CJA eVoucher Attorney Manual

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Eastern District of Washington

Questions? Please call:
Renea Ferrante 509-458-3413
Or
Jaime White 509-458-3416

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Court Appointment

When an appointment is made, an email will be generated and sent to the appropriate attorney. The email will confirm the appointment and provide a link to the CJA eVoucher program.

To: Mark Vovos,

Date: 1/31/2011 1:14:24 PM.

This is to inform you that the U.S. District Court has appointed you to represent James Earl Johnson in case USA v. Johnson 2:10-CR-00021 before this court.

You may access this appointment via the CJA eVoucher program at http://localhost/CJATraining.

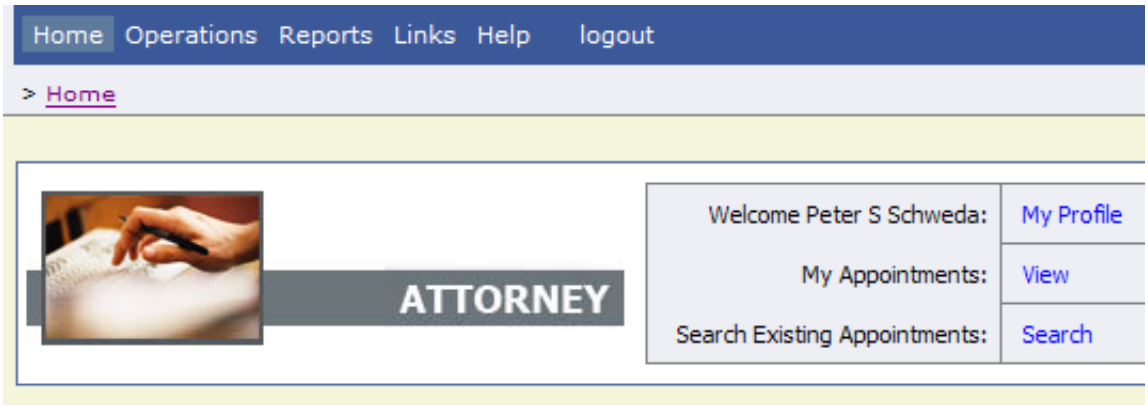
Regards,
U.S. District Court

Access to eVoucher (Do NOT use Mozilla Firefox or Chrome)

To access the CJA eVoucher program in Internet Explorer or Safari, either click on the link provided in the email or use your browser to access the system at https://ecf.waed.uscourts.gov/CJA/LogOn.aspx. You will be taken to the CJA login page. Enter the Username and Password you were provided and click Log In .

Attorney Home Page

Your home page provides access to all of your appointments and vouchers. Security has been put into place that prohibits you from viewing information for anyone else. Likewise, no one else will have access to your information.



Folders on Attorney Home Page

My Active Vouchers Contains vouchers or documents that you are currently working on.

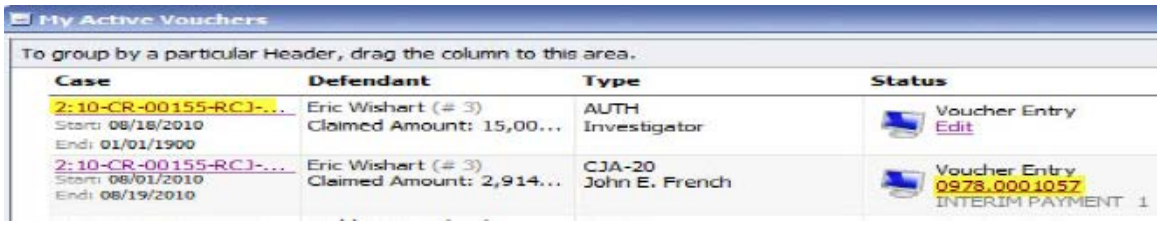
My Submitted Vouchers Contains vouchers for documents that you have completed and have been submitted to the court.

My Service Provider's Vouchers Contains vouchers for service providers that you are overseeing.

Closed Vouchers Contains vouchers or documents that have been approved or paid by the court. Closed vouchers will be displayed only for your active appointments. When your appointment has been closed, the closed vouchers associated with the appointment will not display on your homepage. You will be able to view the removed vouchers by searching for the appointment and then selecting the voucher you want.

All of the folders display basic information regarding the Case Number, the Defendant, Type of Document, and the Status of the Document. The status tells you where the document/voucher is in the process, i.e., you are still entering information, it has been submitted to the attorney, it has been submitted to the court or it is closed.

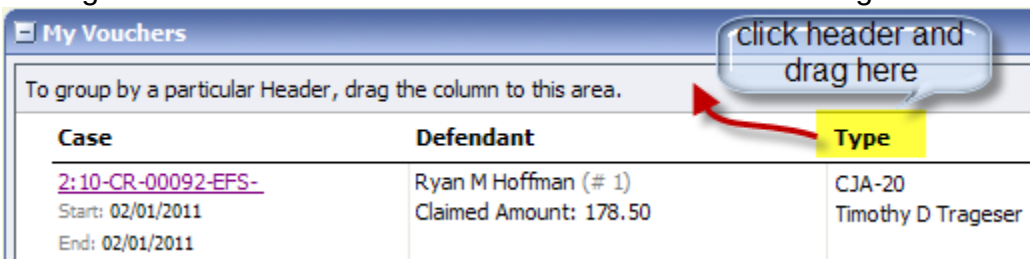
To view a specific voucher, click on the Case Number or the voucher number (i.e., 0980.0000004)



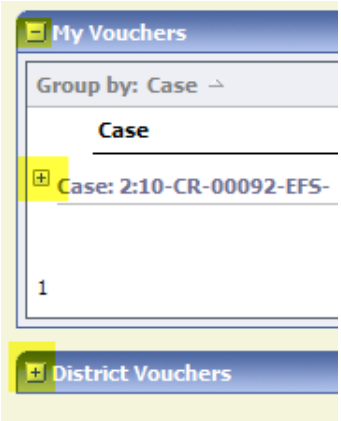
Adjusting Views

You can change the way information is displayed in the folders.

- Sorting. Click on the column header to sort by that column (clicking once will sort it low to high; clicking twice will sort it high to low.
- Change size of Column. Move your cursor to the line between columns until you see an arrow. Hold your left click down and drag the line in the desired direction.
- Group by Column Header. Click on the header for the column you would like to group by (i.e., if you want the documents grouped by case, click on the “Case” header. If you want all the documents grouped by the kind of document it is, click on the “Type” header.) Keeping the left click down, drag the column header into the identified area above the grid.



- Closing Folder. Click on the “-“ next to the name of the folder you would like to close. Click on the “+” to open the folder.



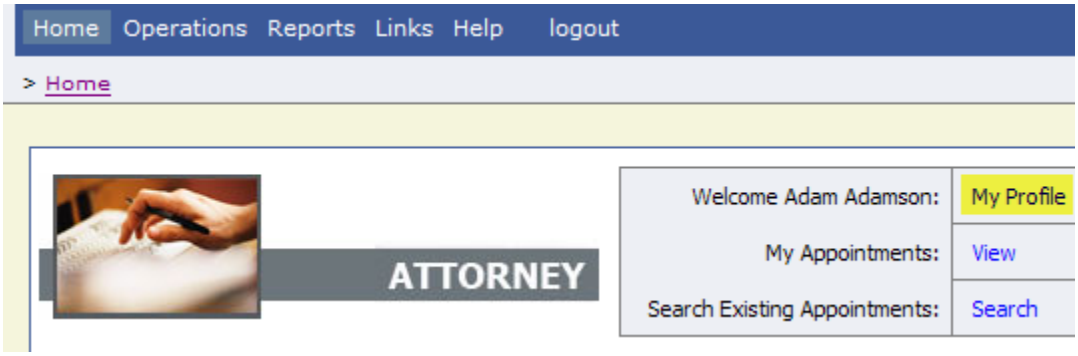
- Moving Folders. Click on the title of the folder you want to move, keeping the left click down, drag the folder to the desired location and let go.

Menu Bar

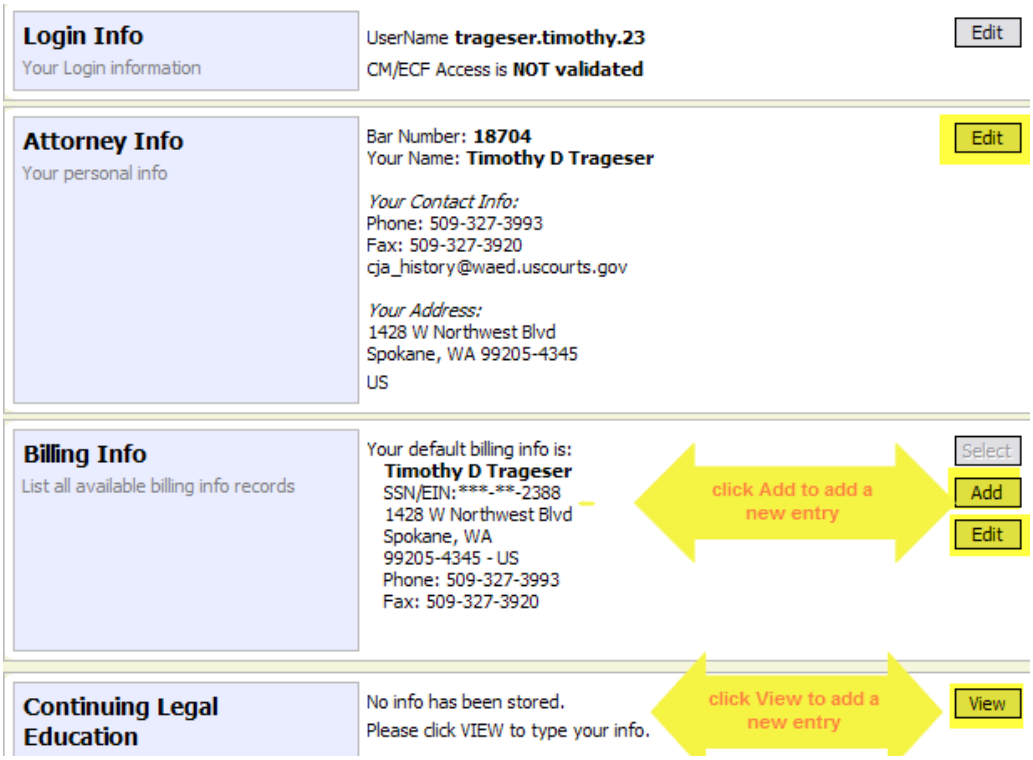
You can use the menu bar at the top of the screen to access other functions of the program.

- Home: Takes you to your homepage.
- Operations: Takes you to your appointments.
- Reports. Takes you to reports you can select and run.
- Links. Takes you to other CJA related information
- Help. Takes you to: "My Profile" (another way to access your profile)
  "Contact Us" a means to email the court.
  "Privacy" the court's privacy statement
- Logout. Logs you out and closes the program.

Profile Maintenance

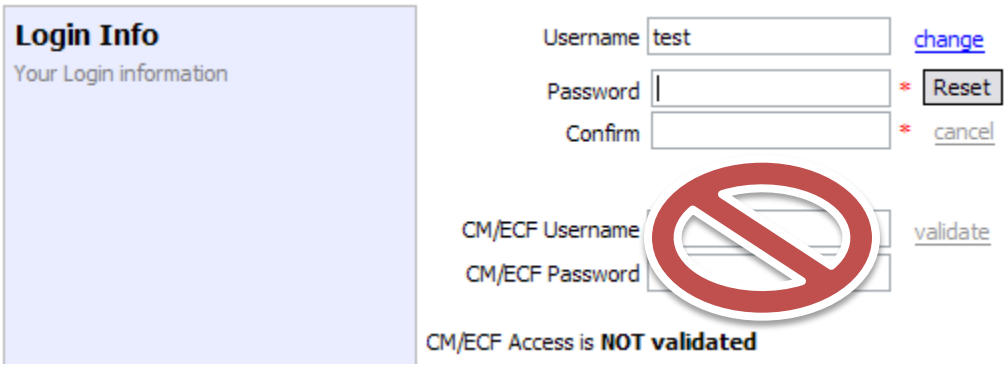


To change your login information, password, personal information, and billing information; click on My Profile and then Edit for the section you would like to change.



Login Info:

- To change your Username, type new Username in the “Username” field and press change.
- To change your Password, type the new password in both the “Password” and “Confirm” fields and press Reset.
- The CM/ECF Username and Password fields are for future use to synchronize your rights between CJA eVoucher and CM/ECF. Leave as is until instructed further.



Attorney Info:

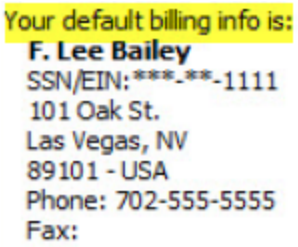
It is the attorney's responsibility to maintain accurate contact information. Enter the desired information in the fields and press Save

Billing Info:

It is the attorney's responsibility to maintain accurate billing information. You may have multiple bill records, i.e., tax number and/or addresses.

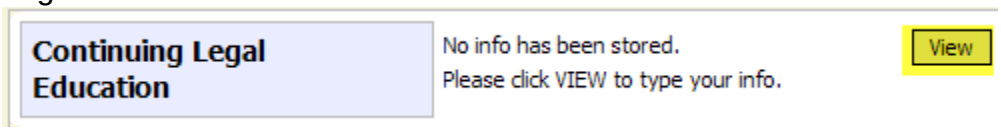
Note: You must have billing information before a voucher can be paid.

To add a billing record click Add. Enter the desired information in the fields and click Save. To edit a billing record, click on the for the record you would like to edit and click Edit. Make the desired changes and click Save. Identify the billing information you would like to serve as your default by clicking on the for the desired record and then clicking on Select. The default billing record will be identified.

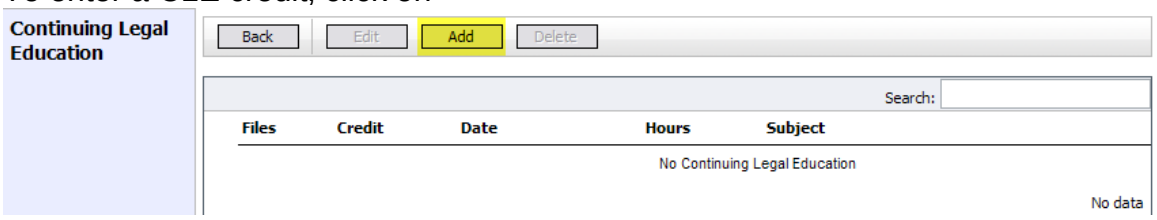


CLE Records:

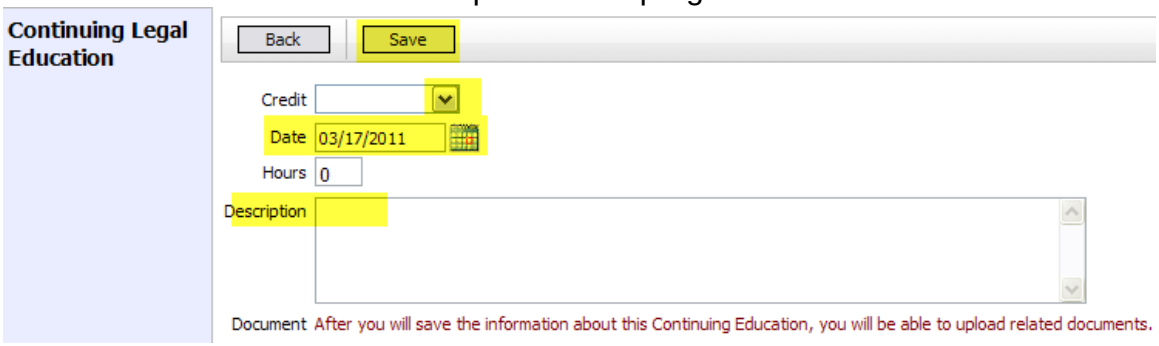
Attorneys can keep track of their CJA related CLE credits via the "Continuing Legal Education" section.



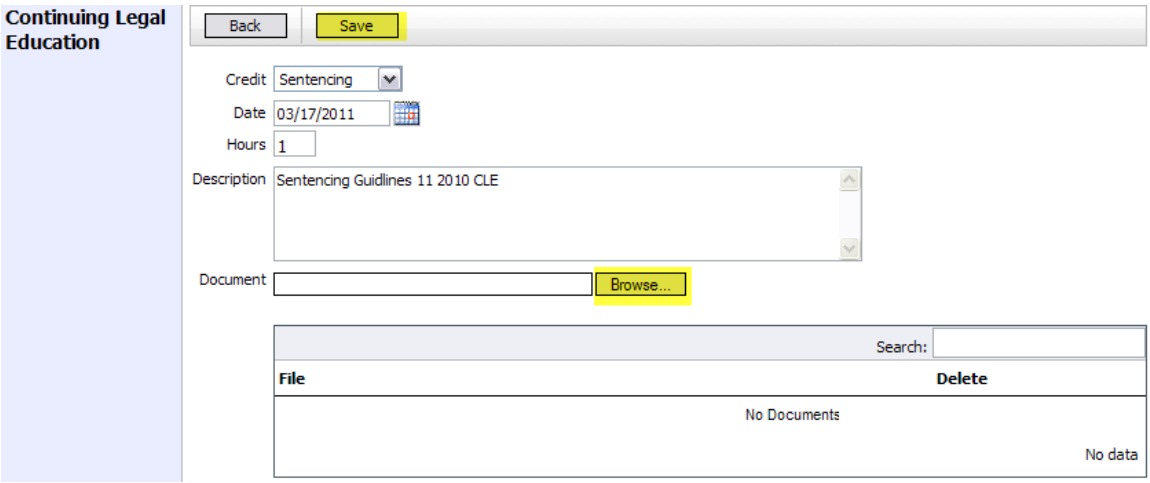
To enter a CLE credit, click on View



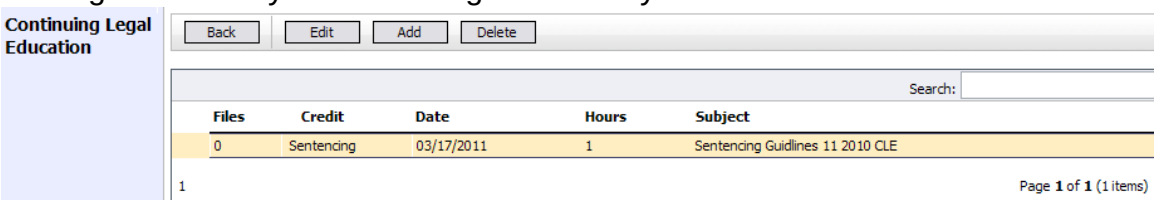
Click on Add Choose the type of credit by clicking on the arrow. Enter the date, the number of hours and a description of the program and click on Save



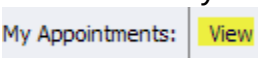
Add a PDF document as an attachment by clicking on Browse... and locating and clicking on your document. The document will appear in the grid below. Click on Save to complete the entry.



All entries will be displayed in the grid and can be accessed, edited, or deleted by clicking on the entry and choosing the action you want to take.



Appointments

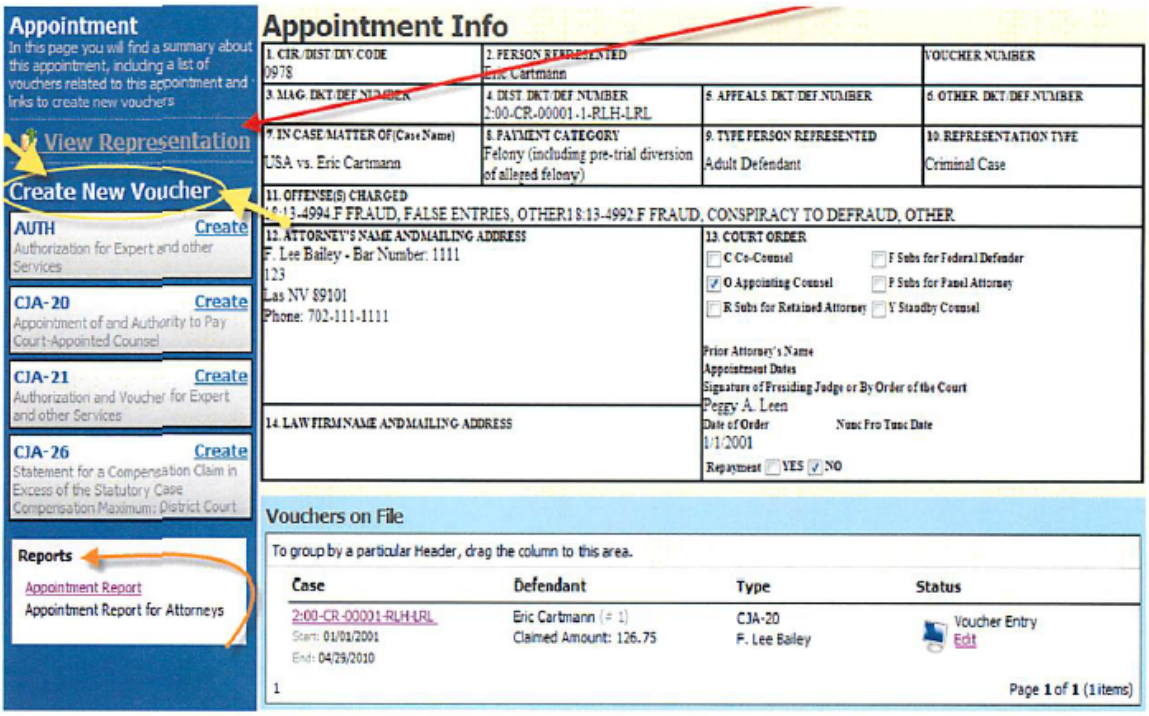
You can view your active appointments by either clicking on View at 

or looking in the

folder.

You can review a specific appointment by clicking on the Case Number. Information about the appointment, as well as any vouchers or documents associated with the appointment, will be displayed.

You can review representation information by clicking on



The representation information will also display the default excess fee limit, presiding judge and magistrate judge as well as co-counsel and any previous counsel.

You can also run reports and create new vouchers and documents from this page.

To leave this page and return to your "Home" page, click on Home on the menu bar at the top of the page.

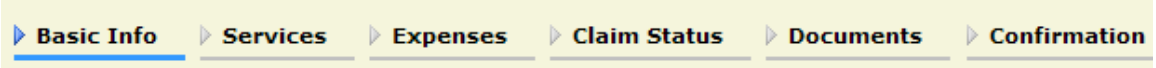
Create a Voucher / Document (CJA 20)

Note: All voucher types and documents function primarily the same. The following instructions, while showing a CJA 20, pertain to all of the voucher/document types. The few differences for other types of vouchers/documents will be identified and discussed in a separate section for each voucher/document.

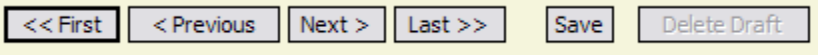
- Locate the appointment for which you want to create the voucher
- Click on the Case Number

- Click on “Create” for the type of voucher or document you want to create

Navigate between the pages of the voucher by clicking on the tab for pages as listed on the top:



Or move directionally on the bottom:



The following information will be displayed for all vouchers.

Shows the type of voucher or document and the state it is in.

Shows the voucher # (note: a voucher number is assigned when the voucher is submitted) and the period of time the voucher covers.

Click on the ▾ to display a running total of the items entered for services on the voucher.

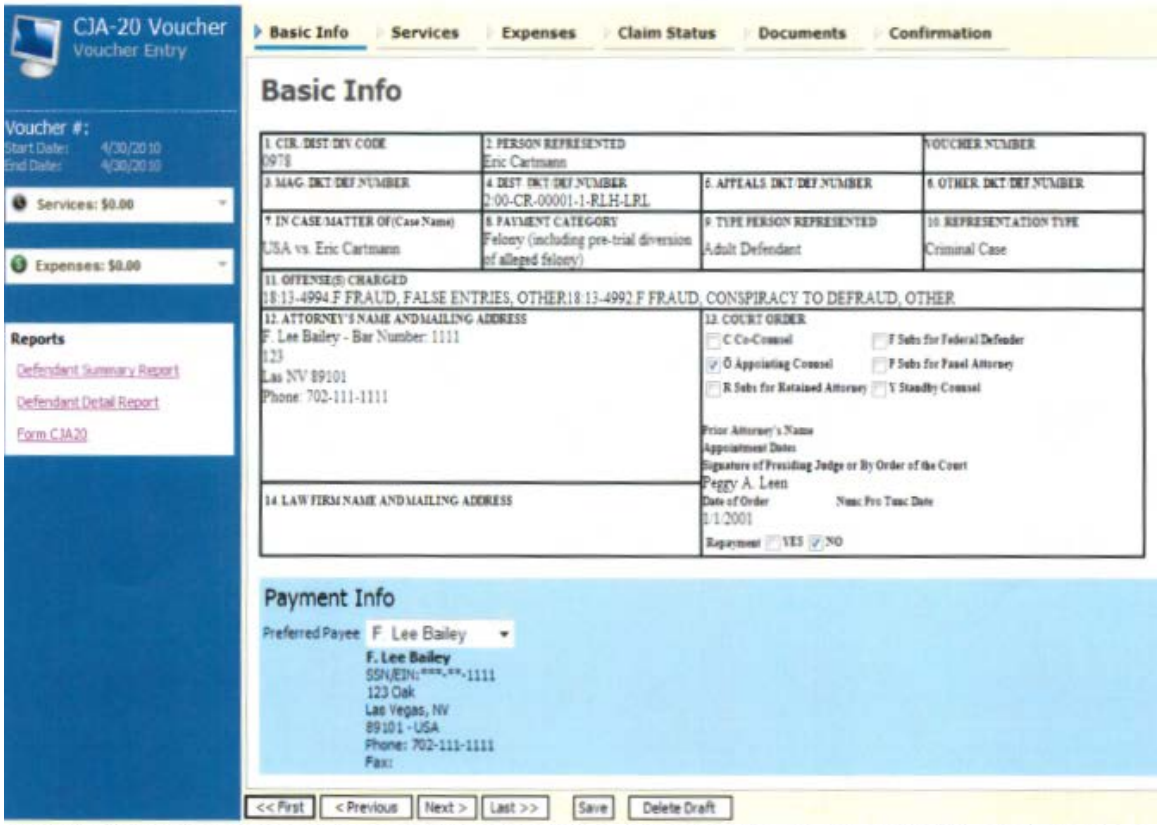
Click on the ▾ to display a running total of the items entered for expenses on the voucher.

Click on the name of a report you would like to run for this appointment.

Basic Info:

The **Basic Info** page will come up.

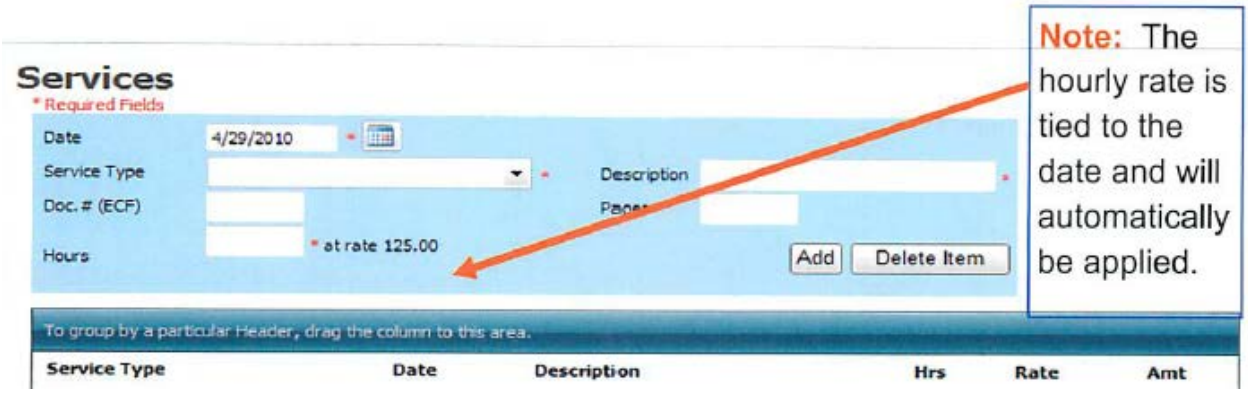
The Basic Info page displays information regarding the appointment.



Select the Preferred Payee for the voucher by clicking on the arrow. A list of the available billing records will be displayed. Click on the payee for this voucher.

Entering Services:

Navigate to the Services tab.



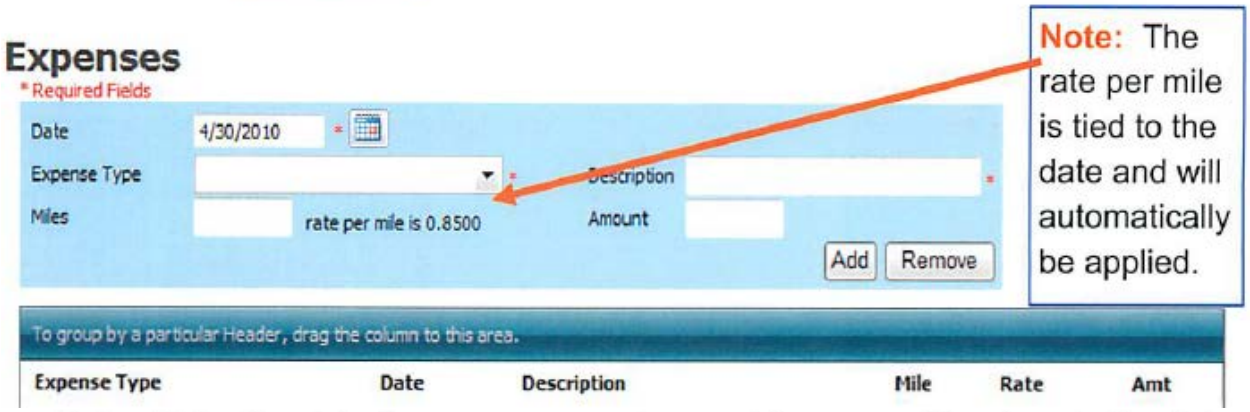
- Date: Enter the date the service was provided (you can either type in the date or click on the calendar and select a date)
- Service Type . Click on the ▾ and select (click on) the type of service from the drop-down list.
- Description. Type a description of the service provided.
- Hours. Type the number of hours (note: it must be in 10ths of an hour, i.e., .1)
- Press Add and the entry will appear in the grid below.
- Edit. Select the entry you want to change by clicking on it in the grid. The entry will appear in the entry portion of the screen. Make the desired changes and press Add

When you have finished making entries, press Save to save your entries.

Note: Press Delete Item to remove an item from the grid.

Entering Expenses:

Navigate to the Expenses tab.



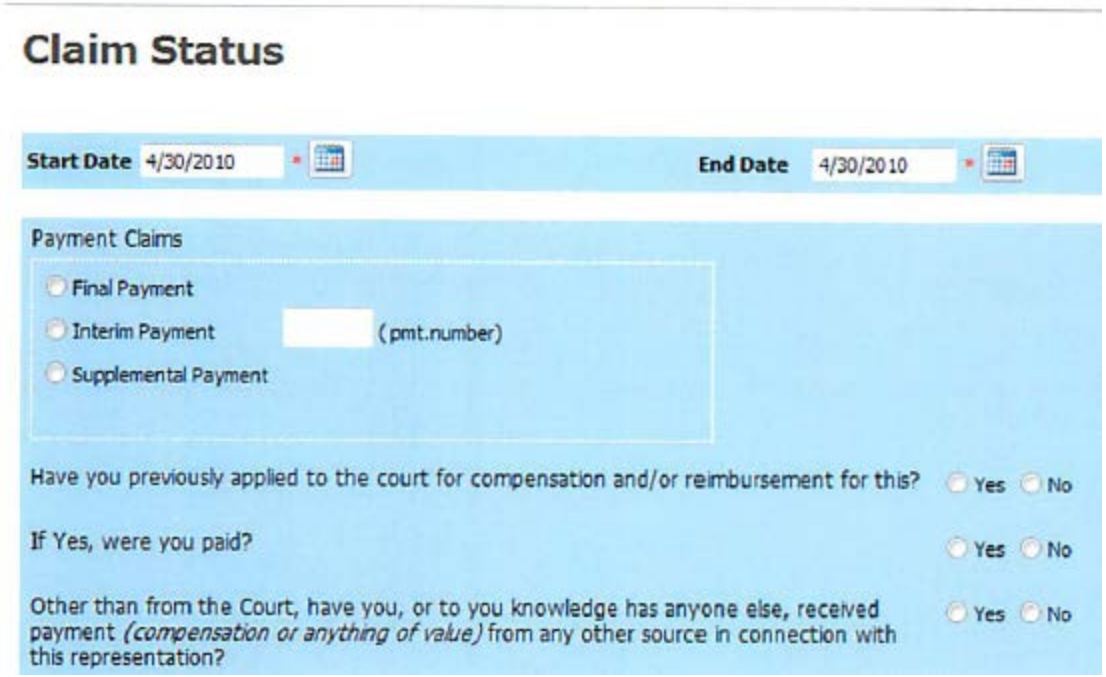
- Date: Enter the date the expense was incurred (you can either type in the date or click on the calendar and select a date)
- Expense Type . Click on the ▼ and select (click on) the type of expense from the drop-down list.
- Description. Type a description of the expense.
- Miles. Type the number of miles claimed (only if the entry is for "Travel Miles")
- Amount. Enter the amount of the expense (do **not** use the "$" sign or commas.)
- Press Add and the entry will appear in the grid below.
- Edit. Select the entry you want to change by clicking on it in the grid. The entry will appear in the entry portion of the screen. Make the desired changes and press Add

When you have finished making entries, press Save to save your entries.

Note: Press Delete Item to remove an item from the grid.

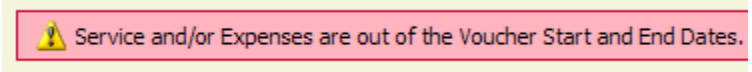
Claim Status:

Navigate to the **Claim Status** tab.



- Start Date: Enter the beginning date for the time period covered by this voucher (you can either type in the date or click on the calendar and select a date).
- End Date: Enter the ending date for the time period covered by this voucher.
- Payment Claims: Click on the appropriate type of claim. If it is an interim payment make sure you enter the interim payment number in the (pmt.number) box.
- Compensation Questions: Click on the answer to the questions.

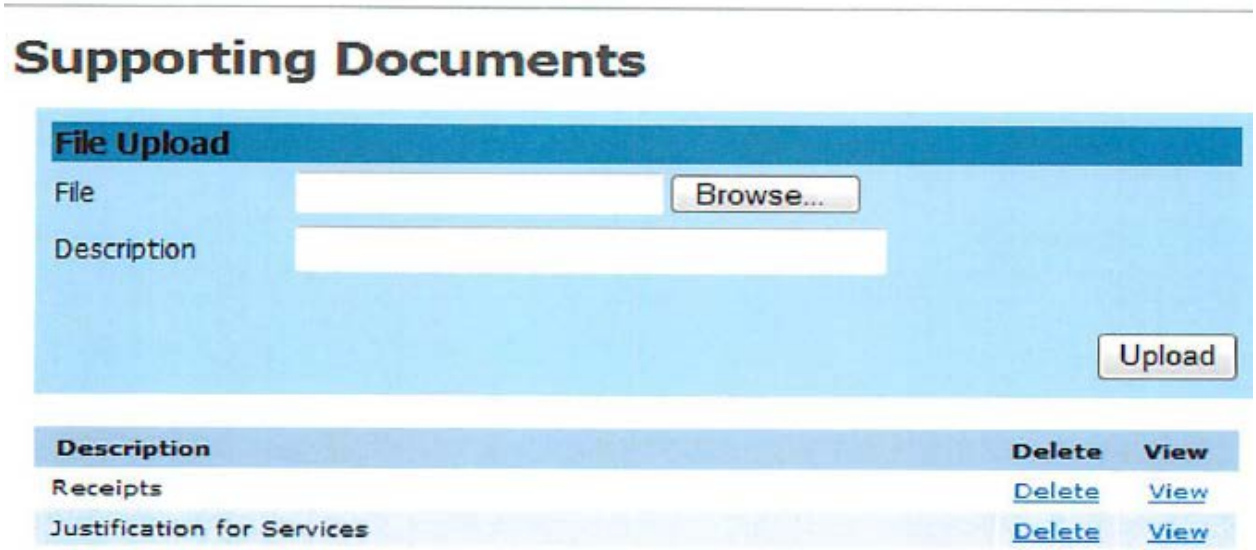
If Start and End dates are not entered correctly you will get an error



To fix error so voucher can be submitted. Click **Claim Status** and correct dates.

Documents:

Navigate to the Documents tab.



All documents uploaded to the system must be in the PDF format.

- File. Use the Browse... to access your directory of files. Identify the PDF file you want to upload and click on it. The file path will be displayed in the "File" field.
- Description. Type in a description/name for the document being uploaded.
- Upload. Press Upload the file will appear in the grid below.

Delete. You can delete a document by pressing "Delete".

View. You can view a document by pressing "View".

Confirmation:

Navigate to the Confirmation tab.

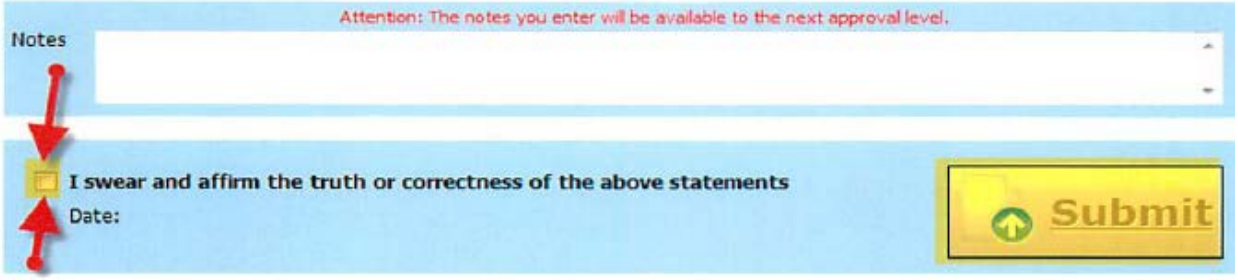
The "Confirmation" page will display the data that has been entered in the format of the voucher. As the voucher is "signed" the signature/approval information will be included on the voucher.

Submit Voucher.

At the bottom of the confirmation page you will be asked to check the box to swear to the correctness of the voucher. Click on the to sign the voucher. The Submit will be highlighted. Click on the button to submit the voucher to the court.

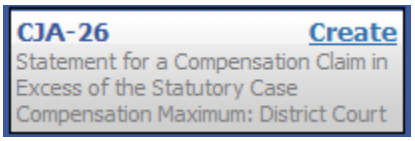
Note: Once the voucher has been submitted, you will be able to view it but you will not be able to change it, unless it is returned to you by the court.

Delete Voucher. You can delete a draft voucher by clicking on Delete Draft You can not delete a voucher that has been submitted to the court unless it is returned to you.

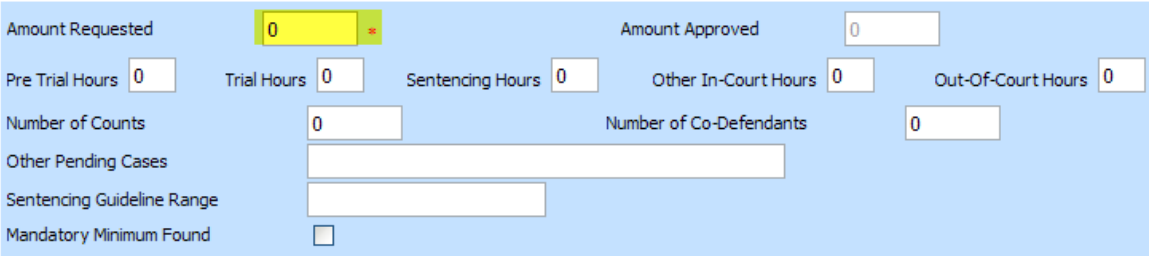


Request for Excess Fees / CJA 26

When fees in excess of the case maximum are required, the attorney must prepare and submit a CJA 26 through the system. Follow the instructions to "Create a Voucher / Document" and select the option:



Basic Info
Fill out all applicable fields. Amount Requested is required.



Justification
Fill out all applicable fields.

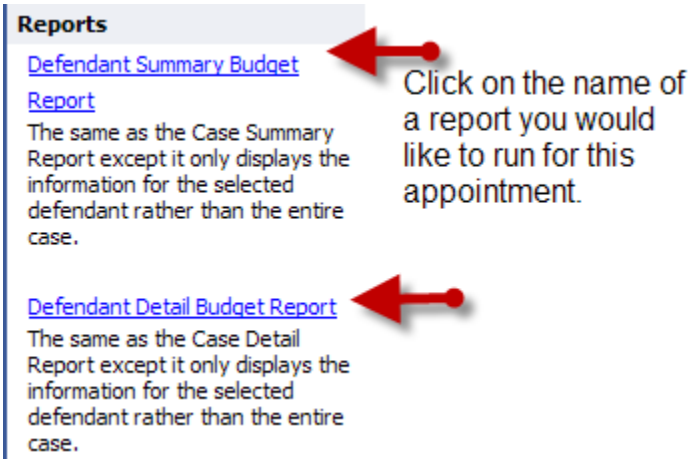
Supporting Documents
Attach any supporting documents.

Monitoring Status of Funds

You can, and are encouraged to, monitor the status of funds for your representations by reviewing budget reports.

To run a budget report:

- Identify and access a voucher for the representation for which you would like to check the funding.
- Select either the Defendant Summary Report or the Defendant Detail Report.



These reports will display:

- Current amount approved for the representation
- CJA 26 documents approving the amounts
- Voucher amounts that have been approved
- Voucher amounts that are still pending approval
- Remaining balances
- Each authorization for expert services and the amounts listed above

The detail report will itemize each voucher. The summary report will present a summary of the vouchers

The reports will also list each authorization for expert services, the amounts approved for each authorization, and the amounts as listed above.

A sample of these reports is attached.

Voucher that Exceeds Authorized Amount:

If you attempt to submit a voucher that will exceed the amount authorized, you will receive the following message:

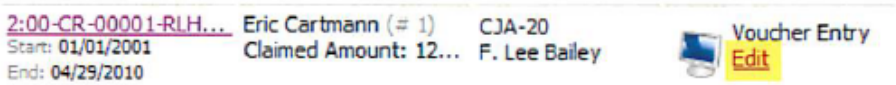
Edit Voucher:

You can work on your voucher over time adding services, expenses and documents as needed.

To edit a voucher:

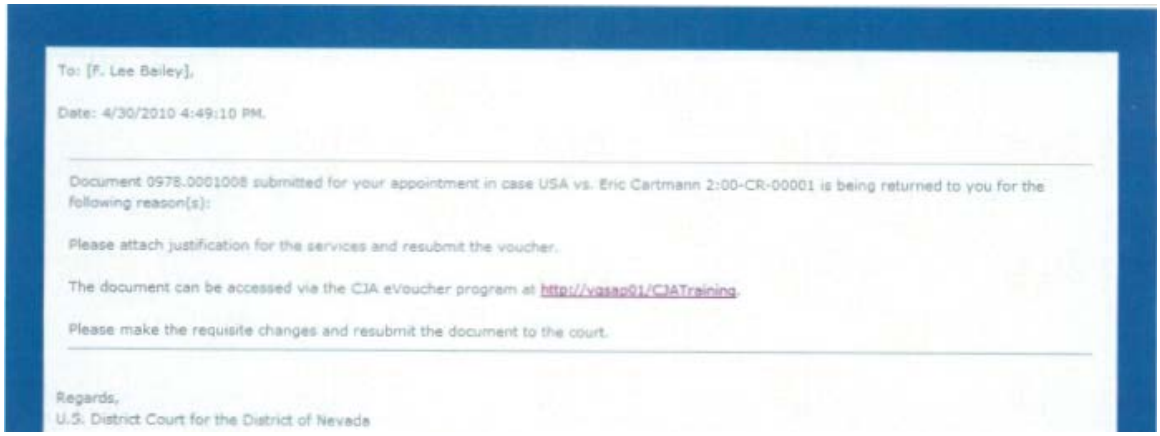
- Click on "Edit" for the voucher you want to access.
- Make your additions per the foregoing instructions.

Remember to Save the voucher each time you work on it.

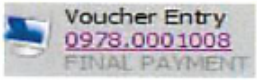


Returned Voucher / Document:

If the Court needs to return a document, an email will be generated and sent by the system notifying you of the reason the document is being returned and any instructions from the Court.

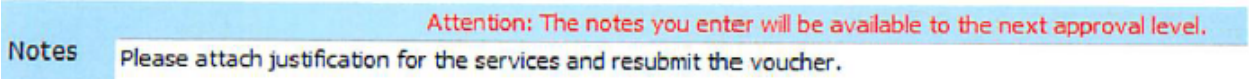


The document will appear in gold in the **My Active Vouchers** folder on your home page.

The voucher will retain the voucher number it received when it was submitted and the status will return to 

You may access the voucher by clicking on the voucher number.

The Court's notes can be found on the Confirmation page.



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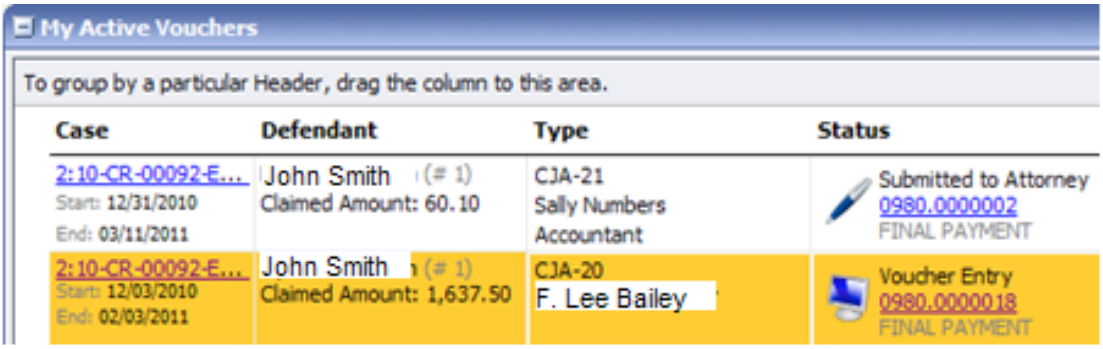
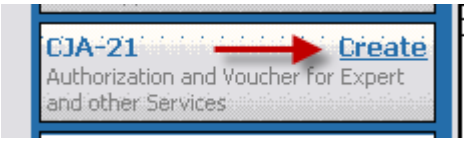
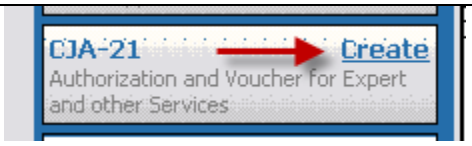
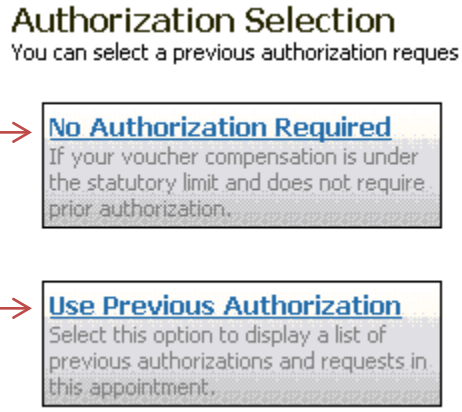
Attorney Homepage:



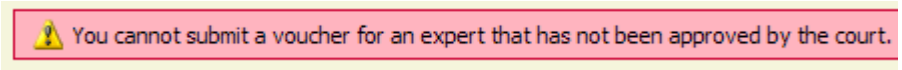
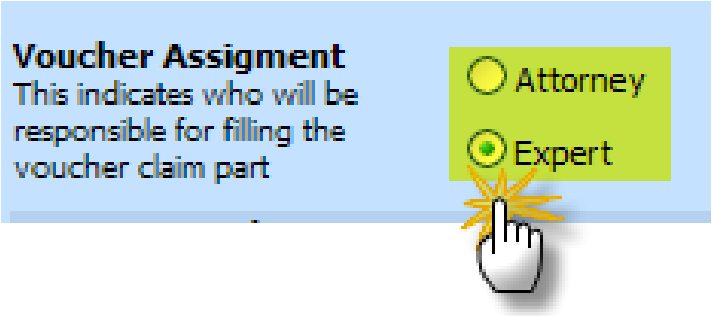
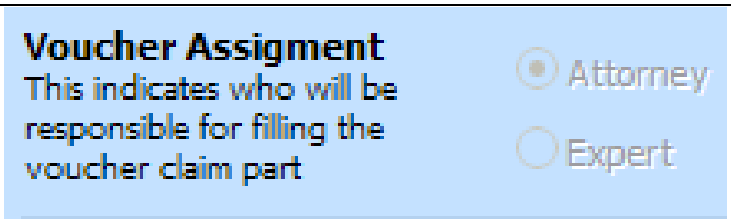
CJA 21 Specifics

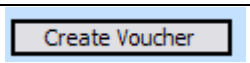
Follow the instructions to “Create a Voucher / Document” and select the option:



Click Create CJA-21	
If the request does not require advance authorization ($800 or under), or previous authorization was not obtained, click on If you have a previous authorization click on	

If you click “Use Previous Authorization” a list of Existing Requests for Authorization appears	**Authorization Selection** You can select a previous authorization request, request a new authorization or click the 'No Authoriza **No Authorization Required** If your voucher compensation is under the statutory limit and does not require prior authorization. **Existing Requests for Authorization** **ID Number: 22** Order Date: 03/08/2011 Authorized Amount: 1500 Service Type: Estimated Amo Requested Pro **Use Previous Authorization** Select this option to display a list of previous authorizations and requests in this appointment. **New Voucher Information** **Service Type**
Click to highlight the authorization to which you will be associating the CJA 21	**Existing Requests for Authorization** **ID Number: 22** Order Date: 03/08/2011 Authorized Amount: 1500 Service Type: Paralegal Services Estimated Amount: 1500 Requested Provider:
The service type will rollover from the authorization selected. If no authorization is being used, you will use the dropdown box to select the service type.	**New Voucher Information** **Service Type** Paralegal Services
Enter a “Description” of the service to be provided **This step correlates to box 13 on the CJA 21 and must be filled out**.	**Description**
Service Provider Note: Only experts registered with the service type selected will appear in the drop-down box.	**Service Provider** You can search one of the service providers already in the system OR you can enter the required information for another provider **Expert**

If the expert you would like to use is not listed, please contact Jaime White or Renea Ferrante to enter the expert in the system before you enter your voucher.	You will get the following error message if you try to submit a voucher without first having the court enter the new expert: 
If the **Expert** you selected <u>is</u> authorized to use eVoucher the **Voucher Assignment** field will unlock for you to indicate the Expert will be responsible for filling in the voucher claim part.	
If the **Expert** you selected <u>is not</u> authorized to use eVoucher the **Voucher Assignment** field will remain locked indicating the Attorney will be responsible for filling in the voucher claim part.	

Click 

Note: if all information is not entered you cannot advance to the next screen

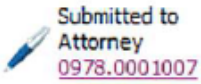
If the **Expert** you selected **<u>is</u>** authorized to use eVoucher you are done at this point and you may click Home or logout.

If the **Expert** you selected **<u>is not</u>** authorized to use eVoucher you will continue filling in the voucher claim part on behalf of the expert. See page 26

Approval and submission of CJA 21 vouchers on behalf of an expert not authorized to use eVoucher

This is a 2 Step Process

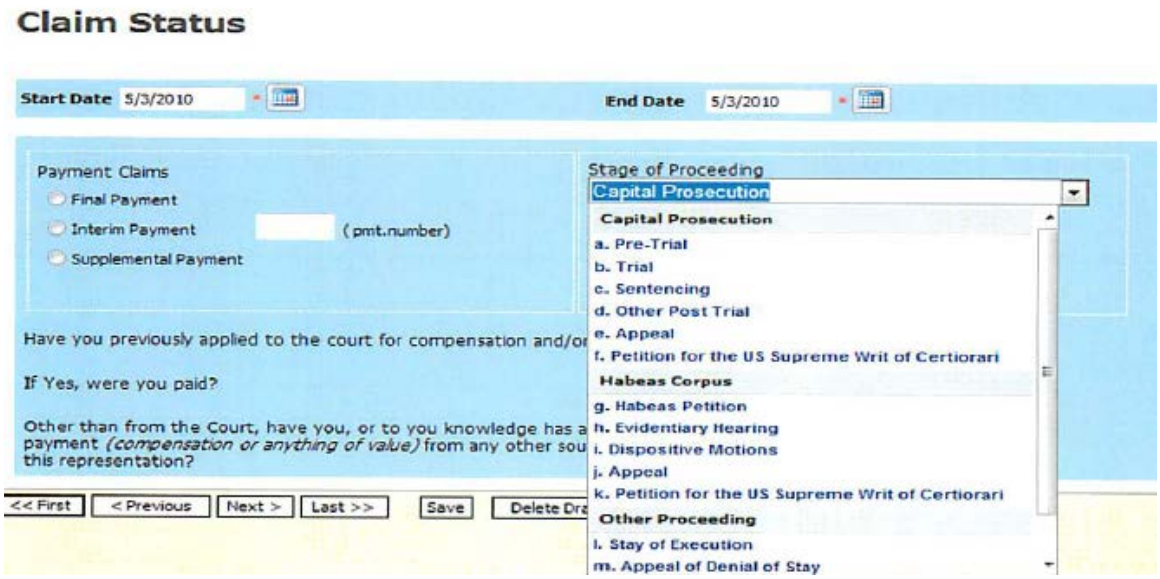
Attorney Enters CJA 21 Voucher Information: The attorney will enter the services and expenses on behalf of the expert (based upon the documentation the expert provided the attorney.) The attorney will perform the first level of submission on behalf of the expert.

The voucher will appear in the attorney's "My Active Vouchers" as 

The attorney will then perform the second level of approval/submission by clicking on the voucher, navigating to the "Confirmation" page and approving the voucher. The voucher will move to the attorney's "My Submitted Vouchers" folder.

CJA 30 and 31 Specifics

CJA 30 vouchers function the same as CJA 20 vouchers other than:

- They have a different "Service Type" drop down list on the "Services" page .

- CJA 30 and 31 vouchers have a mandatory "Stage of Proceeding" drop-down box on the "Claim Status" page which the other vouchers do not have.