User Manual

UNITED STATES DISTRICT COURT FOR THE DISTRICT OF PR



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Court Appointment

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

To access the CJA eVoucher program, either click on the link provided in the email or use



your browser to access the system at the web address provided. You will be taken to the CJA login page. Enter the Username and Password you were provided and press Login.



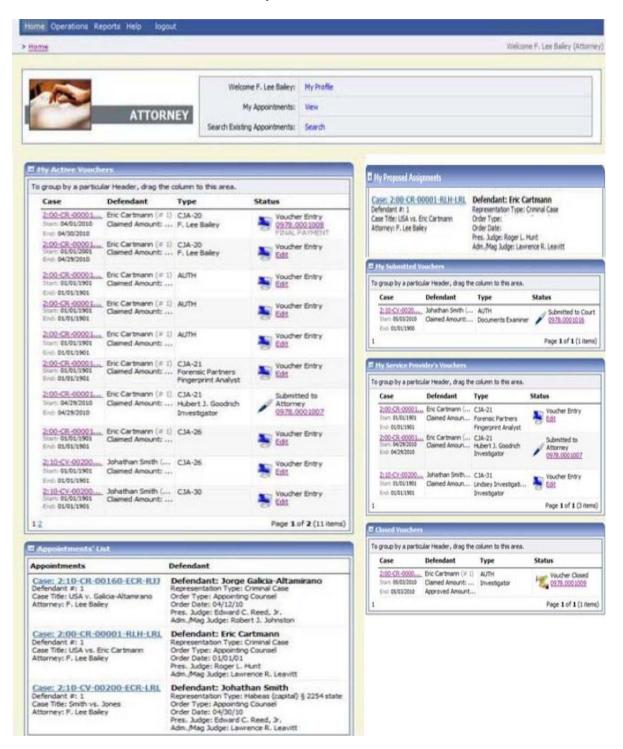
If you forgot your login you may click on Forgot your login?

And enter your Username or email address to retrieve your information.

	Forgot your Login? Please tell us your username and/or email. We will send you an email to retrieve the missing info.				
Username:	and/or				
Email:					
	Recover Logon				

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 Home Page

Your home page has several folders to organize your information.

My Active Vouchers Contains vouchers or documents that you are currently working on or have been submitted for your approval by a service provider.

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

My Service Provider's Vouchers Contains vouchers or documents for service providers that you are over seeing. (See Note below.) Contains vouchers or documents that have been approved or paid by the court.

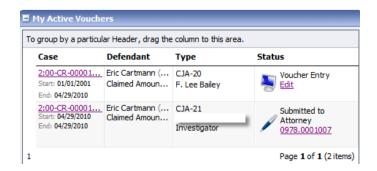
Closed vouchers will be displayed only for your active appointments. When your appointment has been closed, the closed vouchers associated with the appointment will not display on your home page. You will be able to view the removed vouchers by searching for the appointment and then selecting the voucher you want.

My Proposed Assignments Contains information about appointments for which you have tentatively been selected for appointment

NOTE: You will be able to view vouchers from all service providers that you are over seeing. However the service providers will only be able to view their own information and vouchers.

All 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 <u>Case Number</u> or the voucher number (i.e., **0978.0001007**)

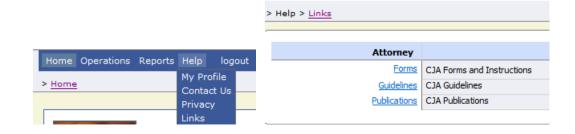


Adjusting Views- You can change the way information is displayed in the folders

- Sorting- Click on the column header to sort by that column (clicking once will sort it low to high, clicking twice with 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 home page.
- Operations- Takes you to your appointments.
- Reports- Takes you to reports you can select and run.
- 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
 - "Links" to other CJA related information
- Logout- Logs you out and closes the program.



Profile Maintenance



Login Info:

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.



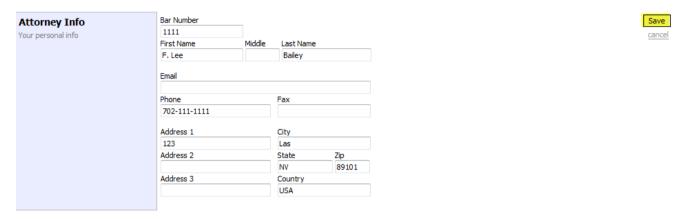
- To change your Username, type the new username in the "Username" field and press <u>change.</u>
- To change your Password, type the new password in both the "Password" and "Confirm" fields and press reset.
- The CM/ECF Username and Password fields are for future use to synchronize your rights between CJA eVoucher and CM/ECF.



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 billing 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 press Add .

Enter the desired information in the fields and press [Save].



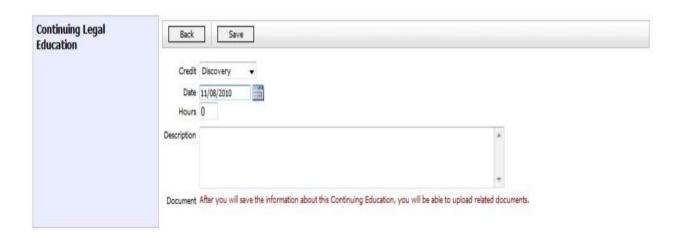
To edit a billing record, click on the of for the record you would like to edit. Press Edit Make the desired changes and press Save. Identify the billing information you would like to serve as your default by clicking on the of for the desired record and then clicking on Select. The default billing record will be identified with a o.

CLE Records

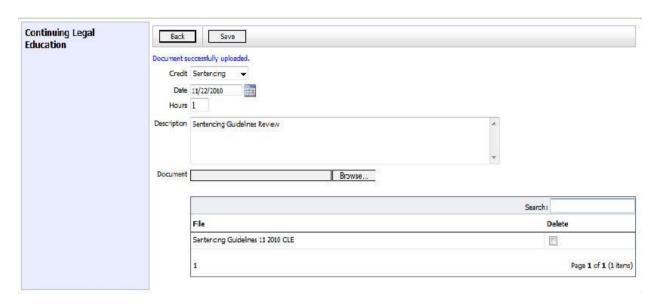
You can keep track of your CJA related CLE credits via the "Continuing Legal Education" section at the bottom of the page. It is required that all credits are entered.



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 your 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.

Continuing Legal Education	Credit	Save ccessfully uploaded. Sentencing ▼ 11/22/2010 11	
		Sentencing Guidelines Review	×
	Document	Browse	
			Search:
		File	Delete
		Sentencing Guidelines 11 2010 CLE	
		1	Page 1 of 1 (1 items)

Proposed Assignment

The system has the ability to electronically contact you regarding your ability to accept an appointment. Please note that in many instances where time is of the essence, you will still be contacted by telephone. When the electronic means of contacting you is used, you will receive an email from the court advising you that you have been selected to tentatively be assigned to represent a defendant. It will also give you a link to the CJA system and instructions.



Proposed appointments will be in the My Proposed Assignments folder. To review the pro-posed appointment, click on the Case Number.

Basic information about the appointment will be displayed. If the system has detected a POTENTIAL conflict, it will appear on the right side of the page. Please note that it is your responsibility to review any potential conflicts and determine whether it is a con-flict or not.



You can accept the appointment by clicking on Recept or reject the appointment by clicking on Relect . If you reject the appointment, you will be asked to provide a reason. Your decision will be sent to the court who will continue with the appointment process.

Appointments

You can view your active appointments by either clicking on View at My Appointments: View or looking in the Appointments' List folder.



You can review a specific appointment by clicking on the <u>Case Number</u>. 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 View Representation



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.

Representation In this page you can access information of an existing representation.	Representation Info				
	1. CIR./DIST/DIV CODE 2. PERSON REPRESENTED 0978 Eric Cartmann		VOUCHER NUMBER		
	3. MAG. DKT/DEF.NUMBER	4.DIST.DKT/DEF.NUMBER 2:00-CR-00001-1-RLH-LRL	5. APPEALS, DKT/DEF.NUMBER	6. OTHER. DKT/DEF.NUMBER	
	7.IN CASE/MATTER OF (Case Name) USA vs. Eric Cartmann	Felony (encluding one trial dissersion		10. REPRESENTATION TYPE Criminal Case	
	11. OFFENSE(5) CHARGED 18:13:4994 F FRAUD, FALSE ENTRIES, OTHER18:13:4992 F FRAUD, CONSPIRACY TO DEFRAUD, OTHER				
	EXCESS FEE LIMIT \$9,700.00	PRESIDING JUDGE Roger L. Hunt	MAGISTRATE JUDGE Lawrence R. Leavitt	DESIGNEE	
	App.ID Attorney	Order Type	Order Email		
	261 F. Lee Baiey	Appointing Counsel	01/01/01 Cindy_	Jensen@nyd.uscourts.gov	

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 functions primarily are the same. The following instructions, while showing a CJA 20, pertain to all 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.

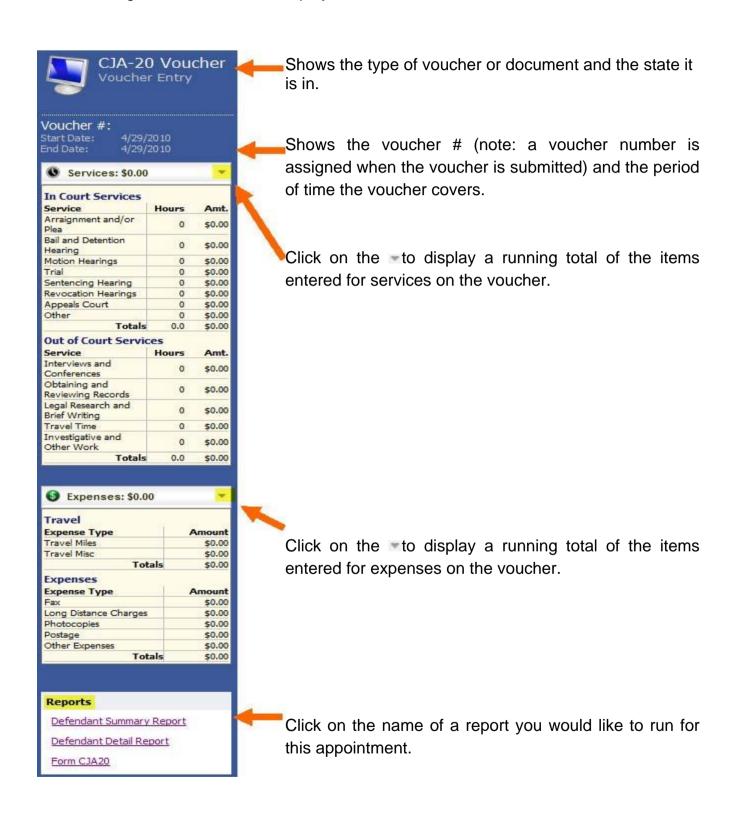
- Locate the appointment for which you want to create the voucher.
- Click on the Case Number.
- Click on "Create" for the type of voucher or document you want to create.



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



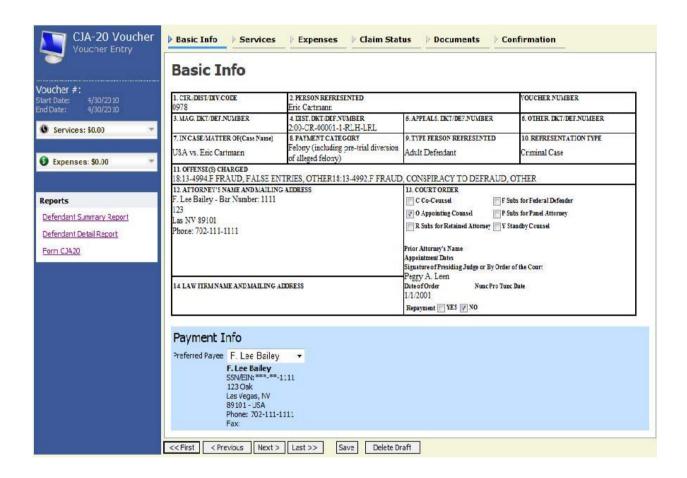
The following information will be displayed for all vouchers.



Basic Info:

The Basic Info page will come up.

The Basic Info page displays information regarding the appointment.

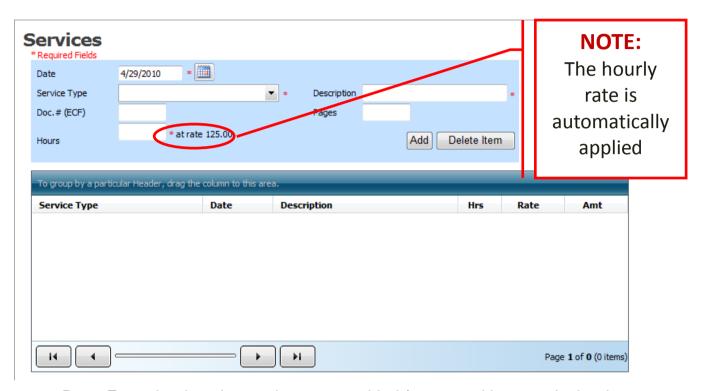


Select the Preferred Payee for the voucher by clicking on the arrow. A list of the available billing records will be displayed. Click on the payee for this voucher.



Entering Services:

Navigate to the Services tab.

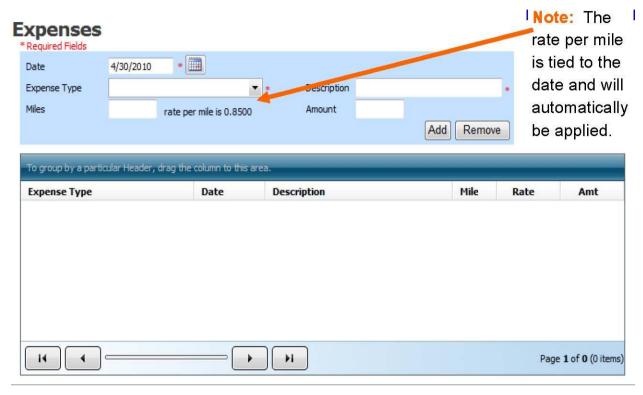


- Date: Enter the date the service was provided (you can either type in the date or click on the calendar and select a date)
- Service Type . Click on the and select (click on) the type of service from the dropdown list.
- Description. Type a description of the service provided. Try NOT to use special characters such as: "", <>, {}, or '.
- 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 Add to save your entries.

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

Entering Expenses: Navigate to the Expenses tab.



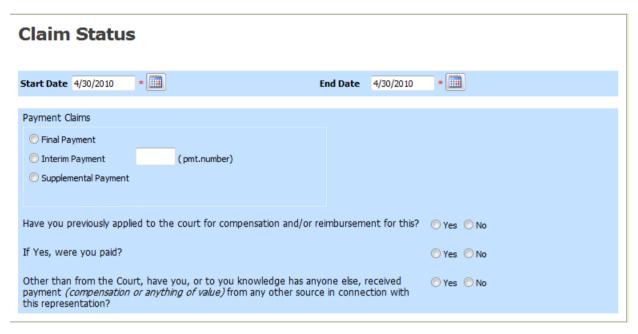
- Date: Enter the date the expense was incurred (you can either type in the date or click on the calendar and select a date)
- Expense Type. Click on the ▼and select (click on) the type of expense from the drop-down list.
- Description. Type a description of the expense.
- Miles. Type the number of miles claimed (only if the entry is for "Travel Miles",
 Only 1 decimal space)
- Amount. Enter the amount of the expense (do NOT use the "\$" sign or commas.)
- Press 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

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

Note: Press to remove an item from the grid.

Claim Status:

Navigate to the Lam Status tab.

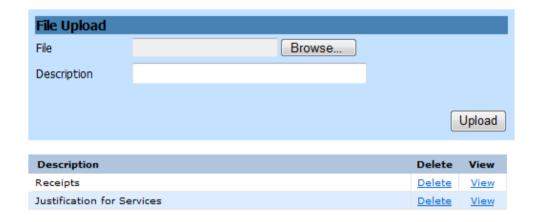


- Start Date: Enter the beginning date for the time period covered by this voucher (you can either type in the date or click on the calendar and select a date).
- End Date: Enter the ending date for the time period covered by this voucher. This is the last day you worked with this case, not the date when you submit the voucher in the system.
- 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.

Documents:

Navigate to the **Documents** tab.

Supporting Documents



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.
 - o Delete. You can delete a document by pressing "Delete".
 - View. You can view a document by pressing "View".

Confirmation:

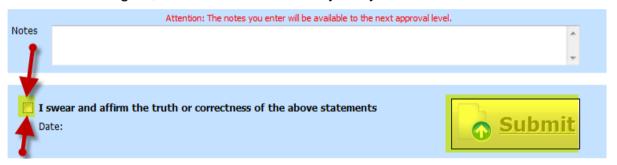
Navigate to the Confirmation tab.

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 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 cannot delete a voucher that has been submitted to the court.

Edit Voucher:

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

To edit a voucher:

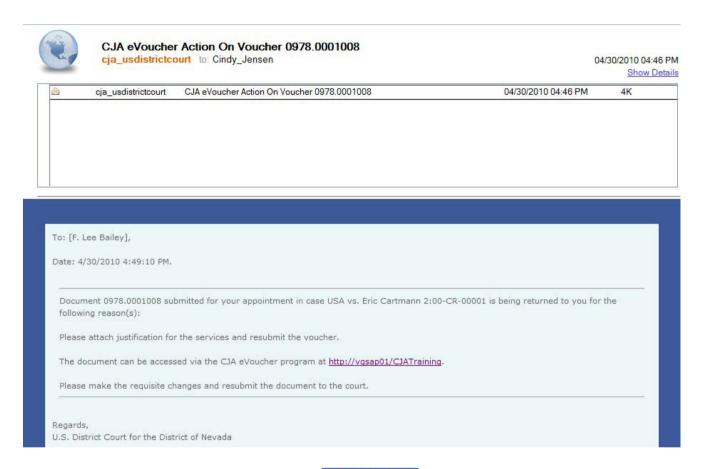
- Click on "Edit" for the voucher you want to access.
- Make your additions per the foregoing instructions.

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 Voucher Entry 1978.0001008 FINAL PAYMENT

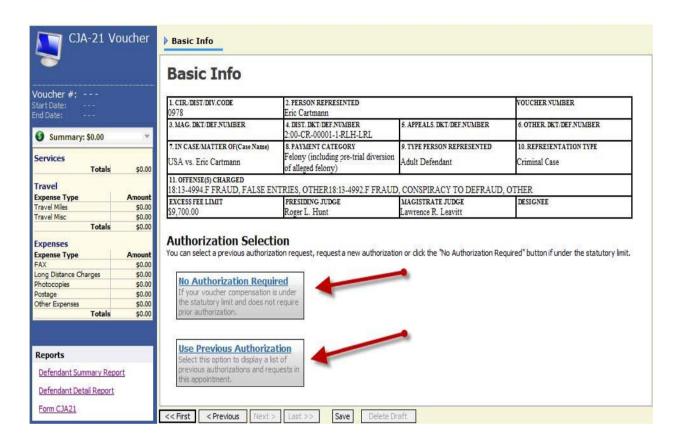
You may access the voucher by clicking on the voucher number.

The Court's notes can be found on the Confirmation page CJA 21 Specifics Follow the instructions to "Create a Voucher / Document" and select the option.

CJA 21 Specifics

Follow the instructions to "Create a Voucher / Document" and select the option.





If the request does not require advance authorization (\$800 or under) click on:

No Authorization Required

If you have a previous authorization click on:

Use Previous Authorization

Authorization Selection

You can select a previous authorization request, request a new authorization or click the "No Authorization Required" button if under the statutory limit.

No Authorization Required

If your voucher compensation is under the statutory limit and does not require prior authorization.

<u>Use Previous Authorization</u> Select this option to display a list of previous authorizations and requests in this appointment.

Existing Requests for Authorization ID Number: 1009 Order Date: 01/01/2001 Service Type: Investigator Authorized Amount: 25000 Estimated Amount: 25000

New Voucher Information Service Type Description Voucher Assigment Attorney This indicates who will be responsible for filling the voucher claim part 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 Middle First Name Last Name * SSN/EIN: Email * Phone * Fax Address 1 * City * Address 2 State * Zip * Address 3 Country Create Voucher

All approved authorizations associated with the appointment will be displayed.

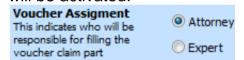
Click to highlight the authorization to which you will be associating the CJA 21.

Existing Requests for Authorization

ID Number: 1009 Order Date: 01/01/2001 Authorized Amount: 25000

Service Type: Investigator Estimated Amount: 25000 The service type will roll-over from the authorization selected. If no authorization is being used, you will use the drop-down box to select the service type.

- Enter a "Description" of the service to be provided on the CJA 21.
- - Note: Only experts registered with the service type selected will appear in the drop-down box.
 - Note: See below to enter an expert not on the drop-down list.
- Contact information for the expert selected will be displayed.
- If the selected expert has been given permission to enter their own vouchers,
 "Voucher Assignment" will be activated.



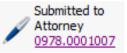
- Click on "Attorney" if you will be entering the CJA 21 voucher information on behalf of the expert. Click on "Expert" if you would like the expert to enter the CJA 21 voucher information.
 - Note: Not all experts will be given permission to enter vouchers. It is the attorney's responsibility on their behalf.
- Click on Create Voucher

Approval and Submission of CJA 21 Vouchers.

CJA 21 vouchers require two levels of submission or approval. The services must be submitted by the expert and it must be approved by the attorney.

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.

Expert Enters CJA 21 Voucher Information: The expert will perform the first level of submission and approval. The voucher will appear in "My Active Vouchers" on the approving attorney's homepage with the status of "Submitted to Attorney". The attorney will perform the second level of approval and submission as discussed.

Entering Expert Not in System.

If the expert you would like to use is not in the system, you can add payment information and create the CJA 21 Voucher by entering the required information on the "New Voucher Information" section.

NOTE: While you can enter payment information for an expert which has not been approved by the Court and added to the system, you will not be able to submit a voucher for the expert until the Court approves the expert.



8

You cannot submit a voucher for an expert that has not been approved by the court.

CJA 30 and 31 Specifics

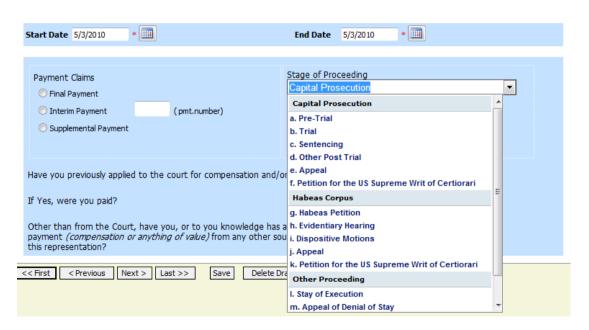
CJA 30 voucher functions the same as CJA 20 vouchers other than:

-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.

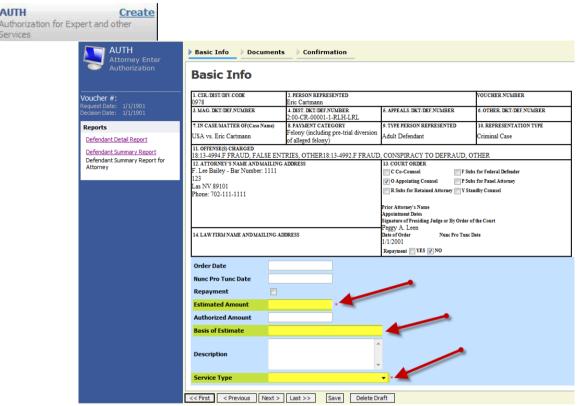
Claim Status



Authorization for Service Providers

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

Follow the instructions to "Create a Voucher / Document" and select the option.



- Enter the "Estimated Amount"
- Enter the "Basis of Estimate"
- Select the "Service Type" by clicking on the ▼ and select the type of service from the drop-down list.
- Prepare and attach a "Memorandum Re Services Other Than Counsel" as appropriate. (Use the upload feature on the "Documents" page.)
- Submit the request to the Court.

When the Court has approved the Authorization, it will move from your "My Submitted Vouchers" folder to your "Closed Vouchers" folder.

NOTE: you will not be able to create a CJA 21 using this authorization until it has been approved.

Monitoring Status of Funds.

You can, and are encouraged to, monitor the status of funds for your representations and experts 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 has 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.

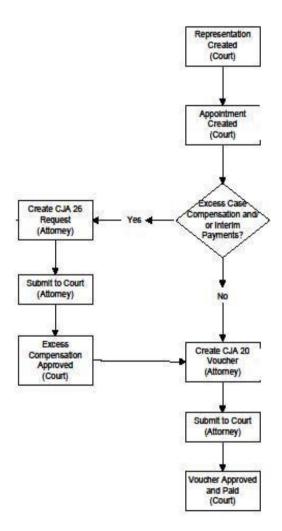
The reports will also list each authorization for expert services, the amount approved for each authorization, and the amounts as listed above.

Voucher that Exceeds Authorized Amount:

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



ATTORNEY COMPENSATION



Expert Compensation

