

## Associate Functionality for Attorneys

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

The Associate functionality in the eVoucher application 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.

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

Appointments' List	
Appointments	Defendant
<a href="#">Case: 1:14-CR-08805-AA</a> Defendant #: 1 Case Title: USA v. Branson Attorney: Andrew Anders <a href="#">Representation ID: 2</a> Appointment ID: 4	<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-AA</a> Defendant #: 1 Case Title: USA v. Watson Attorney: Andrew Anders <a href="#">Representation ID: 4</a> Appointment ID: 2	<b>Defendant: Thomas Watson</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-08808-AA</a> Defendant #: 1 Case Title: USA v Howell Attorney: Andrew Anders <a href="#">Representation ID: 10</a> Appointment ID: 8	<b>Defendant: Thomas Howell</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-08808-AA</a> Defendant #: 1 Case Title: USA v Howell Attorney: Andrew Anders <a href="#">Representation ID: 10</a> Appointment ID: 103	<b>Defendant: Thomas Howell</b> Representation Type: Criminal Case Order Type: Associate Order Date: 08/21/18 Pres. Judge: Albert Albertson Adm./Mag Judge:

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

The screenshot displays the 'Appointment' section of the eVoucher system. On the left, a sidebar lists voucher types with 'Create' links: AUTH, AUTH-24, BUDGETAUTH, CJA-20 (highlighted with a red box), CJA-21, and CJA-24. The main area shows 'Appointment I' details for case 'USA v. Branson', including court code, matter name, offense charged, and attorney information. A 'Vouchers on File' table is also visible at the bottom right.

Case	Defer
<a href="#">1:14-CR-08805-AA-</a>	Jebed
Start: 09/23/2015	Claims
End: 09/23/2015	Appro

1. 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.
  - 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.

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: <a href="mailto:lisa_ornelas@aotx.uscourts.gov">lisa_ornelas@aotx.uscourts.gov</a>		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 Date: 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:

\* Required Fields

To group by a part:

Attorney	Hrs	Rate	Amt
(y)			

Add Remove

# eVoucher 6.7

# Associate Functionality

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  
 Service Type: [Dropdown]  
 Description: [Text Area]  
 Doc.# (ECF): [Text]  
 Pages: [Text]  
 Hours: [Text] at \$148.00 per hour.  
 Add Remove

**In Court Services**

Service	Hours	Amt.
Arraignment and/or Plea	2.0	\$296.00
Bail and Detention Hearing	1.0	\$148.00
Motion Hearings	3.0	\$372.00
Trial	4.0	\$496.00
Sentencing Hearing	0	\$0.00
Revocation Hearings	0	\$0.00
Appeals Court	0	\$0.00
Other	0	\$0.00
<b>Totals</b>	<b>10.0</b>	<b>\$1312.00</b>

**Out of Court Services**

Service	Hours	Amt.

**Services Table:**

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  
 End Date: 03/25/2020

**Payment Claims \***

- Final Payment
- Interim Payment (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

> Home

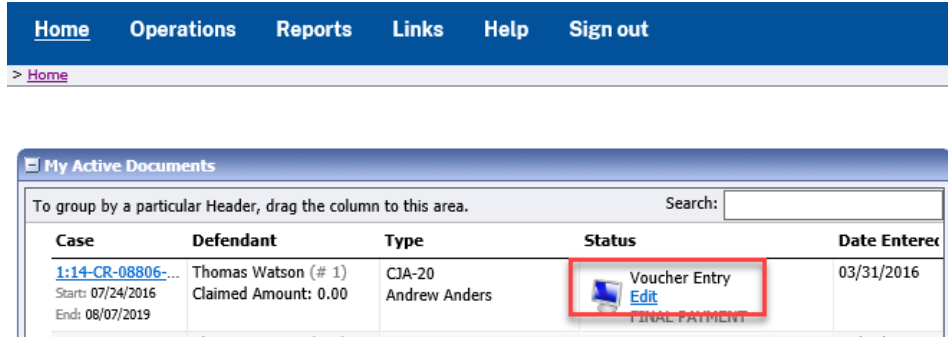
My Active Documents

Appointments' List

Appointments	Defendant
<a href="#">Case: 1:55-CR-5555-LRJ</a> Defendant #: 5555 Case Title: USA VS Bob Smith Attorney: Andrew Anders <a href="#">Representation ID: 120</a> Appointment ID: 128	<b>Defendant: Bob Smith</b> Representation Type: Criminal Case <b>Order Type: Associate For David D Attorney</b> Order Date: 10/18/18 Pres. Judge: LeVar Judge Adm./Mag Judge:

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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

<b>Basic Info</b>	
1. CIR./DIST./DIV. CODE 0101	2. PERSON REPRESENTED Thomas Watson
3. MAG. DKT/DEF NUMBER	4. DIST. DKT/DEF NUMBER 1:14-CR-08806-1-AA
7. IN CASE/MATTER OF(Case Name) USA v. Watson	8. PAYMENT CATEGORY Felony (including pre-trial diversion of alleged felony)
11. OFFENSE(S) CHARGED 12:1738.P MORTGAGE DISCRIMINATION	9. TYPE PERSON REPRESENTED Adult Defendant
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: <a href="mailto:lisa_ornelas@aotx.uscourts.gov">lisa_ornelas@aotx.uscourts.gov</a>	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 checked="" 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    Nunc Pro Tunc Date 3/3/2014 Repayment <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO
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:  \*   
 Description:  \*   
 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:  \*   
 Description:  \*   
 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