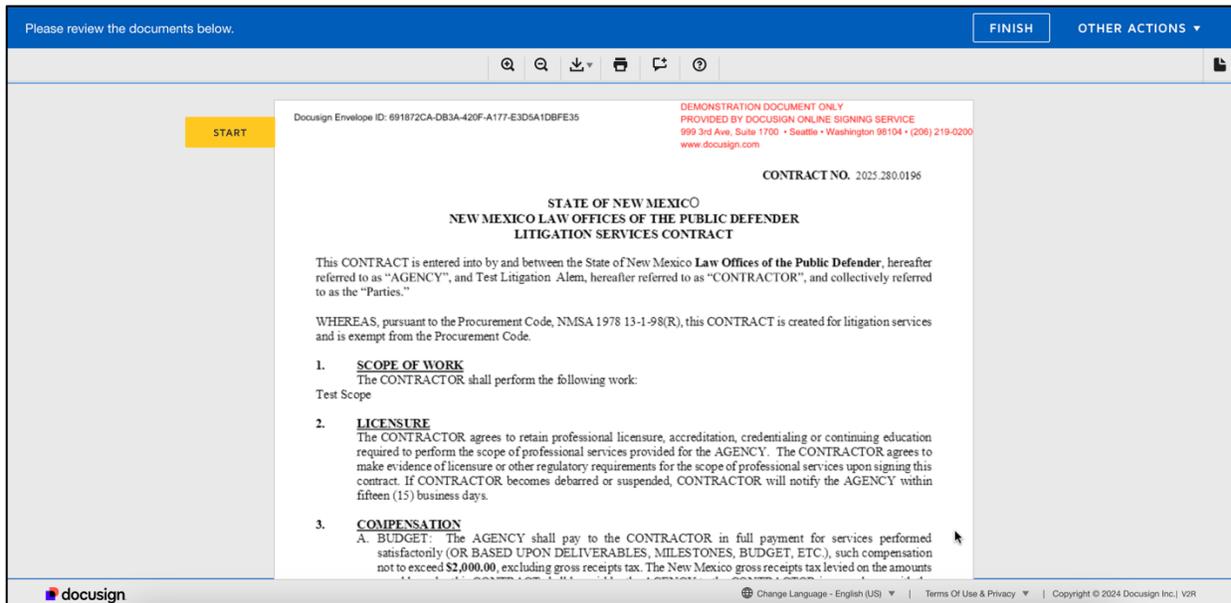
**Note:** The email may also include notes for the expert for the reference.



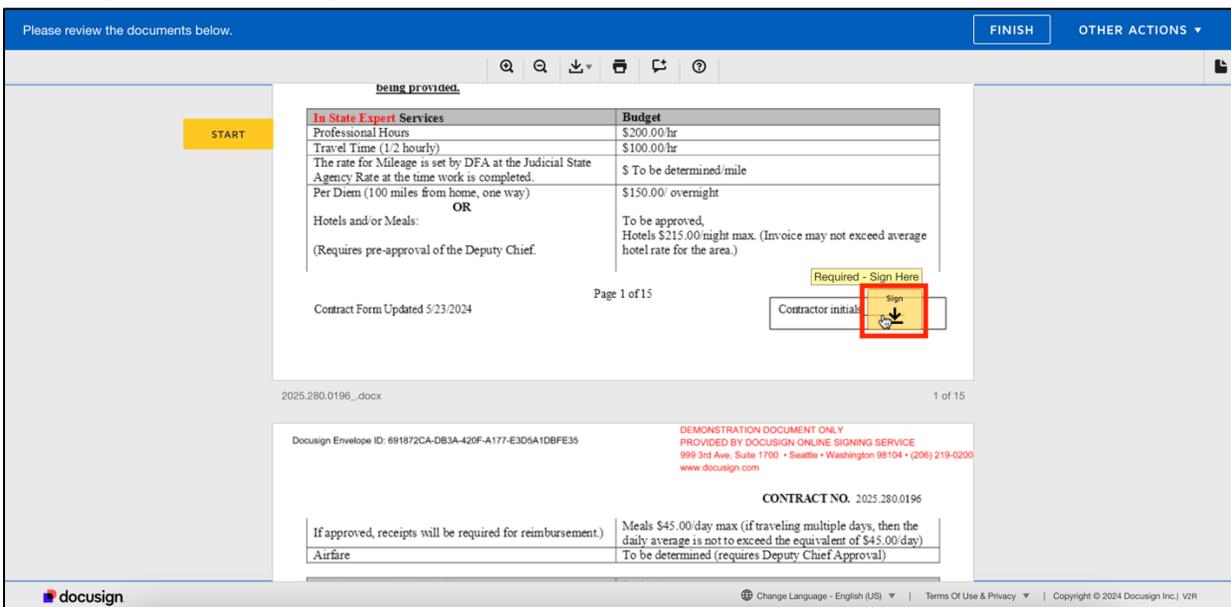
2. You will be taken to the document page, click the **Continue** button to get started.



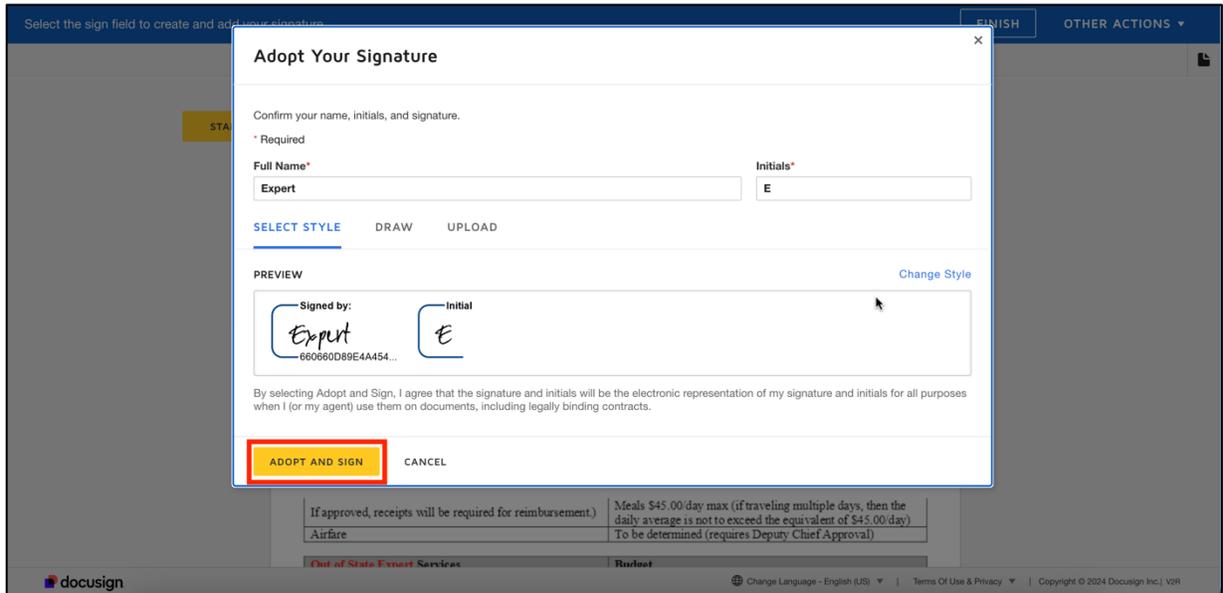
3. Scroll down to begin reviewing the document.



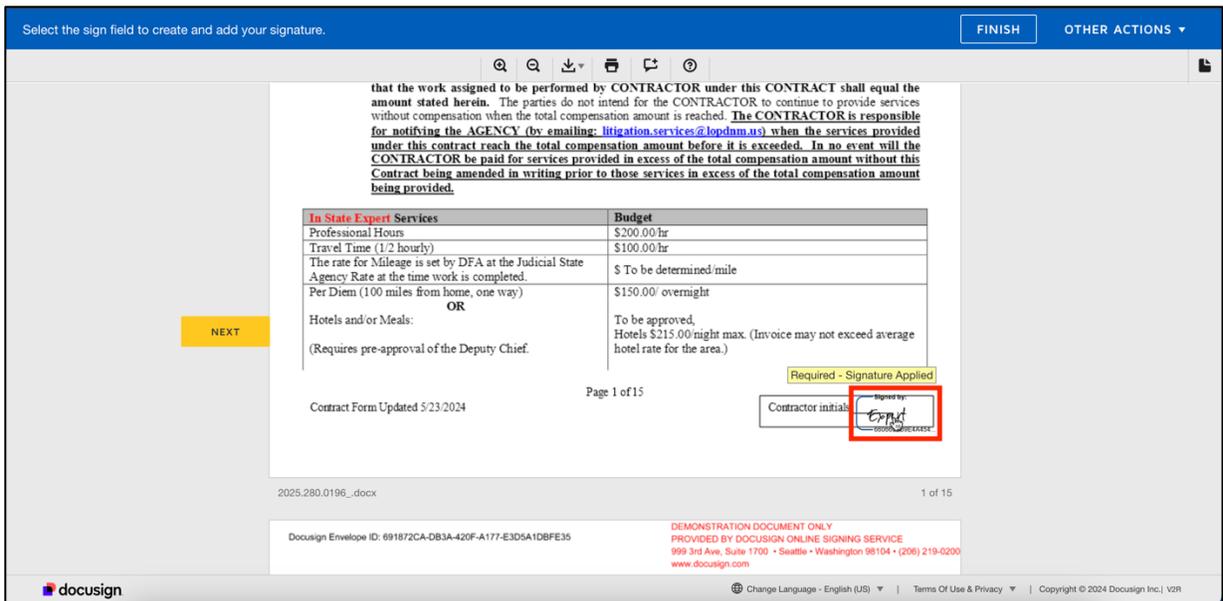
4. It is necessary for you to sign the document wherever signatures are requested. Click the **Sign Here** icon to sign the document.



- 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.

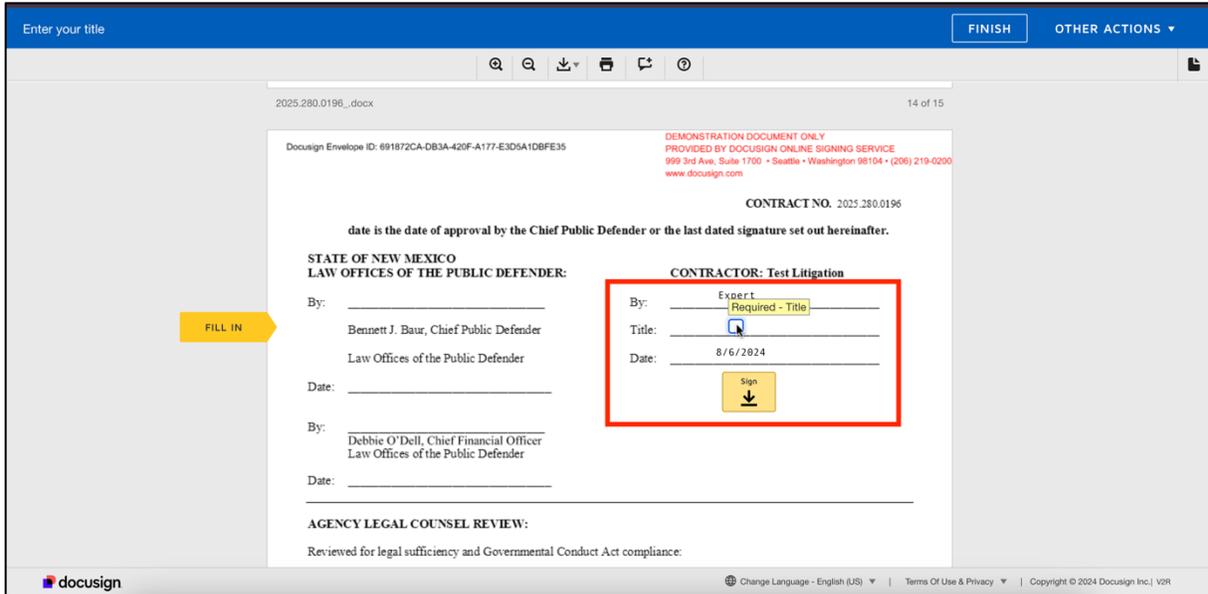


- Your signature will be applied.

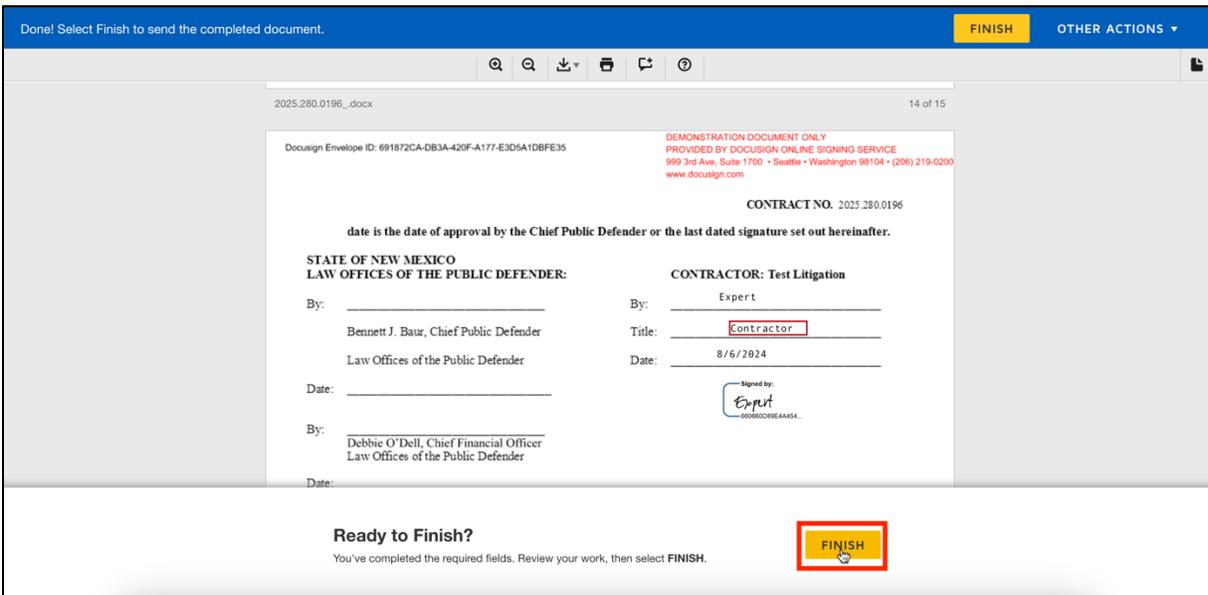


7. Scroll through the document, after reviewing, apply the signature in all the requested areas.

**Note:** If asked, you might need to enter specific information or dates in the provided text boxes.



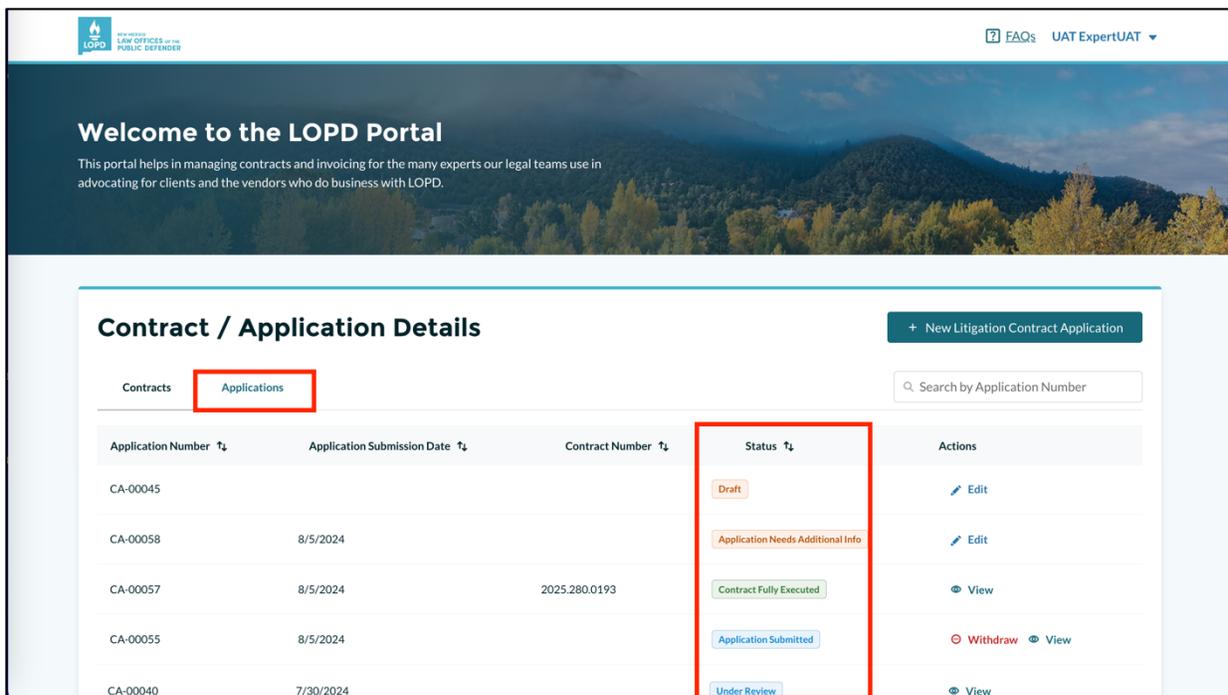
8. After reviewing & signing the document, click the **Finish** button to complete.



## 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).

- 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.
- 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.
- 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.
- 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.



**Contract / Application Details** + New Litigation Contract Application

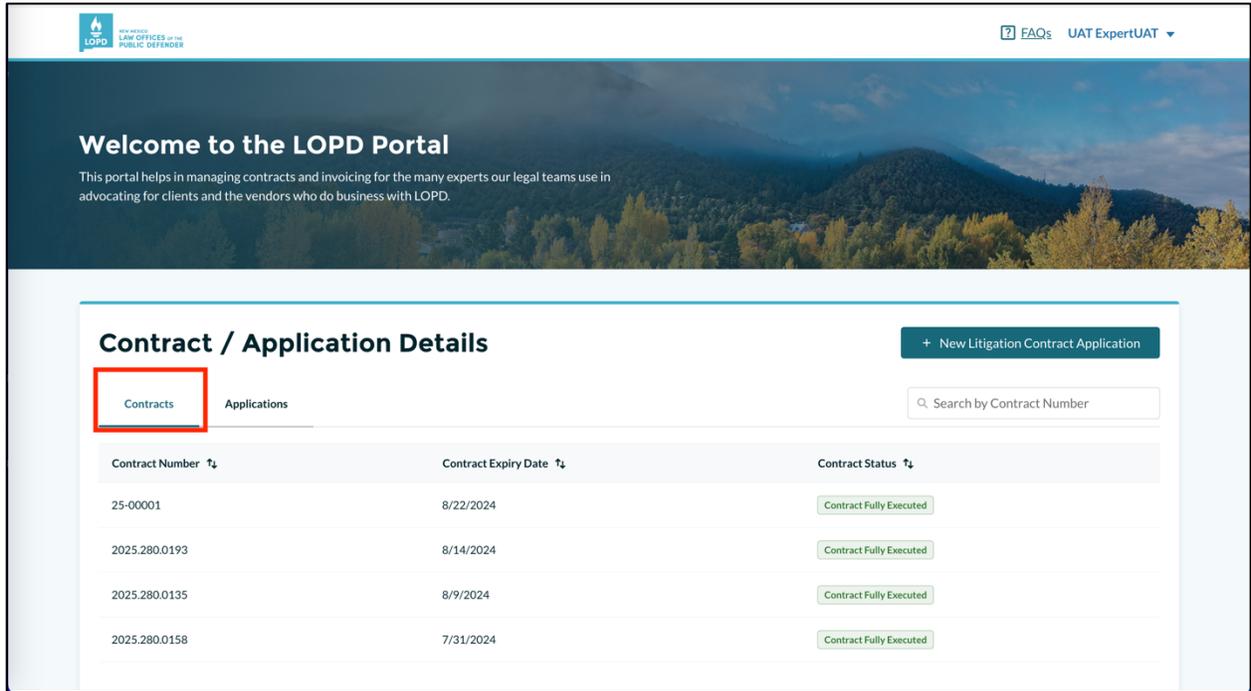
Contracts Applications Search by Application Number

Application Number	Application Submission Date	Contract Number	Status	Actions
CA-00045			Draft	Edit
CA-00058	8/5/2024		Application Needs Additional Info	Edit
CA-00057	8/5/2024	2025.280.0193	Contract Fully Executed	View
CA-00055	8/5/2024		Application Submitted	Withdraw View
CA-00040	7/30/2024		Under Review	View

## 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.



The screenshot shows the 'Contract / Application Details' page in the LOPD Portal. The 'Contracts' tab is selected and highlighted with a red box. The page displays a table of fully executed contracts. The table has three columns: 'Contract Number', 'Contract Expiry Date', and 'Contract Status'. There are four rows of data, all with a status of 'Contract Fully Executed'.

Contract Number	Contract Expiry Date	Contract Status
25-00001	8/22/2024	Contract Fully Executed
2025.280.0193	8/14/2024	Contract Fully Executed
2025.280.0135	8/9/2024	Contract Fully Executed
2025.280.0158	7/31/2024	Contract Fully Executed