

# SUBMITTING ONLINE ADR QUARTERLY REPORTS

(Via website: <http://adr.gsd.state.nm.us/QRSubmit.aspx>)

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Before entering any information into the initial Quarterly Report Entry screen (or at any time), download an Excel “Quarterly Report Template” and save it to your desktop. Downloading the template allows you to enter and save your ADR activities and events as they occur; this will greatly simplify submitting your report at the end of each quarter. (We recommend downloading the template before starting data entry or system will “time-out” after 15 minutes due to no activity.)

You will see this message at the top of the initial screen:

(\* Quarterly Report Template Now Available: to save the Quarterly Report template to your computer, Click [Here](#))

1. Click on the link provided ([Here](#)).
  2. You will be asked: “*What do you want to do with QuarterlyReportsDetailTemplate.xlsx?*”
  3. Select “Save as” and save the Template to your desktop; for now, leave the name as is. Each quarter, you will use this template to create a new Excel spreadsheet to enter and track your agency’s ADR activities/events.
  4. To create a spreadsheet for this quarter, select the template from your desktop and enable editing. This spreadsheet tracks ADR activities and events individually. Mandatory data entry fields are identified as **(required)**. All eleven fields in this template are the same fields used to enter events manually in the past. The template will guide your data entry with pop-up messages and drop-down menus, and each line ends with a field for “Other Information or Comment.”
  5. Enter information for each activity or event based on your knowledge of that particular ADR activity or event. If the event is a mediation coordinated by the ADR Bureau, it will have an assigned request tracking number and we can assist you with how these events should be entered. For other activities or events, utilize the drop-down menus and the “Other Information or Comment” to best describe what took place. (Sample language can be found in the ADR REPORTABLE ACTIVITY EXAMPLES). As the ADR Coordinator, you may not always have complete details about an activity or event and may need to get additional information in order to complete reporting.
  6. Once you have completed data entry, rename and save the spreadsheet identifying it for this particular quarter; continue to enter and save additional ADR activities and events as they occur.
- At the end of the quarter, you will upload this spreadsheet directly into the ADR Bureau’s online system.
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Return to the initial Quarterly Report Entry Screen at <http://adr.gsd.state.nm.us/QRSubmit.aspx> (or go to our website: New Mexico General Services/Risk Management Division/ Office of Alternative Dispute Resolution & Prevention Website; select “Submit Forms Online-Quarterly Activity Report”; click on “To submit Quarterly ADR reports, [click here.](#)”)

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## ENTERING & SUBMITTING YOUR INFORMATION

1. At the initial Quarterly Report Entry Screen, carefully enter your identifying information and click on **Next>>**.
2. On the next screen, verify that your identifying information is correct; if necessary, click on [Edit](#) and make corrections, then click on [Update](#) to save those corrections (or [Cancel](#) to disregard them). You will then return to the Quarterly Report Information Entry Screen.
3. You have two methods to enter your ADR activities and events:
  - a. Manually enter activities and events individually as in the past.

OR

  - b. Upload the spreadsheet you created and saved for this quarter.
4. If you have only one or two ADR activities and events, you may want to manually enter each event as in the past. In the middle of the screen, you will see this box:

Add a single Quarterly Report Event in this section

[Add New Line](#)

- a. Click on [Add New Line](#) and enter your activity or event in the appropriate fields. Mandatory data entry fields are identified as **(required)**. When complete, click on [Insert](#) (or [Cancel](#) to disregard).
  - b. Continue to enter each ADR activity or event individually until reporting for quarter is complete.
  - c. Review individual entries; if all entries are correct, click on **Submit Report**. You will be asked: *“Are you sure you want to submit this form?”* If the report is correct, click on **OK**; if not, click on **Cancel** and correct a specific activity or event using the [Edit](#) or [Delete](#) links at the end of that data entry row. When corrected, click on **Submit Report**.
5. If your ADR activities and events are saved to a spreadsheet, you will want to upload the spreadsheet directly into the system. At the lower part of the screen, you will see this box:

To save the Quarterly Report template to your computer, Click [Here](#)

\* Upload new spreadsheet

\* You may add the information in one of the two ways below:

- Delete existing entries & add new entries from spreadsheet       Add spreadsheet entries to existing entries

Upload

You have two options for uploading your spreadsheet:

- a. Selecting the first option (“Delete existing entries & add new entries from spreadsheet”) will delete existing entries (for this quarter) and add new entries from the spreadsheet. Click on **Browse...** and select the saved Quarterly Report Excel spreadsheet. Once you have selected the correct Quarterly Report Excel spreadsheet for this quarter, click on **Upload**; you will be asked: *“ATTENTION!!! Are you sure you want to upload this Excel Quarterly File?”* If you are sure, click on **OK**; if not, click on **Cancel** to stop this action and return to the previous screen. Once you click on **OK**, the data uploaded from the saved Excel spreadsheet should appear (minus any events manually entered).

- b. Selecting the second option (“Add spreadsheet entries to existing entries”) will upload your Excel spreadsheet entries in addition to any events already manually entered. Follow the same **Browse...** and **Upload** steps; you will be asked the same question and will have the same opportunities to continue or cancel this action. Once you click on **OK**, the data uploaded from the Excel spreadsheet should appear in addition to the lines of activity that have already been entered manually.
- c. When you are satisfied that your data entries are complete and correct, click on **Submit Report** on the bottom left of your screen. You will be asked, “*Are you sure you want to submit this form?*” If you are sure, click on **OK**; if not, click **Cancel** to stop this action and return to the previous screen for further entries or corrections.

You will receive a screen message confirming that you that you have “Successfully Submitted a Quarterly Report.”

**CONGRATULATIONS!**

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## **AMENDING, CORRECTING & RESUBMITTING YOUR REPORT**

Once you have submitted your report, you will receive a number of e-mails:

1. You will receive an initial e-mail like the one below:

Hello,

Your form has been submitted and it's ready to be approved.

If you have questions please contact us at [ADR.Bureau@state.nm.us](mailto:ADR.Bureau@state.nm.us) providing the following information :

Reference ID : FY16Q300758

To review or edit your form, please follow this link [Click here to access](#)

Thank you for using the ADR online reporting system!

GSD/RMD-Office of Alternative Dispute Prevention & Resolution

- a. Use the highlighted link in the e-mail if you need to amend or change anything in the report.
- b. You can then resubmit the report to the ADR Bureau.

2. If the ADR Bureau finds an error in your report, or needs more information, it may be rejected. You will receive an e-mail explaining the reason, like the one below:

Hello,

Your form has been rejected : Please correct dates on line 3 in the Quarterly Report.

If you have questions, please contact us at [ADR.Bureau@state.nm.us](mailto:ADR.Bureau@state.nm.us) providing the following information :

Reference ID : FY16Q300758

To review or edit your form, please follow this link [Click here to access](#)

Thank you for using the ADR online reporting system!

GSD/RMD-Office of Alternative Dispute Prevention & Resolution

- a. Use the highlighted link in the e-mail if you need to amend or change anything in the report.
- b. You can then resubmit the report to the ADR Bureau.

3. If the ADR Bureau approves the report as submitted (or after you amend or correct it), you will receive an e-mail like the one below:

Hello,

Your form has been approved

If you have questions, please contact us at [ADR.Bureau@state.nm.us](mailto:ADR.Bureau@state.nm.us) providing the following information :

Reference ID : FY16Q300758

To review your form please follow this link [Click here to access](#)

Thank you for using the ADR online reporting system!

GSD/RMD-Office of Alternative Dispute Prevention & Resolution

You can use the highlighted link in the e-mail to review your report at any time.

**Your reports, with their unique Reference ID #, will be stored in the ADR Bureau's database, and your data will be included in the Bureau's annual report.**

**THANK YOU for using the ADR online reporting system!**