

CJA eVoucher Associates Functionality for Attorneys

This document explains the features of the **Associates** functionality in CJA eVoucher. Follow local policies where applicable.

The new associates functionality in the eVoucher applications allows an appointed attorney using the services of an associate attorney to add claims for services and expenses to their own CJA 20/30. To do this, the appointed attorney must contact the court or federal defender's office to ensure the associate attorney is set up in eVoucher and to have the associate attorney added to the appointment. Once completed, an attorney having an associate on their appointment may add associate services and expenses to a CJA 20/30 and submit together with their own services and expenses on the same voucher.

Current Vouchers

Attorneys and courts can process vouchers on associate appointments created before v5.2 for 90 days after the deployment to production. After this time, all new associates must be created as an associate on the voucher and processed the new way.

Creating a CJA 20/30 with an Associate

Payments are always made to the appointed attorney's preferred payee billing selected on the **Basic Info** tab of the CJA 20/30.

1. On the **Home** page, select a case from the **Appointments' List** grid.

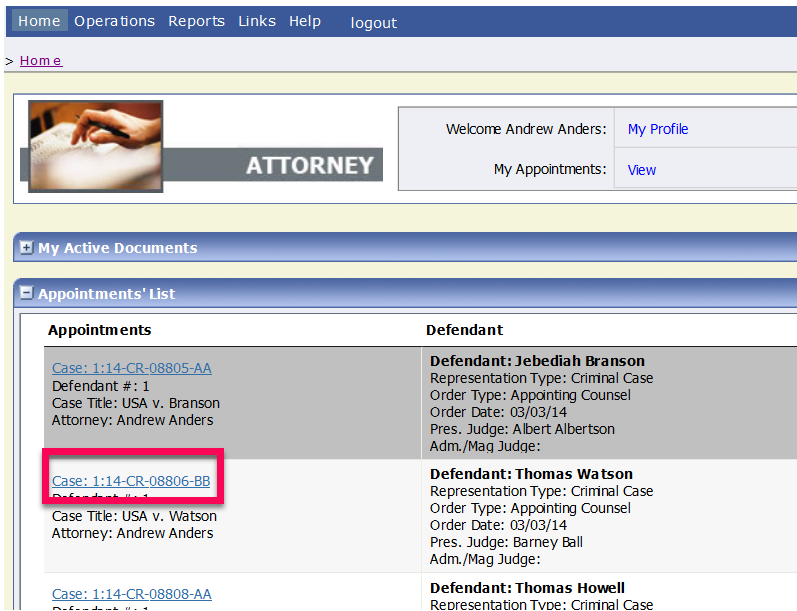


Figure 1: Billing Code

- In the CJA-20 (or CJA-30, if the case is a Capital Case) section, click **Create**.

Figure 2: Appointment Info Page



- In the **Associate Info** section, select the level of access (below) for this voucher that the associate attorney has, if any. Payment for this voucher still goes to the selected preferred payee.

- a. **Not on Voucher:** This voucher does not include any claims for services and/or expenses for the associate attorney.
- b. **On Voucher, No Edit:** This voucher includes claims for services and/or expenses for the associate attorney. While the voucher is in Voucher Entry mode, the associate has read-only access. They can only view their own entries on this voucher. Only the appointed attorney can add, remove, edit, and save entries on behalf of the associate.
- c. **On Voucher, Can Edit:** This voucher includes claims for services and/or expenses for the associate attorney. While the voucher is in Voucher Entry mode, both the appointed attorney and the associate can add, remove, edit, and save their entries on this voucher. The associate always has access to only their voucher entries.

After selecting **On Voucher, No Edit** or **On Voucher, Can Edit**, click the **Services** and/or **Expenses** tab.

Figure 3: Basic Info Tab

The screenshot shows the 'Basic Info' tab selected. The form is divided into several sections:

- Basic Info:** A table with fields for CIR. DIST/DIV. CODE, PERSON REPRESENTED, MAG. DKT/DEF. NUMBER, DIST. DKT/DEF. NUMBER, APPEALS. DKT/DEF. NUMBER, OTHER. DKT/DEF. NUMBER, IN CASE/MATTER OF (Case Name), PAYMENT CATEGORY, TYPE PERSON REPRESENTED, REPRESENTATION TYPE, OFFENSE(S) CHARGED, ATTORNEY'S NAME AND MAILING ADDRESS, COURT ORDER (with checkboxes for Associate, Co-Counsel, Federal Defender, etc.), LAW FIRM NAME AND MAILING ADDRESS, and Repayment options.
- Payment Info:** Preferred Payee dropdown set to 'Andrew Anders - Andrew Anders'.
- Associate Info:** A red box highlights this section, showing 'Billy Bates' and a dropdown menu with options: 'Not on Voucher', 'On Voucher, No Edit', and 'On Voucher, Can Edit'.

- The **Services** and **Expenses** tab include an additional **Attorney** drop-down field. If no selection is made in this field, then service or expense entries added to the voucher will be for the appointed attorney. To enter a service or expense claim for the associate, click the **Attorney** drop-down arrow and select the associate's name.

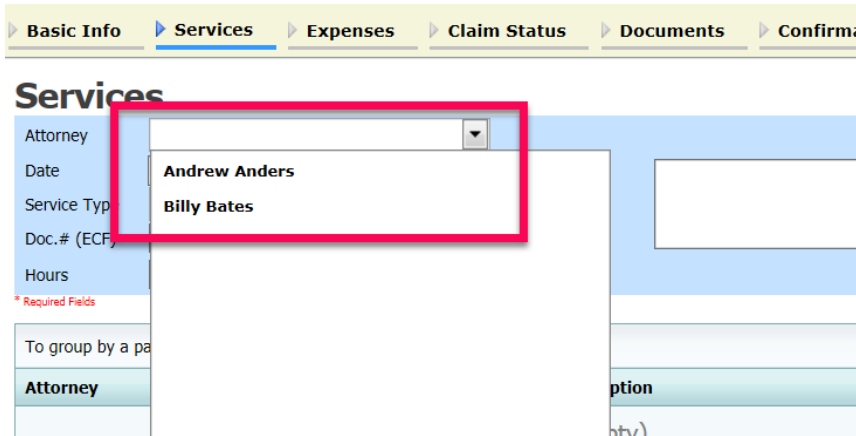


Figure 4a: Services Tab

Entries added for the associate are added at the rate entered by court staff when the associate was added to the appointment. The rate may be at or below the statutory hourly rate. Service and expense entries for the appointed attorney appear at the statutory rate (non-capital or capital). The Attorney column in the table indicates for whom each line item applies.

Figure 4b: Services Tab

Attorney	Service Type	Date	Description	Hrs	Rate	Amt
Andrew Anders	a. Arraignment and/or Plea	10/03/2018	Arraignment	4.0	\$129.00	\$516.00
Andrew Anders	c. Motion	10/03/2018	motion	8.0	\$129.00	\$1,032.00
Billy Bates	d. Trial	10/03/2018	Trial	8.0	\$100.00	\$800.00
Billy Bates	e. Sentencing Hearings	10/03/2018	sentencing	6.0	\$100.00	\$600.00

- Click the **Claim Status** tab to enter the start and end dates of the voucher, along with other information. This tab is always read-only for the associate. Submit supporting documentation on the **Documents** tab in PDF format.

Figure 5: Claim Status Tab

- Click the **Confirmation** tab and then click **Submit** to send the voucher to the court. Only the appointed attorney can submit the voucher to the court.

Figure 6a: Confirmation Tab

34. SIGNATURE OF THE CHIEF JUDGE, COURT OF APPEALS (OR DELEGATE) <i>Payment approved in excess of the statutory threshold amount</i>	DATE	34a. JUDGE CODE	TOTAL AMT. CERTIFIED FOR PAYMENT
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Attention: The notes you enter will be available to the next approval level.

Public/Attorney Notes

I swear and affirm the truth or correctness of the above statements
Date: 10/3/2018 13:49:42

Adding Services/Expenses as an Associate Attorney

Associate appointments appear in the My Appointments page with the order type of **Associate For** [the appointed attorney's name]. Only the appointed attorney can create a voucher.

- If the associate is given **On Voucher, Can Edit** permission, they can add their services and expenses to the voucher.



- If the associate is given **On Voucher, No Edit** permission, only the appointed attorney can edit the voucher.

Associates can only see their own claims and claimed amounts on the voucher. The appointed attorney is the only one who can view the entire voucher with the combined entries.

Figure 8: My Appointments

Appointments	Defendant
Case: 1:14-CR-08806-BB Defendant #: 1 Case Title: USA v. Watson Attorney: Billy Bates	Defendant: Thomas Watson Representation Type: Criminal Case Order Type: Associate For Andrew Anders Order Date: 10/02/18 Pres. Judge: Barney Ball Adm/Mag Judge:
Case: 1:14-CR-08807 Defendant #: 1 Case Title: USA v Delgado Attorney: Billy Bates	Defendant: Patricia Delgado Representation Type: Criminal Case Order Type: Appointing Counsel Order Date: 04/10/17 Pres. Judge: Adm/Mag Judge:

1. Log in to eVoucher, and in the My Active Documents section, click the **Edit** link next to the voucher in Voucher Entry status.

Figure 8: My Active Documents Section

Case	Defendant	Type	Status	Date Entered
1:14-CR-08806-BB- Start: End:	Thomas Watson (# 1) Claimed Amount: 1,000.00	CJA-20 Andrew Anders	Voucher Entry Edit	10/04/2018
1:16-CR-03333-AA- Start: End:	Bartolomeo Venzetti (# 1) Claimed Amount: 0.00	CJA-20	Voucher Entry Edit	02/23/2016
1:15-CR-02103-BB-	Randolf Rex (# 2)	CJA-20	Voucher Entry	11/25/2015

2. The **Basic Info** tab contains read-only information about the case and appointed attorney. The appointed attorney is the only person who can upload documents and submit the voucher; therefore, the voucher does not include the **Documents** or **Confirmation** tabs when viewed by the associate.

Figure 9: Basic Info Tab

Basic Info Services Expenses Claim Status

Basic Info

1. CIR./DIST./DIV.CODE 0101	2. PERSON REPRESENTED Thomas Watson	VOUCHER NUMBER	
3. MAG. DKT/DEF.NUMBER	4. DIST. DKT/DEF.NUMBER 1:14-CR-08806-1-BB	5. APPEALS. DKT/DEF.NUMBER	6. OTHER. DKT/DEF.NUMBER
7. IN CASE/MATTER OF(Case Name) USA v. Watson	8. PAYMENT CATEGORY Felony (including pre-trial diversion of alleged felony)	9. TYPE PERSON REPRESENTED Adult Defendant	10. REPRESENTATION TYPE Criminal Case
11. OFFENSE(S) CHARGED			
12. ATTORNEY'S NAME AND MAILING ADDRESS Billy Bates Associate for Andrew Anders 110 Main Street San Antonio TX 78210 Phone: 210-833-5623 - Fax:		13. COURT ORDER <input checked="" type="checkbox"/> A Associate <input type="checkbox"/> C Co-Counsel <input type="checkbox"/> D Federal Defender <input type="checkbox"/> F Subs for Federal Defender <input type="checkbox"/> L Learned Counsel (Capital Only) <input type="checkbox"/> O Appointing Counsel <input type="checkbox"/> P Subs for Panel Attorney <input type="checkbox"/> R Subs for Retained Attorney <input type="checkbox"/> S Pro Se <input type="checkbox"/> T Retained Attorney <input type="checkbox"/> U Subs for Pro Se <input type="checkbox"/> X Administrative <input type="checkbox"/> Y Standby Counsel	
14. LAW FIRM NAME AND MAILING ADDRESS Andrew Anders TIN: XX-XXXXXXX 110 Main Street San Antonio TX 78210 Phone: 210-833-5623		Prior Attorney's Name Appointment Dates Signature of Presiding Judge or By Order of the Court Barney Ball Date of Order 10/2/2018 Nunc Pro Tunc Date Repayment <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	

<< First < Previous Next > Last >> Save

- Click the **Services** tab to add services. Complete the required fields and click **Add**. If there are expenses to be claimed, click the **Expenses** tab. Complete the required fields and click **Add**.

Figure 10a: Services and Expenses Tabs

Basic Info **Services** Expenses Claim Status

Services

Date: 10/04/2018 * Description: Arraignment

Service Type: a. Arraignment and/or Plea *

Doc.# (ECF): Pages: Hours: 4 * at \$100.00 per hour.

* Required Fields

To group by a particular Header, drag the column to this area.

Attorney	Service Type	Date	Description	Hrs	Rate	Amt
Billy Bates	a. Arraignment and/or Plea	10/04/2018	Arraignment	4.0	\$100.00	\$400.00
Billy Bates	d. Trial	10/04/2018	Trial	6.0	\$100.00	\$600.00



When all service and expense items have been added to the voucher, click **Save**. The appointed attorney will submit the voucher to the court when ready. After the voucher is submitted to the court, it may still be accessed from the **Appointment Info** page, but will be read-only.

Figure 10b: Services and Expenses Tabs

Basic Info | **Services** | Expenses | Claim Status

Services

Date: 10/04/2018 *
 Description: Arraignment

Service Type: a. Arraignment and/or Plea *

Doc.# (ECF): Pages:

Hours: 4 * at \$100.00 per hour.

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