

Associate Functionality for Attorneys

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

The 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 add the associate attorney to the appointment. Once completed, an attorney having an associate on their appointment can add associate services and expenses to a CJA 20/30 and submit together with their own services and expenses on the same voucher.

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.

The screenshot displays the SDSO Training - Release 6.3.0.0 Home page. The navigation menu includes Home, Operations, Reports, Links, Help, and Sign out. The main content area shows the 'Appointments' List grid, which is divided into two columns: 'Appointments' and 'Defendant'. The first row is highlighted, and the 'Appointments' column cell is enclosed in a red box. The second row is also visible.

Appointments	Defendant
Case: 3:19-MJ-04562-JL Defendant #: 4302 Case Title: USA vs Badman Attorney: Atty Longoria	Defendant: Mister Badman Representation Type: DR 1 - Drugs Minus 2 Order Type: Federal Defender Order Date: 06/06/19 Pres. Judge: Judge Longoria Adm./Mag Judge:
Case: 1:19-MJ-96325-JL Defendant #: 9876 Case Title: Voucher vs USA Attorney: Atty Longoria	Defendant: Practice Voucher Representation Type: DRA - Drug Minus 2 Appeal Order Type: Federal Defender Order Date: 06/10/19 Pres. Judge: Judge Longoria

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

Appointment
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

[View Representation](#)

Create New Voucher

AUTH Authorization for Expert and other Services	Create
AUTH-24 Authorization for payment of transcript	Create
BUDGETAUTH Authorization for Excess Attorney Fees and/or Expert and other Services on Budgeted Case	Create
CJA-20 Appointment of and Authority to Pay Court-Appointed Counsel	Create
CJA-21 Authorization and Voucher for Expert and other Services	Create
CJA-24	Create

Appointment I

1. CIR./DIST./DIV. CODE 0101
3. MAG. DKT/DEF. NUMBER
7. IN CASE/MATTER OF (Case Name) USA v. Branson
11. OFFENSE(S) CHARGED 15:1825.F INSPECTION VIOLA
12. ATTORNEY'S NAME AND MAILING Andrew Anders 110 Main Street San Antonio TX 78210 Phone: 210-833-5623 Cell phone: 210-555-1234 Email: lisa_ormelas@aotx.uscourts
14. LAW FIRM NAME AND MAILING A

Vouchers on File

To group by a particular Header,

Case	Defen
1:14-CR-08805-AA	Jebed
Start: 09/23/2015	Claim
End: 09/23/2015	Appro

- In the Associate Info section, on the Basic Info tab, 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.

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. DK. DEF. NUMBER	4. DIST. DKT/DEF. NUMBER 1:14-CR-08806-1-AA	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 12:1738 P MORTGAGE DISCRIMINATION			
12. ATTORNEY'S NAME AND MAILING ADDRESS Andrew Anders 110 Main Street San Antonio TX 78210 Phone: 210-833-5623 Cell phone: 210-555-1234 Email: lisa_ornelas@aotx.uscourts.gov		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

Kerry Kriger: Not on Voucher
 Eddie E Associate: On Voucher, No Edit
 Cindy Caltagirone: Not on Voucher
 Billy Bates: Not on Voucher

« First < Previous Next > Last » Save Delete Draft Audit Assist

- The **Services** and **Expenses** tabs include an additional **Attorney** field with a drop-down list. 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.

Basic Info Services Expenses Claim Status Documents Confirmation

Services

Attorney: Andrew Anders
 Date:
 Service Type: Kerry Kriger
 Doc.# (ECF):
 Hours:
 Add Remove

* Required Fields

To group by a part

Attorney	Description	Hrs	Rate	Amt
(y)				

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.

Services

Attorney: [Dropdown]
 Date: 3/26/2020 * [Calendar]
 Service Type: [Dropdown] * Description: [Text Area]
 Doc.# (ECF): [Text] Pages: [Text]
 Hours: [Text] * at \$148.00 per hour. [Add] [Remove]

* Required Fields

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

Attorney	Service Type	Date	Description	Hrs	Rate	Amt
Atty Longoria	a. Arraignment and/or Plea	03/26/2020	Arraignment.	2.0	\$148.00	\$296.00
Atty Longoria	b. Bail and Detention Hearing	03/26/2020	Bail.	1.0	\$148.00	\$148.00
Jaime Longoria	c. Motion	03/26/2020	Motion.	3.0	\$124.00	\$372.00
Jaime Longoria	d. Trial	03/26/2020	Trial.	4.0	\$124.00	\$496.00

- 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.

Claim Status

Start Date: 03/24/2020 * [Calendar] End Date: 03/25/2020 * [Calendar]

Payment Claims *

Final Payment

Interim Payment [Text] (payment #)

Supplemental Payment

Withholding Return Payment

**** Reminder: Please select the appropriate claim status.**


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

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 on 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.

Home	Operations	Reports	Links	Help	Sign out
Operations > My Appointments					
Appointments			Defendant		
Case: 3:12-AP-12121-AA Defendant #: 9876 Case Title: TestAutomation0802 Attorney: Andrew Anders			Defendant: TestDefendent0802 Representation Type: Appeal of a Trial Disposition Order Type: Co-Counsel Order Date: 08/02/17 Pres. Judge: Albert Albertson Adm./Mag Judge:		
Case: 1:55-CR-55555-LRJ Defendant #: 5555 Case Title: USA VS Bob Smith Attorney: Andrew Anders			Defendant: Bob Smith Representation Type: Criminal Case Order Type: Associate For David D Attorney Order Date: 10/10/18 Pres. Judge: LeVar Judge Adm./Mag Judge:		

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



- 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.

[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-AA	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
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14. LAW FIRM NAME AND MAILING ADDRESS			

- 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**.

Basic Info **Services** Expenses Claim Status Documents Confirmation

Services

Attorney:
 Date: 3/26/2020 *
 Service Type: *
 Doc.# (ECF): Pages:
 Hours: * at \$150.00 per hour. Add Remove

* Required Fields

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

Attorney	Service Type	Date	Description	Hrs	Rate	Amt
Eddie E Associate	c. Motion	08/07/2016	test	5.0	\$0.00	\$0.00

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

Services

Attorney:
 Date: 3/26/2020 *
 Service Type: *
 Doc.# (ECF): Pages:
 Hours: * at \$150.00 per hour. Add Remove

* Required Fields

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

Attorney	Service Type	Date	Description	Hrs	Rate	Amt
Eddie E Associate	c. Motion	08/07/2016	test	5.0	\$0.00	\$0.00

« First < Previous Next > Last » **Save** Delete Draft Audit Assist

Note

Applicable report for associates is listed below:

- Appointments with Associates Rep