

## 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

The screenshot shows the user interface for an attorney. At the top, there is a navigation bar with links for Home, Operations, Reports, Links, Help, and Logout. Below this, a welcome message for Andrew Anders is displayed, along with links for My Profile and My Appointments. The main content area is titled 'My Active Documents' and contains a section for 'Appointments' List. This section is a table with two columns: 'Appointments' and 'Defendant'. The second row of the table is highlighted with a red box, indicating it is the selected case.

Appointments	Defendant
<a href="#">Case: 1:14-CR-08805-AA</a> Defendant #: 1 Case Title: USA v. Branson Attorney: Andrew Anders	<b>Defendant: Jebediah Branson</b> Representation Type: Criminal Case Order Type: Appointing Counsel Order Date: 03/03/14 Pres. Judge: Albert Albertson Adm./Mag Judge:
<a href="#">Case: 1:14-CR-08806-BB</a> Defendant #: 1 Case Title: USA v. Watson Attorney: Andrew Anders	<b>Defendant: Thomas Watson</b> Representation Type: Criminal Case Order Type: Appointing Counsel Order Date: 03/03/14 Pres. Judge: Barney Ball Adm./Mag Judge:
<a href="#">Case: 1:14-CR-08808-AA</a> Defendant #: 1 Case Title: USA v. ... Attorney: Andrew Anders	<b>Defendant: Thomas Howell</b> Representation Type: Criminal Case

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

Figure 2: Appointment Info Page

Appointment	Appointment Info												
<p>In this page you will find a summary about this appointment, including a list of vouchers related to this appointment and links to create new vouchers</p> <p><a href="#">View Representation</a></p> <p><b>Create New Voucher</b></p> <p><b>AUTH</b> <a href="#">Create</a> Authorization for Expert and other Services</p> <p><b>AUTH-24</b> <a href="#">Create</a> Authorization for payment of transcript</p> <p><b>CJA-20</b> <a href="#">Create</a> Appointment of and Authority to Pay Court-Appointed Counsel</p> <p><b>CJA-21</b> <a href="#">Create</a> Authorization and Voucher for Expert</p>	<table border="1"> <tr> <td>1. CIR./DI ST/DIV.CODE 0101</td> <td>2. PERSON REFF Thomas Wat sc</td> </tr> <tr> <td>3. MAG. DKT/DEF NUMBER</td> <td>4. DIST. DKT/DE 1:14-CR-0880</td> </tr> <tr> <td>7. IN CASE/MATTER OR(Case Name) USA v. Watson</td> <td>8. PAYMENT CA Felony (includi of alleged felon</td> </tr> <tr> <td colspan="2">11. OFFENSE(S) CHARGED</td> </tr> <tr> <td colspan="2">12. ATTORNEY'S NAME AND MAILING ADDRESS Andrew Anders 110 Main Street San Antonio TX 78210 Phone: 210-833-5623 - Fax:</td> </tr> <tr> <td colspan="2">14. LAW FIRM NAME AND MAILING ADDRESS</td> </tr> </table>	1. CIR./DI ST/DIV.CODE 0101	2. PERSON REFF Thomas Wat sc	3. MAG. DKT/DEF NUMBER	4. DIST. DKT/DE 1:14-CR-0880	7. IN CASE/MATTER OR(Case Name) USA v. Watson	8. PAYMENT CA Felony (includi of alleged felon	11. OFFENSE(S) CHARGED		12. ATTORNEY'S NAME AND MAILING ADDRESS Andrew Anders 110 Main Street San Antonio TX 78210 Phone: 210-833-5623 - Fax:		14. LAW FIRM NAME AND MAILING ADDRESS	
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14. LAW FIRM NAME AND MAILING ADDRESS													

- 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.
  - Not on Voucher:** This voucher does not include any claims for services and/or expenses for the associate attorney.
  - 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.
  - 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

Basic Info Services Expenses Claim Status Documents Confirmation

### 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 Andrew Anders 110 Main Street San Antonio TX 78210 Phone: 210-833-5623 - Fax:		13. COURT ORDER <input 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 Prior Attorney's Name Appointment Dates Signature of Presiding Judge or By Order of the Court Albert Albertson Date of Order 3/3/2014 Nunc Pro Tunc Date Repayment <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
14. LAW FIRM NAME AND MAILING ADDRESS			

Payment Info  
Preferred Payee: Andrew Anders - Andrew Anders  
Andrew Anders - Andrew Anders  
Billing Code:0101-00002  
110 Main Street  
San Antonio, TX  
78210 - US  
Phone: 210-833-5623  
Fax:

Associate Info  
Billy Bates  
Not on Voucher  
On Voucher, No Edit  
On Voucher, Can Edit

- 4. 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

Basic Info Services Expenses Claim Status Documents Confirmation

### Services

Attorney  
Date  
Service Type  
Doc.# (ECF)  
Hours  
\* Required Fields  
To group by a page  
Attorney

Andrew Anders  
Billy Bates



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

5. 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.

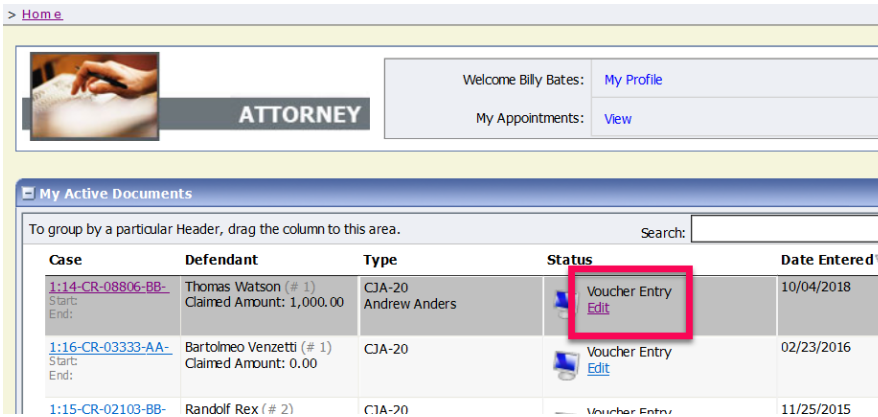
Associates can only see their own claims and claimed amounts on the voucher. The appointed attorney is the only one who can view the entire voucher with the combined entries.

Figure 8: My Appointments

<a href="#">Home</a> <a href="#">Operations</a> <a href="#">Reports</a> <a href="#">Links</a> <a href="#">Help</a> <a href="#">logout</a>	
<a href="#">Operations</a> > <a href="#">My Appointments</a>	
Appointments	Defendant
<a href="#">Case: 1:14-CR-08806-BB</a> Defendant #: 1 Case Title: USA v. Watson Attorney: Billy Bates	<b>Defendant: Thomas Watson</b> Representation Type: Criminal Case Order Type: Associate For Andrew Anders Order Date: 10/02/18 Pres. Judge: Barney Ball Adm/Mag Judge:
<a href="#">Case: 1:14-CR-08807</a> Defendant #: 1 Case Title: USA v. Delgado Attorney: Billy Bates	<b>Defendant: Patricia Delgado</b> 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



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 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

- 3. 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

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

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



## Addendum

Applicable reports for associates are listed below:

- Appointments with Associates Report