United States District Court
Southern District of West Virginia

CJA eVoucher

Attorney User Manual

Release 4.3

CJA
Court Contact Information

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CJA eVoucher Website:
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Introduction

The CJA eVoucher System is a web-based solution for submission, monitoring and management of all Criminal Justice Act (CJA) functions. The eVoucher program will allow for:

- On-line authorization requests by attorneys for service providers and transcripts
- On-line voucher completion by the attorney acting for the service provider
- On-line voucher review and submission by the attorney
- On-line submission to the court for review, processing and payment of all vouchers

Unless the court has indicated otherwise, attorneys are generally required to create and submit vouchers for their service providers. The program includes the following modules:

Panel Management

- Allows attorneys to manage their own account information including address, phone, firm associations and applicable CLE credits.
- Allows for submission of holding periods or a specific amount of time taken off for medical leave, vacation, etc.

Voucher & Authorization Request Submission

- Authorization requests by attorneys for expert services.
- Requests by attorneys for interim payment.
- Upload supporting documents to vouchers or authorization requests.
- Reports for attorneys to take an active part in monitoring costs.
- Automatic e-mail notification to attorney of approval or rejection of vouchers and authorization requests.

Browser Compatibility

- Windows: Internet Explorer 8 or newer are approved.
- Apple Macintosh: Safari 5.1 or newer is approved.
- Chrome, Firefox and other browsers may not be used with CJA.

Court Appointment

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

Please immediately report any changes in your email address to: CJA Technician Debbie Reynolds at (304) 347-3461 or Debbie_Reynolds@wvsd.uscourts.gov or CJA Supervising Attorney Angie Volk at (304) 347-3191 or Angie_Volk@wvsd.uscourts.gov.

Accessing the CJA eVoucher Program

To access the CJA eVoucher program, either click on the link provided in the appointment email or use your browser to access the system at the web address provided. It is suggested that you bookmark it for easier access. You will be taken to the CJA login page.

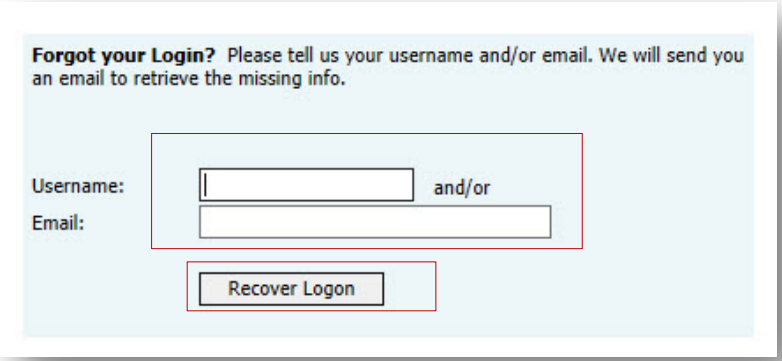
Log in using your Username and Password you were provided (or as updated), and click Log In

Users will be required to change their passwords within **30 days** of the first time they log in to eVoucher. Passwords must be at least eight characters in length and contain:

- One lower-case character
- One upper-case character
- One number
- One special character

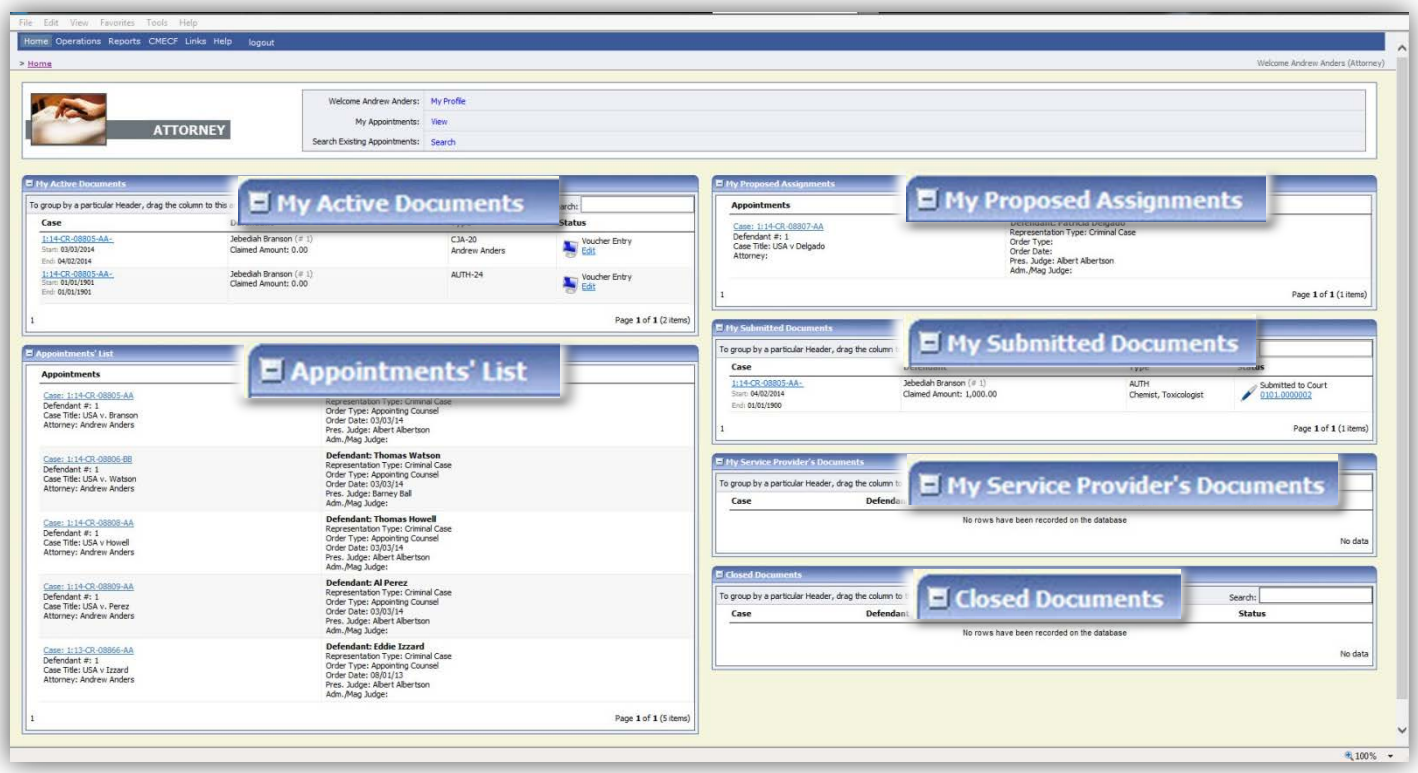
Users are required to change their passwords periodically - currently every 180 days.

If you forget your username or password, click the **Forgot your login?** hyperlink.
Enter your Username or Email address, and click **Recover Logon** to retrieve your information.



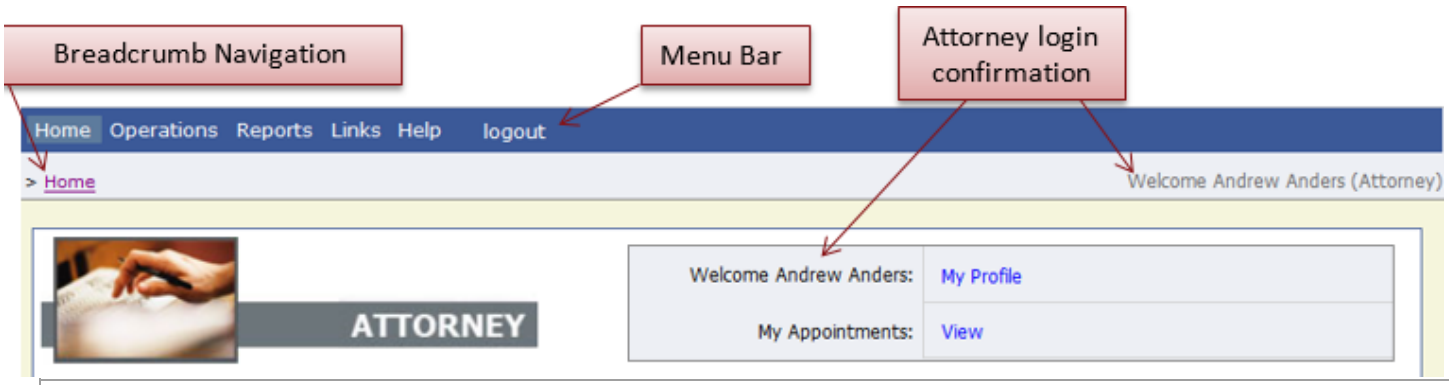
Home Page

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 any other attorney. Likewise, no-one else will have access to your information.



Folder Descriptions	
My Active Documents	Contains documents that you are currently working on. These documents are waiting for action by you.
Appointments' List	Quick reference to all your appointments.
My Proposed Assignments	**SDWV is NOT using this feature**. Cases will appear in this folder if an appointment has been proposed to you and you have not accepted or rejected the appointment.
My Submitted Documents	Contains vouchers for yourself, or for your service provider, which have been submitted to the court for payment. Documents submitted to the court requesting expert services or interim payments will also appear in this folder.
My Service Provider's Documents	Contains all the vouchers for your service providers. This will include: • Vouchers in progress for services provided by the experts • Vouchers submitted for review by the attorney for approval and submission to the court • Vouchers signed off by the attorney and submitted to the court for payment
Closed Documents	Contains documents that have been paid or have been approved by the court. Closed documents will only be displayed for open cases. When the appointment is completed, the closed documents will no longer be displayed on your homepage. They are still accessible through the appointment page.

Navigating in the CJA eVoucher Program



Menu Bar Items	
Home	The eVoucher home page.
Operations	Allows you to search for specific appointments.
Reports	Selected reports you may run on your appointments.
Links	Hyperlinks to CJA resources: forms, guides, publications, etc.
Help	Provides: • Another link to your Profile • "Contact Us" e-mail • Privacy Notice
Logout	Logs user off the eVoucher program.

Customizing the Home Page

Customizing your home page allows you to alter the manner in which your information is displayed in the folders.

Expanding/Collapsing Folders: Click the plus sign to expand a folder. Click the minus sign to collapse a folder.

Moving Folders

Step 1 Place your mouse pointer on the top edge of the folder you wish to relocate.
A crosshair icon will appear.

Step 2 Drag the folder to the new location and release the mouse.

Sorting: Click the column heading (e.g., Case, Description, Type) to sort in either ascending or descending order.

Resizing of Column

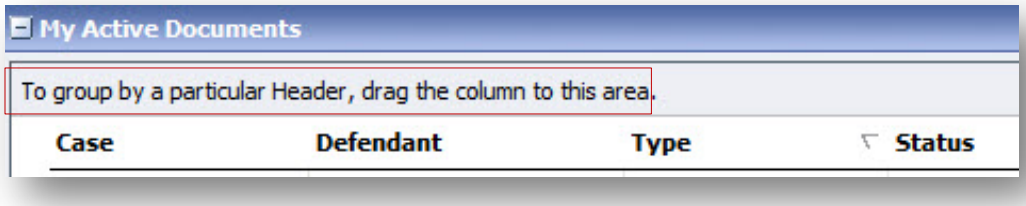
Step 1 Along the folder headings (e.g. case, defendant, type, etc.), move your cursor to the line between the columns until a double arrow appears.

Step 2 Drag the line in the desired direction to enlarge or reduce the column size.

> **Note:**
> The folder size does not increase; therefore, some columns may move off the screen.

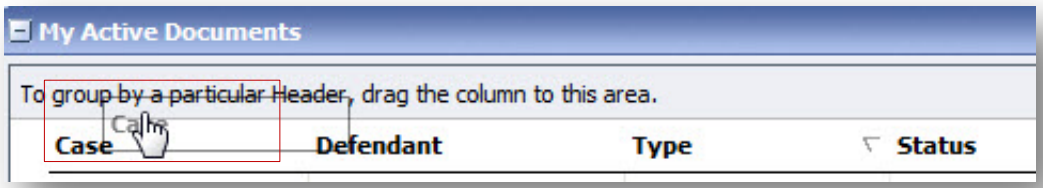
Customizing the Home Page (continued)

Group by Column Heading: You may sort all the information within a folder by grouping documents by the column heading. All folders displaying the "Group Header bar" may be sorted in this manner.

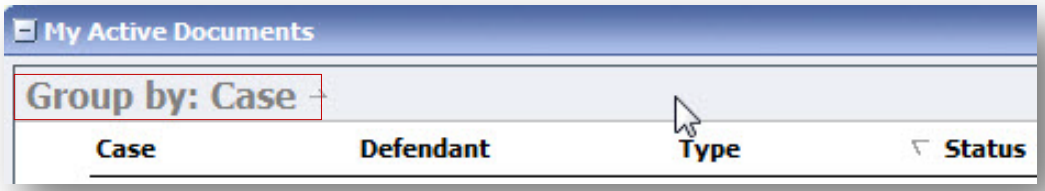


Step 1 Click the header for the column you wish to group.

Step 2 Hold the cursor and drag the header to the "Group by Header" bar.



Step 3 Release the cursor and all the information in that folder will be grouped and sorted by that selection.

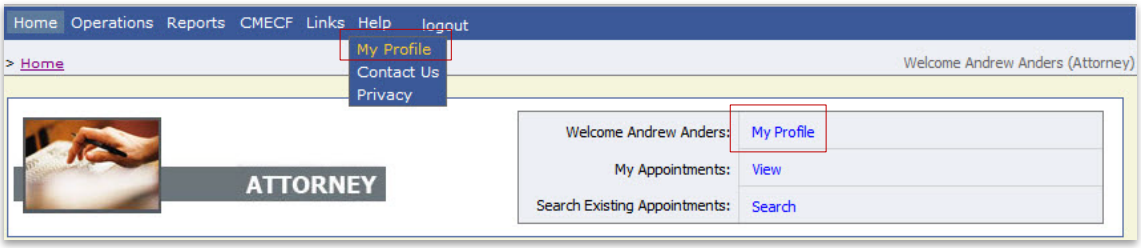


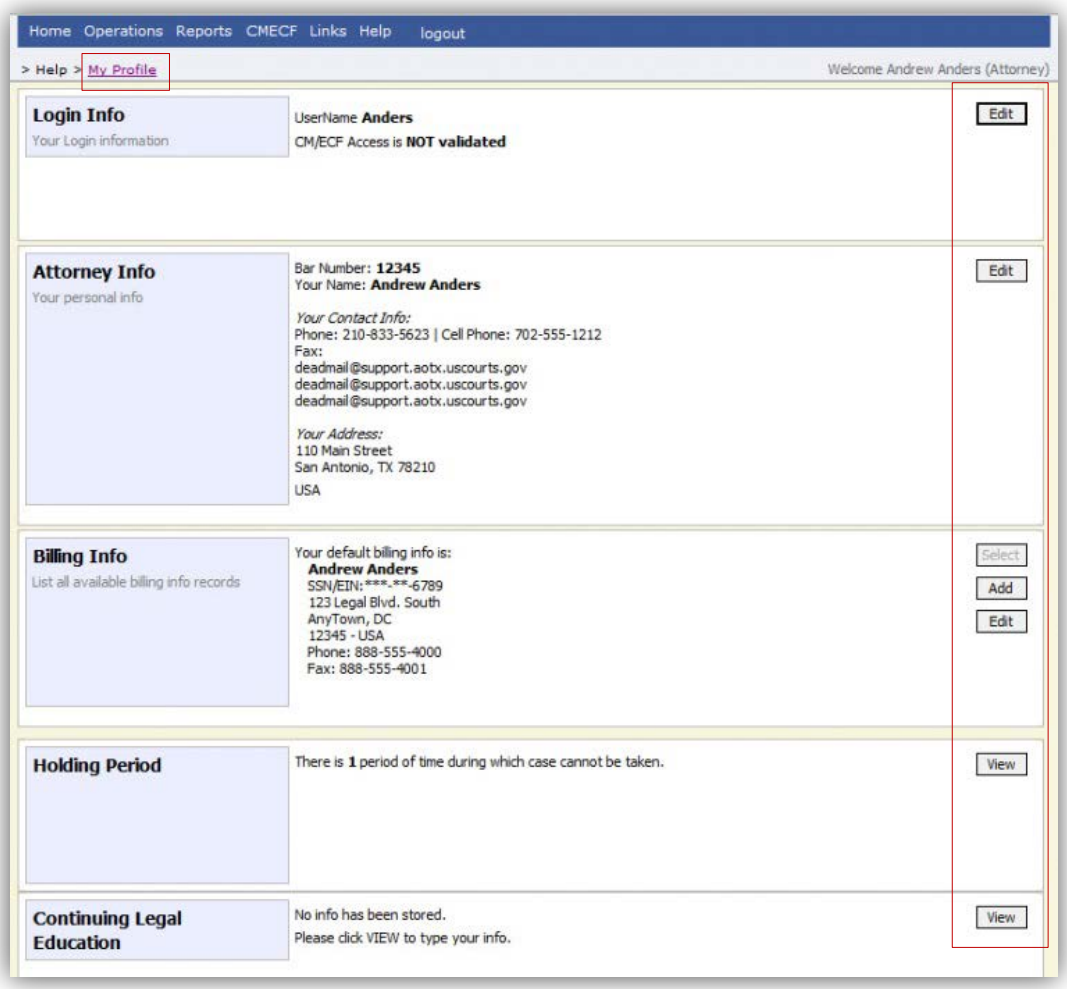
My Profile

In the My Profile section, the attorney may:

- Change password (Login Info section.)
- Edit contact information, phone, e-mail, physical address (Attorney Info section.) **NOTE: If your phone number, address or email changes you must also notify the CJA Technician or CJA Supervising Attorney because the Court is not alerted when you make changes to this information**.
- Update social security number (SSN) or employee identification number (EIN) numbers and any firm affiliation (Billing Info section.)
- Add a time period in which you will be out of office (Holding Period.) ***SDWV is NOT currently using this feature.**
- Document any CLE attendance (Continuing Legal Education section.)

Click the My Profile link from either the **Home** screen or the **Help** menu bar to open the "**My Profile**" page.

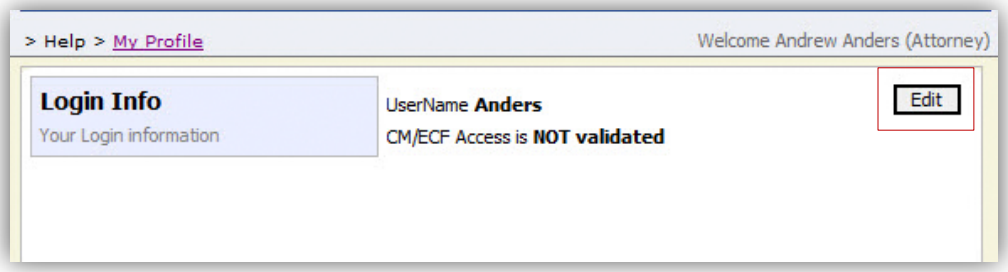




Changing My Profile Username and Password

Step 1

Under the **Login Info** section, click **Edit** to change your Password.

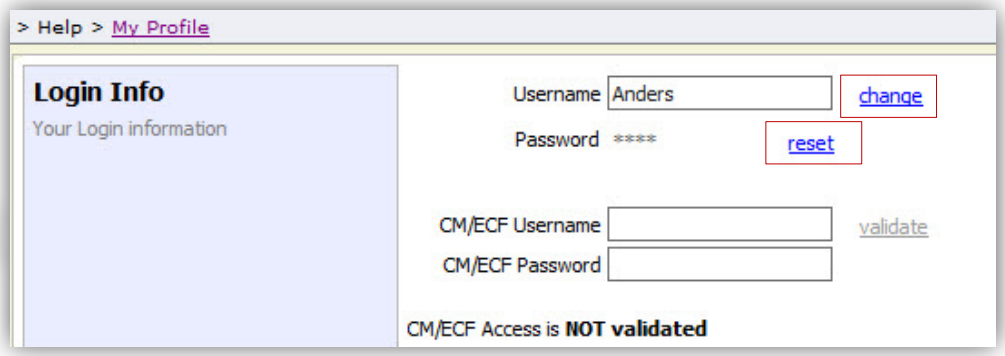


Step 2

To change your Username, type the new Username and click **change**. It will show "The Username has been changed."

Step 3

To reset your password, click **reset**.

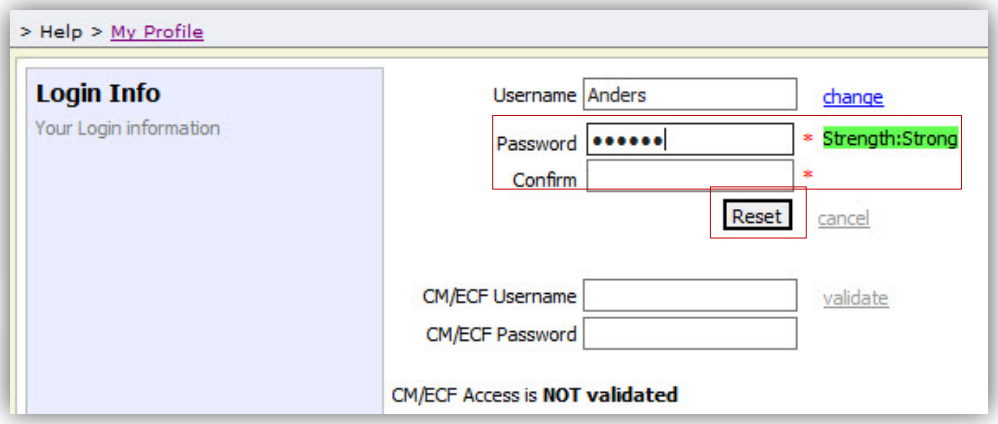


Step 4

Type the new password and retype it in the confirm field.

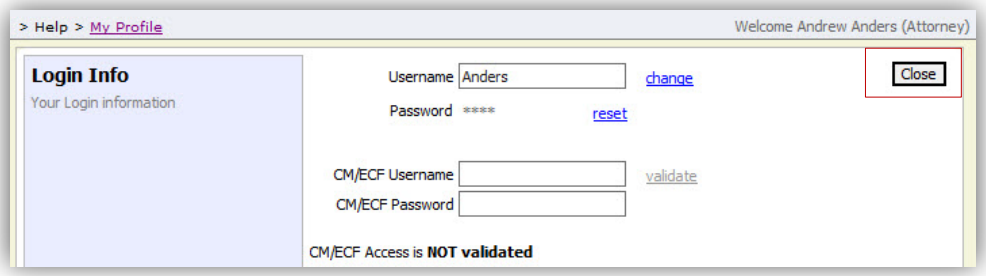
Step 5

Press the **Reset** button to save.



Step 6

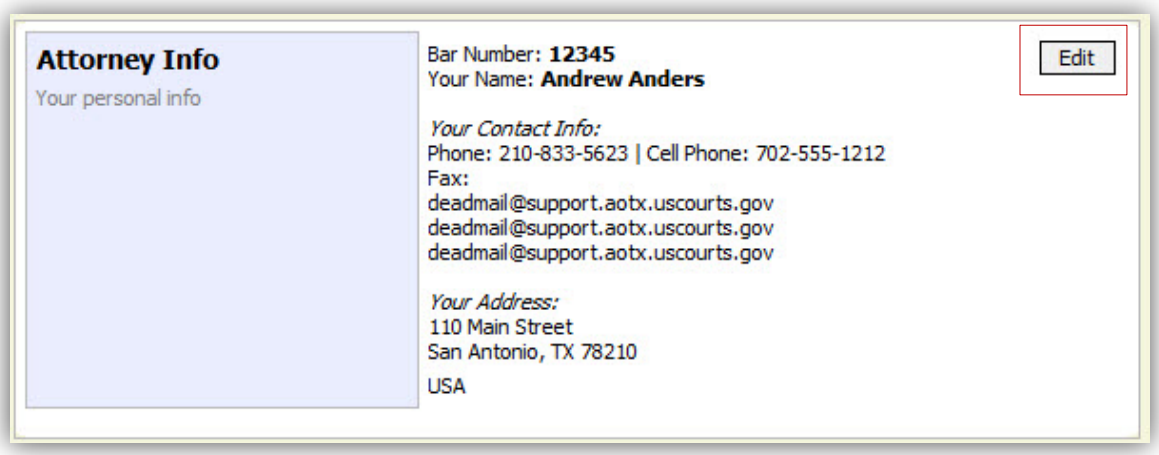
Click the **Close** button to exit the login Info section.



Attorney Info

Step 1

Under the **Attorney Info** section, click the **Edit** button to access your personal information.

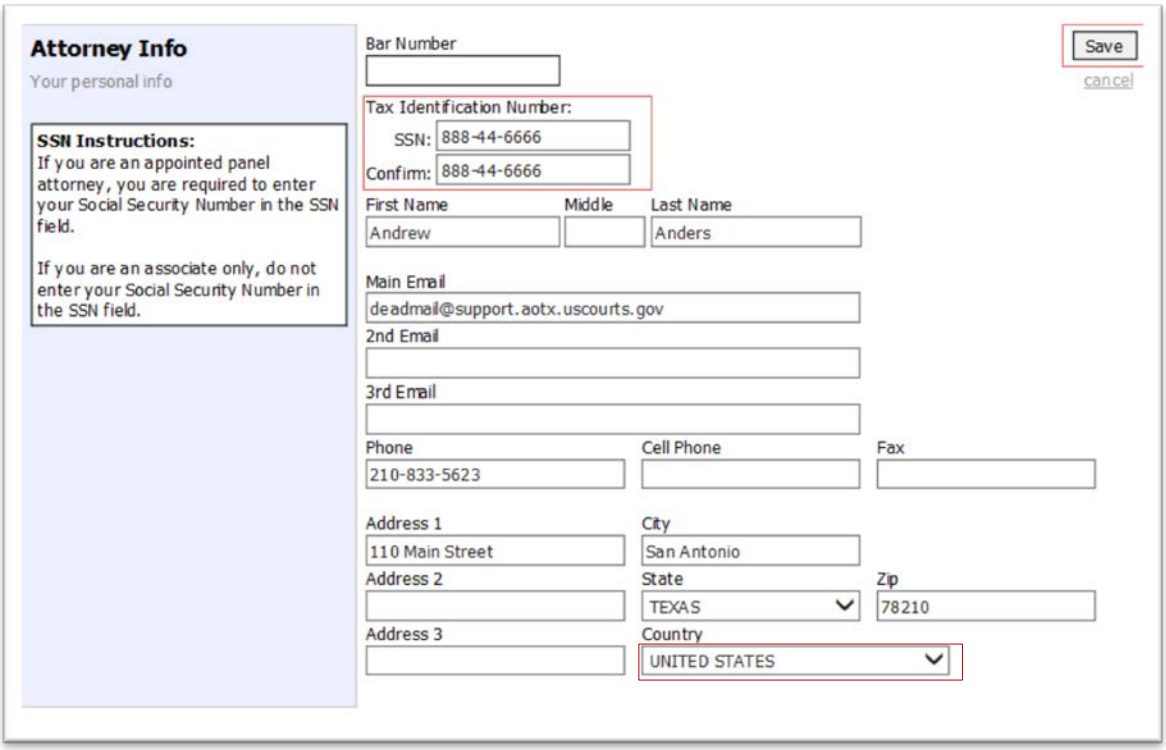


Step 2

Make any necessary changes.

Step 3

Click **Save**.



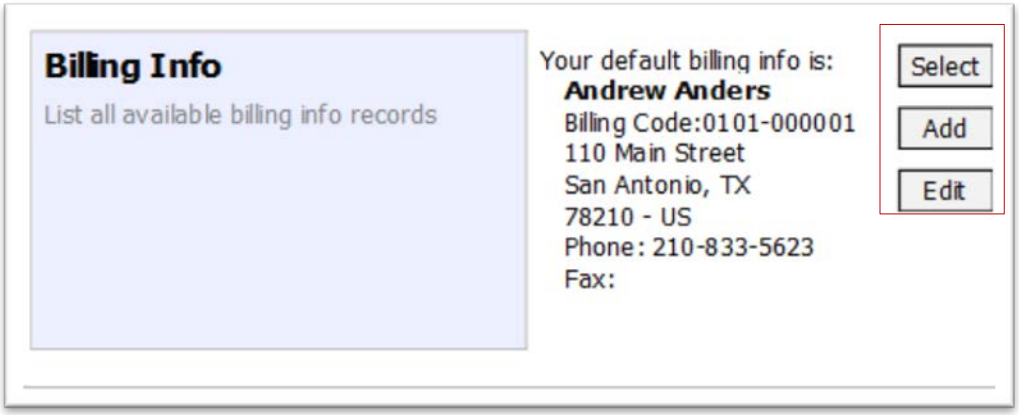
Note:

- Each attorney (except Associates) must enter his/her Social Security Number into the user profile or they will not be paid.
- The Country field will automatically populate UNITED STATES unless otherwise indicated.
- You may list as many as three email addresses. Notifications from eVoucher will be sent to all email addresses.

Billing Info

Step 1

Under the **Billing Info** section, click **Add** if no billing information is available.



Step 2

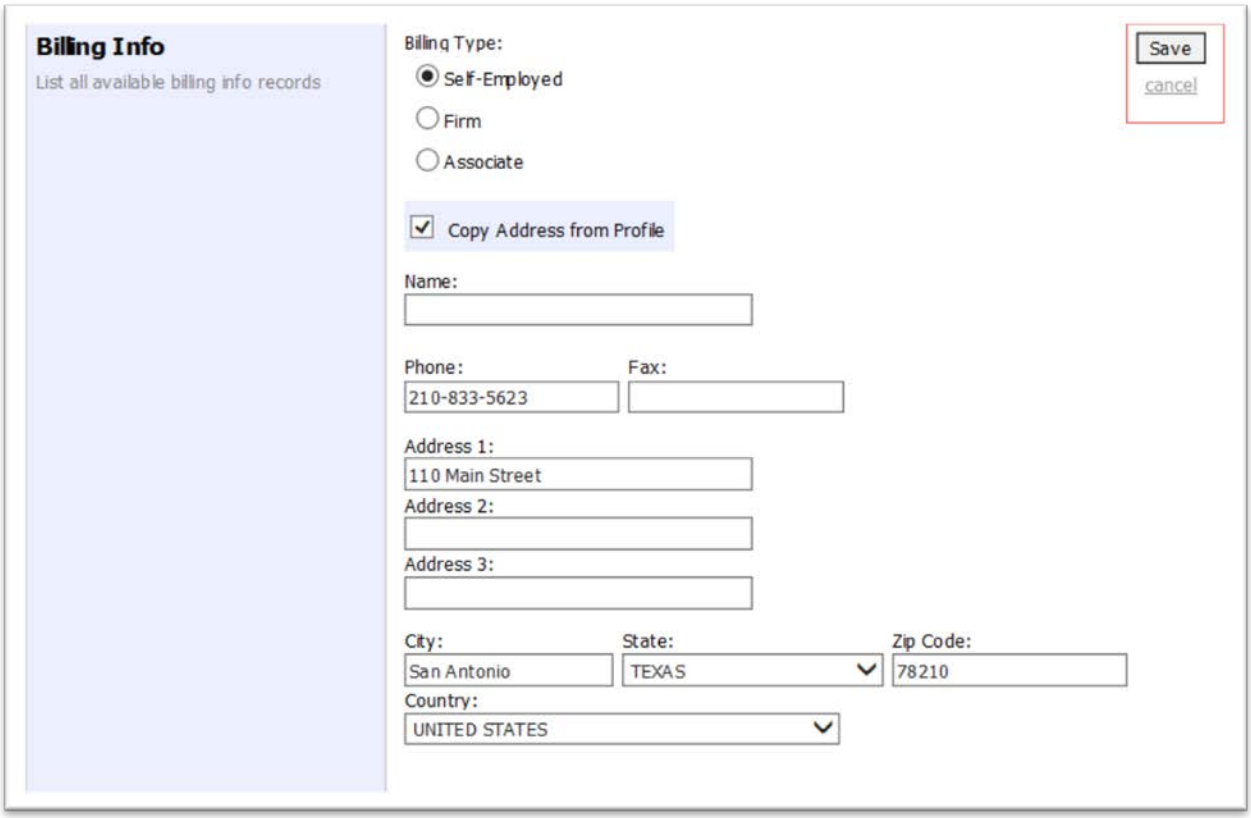
Click **Edit** if you wish to change the information already entered.

Note:

- You must have billing information entered before any payments can be made.
- The SSN/EIN is used when reporting income to the IRS.
- You may use the Copy Address from Profile checkbox if your billing address is the same as your Attorney Info address.

Step 3

Make any necessary changes and click **Save**.



Step 4

If applicable, add Billing Info for a Firm by clicking on the corresponding radio button. **NOTE: At this time the SDWV is NOT using the Associate feature. ***

Billing Info

List all available billing info records

Billing Type:

- ○ Self-Employed
- ◉ Firm
- ○ Associate

Save

cancel

Tax Identification Number:

EIN/TIN:

Confirm:

☑ Copy Address from Profile

Name:

Phone: Fax:

Address 1:

Address 2:

Address 3:

City: State: Zip Code:

Country:

UNITED STATES

Billing Info

List all available billing info records

Billing Type:

- ○ Self-Employed
- ○ Firm
- ◉ Associate

Save

cancel

Billing Code: 0101-000001 Verify

Andrew Anders
Billing Code:0101-000001
110 Main Street
San Antonio, TX
78210 - US
Phone: 210-833-5623
Fax:

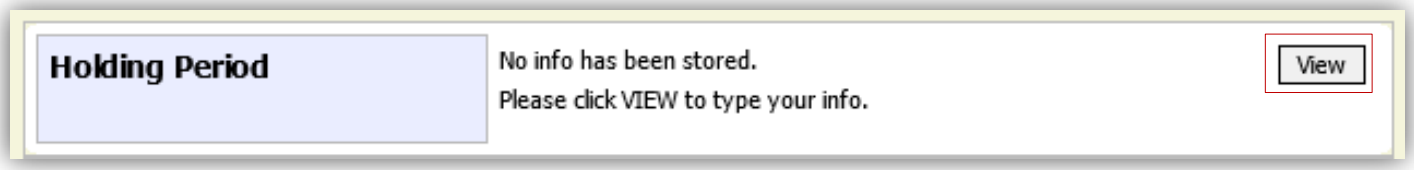
Note:

- Attorneys with a pre-existing agreement must enter the firm's EIN and name (required)
- * If you utilize an associate on a case you will bill for the associate's time by including their initials on the description of services provided on the CJA-20. The total number of associate hours will be manually calculated and the $90/hour associate rate will be applied to those hours.

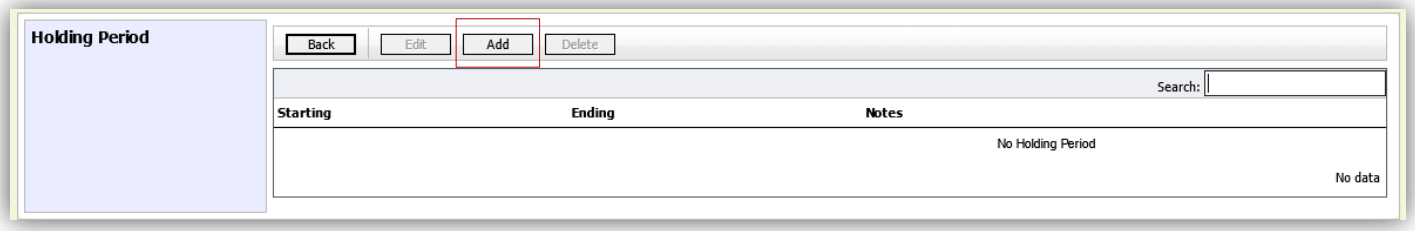
Holding Period

Holding periods can be used for medical leave, vacation, etc. During this time you will not be given a new assignment. ***SDWV is NOT currently using this feature. This information is for informational purposes only* You should notify the CJA Supervising Attorney via email if you are going to be unable to accept appointments for an extended period of time.**

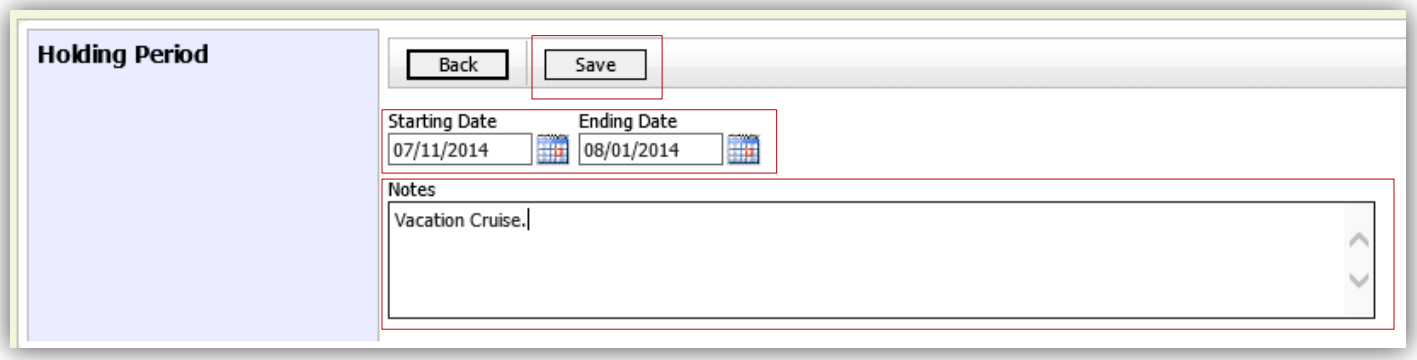
Step 1 Under the **Holding Period** section click **View**.



Step 2 Click **Add.**



Step 3 Enter the **Starting** and **Ending Date**, along with **Notes**.

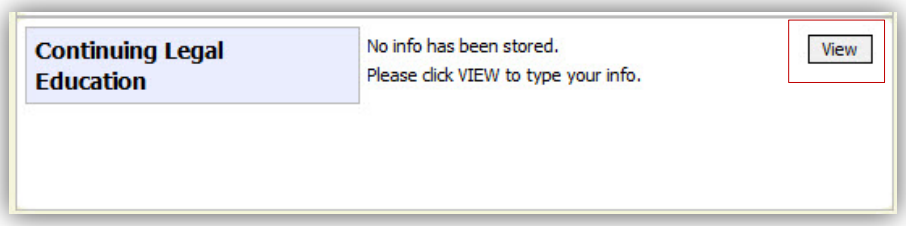


Step 4 Click **Save.**

Continuing Legal Education

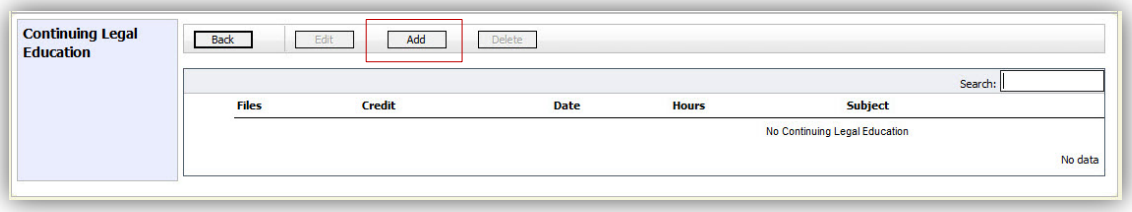
Step 1

Under the **Continuing Legal Education** section, click the **View** button to access your CLE information.



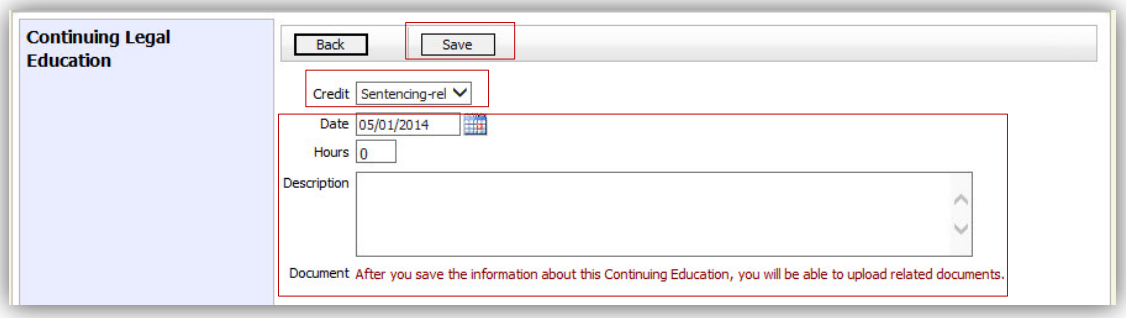
Step 2

To add CLE information, click **Add**.



Step 3

Click the **Credit** dropdown menu to select CLE categories.



Step 4

Enter the **Date**, the number of **Hours,** and a **Description**. See **NOTE** at the end of this section for details to be included.

Step 5

Click **Save**.

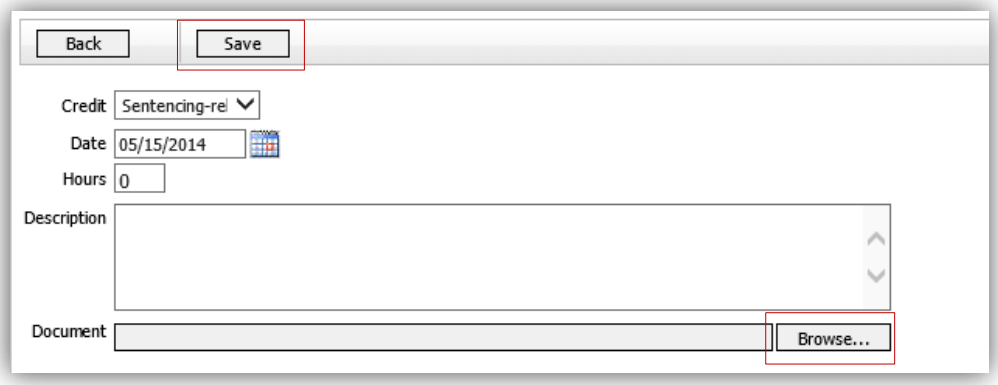
Notes:

- After information is saved, you'll be able to upload related PDF documents.
- The Hours section will currently not accept tenths of hours so include the number of hours you attended in the Description section if the number of hours is not a whole number.

Continuing Legal Education (cont'd)

Step 6

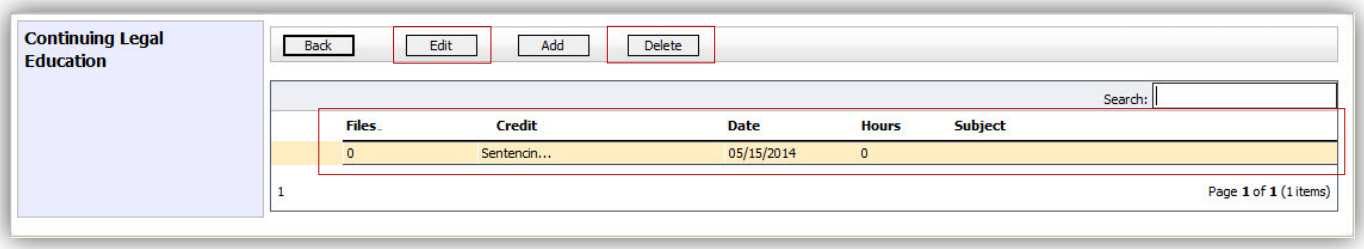
Click **Browse,** to upload and attach a PDF document such as an agenda , course description or verification of attendance.



Step 7

Click **Save**.

All entries will be appear in the grid and can be accessed, edited, or deleted by selecting the entry and choosing an action button.



NOTE: When adding CLE credit information please include the following details in the Description section:

- Type of activity (broadcast, video, live seminar etc.)
- Title of CLE Program
- Sponsor/Presenter
- Location
- Number of CLE credits approved and number claimed
- Brief description/synopsis of the federal criminal law or procedure training you received

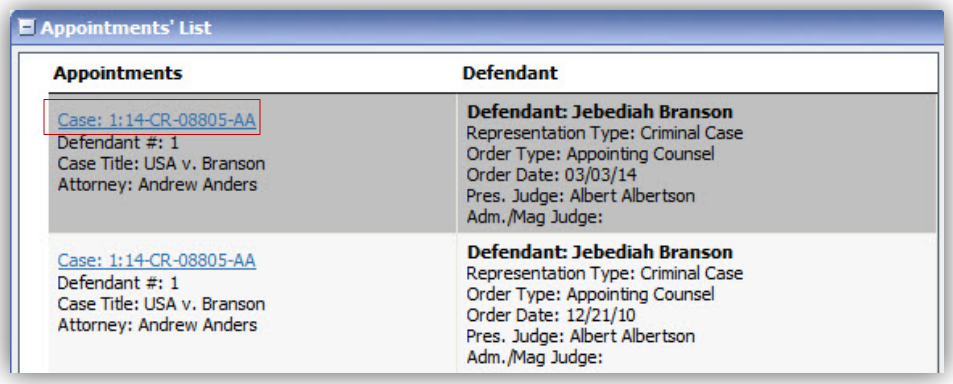
OR you may upload the Court's CLE reporting form in the Document section which includes those details.

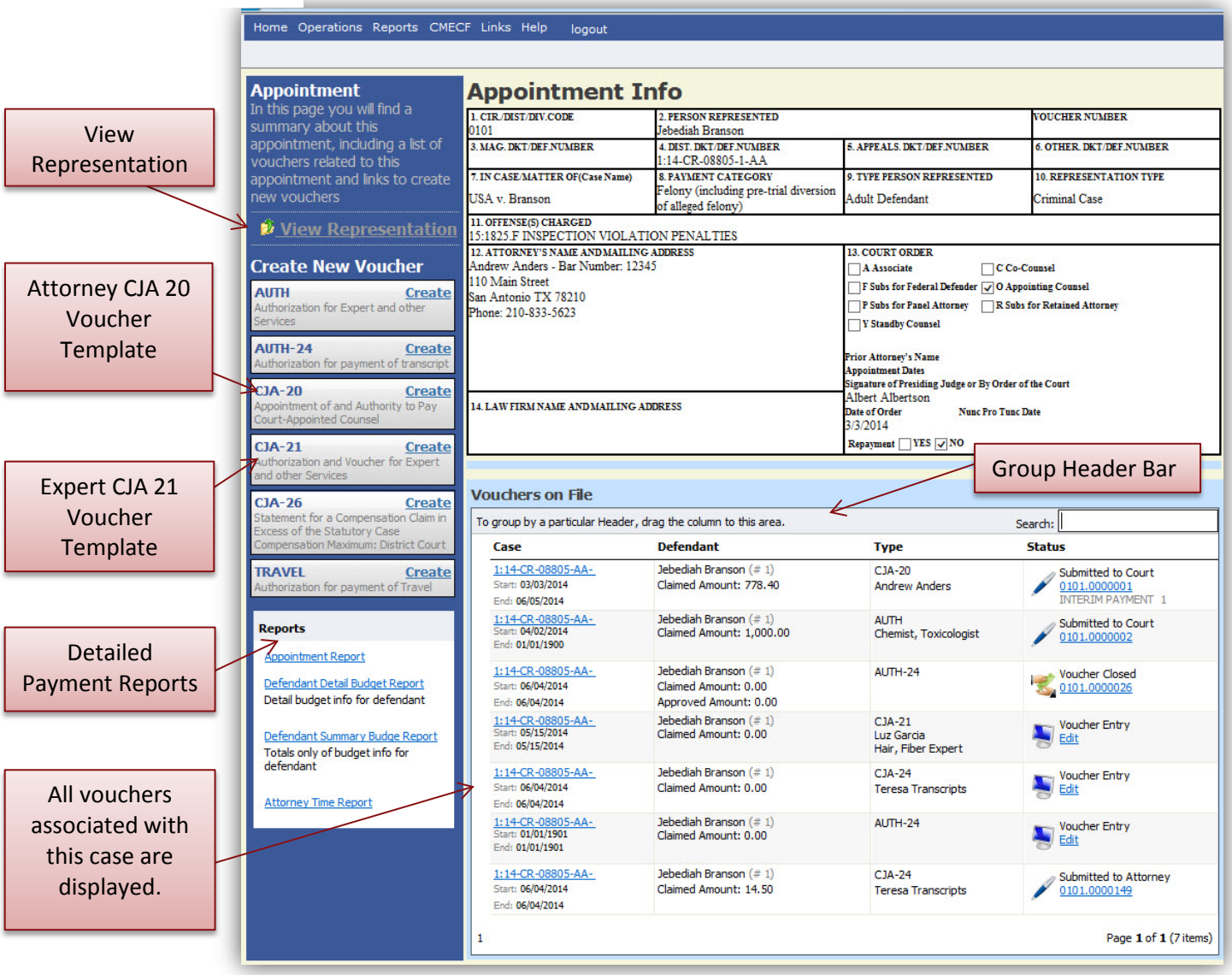
Appointment's List

You can view your active appointments by either holding your mouse over the **Operations** tab and then clicking on **My Appointments** or by looking in the **Appointments** section under the Appointment's List on your home page.

Step 1

Click the case number hyperlink to open the **Appointment** page. Information about the appointment, as well as any vouchers or documents associated with the appointment, will be displayed.





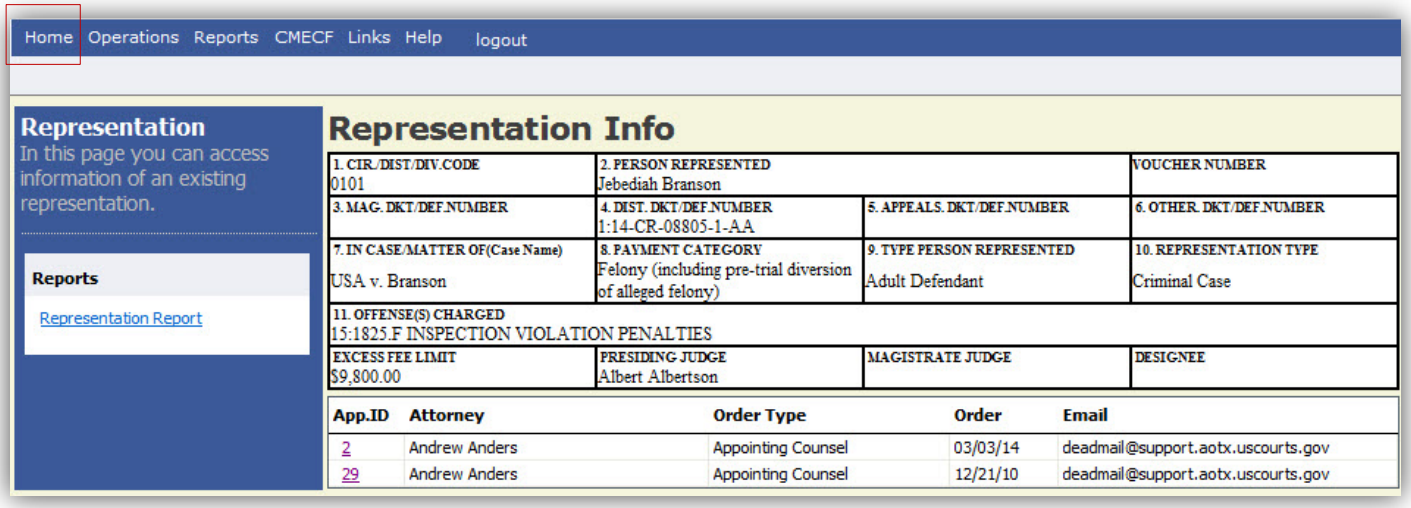
View Representation

The **View Representation** information will display:

- Default excess fee limit
- Presiding judge
- Magistrate judge
- Co-counsel
- Previous counsel

Step 2

From the Appointment page open, click **View Representation**.



Step 3

Click **Home** on the Menu bar at the top of the page.

CJA 20 Voucher Process Overview

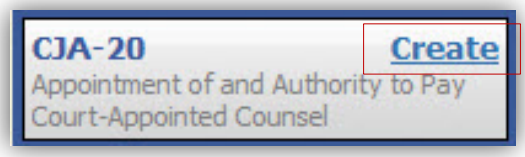
Creating the CJA 20 Voucher

The Court creates the appointment. The attorney will initiate the CJA 20 voucher.

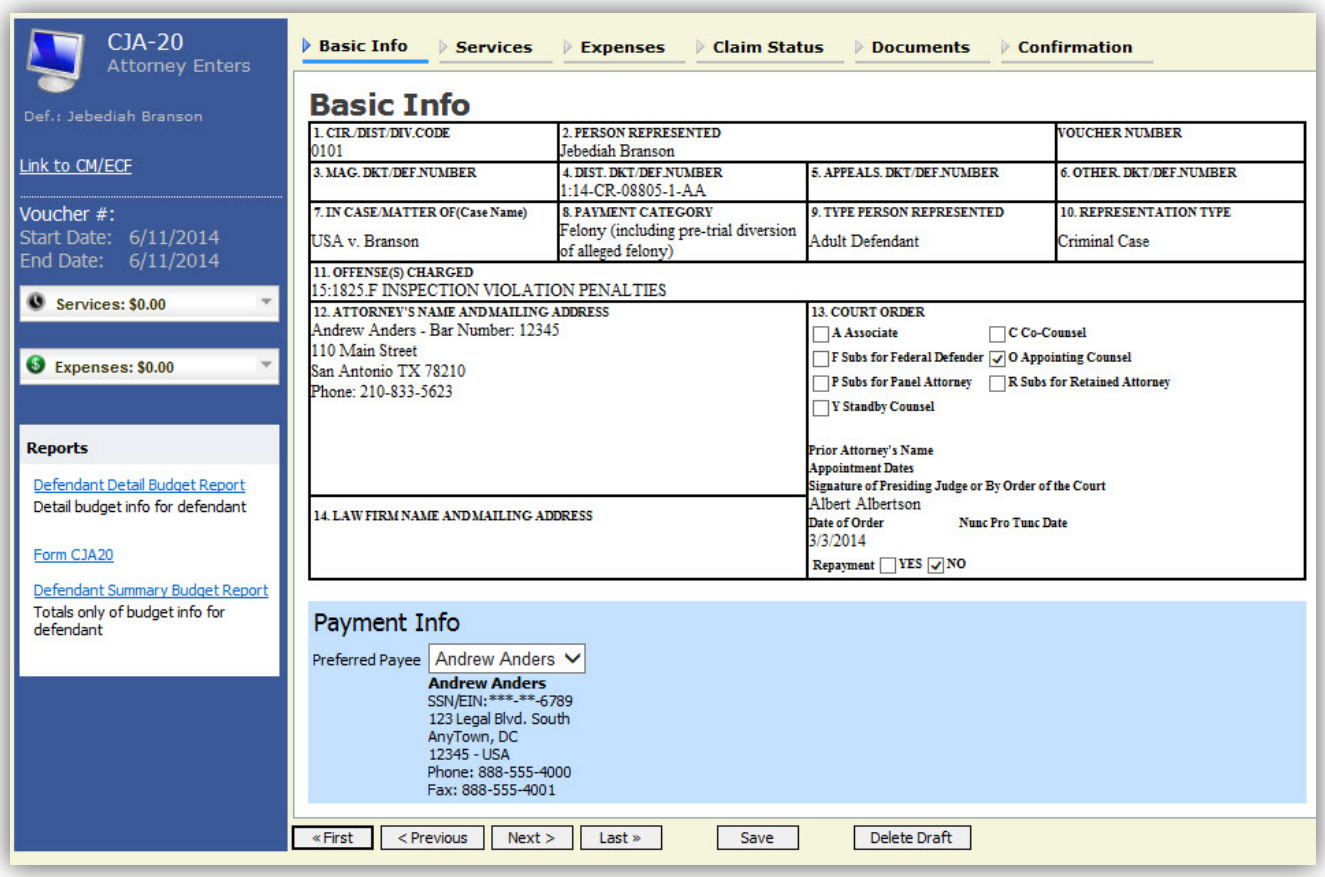
Note:
All voucher types and documents function primarily the same.

Step 1

From the **Appointment** page click **Create** from the CJA 20 Voucher template.

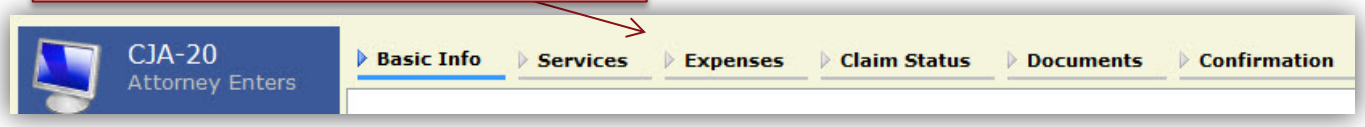


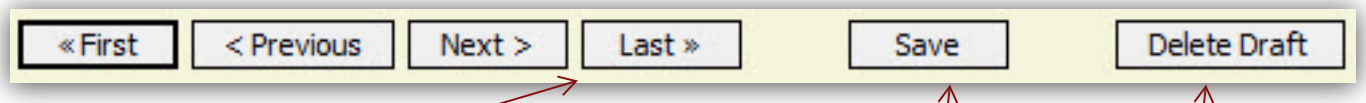
The voucher opens to the **Basic Info** page which displays the information in the paper voucher format.



Creating the CJA 20 Voucher (cont'd)

Tab Headings appear at the top of the screen





Progress Bar appears at the bottom of the screen.

Notes:

- The user should **SAVE** any entries made to a voucher often to avoid data loss.
- At any time prior to submitting the voucher, the user may delete the voucher by clicking the **Delete Draft** button.
- The user may navigate using the Tab Headings or Progress Bar.

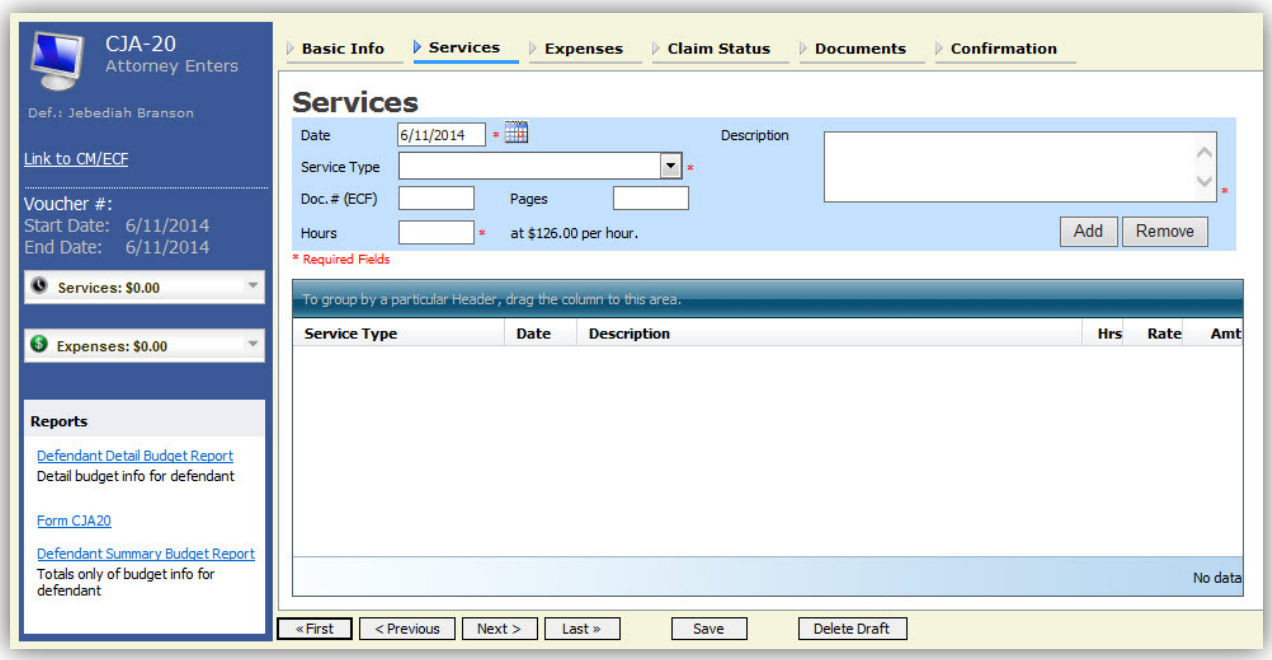
Entering Services

Line item time entries should be entered on the Services tab.
Both In-Court and Out-of Court time should be recorded on this screen.

Step 2

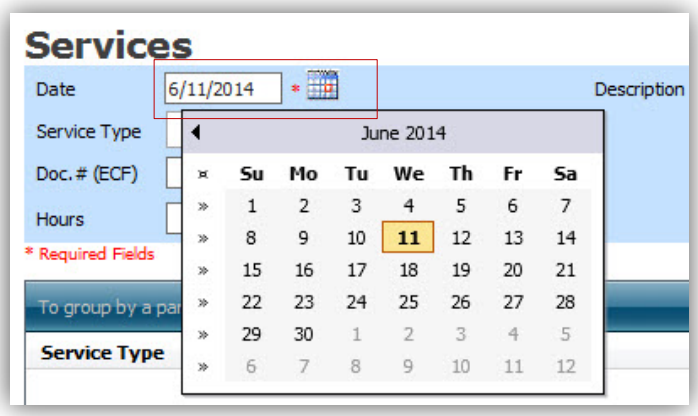
Click the **Services** tab or click the **Next** option located on the progress bar.

Note:
There is **NOT AN AUTOSAVE** function on this program. You must click **SAVE** periodically in order to save your work.



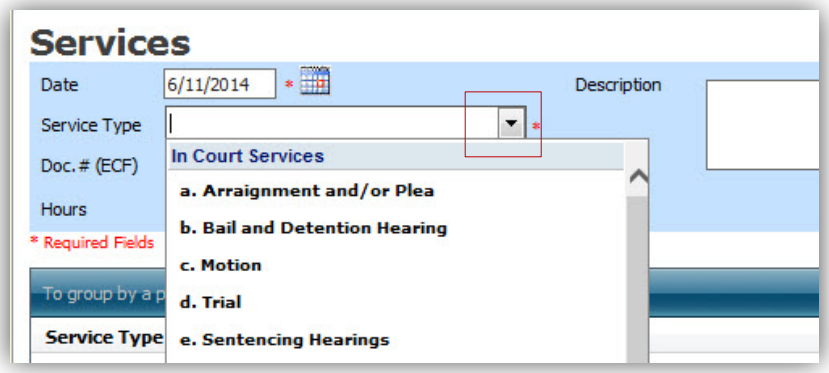
Step 3

Enter the date of the service. The default date is always the current date. You may type in the date or click the calendar icon to select a date from the pop-up calendar.



Services (cont'd)

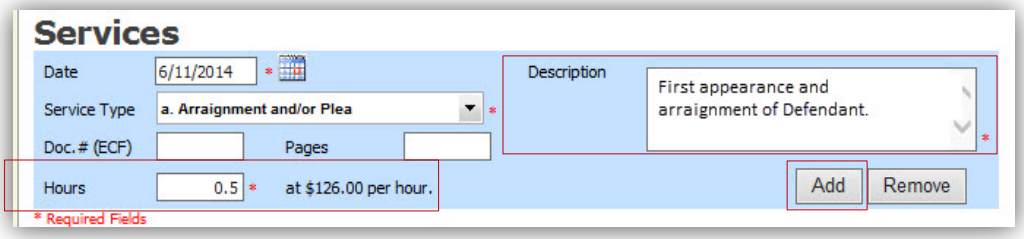
Step 4 Select **Service Type** from the drop-down menu.



> **Note:**
> You may add dates in any order. You can sort in chronological order at any time.

Step 5 Enter hours of service in tenths of an hour.

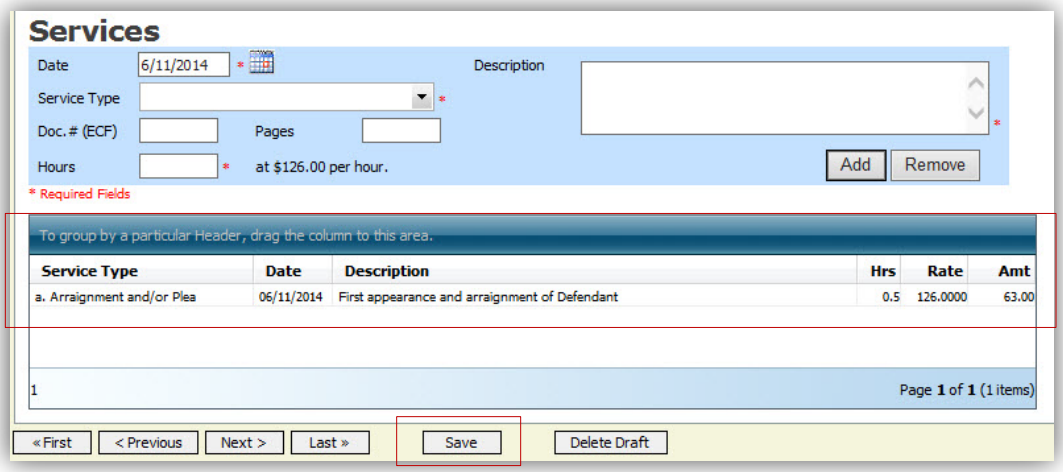
Step 6 Enter a description.



Step 7 Click **ADD.**

> **Note:**
> - You may add time in any order.
> - Double click an entry to edit.

The entry will be added to the voucher and appear at the bottom of the Service Type section.



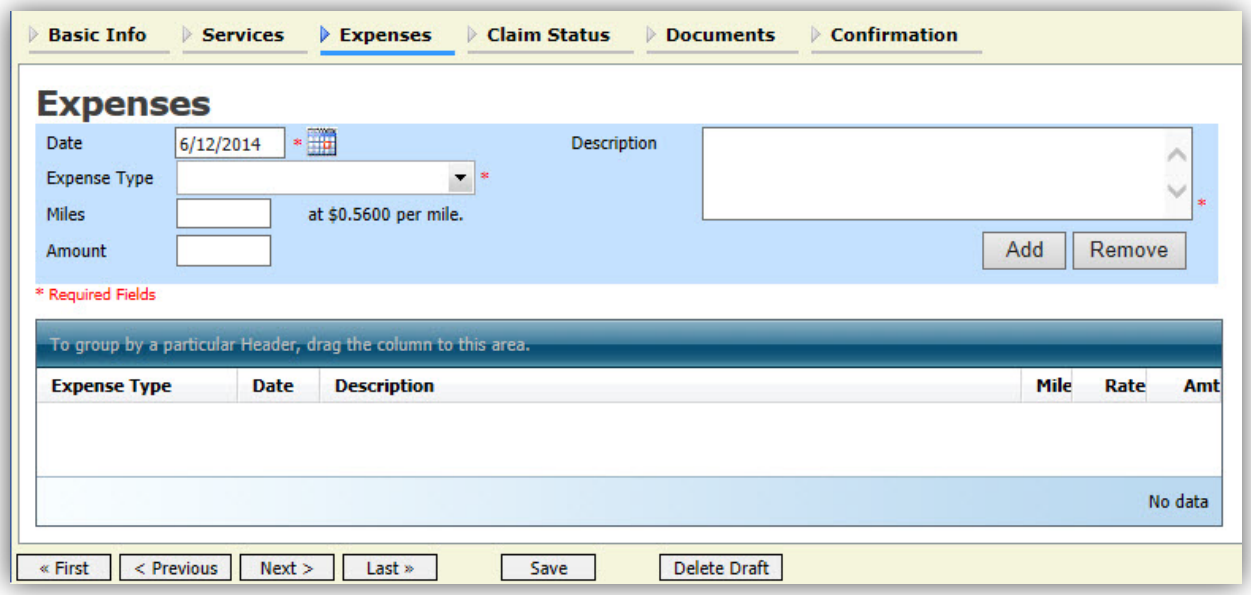
Step 8 Click the **Date** header**.** This will sort services according to date.

Step 9 Click **Save.**

Entering Expenses

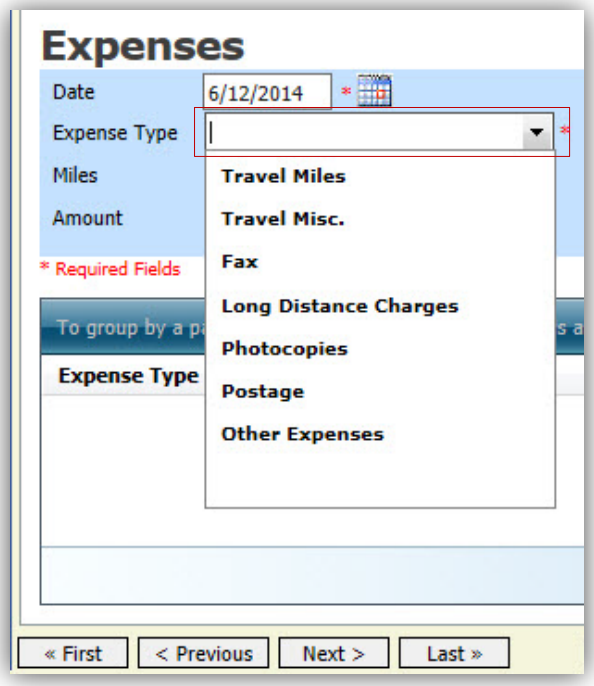
Step 1

Click the **Expenses** tab or click the **Next** option located on the progress bar at the bottom.



Step 2

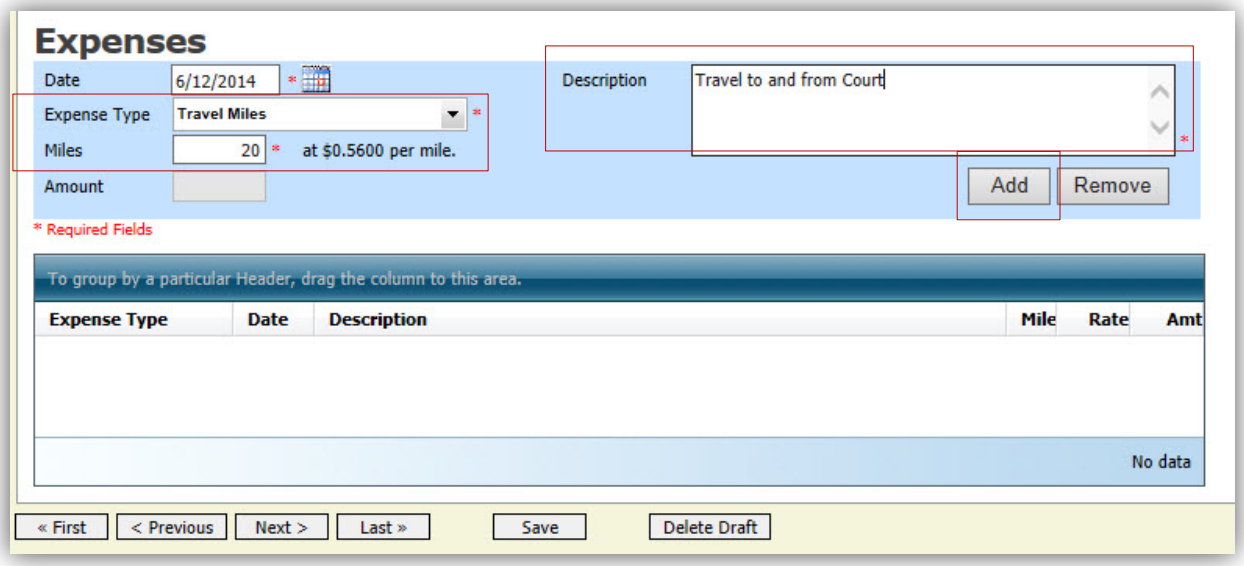
From the **Expense** drop-down menu, select the applicable expense.



Entering Expenses (cont'd)

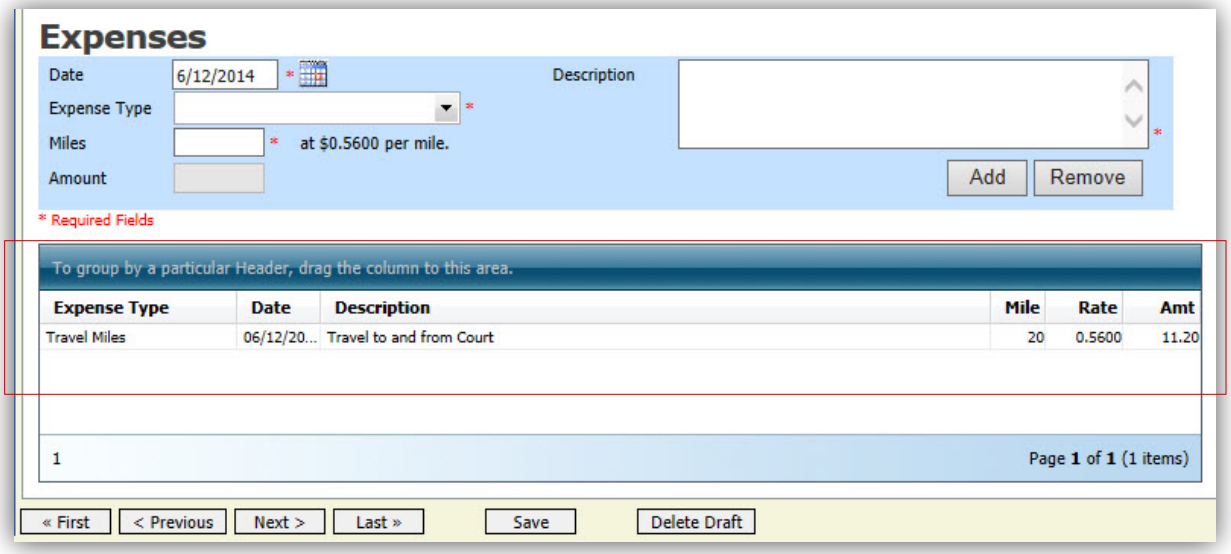
Step 3 If Travel Miles is selected, enter the round trip mileage.

Step 6 Enter a description in the **Description** field.



Step 4 Click **ADD**.

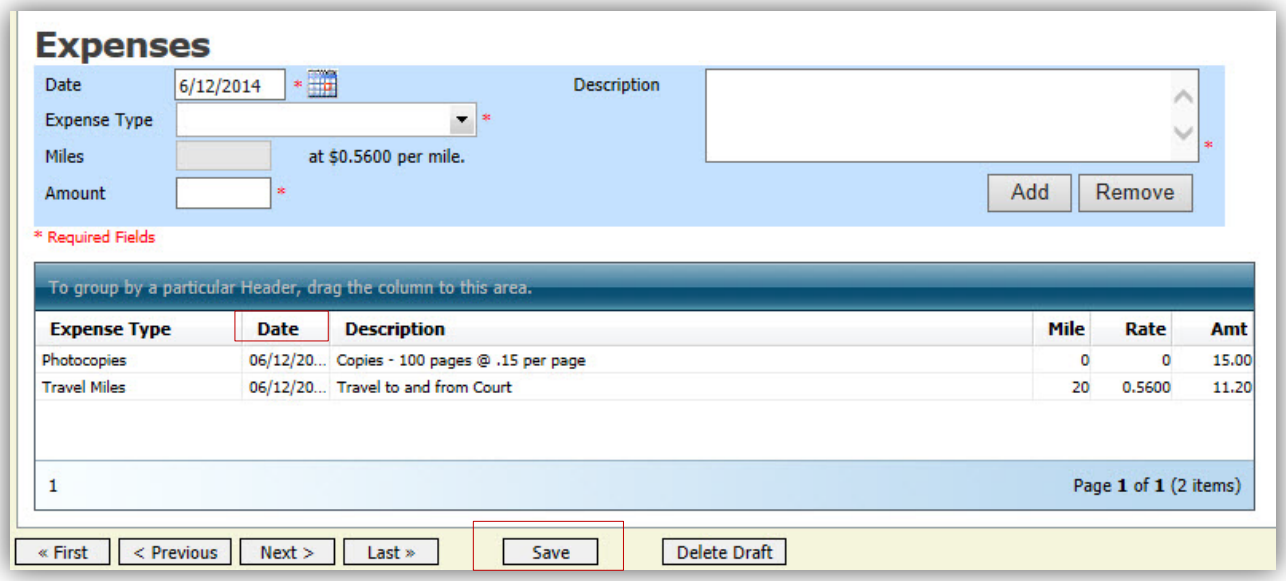
The entry will be added to the voucher and will appear at the bottom of the **Expense Type** section.



Entering Expenses (cont'd)

Notes:

- If photocopies or fax expenses are chosen, indicate the number of pages, and the rate charged per page. Do not use the "$"sign or commas. Photocopies are .10 per page.
- Remember to click **ADD** after each entry.
- Double click an entry to edit.

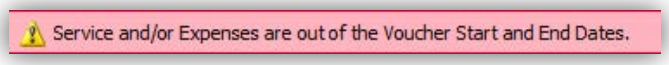


Step 5 Click the **Date** header**.** This will sort expenses according to date.

Step 6 Click **Save**.

Claim Status

Once you begin entering data on the Services and/or Expenses tab, you may receive what looks like an error message:



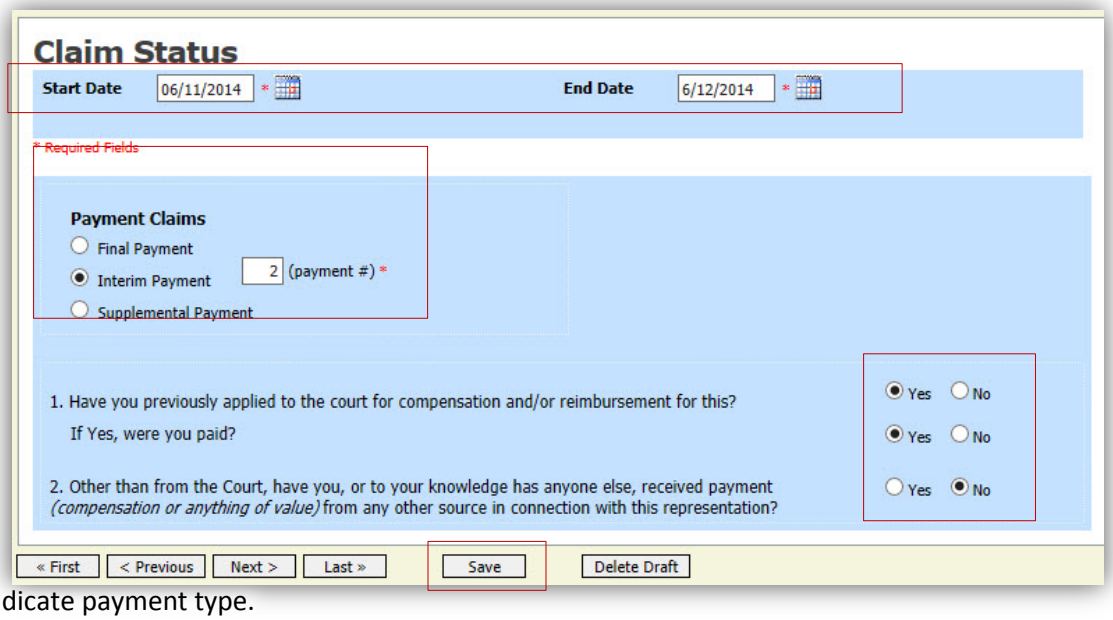
The message will be removed when you complete the **Claim Status** section with start and end dates which include all service and expenses dates for the voucher. **NOTE: If you change the Start Date to the first date of services or expenses on the voucher as your FIRST step in voucher entry this message will be avoided**.

Step 1

Click the **Claim Status** tab or click the **Next** option located on the Progress bar.

Step 2

Enter the start date from the services or expenses entries, whichever date is earliest. If need be, go back to the **Expense** and **Service** sections, and click the **Date** header to sort showing the earliest date of services.



Step 3

Indicate payment type.

Note:

- **Final Payment** is requested after all services have been completed.
- **Interim Payment** allows for payment in segments. If using this type of payment, indicate the number of this request payment.
- After Final Payment number has been submitted, **Supplemental Payment** may be requested due to a missed or forgotten receipt.

Step 4

Answer all the questions regarding previous payments in this case.

Step 5

Click **SAVE**.

Documents

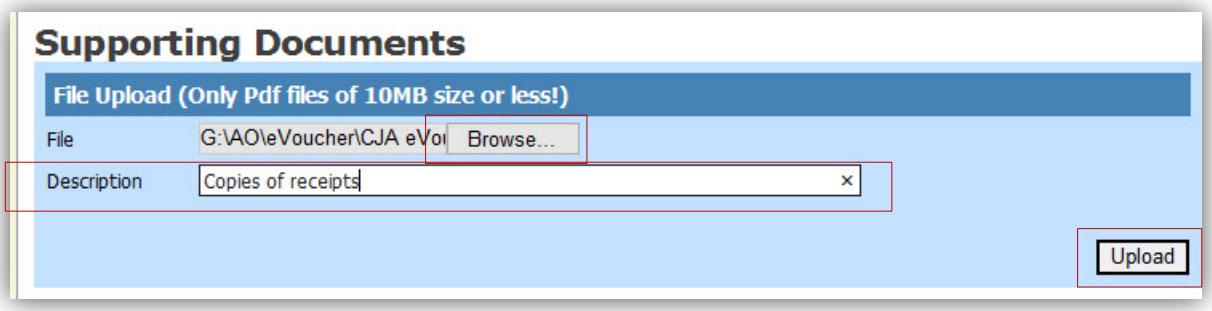
Attorneys, as well as the Court, may attach documents.
Attach any documentation which supports the voucher, i.e. travel or other expense receipts, phone bills, orders from the Court.

Note:
All documents must be submitted in PDF format, and must be 10 MB or less.

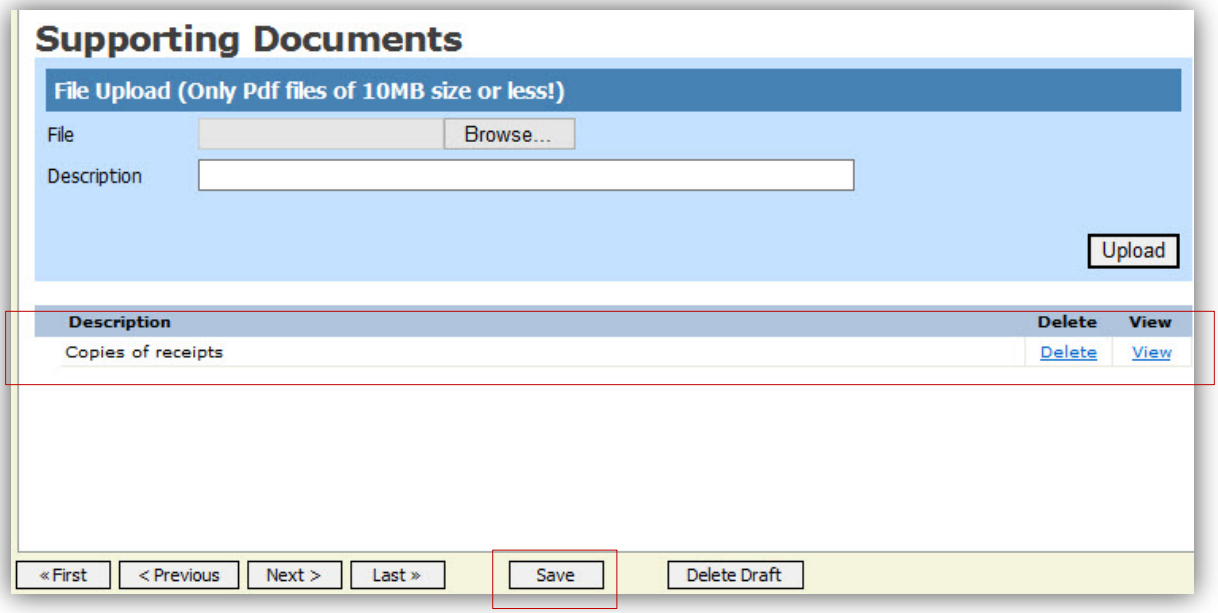
Step 1 To add an attachment, click the **Browse** button to locate your file.

Step 2 Add a description of the attachment.

Step 3 Click **Upload**.



The attachment and description is added to the voucher and appears in the bottom of the Description section.



Step 4 Click **Save**.

Signing and Submitting to Court

After you have added all voucher entries and necessary information on all other tabs of the CJA 20, you are ready to sign, and submit your voucher to the Court.

Step 1 Click Confirmation tab or the **Last** option located on the progress bar.

The Confirmation screen appears which reflects all entries from the previous screens.

Confirmation

1. CIR./DIST/DIV.CODE	2. PERSON REPRESENTED		VOUCHER NUMBER
0101	Jebediah Branson		
3. MAG. DKT/DEF.NUMBER	4. DIST. DKT/DEF.NUMBER	5. APPEALS. DKT/DEF.NUMBER	6. OTHER. DKT/DEF.NUMBER
	1:14-CR-08805-1-AA		
7. IN CASE/MATTER OF(Case Name)	8. PAYMENT CATEGORY	9. TYPE PERSON REPRESENTED	10. REPRESENTATION TYPE
USA v. Branson	Felony (including pre-trial diversion of alleged felony)	Adult Defendant	Criminal Case

11. OFFENSE(S) CHARGED
15:1825.F INSPECTION VIOLATION PENALTIES

12. ATTORNEY'S NAME AND MAILING ADDRESS
Andrew Anders - Bar Number: 12345
110 Main Street
San Antonio TX 78210
Phone: 210-833-5623

13. COURT ORDER
☐ A Associate ☐ C Co-Counsel
☐ F Subs for Federal Defender ☑ O Appointing Counsel
☐ P Subs for Panel Attorney ☐ R Subs for Retained Attorney
☐ Y Standby Counsel

14. LAW FIRM NAME AND MAILING ADDRESS
Andrew Anders TIN: ***-**-6789
123 Legal Blvd. South
AnyTown DC 12345 USA
Phone: 888-555-4000
Fax: 888-555-4001

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 ☐ YES ☑ NO

CLAIMS FOR SERVICES AND EXPENSES				FOR COURT USE ONLY		
	CATEGORIES	HOURS CLAIMED	TOTAL AMOUNT CLAIMED	ADJUSTED HOURS	ADJUSTED AMOUNT	REVIEW
15.	a. Arraignment and/or Plea	0.5	$63.00			
	b. Bail and Detention Hearing	0	$0.00			
	c. Motion	0	$0.00			
	d. Trial	0	$0.00			
	e. Sentencing Hearings	0	$0.00			
	f. Revocation Hearings	0	$0.00			
	g. Appeals Court	0	$0.00			
	h. Other	0	$0.00			
	Totals	0.5	$63.00			
16.	a. Interviews and Conferences	0	$0.00			
	b. Obtaining and Reviewing Records	0	$0.00			
	c. Legal Research and Brief Writing	0	$0.00			
	d. Travel Time	0	$0.00			
	e. Investigative or Other Work	0	$0.00			
	Totals	0	$0.00			
17	Travel Expenses *(lodging, parking, meals, mileage, etc.)*		$11.20			
18	Other Expenses *(other than expert, transcripts, etc.)*		$15.00			
	GRAND TOTALS (CLAIMED AND ADJUSTED)		$89.20			

19. CERTIFICATION OF ATTORNEY FOR THE PERIOD OF SERVICE	20. APPOINTMENT TERMINATION DATE IF OTHER THAN CASE COMPLETION	21. CASE DISPOSITION
FROM: 6/12/2014 TO: 6/12/2014		

22. CLAIM STATUS ☐ Final Payment ☐ Interim Payment (#) ☐ Supplemental Payment

Have you Previously applied to the court for compensation and/or reimbursement for this? ☐ YES ☐ NO
If yes, were you paid? ☐ YES ☐ NO
Other than from the Court, have you, or to your knowledge has anyone else, received payment *(compensation of anything of value)* from any other source in connection with this representation? ☐ YES ☐ NO If yes, please attach supporting documentation
I Swear or affirm the truth or correctness of the above statements.

Signature of Attorney: Date Signed:

APPROVED FOR PAYMENT - COURT USE ONLY

23. IN COURT COMP.	24. OUT OF COURT COMP.	25. TRAVEL EXPENSES	26. OTHER EXPENSES	27. TOTAL AMT. APPR./CERT.
$0.00	$0.00	$0.00	$0.00	$0.00
28. SIGNATURE OF THE PRESIDING JUDGE			DATE	28a. JUDGE CODE
29. IN COURT COMP.	30. OUT OF COURT COMP.	31. TRAVEL EXPENSES	32. OTHER EXPENSES	33. TOTAL AMT. APPR./CERT.
$0.00	$0.00	$0.00	$0.00	$0.00
34. SIGNATURE OF THE CHIEF JUDGE, COURT OF APPEALS (OR DELEGATE) *Payment approved in excess of the statutory threshold amount*			DATE	34a. JUDGE CODE

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:

Submit

« First | < Previous | Next > | Last » | Save | Delete Draft

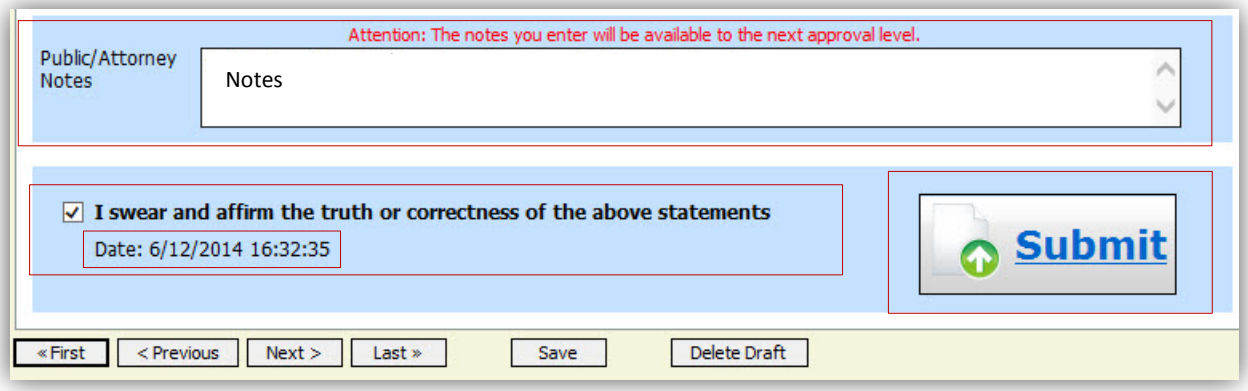
Signing and Submitting to Court (cont'd)

Step 2 Verify the information is correct.

Step 3 Scroll to the bottom of the screen.

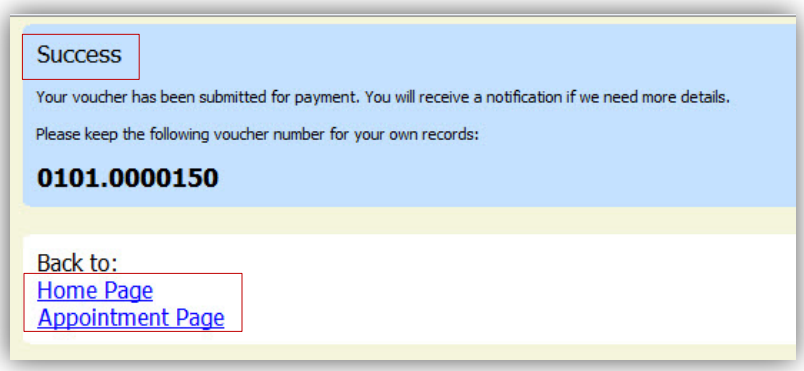
Step 4 Check the box to swear and affirm to the accuracy of the voucher. The voucher will automatically be time stamped.

Note:
You may include any information to the Court in the Public/Attorney Notes section.



Step 5 Click **Submit** to send to the Court.

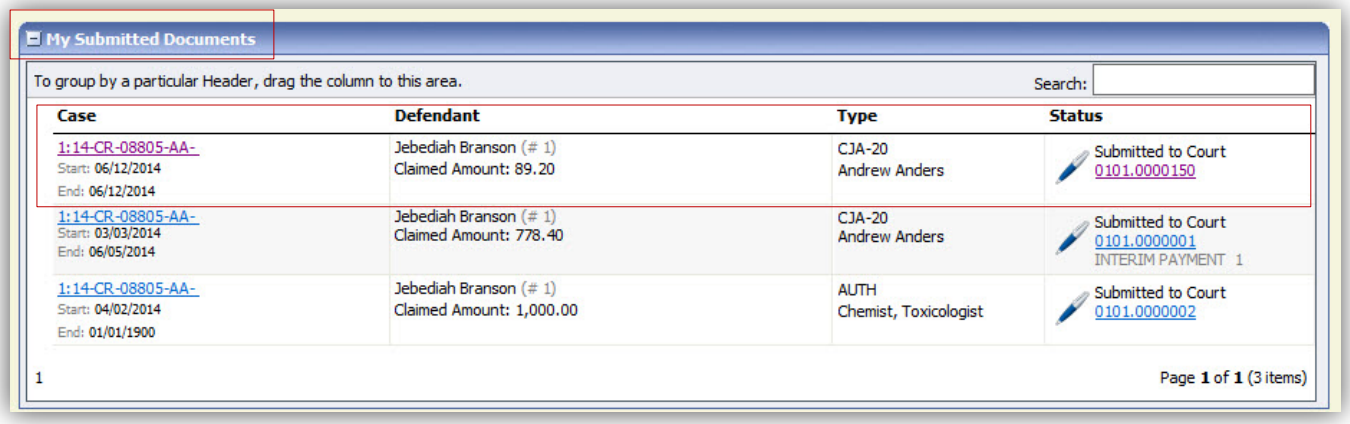
A confirmation screen will appear indicating the previous action was successful and the voucher has been submitted for payment. Once the voucher has been submitted you will be able to view it but you will not be able to change it, unless it is returned to you by the Court.



Step 6 Click **Home Page** to return to the home page. Click **Appointment Page** if you wish to create an additional document for this appointment.

Signing and Submitting to Court (cont'd)

The active voucher is removed from the **My Active Documents** folder and now appears in the **My Submitted Documents** section.



Edit Voucher

Prior to submission the court, you can work on your voucher over time adding services, expenses and documents as needed.

To edit a voucher:

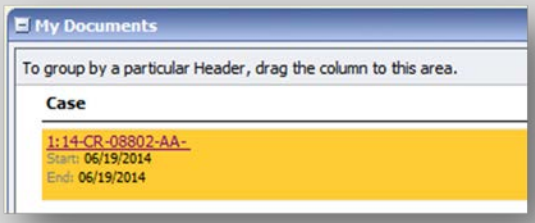
- Go to the **My Documents** panel and click on "**Edit"** for the voucher you want to access.
- Make your additions to the voucher following the instructions above for entering services and expenses.
- Remember to **Save** the voucher each time you work on it.

Returned Voucher

If the Court needs to return a document for corrections, 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.

Notes:

- If a voucher is rejected by the Court, it will reappear in the **My Active Documents** section and will be highlighted in gold.

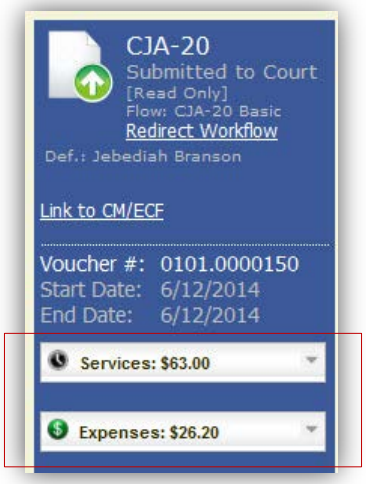


- Click on the **Case Number** to access the voucher.
- The Court's notes can be found on the Confirmation page.
- Make the necessary corrections and resubmit to the Court from the Confirmation page.

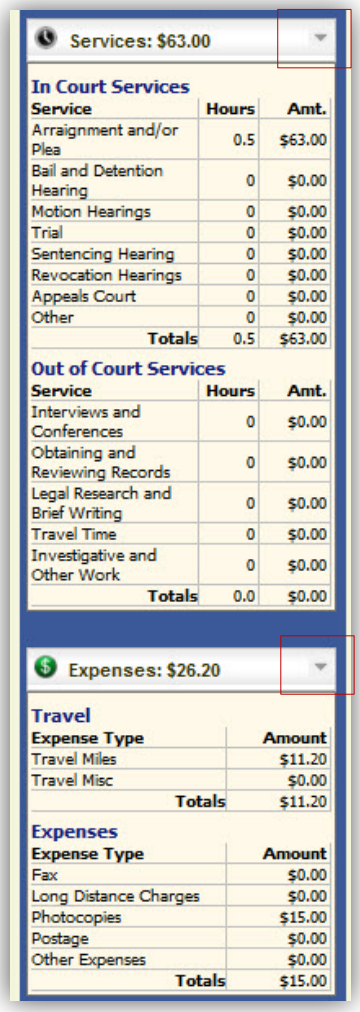
CJA 20 Quick Review Panel

When entering time and expenses in a CJA 20 voucher, the attorney may monitor the voucher totals using the quick review panel on the left side of the screen.

- The Services and Expenses will tally as entries are entered into the voucher.



- Expand the item by clicking on the down arrow (▼) to reveal specifics.



Services: $63.00

In Court Services

Service	Hours	Amt.
Arraignment and/or Plea	0.5	$63.00
Bail and Detention Hearing	0	$0.00
Motion Hearings	0	$0.00
Trial	0	$0.00
Sentencing Hearing	0	$0.00
Revocation Hearings	0	$0.00
Appeals Court	0	$0.00
Other	0	$0.00
Totals	0.5	$63.00

Out of Court Services

Service	Hours	Amt.
Interviews and Conferences	0	$0.00
Obtaining and Reviewing Records	0	$0.00
Legal Research and Brief Writing	0	$0.00
Travel Time	0	$0.00
Investigative and Other Work	0	$0.00
Totals	0.0	$0.00

Expenses: $26.20

Travel

Expense Type	Amount
Travel Miles	$11.20
Travel Misc	$0.00
Totals	$11.20

Expenses

Expense Type	Amount
Fax	$0.00
Long Distance Charges	$0.00
Photocopies	$15.00
Postage	$0.00
Other Expenses	$0.00
Totals	$15.00

Reports and Case Management

At the start of a case, it may be difficult for you or the court to know whether a case has the potential to exceed the statutory maximum allowed for representation.

Therefore, attorneys are encouraged to monitor the status of funds, attorney hours as well as expert services, by reviewing the reports provided in the CJA eVoucher program. Items to remember:

- Viewable reports appear on the left review panel.
- Each panel, depending upon which document you are viewing, can have different reports available.
- Each report can have a short description of the information received when viewing that report.
- The two main reports are the Defendant Detail Budget Report and the Defendant Summary Budget Report.

Other accessible reports can be found on the menu bar under the **Reports** tab.

Defendant Detailed Budget Report

This report will reflect the total amount authorized for this representation, any excess payment allowed, the vouchers submitted against those authorizations, and the remaining balances.

The report will provide the information in two sections: Attorney appointment and authorized expert service.

Defendant Detail Budget Report - Attorney
1:14-CR-08805-1-AA

Counsel Budget **Defendant: Jebediah Branson**

Type of Representation: Criminal Case

Budget Amount Requested: $0.00

Budget Amount Approved: $9,900.00

Time Period For Voucher	Voucher Number	Pending				Approved				Amount Remaining	
		Fees	Expenses		Total	Fees	Expenses		Total	After Approved	After Approved And Pending
			Travel	Other			Travel	Other			
Attorney: Andrew Anders (Appointing Counsel)					Active						
09/23/2015 to 09/23/2015	0101.0000001	$0.00	$0.00	$0.00	$0.00	$6,350.00	$0.00	$0.00	$6,350.00	$3,550.00	$3,550.00
01/01/1901 to 01/01/1901		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$3,550.00	$3,550.00
01/01/1901 to 01/01/1901		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$3,550.00	$3,550.00
			Total Pending:		$0.00		Total Approved:		$6,350.00	$3,550.00	$3,550.00

Expert and Other Services Budget - Requiring Authorization Defendant: Jebediah Branson

Time Period For Voucher	Voucher Number	Pending				Approved				Amount Remaining	
		Fees	Expenses		Total	Fees	Expenses		Total	After Approved	After Approved And Pending
			Travel	Other			Travel	Other			
Authorization Number: 0101.0000002 Specialty: Chemist, Toxicologist		Amount Requested: $1,000.00				Amount Authorized: $0.00					Attorney: Andrew Anders

Grand Totals for the Representation Defendant: Jebediah Branson

NOTE: The Grand Totals include Counsel CJA20 or CJA30 vouchers as well as vouchers for Expert or Services on CJA21 or CJA31. They represent the total submitted expenditures for this representation. *Does not include Travel Auth	Pending				Approved				Combined Total	
	Fees	Expenses		Total	Fees	Expenses		Total	Approved and Pending	
		Travel	Other			Travel	Other		Fees	Fees and Expenses
	$0.00	$0.00	$0.00	$0.00	$6,350.00	$0.00	$0.00	$6,350.00	$6,350.00	$6,350.00

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Defendant Summary Report

This report contains the same information as the Detailed Report without the individual voucher data.

Defendant Summary Budget Report - Attorney
1:14-CR-08805-1-AA

Counsel Budget **Defendant: Jebediah Branson**

Type of Representation: Criminal Case

Budget Amount Requested: $0.00

Budget Amount Approved: $9,900.00

Time Period For Voucher	Voucher Number	Pending				Approved				Amount Remaining	
		Fees	Expenses		Total	Fees	Expenses		Total	After Approved	After Approved And Pending
			Travel	Other			Travel	Other			
Attorney: Andrew Anders (Appointing Counsel)					Active						
			Total Pending:		$0.00		Total Approved:		$6,350.00	$3,550.00	$3,550.00

Expert and Other Services Budget - Requiring Authorization Defendant: Jebediah Branson

Time Period For Voucher	Voucher Number	Pending				Approved				Amount Remaining	
		Fees	Expenses		Total	Fees	Expenses		Total	After Approved	After Approved And Pending
			Travel	Other			Travel	Other			
Authorization Number: 0101.0000002 Specialty: Chemist, Toxicologist		Amount Requested: $1,000.00				Amount Authorized: $0.00					Attorney: Andrew Anders

Grand Totals for the Representation Defendant: Jebediah Branson

NOTE: The Grand Totals include Counsel CJA20 or CJA30 vouchers as well as vouchers for Expert or Services on CJA21 or CJA31. They represent the total submitted expenditures for this representation. *Does not include Travel Auth	Pending				Approved				Combined Total	
	Fees	Expenses		Total	Fees	Expenses		Total	Approved and Pending	
		Travel	Other			Travel	Other		Fees	Fees and Expenses
	$0.00	$0.00	$0.00	$0.00	$6,350.00	$0.00	$0.00	$6,350.00	$6,350.00	$6,350.00

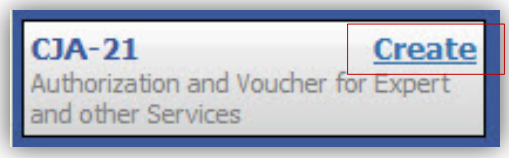
Thursday, November 05, 2015 - Ver. 1.1

Page 1 of 1

Creating a CJA 21 Voucher

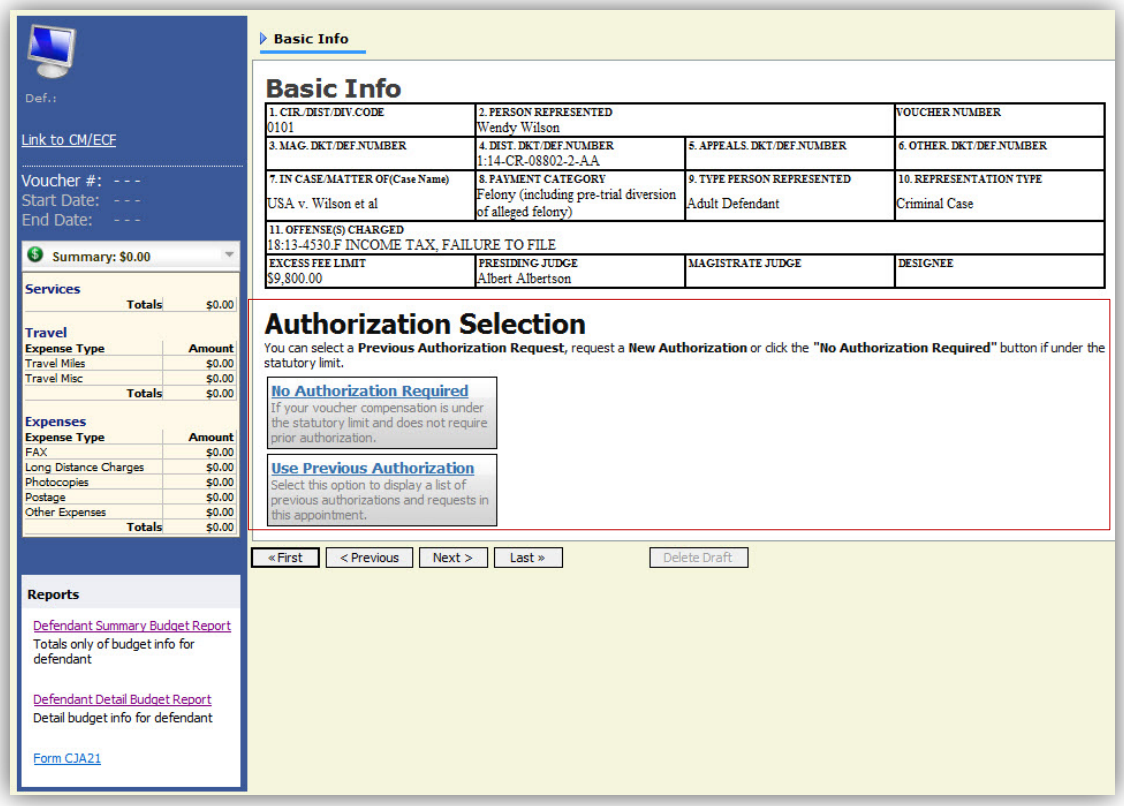
Step 1

From the **Appointment** page click **Create** from the CJA 21 Voucher template.



The voucher opens to the **Basic Info** page.

> **Note:**
> There is **NOT AN AUTOSAVE** function on this program. You must click **SAVE** periodically in order to save your work.

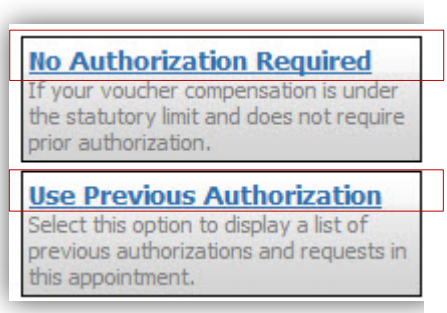


When submitting a CJA 21 voucher you'll have two options to choose from under the **Authorization Selection**.

Step 2

If the request does not require advance authorization ($800 or less), click on the No Authorization Required option.

If you have a previous authorization received through an order from the Court, click on the Use Previous Authorization option.



Creating a CJA 21 Voucher (cont'd)

If you click **Use Previous Authorization** a list of **Existing Requests for Authorization** will appear.

Step 3

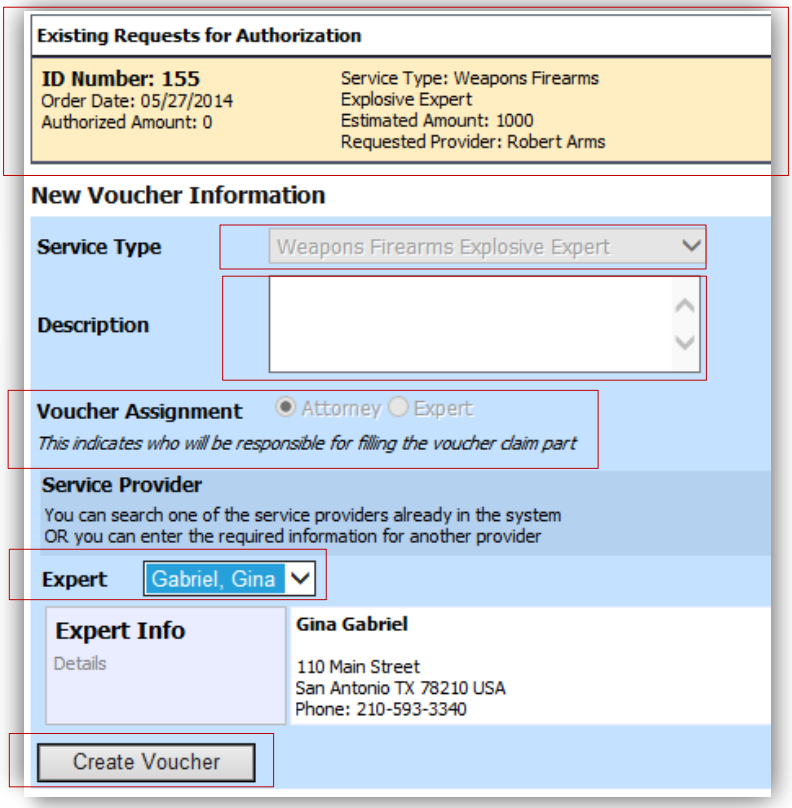
Select the authorization you wish to use by clicking it. The selected authorization will highlight in yellow. **You will not be able to continue until it is highlighted.**

Step 4

The service type will rollover from the authorization selected. If no authorization is being used, use the **Service Type** drop-down list to select the service type.

Step 5

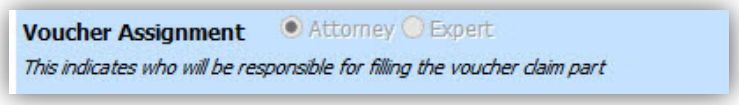
Enter a description of the service to be provided in the **Description** field.



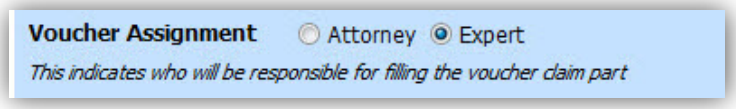
Step 6

From the **Expert** drop down list, select the expert.

If the expert you select is not authorized to use eVoucher, the Voucher Assignment field will remain locked indicating the Attorney will be responsible for filling the voucher claim part.



If the Expert you selected is authorized to use eVoucher, the Voucher Assignment field will unlock for you indicating the Expert will be responsible for filling in the voucher claim part. **NOTE: The "Expert" option in this screen shot will NOT be available in SDWV.**



Note:

Only experts registered with the service type selected will appear in the drop-down list. If you wish to submit a person for approval, the preferred method is to submit the **Service Provider Information form** located under the LINKS tab on the blue menu bar, or you may follow the steps on how to add an Expert are on page 37.

Creating a CJA 21 Voucher (cont'd)

Step 7 Click Create Voucher.

Notes:

- If all information is not entered you cannot advance to the next screen.
- If the Expert you selected is authorized to use eVoucher you are done at this point and you may click Home or logout. **NOTE: experts in the SDWV will NOT be authorized to use eVoucher.**
- If the Expert you selected is NOT authorized to use eVoucher, you will **first** complete and submit the CJA 21 on behalf of the expert/service provider. The CJA 21 will then appear in your "My Active Documents" section as "submitted to the attorney". You will perform the **second step** of approval/submission by clicking on the CJA 21 voucher, navigating to the "Confirmation" page and approving the voucher. The voucher will then move to the "My Submitted Documents" section.

Creating a CJA 21 Voucher (cont'd)

Entering an Expert Not in System

Step 6

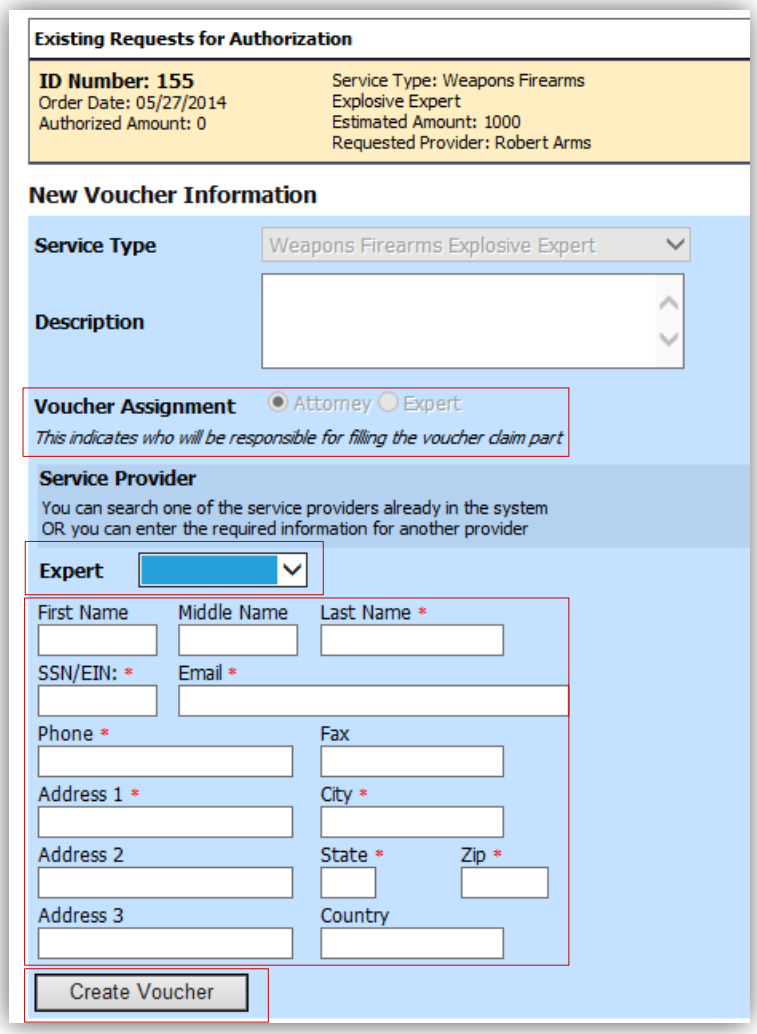
From the **Expert** drop-down list, select the empty (null) value. Voucher Assignment should be on the Attorney option.

Step 7

Fill in all required information on the person you wish to submit for approval.

Step 8

Click Create Voucher



Note:

- The person you submitted will go through an approval process. Once that person has been approved, an email will be sent to you.
- You'll now be able to select the person from the **Expert** drop-down list and all of their information will automatically populate.
- **The preferred method for adding an Expert/Service Provider is to complete the Services Provider Information Form under the LINKS tab on the blue menu bar.**

Creating a CJA 21 Voucher (cont'd)

After **Create Voucher** has been selected, you'll proceed with similar steps mentioned on the CJA 20 Voucher adding Services, Expenses, Claim Status, and Documents.

> **Note:**
> **Once you have submitted the CJA 21 for the expert, you will need to approve the voucher as the attorney. TWO STEP process: ONE - submit the CJA 21 for the expert, and SECOND, after it appears in the My Active Documents section, approve it as the attorney. BOTH STEPS ARE REQUIRED FOR SUBMISSION AND PAYMENT.**

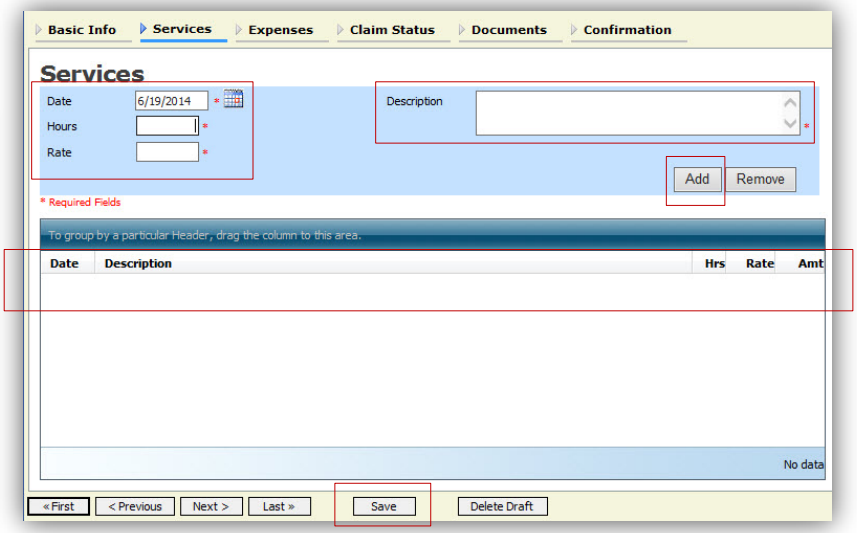
Step 1 Click the **Services** tab or click the **Next** option located on the progress bar.

Step 2 Enter the **Date**, **Hours**, **Rate,** and **Description**. You may do a summary entry for all services.

Step 3 Click **Add**.

The item will appear in the bottom of the **Services** section.

Step 4 Click **Save**.

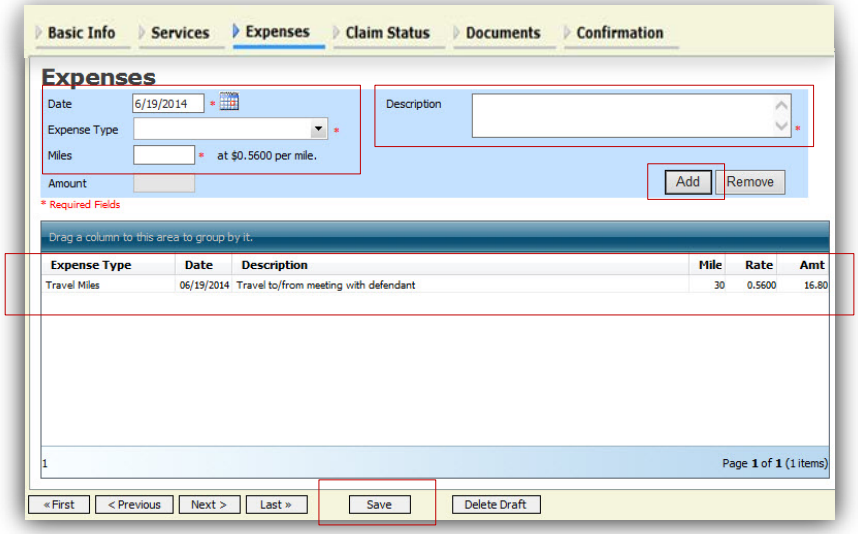


Step 1 Click the **Expenses** tab or click the **Next** option located on the progress bar.

Step 2 Enter the **Date**, **Expense Type**, **Description** and **Miles**. You may do one entry for total expenses.

Step 3 Click **Add** and the item will appear in the bottom of the Expense Type section.

Step 4 Click **Save**.



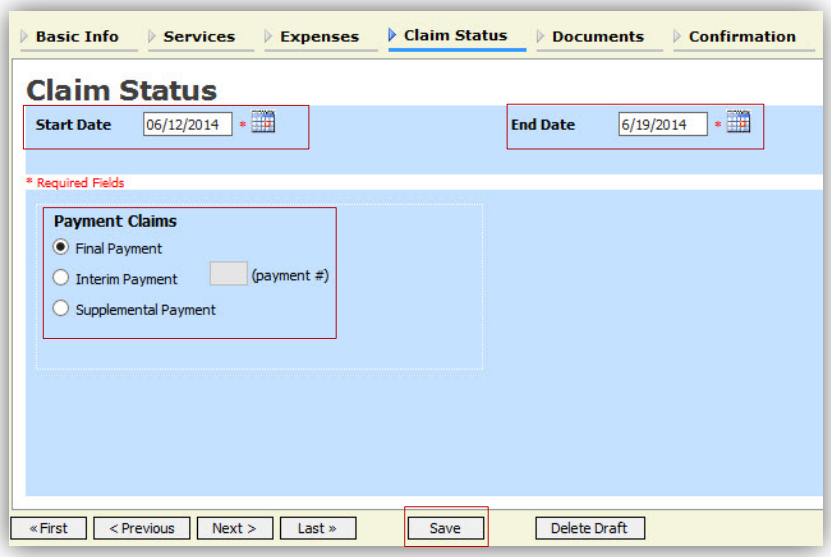
Creating a CJA 21 Voucher (cont'd)

Step 1 Click the **Claim Status** tab or click the **Next** option located on the progress bar.

Step 2 Enter the **Start** and **End Date**, making sure to select the earliest date of services and expenses as the **Start Date**.

Step 3 Select an option under the **Payment Claims** section.

Step 4 Click **Save**.



Note:

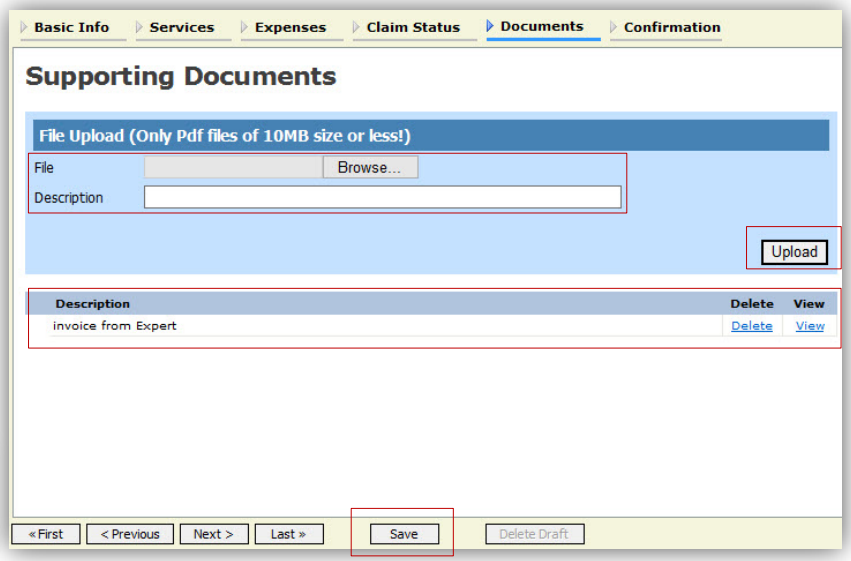
- Final Payment is requested after all services have been completed.
- Interim Payment allows for payment in segments, but each Court's practice may differ. If using this type of payment indicate the number of this request payment.
- After Final Payment number has been submitted, Supplemental Payment may be requested due to a missed or forgotten receipt.

Step 1 Click the **Documents** tab or click the **Next** option located on the Progress bar.

Step 2 Browse to select a PDF file to attach. **NOTE: You MUST upload a SIGNED, detailed invoice from the Service Provider.**

Step 3 Click **Upload**.

Note:
All documents must be submitted in PDF format and must be 10 MB or less.

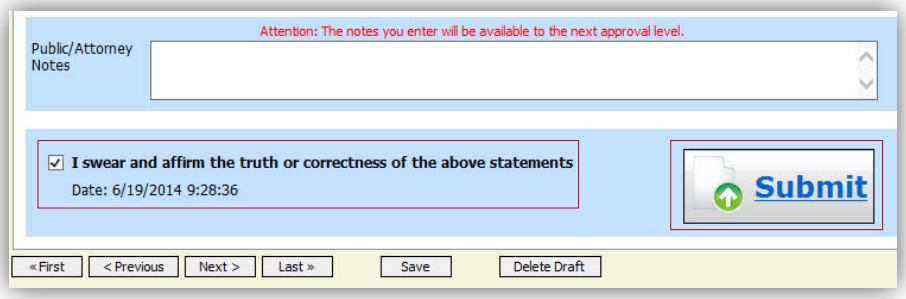


The document will appear in the bottom of the Description section.

Step 4 Click **Save**.

Creating a CJA 21 Voucher (cont'd)

A confirmation page will appear.



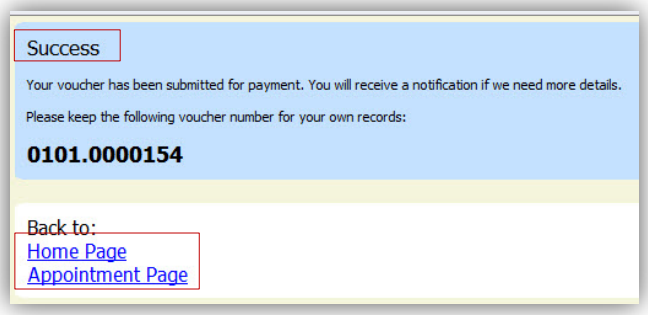
Step 1 Verify all information is correct.

Step 2 Check the affirmation box. This will automatically time stamp the voucher.

Step 3 Click **Submit**.

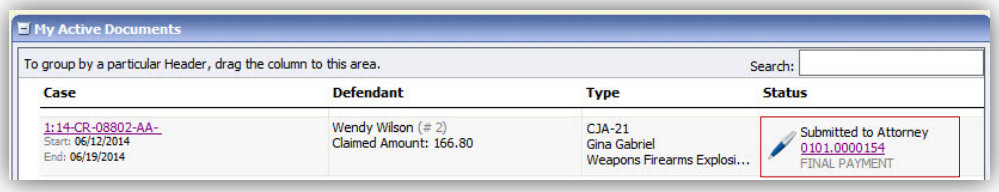
A confirmation screen will appear indicating the previous action was successful and the voucher has been submitted.

Step 4 Click **Home Page** to return to the home page. Click **Appointment Page** if you wish to create an additional document for this appointment.



The case file will appear in the "My Active Documents" section.

Step 5 Select the file.

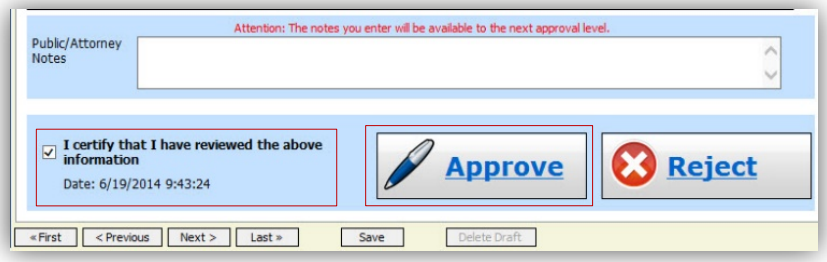


Navigate to the **Confirmation** tab.

Step 6 Verify all information is correct.

Step 7 Certify the information by checking the box. This will automatically time stamp the voucher.

Step 8 Click **Approve.**

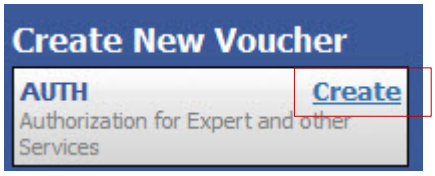


Submitting an Authorization Request for Expert Services

Note: Expert services which are expected to exceed $800 must have prior court approval. Court approval is obtained via an "Authorization."

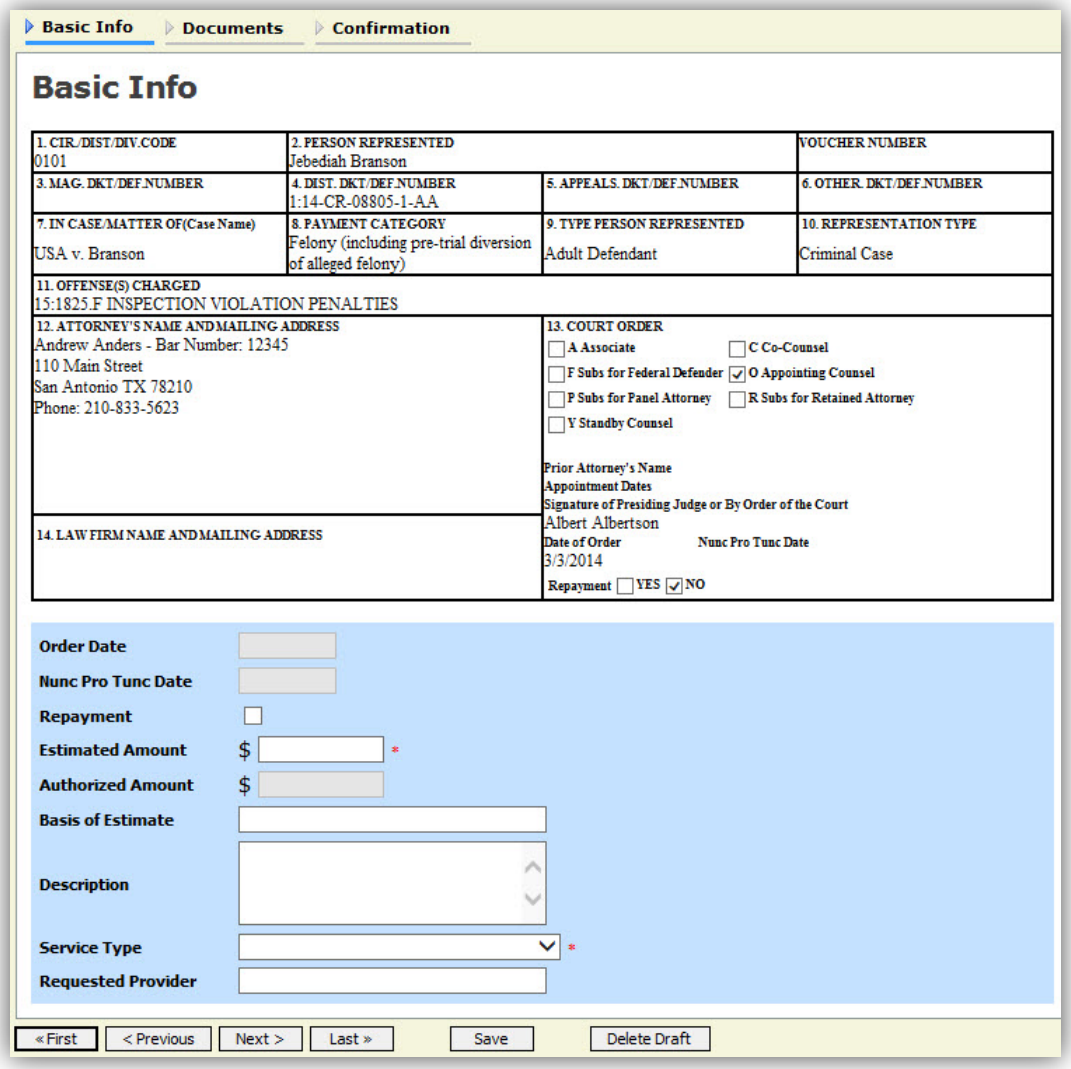
Step 1 Open the Appointment record.

Step 2 Click **Create** from the Authorization template.



The **Basic Info** screen will open.

Note:
There is **NOT AN AUTOSAVE** function on this program. You must click **SAVE** periodically in order to save your work.

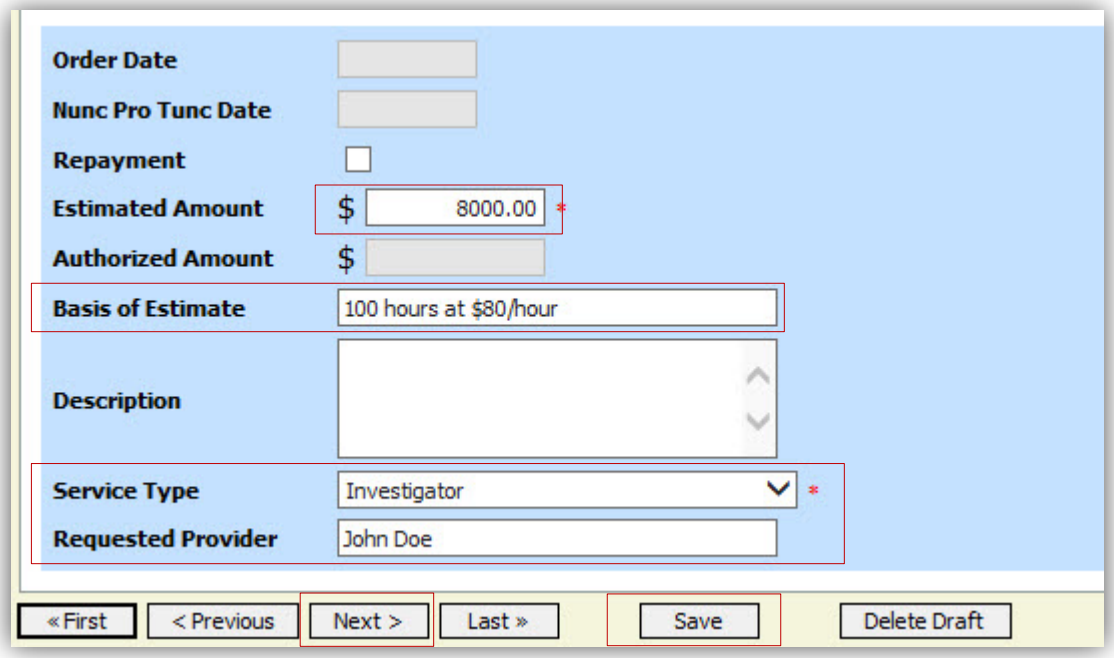


Submitting an Authorization Request for Expert Services (cont'd)

Step 3

Complete the information in the blue section at the bottom of the screen. This is to include:

- **Estimated Amount** – enter the **TOTAL** amount you think you will need for the case.
- **Basis for Estimate**
- **Service Type** from drop-down list
- **Requested Provider** (specific name)



Step 4

Click **Save.**

Step 5

Click the **Supporting Documents** tab or click the **Next** option located on the progress bar.

<u>NOTE:</u> You MUST upload a copy of the Court's CJA-002 Form to your Authorization in this section. The form can be found under the LINKS tab on the blue menu bar at the top of any page when you are in eVoucher.

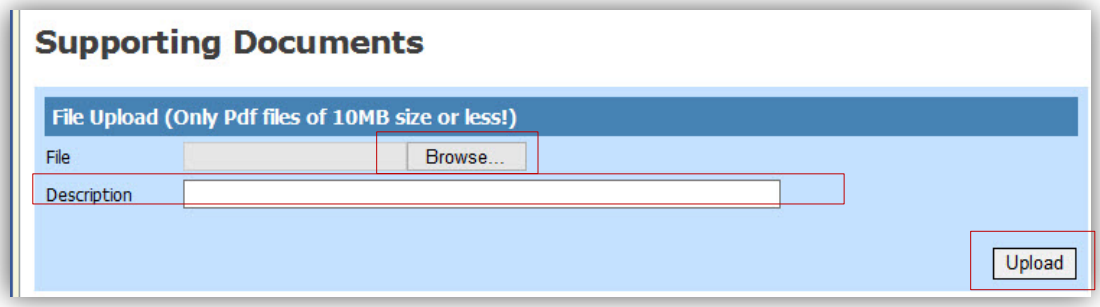
Submitting an Authorization Request for Expert Services (cont'd)

Step 6 To add the attachment, click the **Browse** button to locate your file.

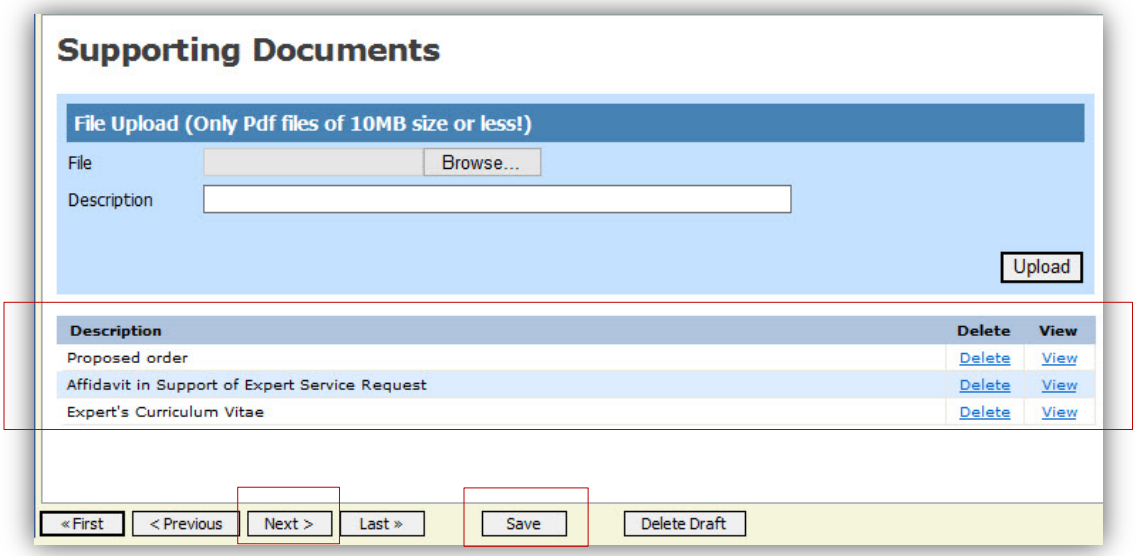
Note:
Documents are limited to PDF files, and must be 10 MB or less.

Step 7 In the **Description** field, add a description of the attachment.

Step 8 Click **Upload**.



The attachment and description will be uploaded and appear in the bottom of the **Description** section.



Step 9 Click **SAVE**.

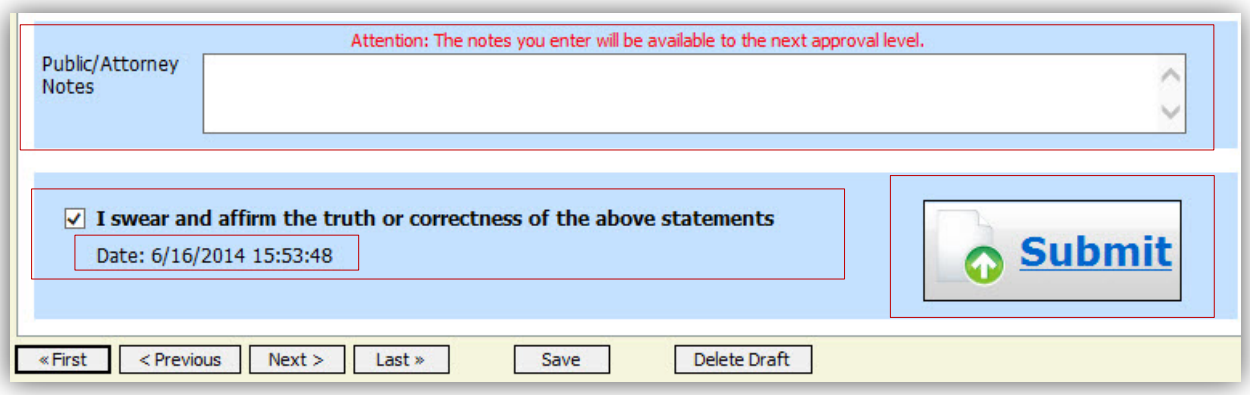
Submitting an Authorization Request for Expert Services (cont'd)

Step 10 Click **Next.**

The **Confirmation** screen will open**.**

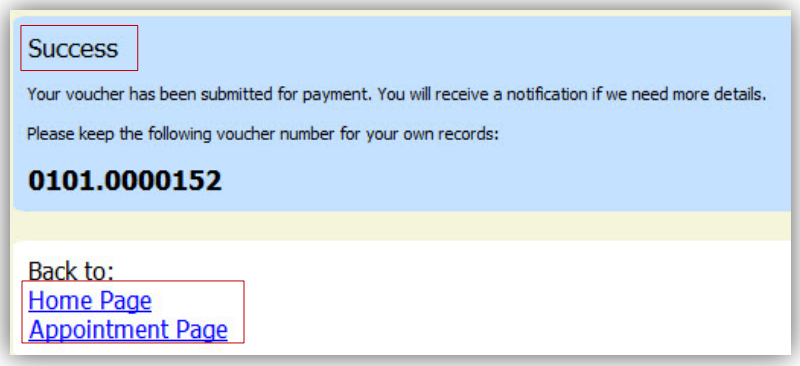
Step 11 Check the box to swear and affirm to the accuracy of the voucher. The voucher will automatically be time stamped.

> **Note:**
> You may include any notes to the Court in the Public/Attorney Notes section.



Step 12 Click **Submit** to send to the Court.

A confirmation screen will appear indicating the previous action was successful and the Authorization Request has been submitted.

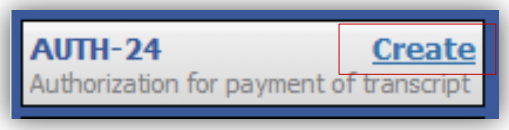


Step 13 Click **Home Page** to return to the home page. Click **Appointment Page** if you wish to create an additional document for this appointment.

The Authorization Request will now appear in the **My Submitted Documents** section on the Attorney home page. When the Court has approved the Authorization, it will move from your **My Submitted Documents** folder to your **Closed Documents** folder. NOTE: You will NOT be able to create a CJA 21 using this authorization until it has been approved.

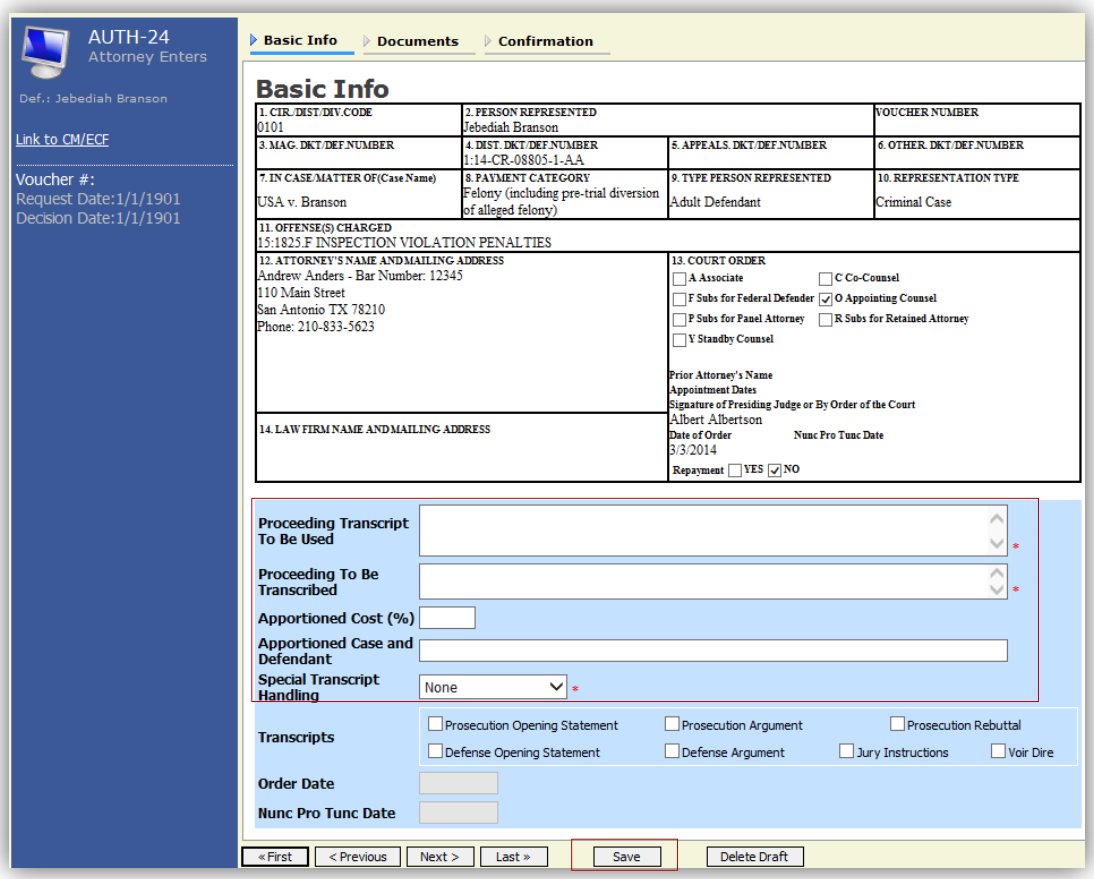
Creating an Authorizations for Transcripts (AUTH 24)

Step 1 From the Appointment page click **Create** Auth 24.



The Authorization opens to the **Basic Info** page. **Note: You MUST notify the Court Reporter Coordinator via email at wvsddb_AUTH24@wvsd.uscourts.gov when you are going to submit an AUTH-24. Doing so will insure that the Coordinator can retrieve and act on the Auth-24 in a prompt manner because eVoucher does not provide an email alert to the Coordinator when the Auth-24 is submitted by an attorney.**

> **Note:**
> There is **NOT AN AUTOSAVE** function on this program. You must click **SAVE** periodically in order to save your work.



Step 2 Enter the details for the transcript required on the **Basic Info** screen.

Step 3 Click **Save**.

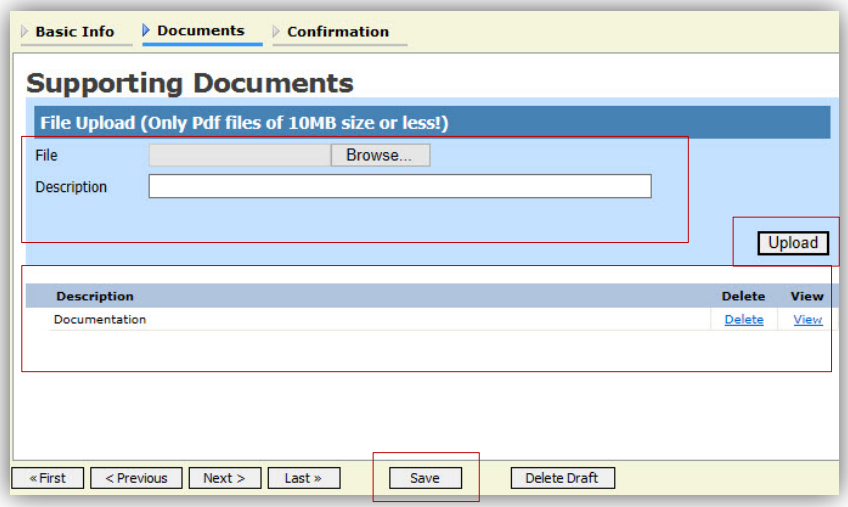
Creating an Authorization for Auth 24 Transcripts (cont'd)

Step 1 Click the **Documents** tab or click the **Next** option located on the progress bar.

Step 2 Browse to select a PDF file to attach and add a Description.

Step 3 Click **Upload**. The Document will appear in the Description section.

Note:
All documents must be submitted in PDF format and must be 10 MB or less.



NOTE: If the transcript is from a Magistrate Judge's hearing and recorded by Courtflow, you MUST attach the required "Request for Transcript from Electronic Recording" form found under the LINKS tab on the blue menu bar.

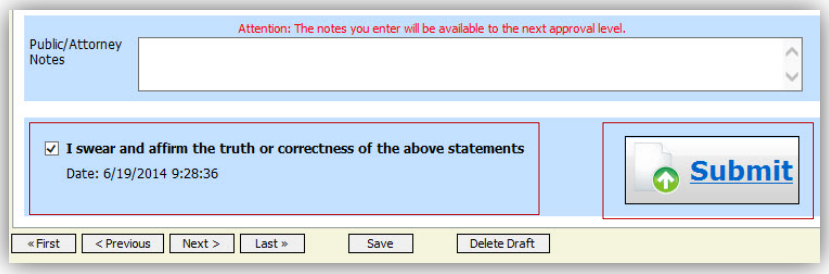
Step 4 Click **Save**.

A confirmation page will appear.

Step 5 Verify all information is correct.

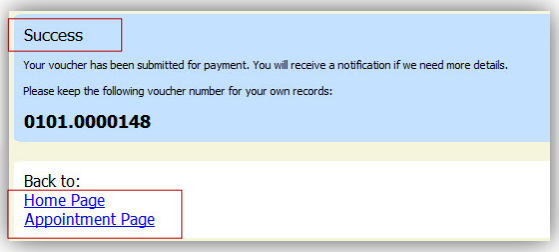
Step 6 Check the affirmation box.

Step 7 Click **Submit**.



A confirmation screen will appear indicating the previous action was successful and the Authorization Request has been submitted

Step 8 Click **Home Page** to return to the home page. Click **Appointment Page** if you wish to create additional document for this appointment.



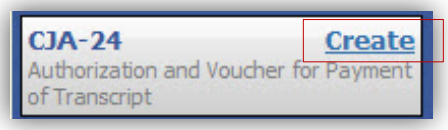
The Auth 24 will now appear in the **My Submitted Documents** section on the Attorney home page. After the Court has approved the authorization, it will move from your **My Submitted Documents** folder to your **Closed Documents** folder.

Creating a CJA 24 Voucher

NOTE: After submission and approval of an Auth-24, a CJA 24 voucher for payment will be created by the Court Reporter Coordinator and sent to the appropriate Court Reporter for completion. <u>These steps are included in this manual for informational purposes only.</u> Your approval role is outlined on page 52 – steps 1 through 4.

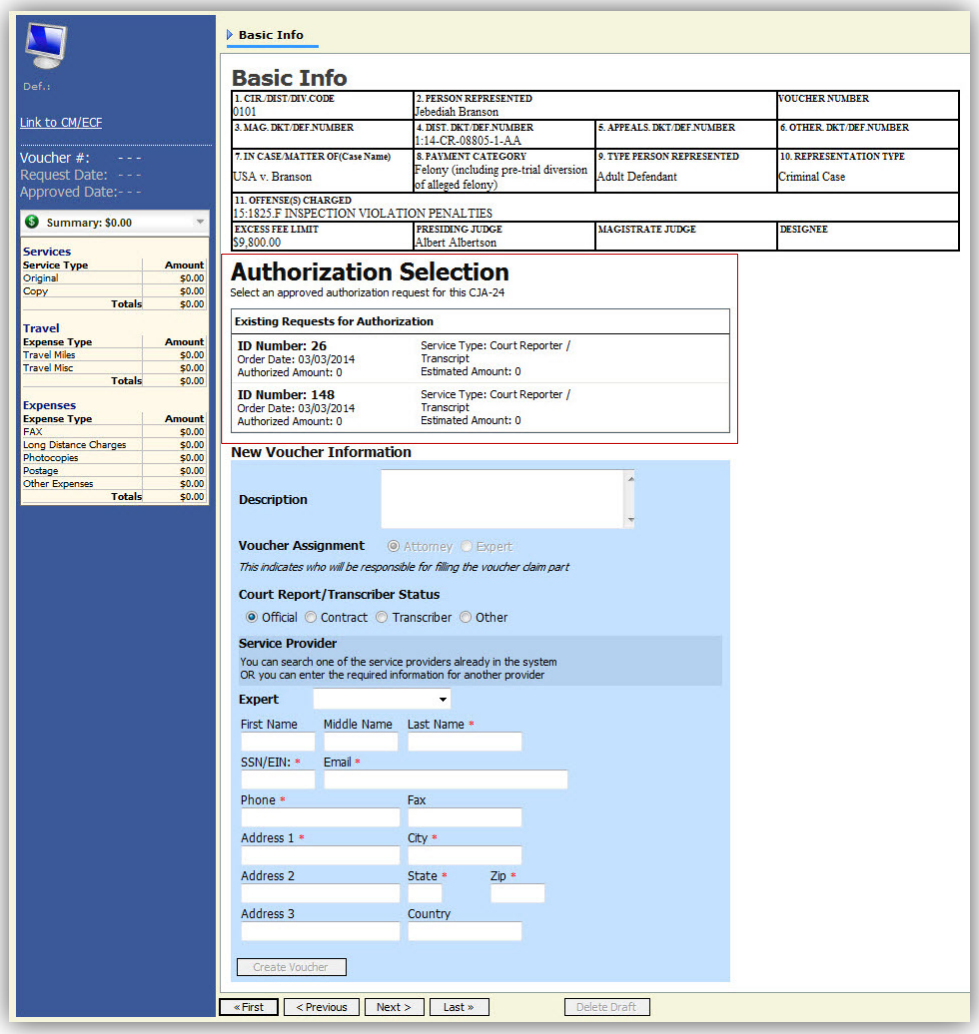
Step 1

From the Appointment page click **Create** from the CJA 24 voucher template.



The Basic Info page will open, showing approved authorizations.

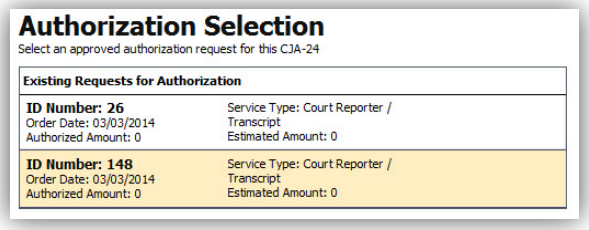
Note:
There is **NOT AN AUTOSAVE** function on this program. You must click **SAVE** periodically in order to save your work.



Creating a CJA 24 Voucher (cont'd)

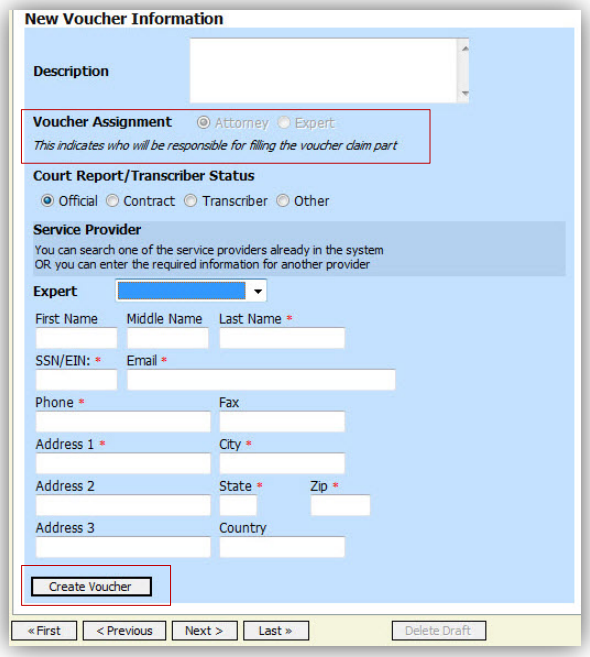
Step 2 Select the authorization you wish to use by clicking it, this will highlight it in yellow. **You will not be able to move forward until it is highlighted**.

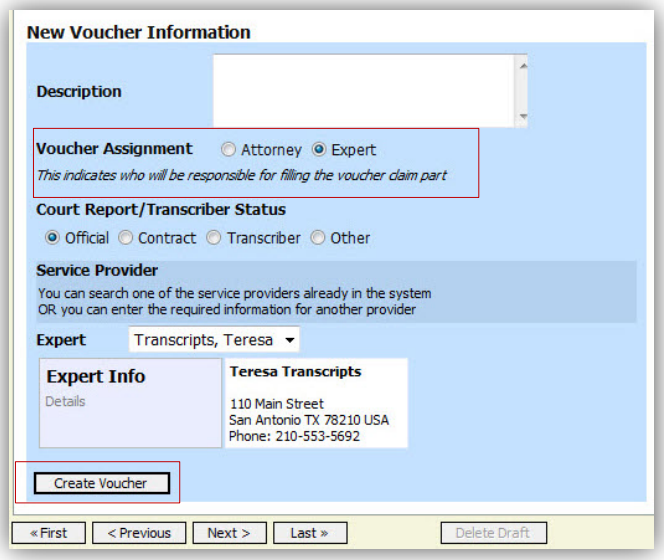
Step 3 Select the Voucher Assignment radio button indicating whether you or the transcriptionist will be entering the information .



Note:
You must select whether you, the attorney, or the court reporter will be filling the voucher claim portion.

Step 4 Click the **Expert** drop-down and select the transcriptionist.





Note:

- If entering a new transcriptionist into the system, select a blank drop-down and enter all required information.
- Selecting a transcriptionist already in the system will automatically populate that expert's information.

Step 5 Click the **Create Voucher**.

Creating a CJA 24 Voucher (cont'd)

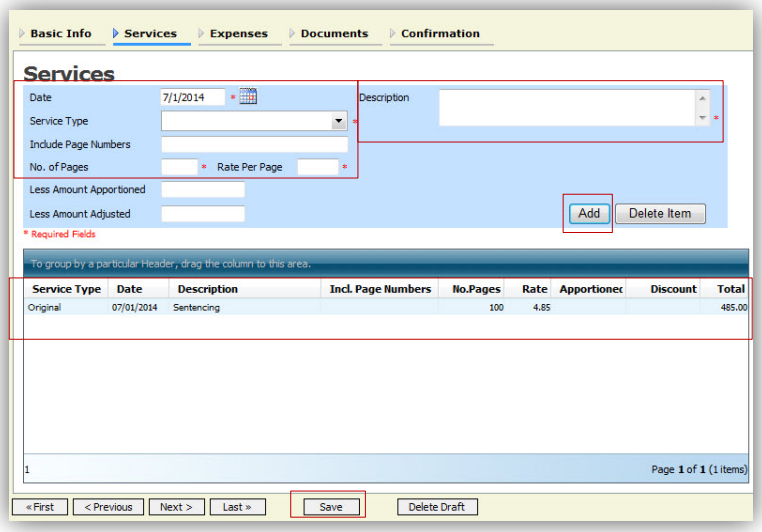
Note:
If Expert has been selected under the Voucher Assignment, the expert will fill out the required expense information and submit the form. The attorney will then approve it and submit to the Court.

Step 1 Click the **Services** tab or click the **Next** option located on the Progress bar.

Step 2 Enter the **Date**, **Service Type**, **No. Pages**, **Rate,** and **Description**.

Note:
You'll have two options to choose from under Service Type: Original or Copy. The rate should vary between the two choices.

Step 3 Click **Add**.



The item will appear in the bottom of the Service Type section.

Step 4 Click **Save**.

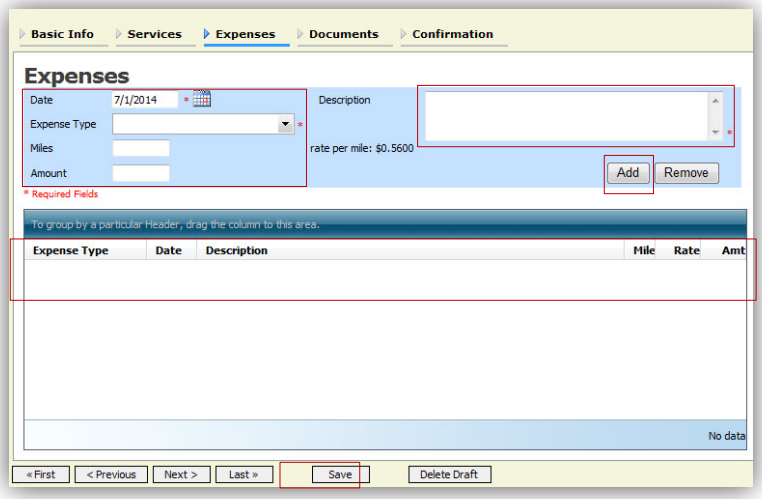
Step 1 Click the **Expenses** tab or click the **Next** option located on the Progress bar.

Step 2 Enter the **Date**, **Expense Type**, and **Description**.

Step 3 Click **Add**.

The item will appear below in the Expense section.

Step 4 Click **Save**.



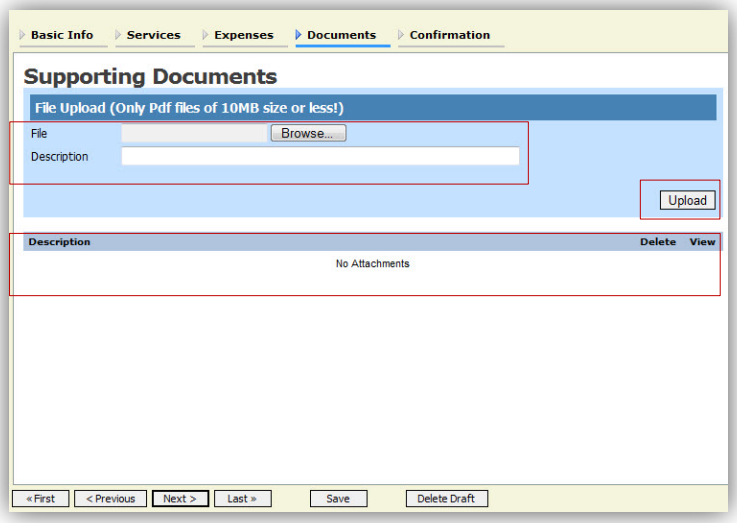
Creating a CJA 24 Voucher (cont'd)

Step 1 Click the **Documents** tab or click the **Next** option located on the Progress bar.

Step 2 Browse to select a PDF file to attach.

Note:
All documents must be submitted in pdf format, and must be 10 MB or less.

Step 3 Click **Upload**.



The document will appear in the bottom of the Description section.

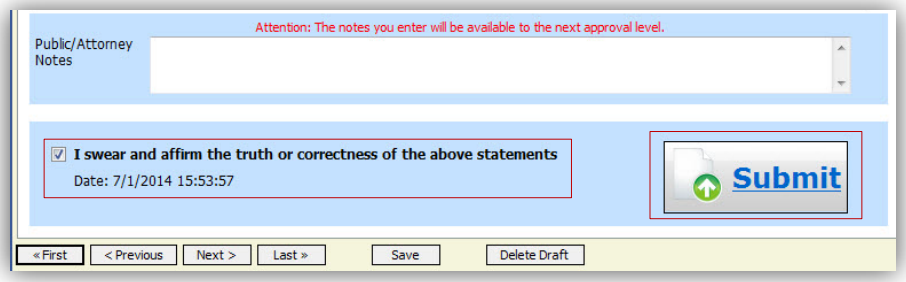
Step 4 Click **Save**.

A confirmation page will appear.

Step 1 Verify all information is correct.

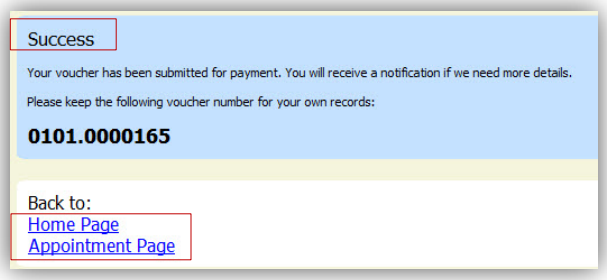
Step 2 Check the affirmation box. This will automatically time stamp the voucher.

Step 3 Click Submit.



A confirmation screen will appear indicating the previous action was successful, and the voucher has been submitted.

Step 4 Click **Home Page** to return to the home page. Click **Appointment Page** if you wish to create an additional document for this appointment.

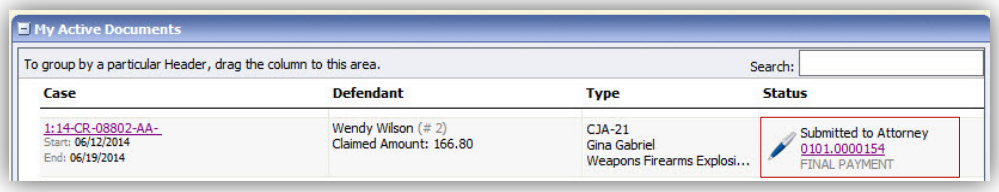


Court Reporter Coordinator Creates a CJA 24 Voucher

The court reporter will perform the first level of submission and approval. **You will receive an email that the CJA 24 has been submitted to you for review.**

Once the court reporter has submitted the voucher, it will appear in your **My Active Documents** folder with the status of **Submitted to Attorney**. You will need to perform the second level of approval and submission.

Step 1 Select the file.

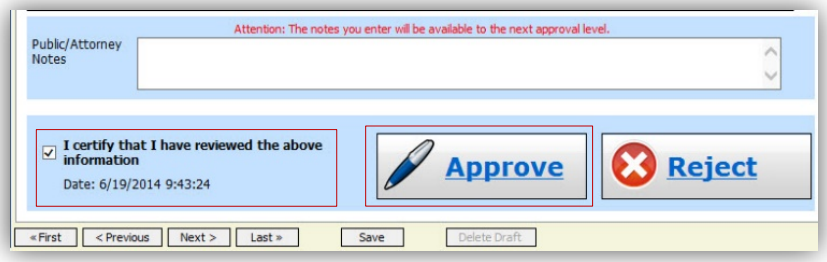


Navigate to the **Confirmation** tab.

Step 2 Verify all information is correct.

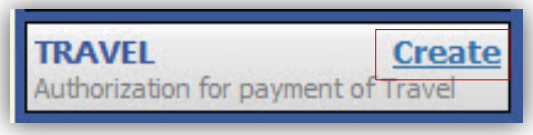
Step 3 Certify the information by checking the attestation box. This will automatically time stamp the voucher.

Step 4 Click **Approve.**



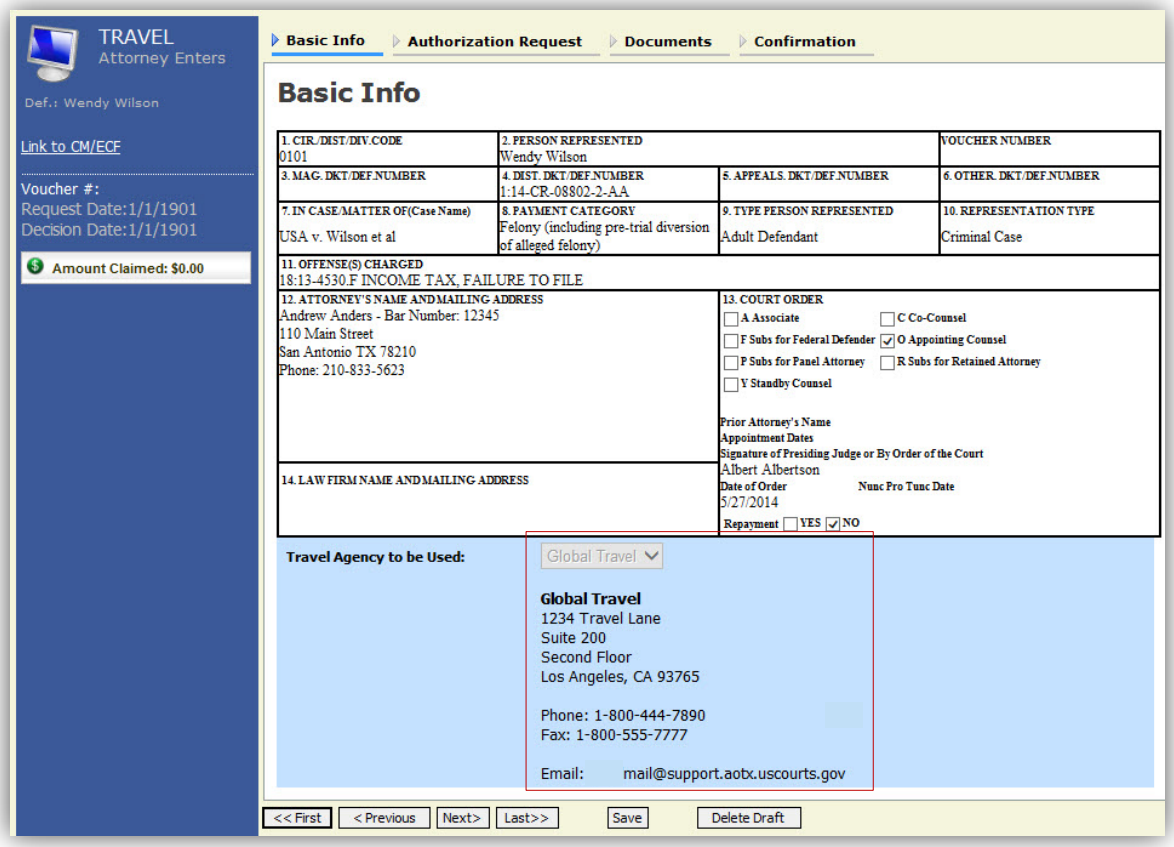
Creating a Travel Voucher

Step 1 From the **Appointment** page click **Create** from the Travel Voucher template.



Note:
There is **NOT AN AUTOSAVE** function on this program. You must click **SAVE** periodically in order to save your work.

The Basic Info screen will open.



The **Travel Agency to be Used** section will automatically populate.

Step 2 Click the **Authorization Request** tab or click the **Next** option located on the progress bar.

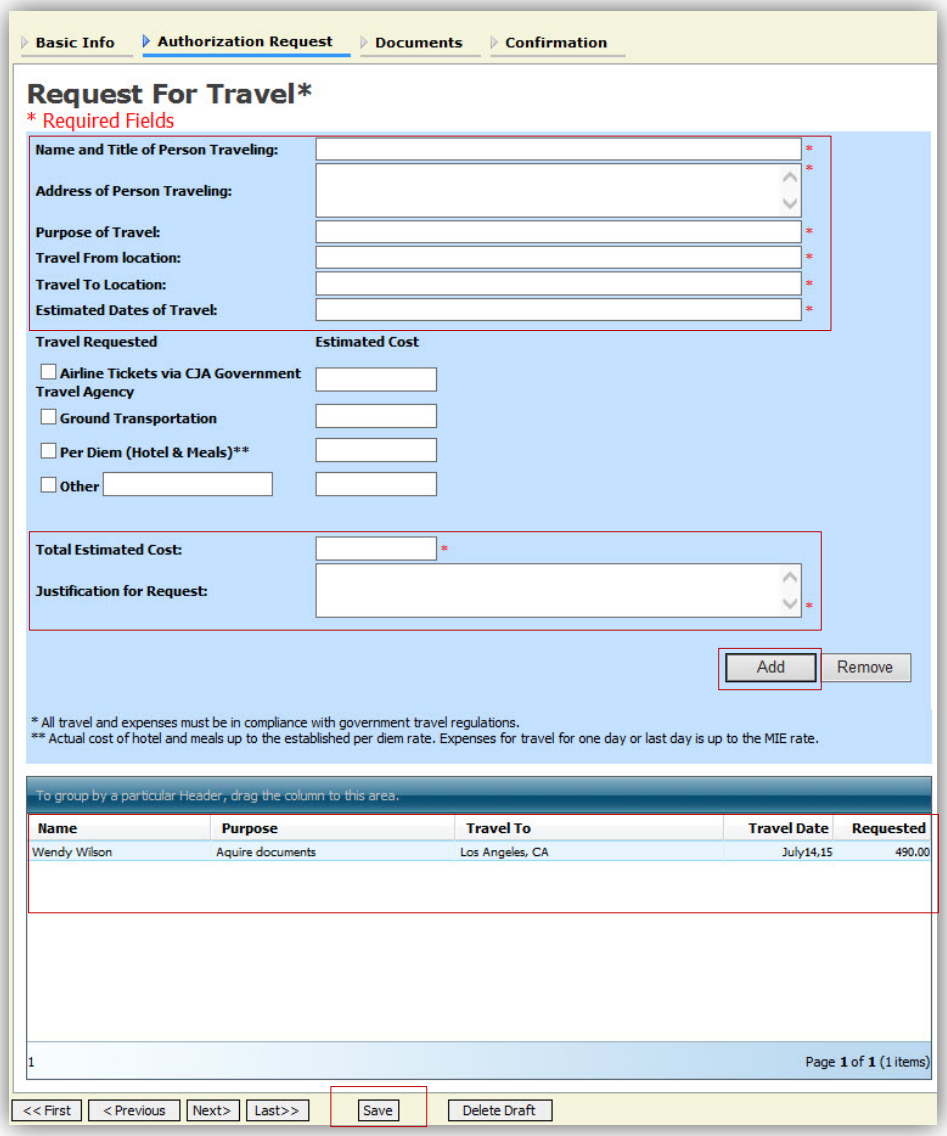
Creating a Travel Voucher (cont'd)

Step 3 Fill out all required fields marked with a red asterisk.

Step 4 Click Add.

The information will appear in the bottom section.

Step 5 Click Save.

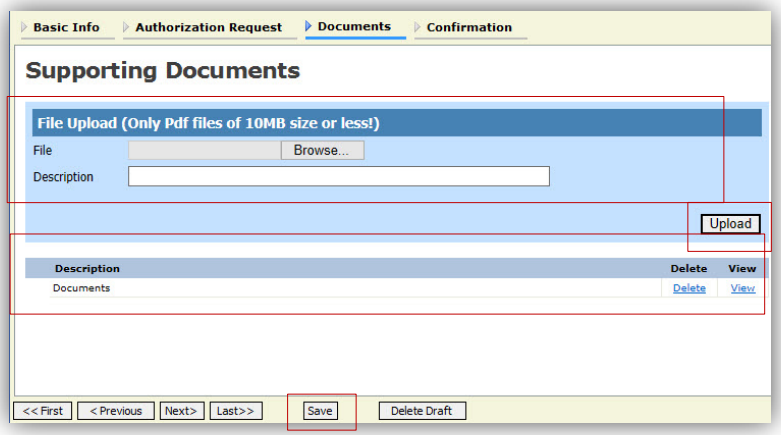


Creating a Travel Voucher (cont'd)

Step 1 Click **Documents** tab or click the **Next** option located on the progress bar.

Step 2 Browse to select a PDF file to attach.

Note:
All documents must be submitted in PDF format, and must be 10 MB or less.



Step 3 Click Upload.

The document will appear in the bottom of the **Description** section.

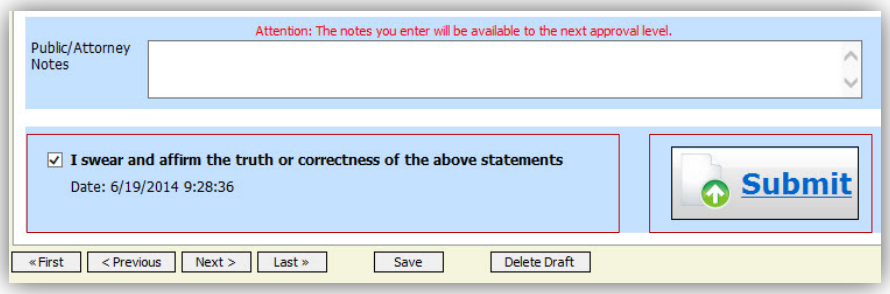
Step 4 Click **Save**.

The Confirmation tab will appear.

Step 1 Verify all information is correct.

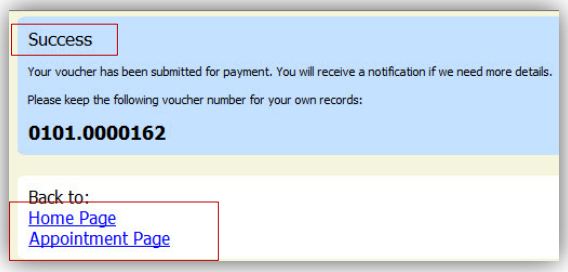
Step 2 Check the affirmation box. This will automatically time stamp the voucher.

Step 3 Click **Submit**.



A confirmation screen will appear indicating the previous action was successful and the voucher has been submitted.

Step 4 Click **Home Page** to return to the home page. Click **Appointment Page** if you wish to create additional document for this appointment.



The Travel Voucher will now appear in the "My Submitted Documents" section.

Creating a CJA 26 Voucher

This is a request and justification for expenses outside the statutory limits.

Step 1

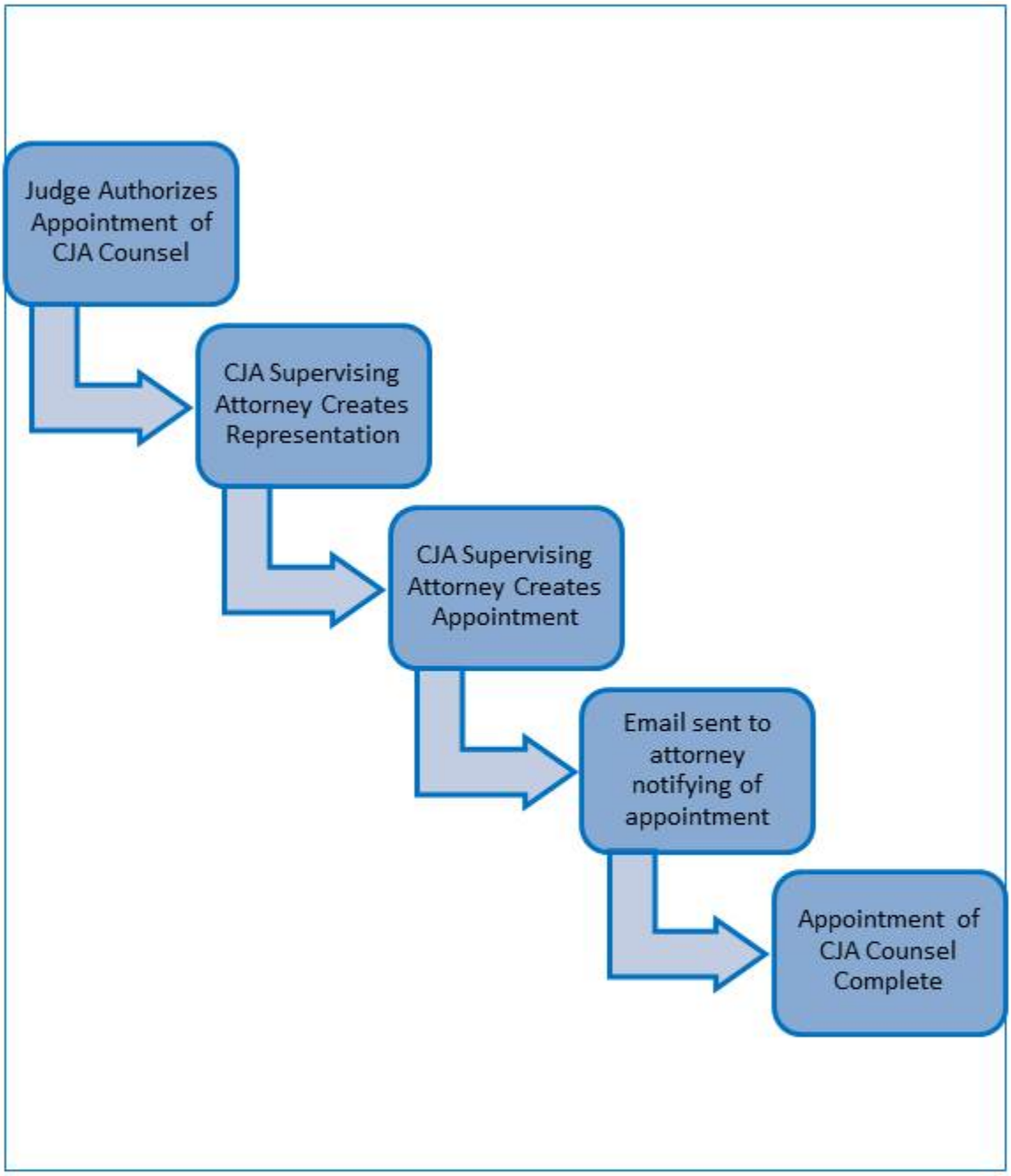
From the Appointment page, click the **LINKS** tab on the top of the page on the blue menu bar. Complete the PDF-fillable CJA-26. Save the PDF document.

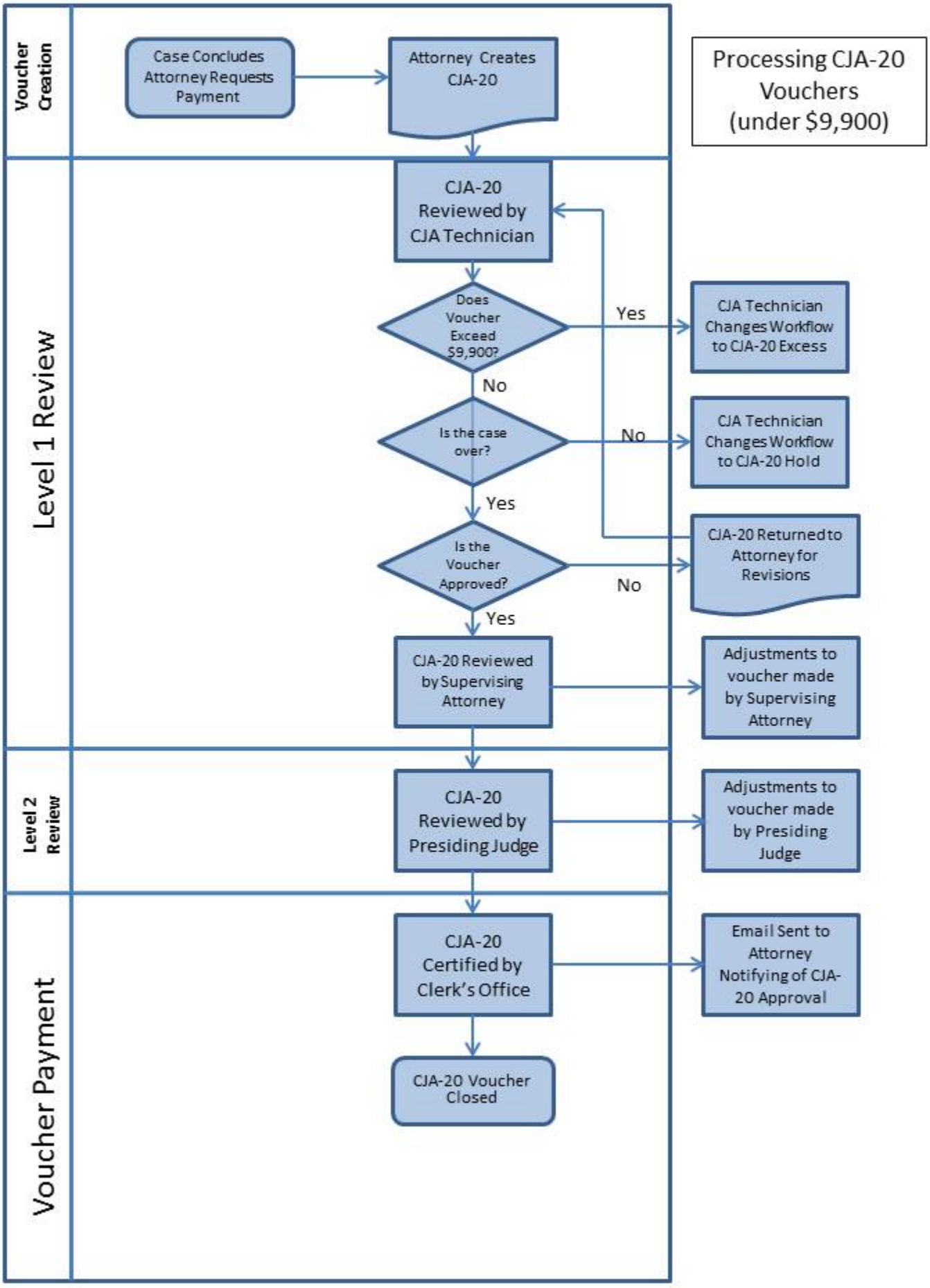
Step 2

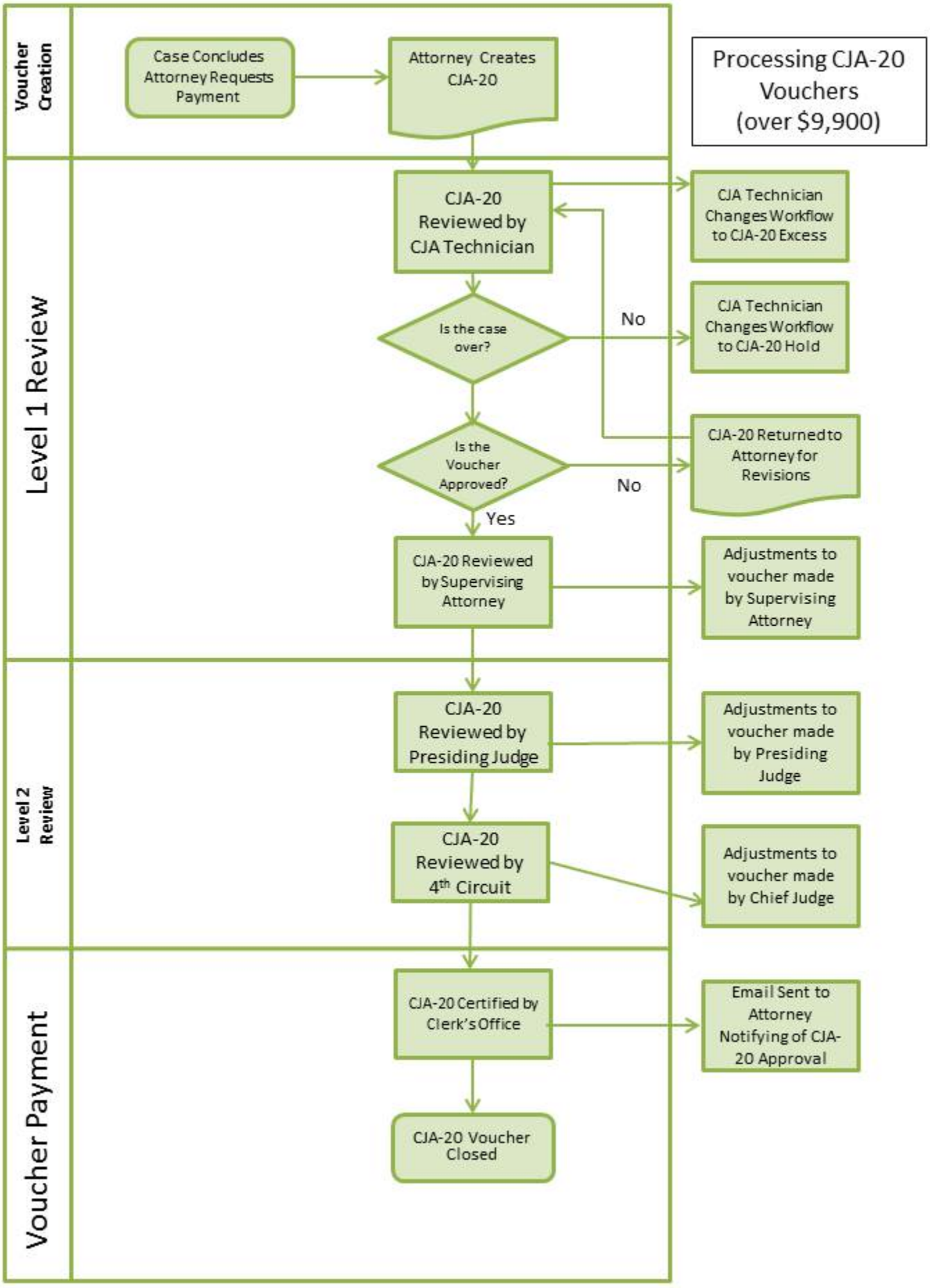
Upload the completed CJA-26 form in the Supporting Documents section of your CJA-20. See page 26.

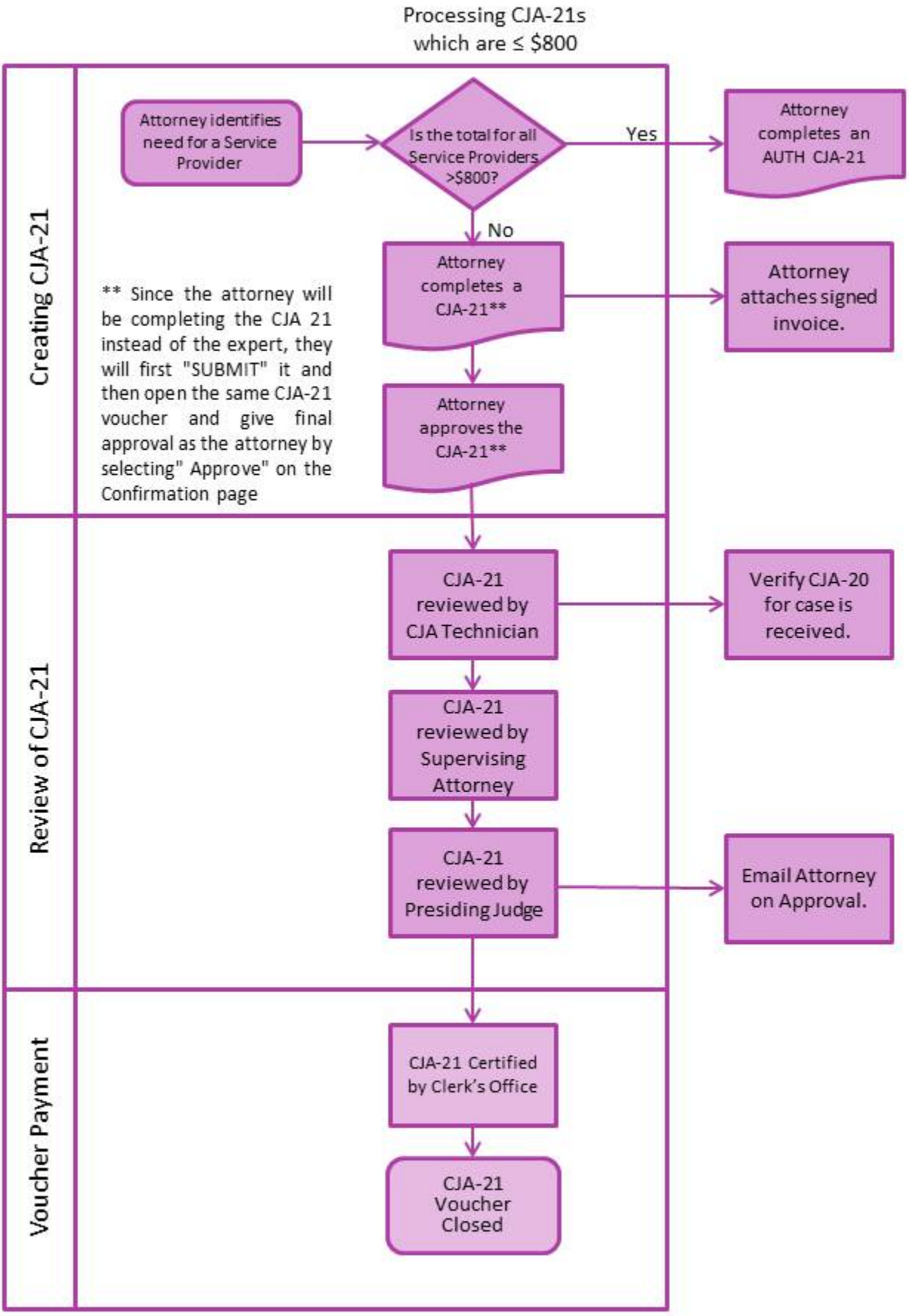
Note:
All documents must be submitted in PDF format, and must be 10 MB or less.

Appointment of CJA Attorney (outside eVoucher)

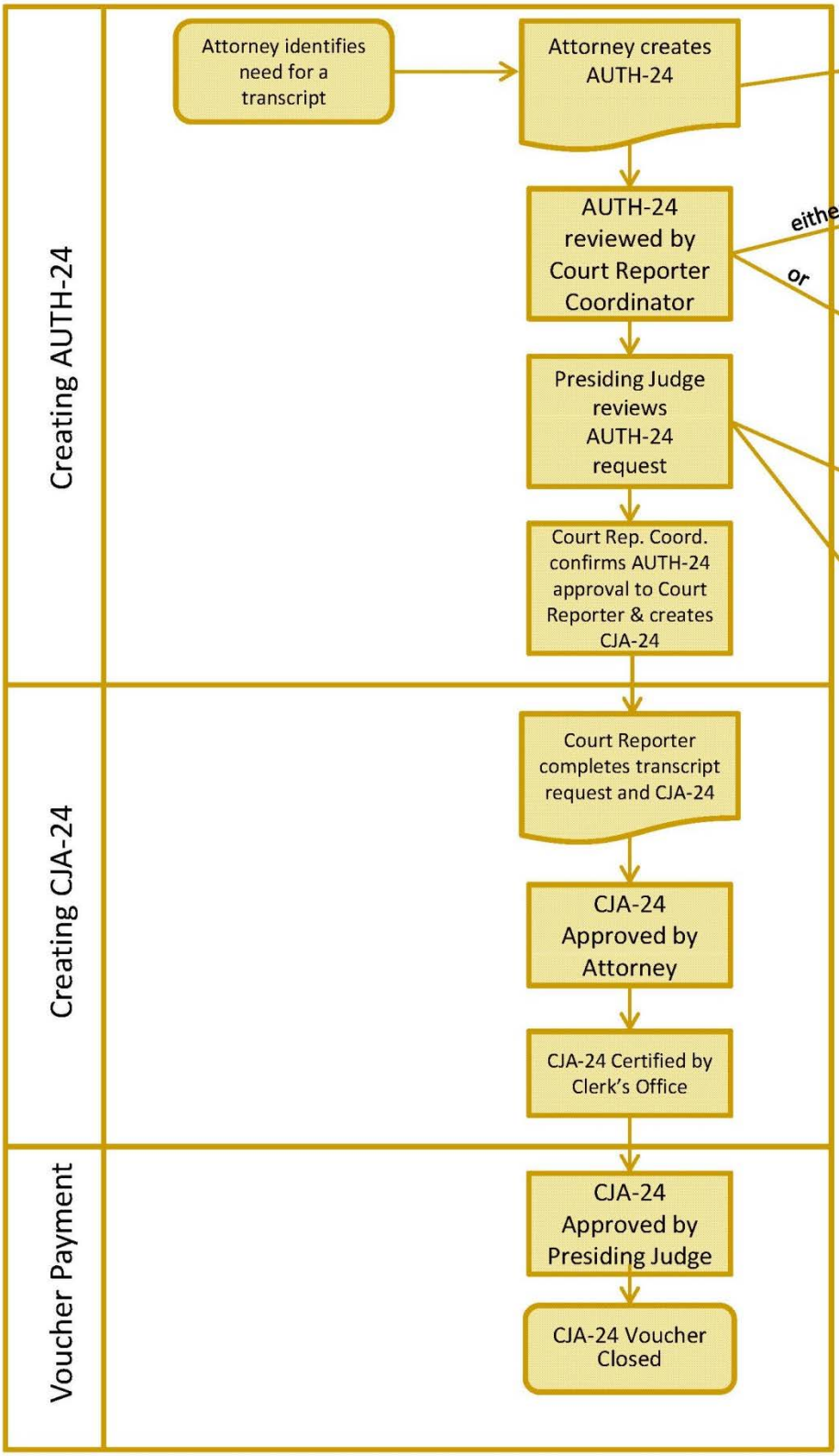



Processing CJA-20 Vouchers (under $9,900)
Voucher Creation
Case Concludes Attorney Requests Payment
Attorney Creates CJA-20
Level 1 Review
CJA-20 Reviewed by CJA Technician
Does Voucher Exceed $9,900?
Yes
CJA Technician Changes Workflow to CJA-20 Excess
No
Is the case over?
No
CJA Technician Changes Workflow to CJA-20 Hold
Yes
Is the Voucher Approved?
No
CJA-20 Returned to Attorney for Revisions
Yes
CJA-20 Reviewed by Supervising Attorney
Adjustments to voucher made by Supervising Attorney
Level 2 Review
CJA-20 Reviewed by Presiding Judge
Adjustments to voucher made by Presiding Judge
Voucher Payment
CJA-20 Certified by Clerk's Office
Email Sent to Attorney Notifying of CJA-20 Approval
CJA-20 Voucher Closed


Processing CJA-20 Vouchers (over $9,900)
Voucher Creation
Case Concludes Attorney Requests Payment
Attorney Creates CJA-20
Level 1 Review
CJA-20 Reviewed by CJA Technician
CJA Technician Changes Workflow to CJA-20 Excess
Is the case over?
No
CJA Technician Changes Workflow to CJA-20 Hold
Is the Voucher Approved?
No
CJA-20 Returned to Attorney for Revisions
Yes
CJA-20 Reviewed by Supervising Attorney
Adjustments to voucher made by Supervising Attorney
Level 2 Review
CJA-20 Reviewed by Presiding Judge
Adjustments to voucher made by Presiding Judge
CJA-20 Reviewed by 4th Circuit
Adjustments to voucher made by Chief Judge
Voucher Payment
CJA-20 Certified by Clerk's Office
Email Sent to Attorney Notifying of CJA-20 Approval
CJA-20 Voucher Closed


Processing CJA-21s which are ≤ $800
Creating CJA-21
Attorney identifies need for a Service Provider
Is the total for all Service Providers >$800?
Yes
Attorney completes an AUTH CJA-21
No
Attorney completes a CJA-21**
Attorney attaches signed invoice.
** Since the attorney will be completing the CJA 21 instead of the expert, they will first "SUBMIT" it and then open the same CJA-21 voucher and give final approval as the attorney by selecting" Approve" on the Confirmation page
Attorney approves the CJA-21**
Review of CJA-21
CJA-21 reviewed by CJA Technician
Verify CJA-20 for case is received.
CJA-21 reviewed by Supervising Attorney
CJA-21 reviewed by Presiding Judge
Email Attorney on Approval.
Voucher Payment
CJA-21 Certified by Clerk's Office
CJA-21 Voucher Closed

Processing AUTH CJA-21 > $800



Processing AUTH-24 and CJA-24 Transcript Vouchers