

## Associate Functionality for Attorneys

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

The Associate functionality in the eVoucher application allows an appointed attorney using the services of an associate attorney to add claims for services and expenses to their own CJA 20/30. To do this, the appointed attorney must contact the court or federal defender's office to ensure the associate attorney is set up in both eVoucher and Vendor Manager before the associate attorney can be added to the appointment. Once this is completed, an attorney having an associate on their appointment can add associate services and expenses to a CJA 20/30 and submit them together with their own services and expenses on the same voucher.

### Creating a CJA 20/30 with an Associate

Payments are always made to the appointed attorney's preferred payee billing selected on the **Basic Info** tab of the CJA 20/30.

#### Step 1

On the Home page, in the Appointments' List section, click a case number link.

| Appointments' List   |  |
|--|--|
| Search: <input type="text"/>   |  |
| Appointments   | Defendant  |
| <a href="#">Case: 1:14-CR-08805-AA</a><br>Defendant #: 1<br>Case Title: USA v. Branson<br>Attorney: Andrew Anders<br><a href="#">Representation ID: 2</a><br>Appointment ID: 4   | <b>Defendant: Jebediah Branson</b><br>Representation Type: Criminal Case<br>Order Type: Appointing Counsel<br>Order Date: 03/03/14<br>Pres. Judge: Albert Albertson<br>Adm./Mag Judge: |
| <a href="#">Case: 1:14-CR-08806-AA</a><br>Defendant #: 1<br>Case Title: USA v. Watson<br>Attorney: Andrew Anders<br><a href="#">Representation ID: 4</a><br>Appointment ID: 2    | <b>Defendant: Thomas Watson</b><br>Representation Type: Criminal Case<br>Order Type: Appointing Counsel<br>Order Date: 03/03/14<br>Pres. Judge: Albert Albertson<br>Adm./Mag Judge:    |
| <a href="#">Case: 1:14-CR-08808-AA</a><br>Defendant #: 1<br>Case Title: USA v. Howell<br>Attorney: Andrew Anders<br><a href="#">Representation ID: 10</a><br>Appointment ID: 8   | <b>Defendant: Thomas Howell</b><br>Representation Type: Criminal Case<br>Order Type: Appointing Counsel<br>Order Date: 03/03/14<br>Pres. Judge: Albert Albertson<br>Adm./Mag Judge:    |
| <a href="#">Case: 1:14-CR-08808-AA</a><br>Defendant #: 1<br>Case Title: USA v. Howell<br>Attorney: Andrew Anders<br><a href="#">Representation ID: 10</a><br>Appointment ID: 103 | <b>Defendant: Thomas Howell</b><br>Representation Type: Criminal Case<br>Order Type: Associate<br>Order Date: 08/21/18<br>Pres. Judge: Albert Albertson<br>Adm./Mag Judge:             |

## Step 2

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

### Appointment

In this page you will find a summary about this appointment, including a list of vouchers related to this appointment and links to create new vouchers

[View Representation](#)

### Create New Voucher

AUTH

Authorization for Expert and other Services

Create

AUTH-24

Authorization for payment of transcript

Create

BUDGETAUTH

Authorization for Excess Attorney Fees and/or Expert and other Services on Budgeted Case

Create

CJA-20

Appointment of and Authority to Pay Court-Appointed Counsel

Create

CJA-21

Authorization and Voucher for Expert and other Services

Create

CJA-24

Create

### Appointment Info

|  |                                    |
|--|------------------------------------|
| 1. CIR./DIST./DIV.CODE<br>0542   | 2. PERSON<br>Thomas W              |
| 3. MAG. DKT/DEF.NUMBER   | 4. DIST. DK<br>5:08-CR-0           |
| 7. IN CASE/MATTER OF(Case Name)<br>USA v. Watson   | 8. PAYMEN<br>Felony (in of alleged |
| 11. OFFENSE(S) CHARGED<br>12:1738.P MORTGAGE DISCRIMINATION  |                                    |
| 12. ATTORNEY'S NAME AND MAILING ADDRESS<br>David Dd Attorney - Bar Number: 1234123<br>2500 Main St<br>San Antonio TX 78209<br>Phone: 2105552500<br>Email: <a href="mailto:daviddattorney@gmail.com">daviddattorney@gmail.com</a> |                                    |
| 14. LAW FIRM NAME AND MAILING ADDRESS  |                                    |

### Vouchers on File

To group by a particular Header, drag the colu

| Case                        | Defendant                       |
|-----------------------------|---------------------------------|
| 5:08-CR-00806-AA-<br>Start: | Thomas Watson ( Claimed Amount: |

## Step 3

On the **Basic Info** tab, from the **Associate Info** drop-down list, select the associate attorney's level of access, if any, for this voucher. Payment for this voucher still goes to the selected preferred payee. (Below are available levels of access).

- **Not on Voucher:** This voucher does not include any claims for services and/or expenses for the associate attorney.
- **On Voucher, No Edit:** This voucher includes claims for services and/or expenses for the associate attorney. While the voucher is in Voucher Entry mode, the associate has read-only access. They can only view their own entries on this voucher. Only the appointed attorney can add, remove, edit, and save entries on behalf of the associate.
- **On Voucher, Can Edit:** This voucher includes claims for services and/or expenses for the associate attorney. While the voucher is in Voucher Entry mode, both the appointed attorney and the associate can add, remove, edit, and save their entries on this voucher. The associate always has access to only their voucher entries.

After selecting **On Voucher, No Edit** or **On Voucher, Can Edit**, click the **Services** and/or **Expenses** tab.

**Basic Info**

|  |   |   |  |
|--|---|---|--|
| 1. CHR. DIST. DIV. CODE<br>0542  | 2. PERSON REPRESENTED<br>Thomas Watson  | VOUCHER NUMBER  |  |
| 3. MAG. DIST. DIV. NUMBER  | 4. DIST. DKT. DEF. NUMBER<br>5:08-CR-00806-14-AA                                | 5. APPEALS DKT. DEF. NUMBER   | 6. OTHER DKT. DEF. NUMBER                |
| 7. IN CASE MATTER OF (Case Name)<br>USA v. Watson  | 8. PAYMENT CATEGORY<br>Felony (including pre-trial diversion of alleged felony) | 9. TYPE PERSON REPRESENTED<br>Adult Defendant   | 10. REPRESENTATION TYPE<br>Criminal Case |
| 11. OFFENSE(S) CHARGED<br>12:1738 P. MORTGAGE DISCRIMINATION   |   |   |  |
| 12. ATTORNEY'S NAME AND MAILING ADDRESS<br>David Dd Attorney - Bar Number: 1234123<br>2500 Main St<br>San Antonio TX 78209<br>Phone: 2105552500<br>Email: <a href="mailto:daviddattorney@gmail.com">daviddattorney@gmail.com</a> |   | 13. COURT ORDER<br><input type="checkbox"/> A Associate <input type="checkbox"/> C Co-Counsel <input type="checkbox"/> D Federal Defender <input type="checkbox"/> F Subj for Federal Defender<br><input type="checkbox"/> L Learned Counsel (Capital Only) <input checked="" type="checkbox"/> O Appointing Counsel <input type="checkbox"/> P Subj for Panel Attorney <input type="checkbox"/> R Subj for Retained Attorney<br><input type="checkbox"/> S Pro Se <input type="checkbox"/> T Retained Attorney <input type="checkbox"/> U Subj for Pro Se <input type="checkbox"/> X Administrative<br><input type="checkbox"/> Y Standby Counsel<br>Prior Attorney's Name<br>Appointment Date:<br>Signature of Presiding Judge or By Order of the Court<br>Albert Albertson<br>Date of Order<br>3/3/2014<br>Nunc Pro Tunc Date<br>Repayment <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO |  |
| 14. LAW FIRM NAME AND MAILING ADDRESS  |   |   |  |

**Associate Info**

Eddie Associate: **Not on Voucher** ▼

**Payment Display**

Select the payment accounts that are ready to use display below. To see all payment accounts, go to [Payment Accounts](#).

David D Attorney

**David D Attorney**  
TIN (SSN): .....00

Electronic payments will be sent to:  
Routing Number: 121000248, FAKE BANK  
Account Number: .....89

#### Step 4

The **Services** and **Expenses** tabs include an additional **Attorney** field with a drop-down list. If no selection is made in this field, then service or expense entries added to the voucher apply to the appointed attorney. To enter a service or expense claim for the associate, click the **Attorney** drop-down arrow and select the associate's name.

**Services**

Attorney: **David Dd Attorney** ▼

Date:

Service Type:

Doc.# (ECF):

Hours:

**Required Fields**

To group by a part:

Attorney:

No data to page

Add Remove

| ion | Hrs | Rate | Amt |
|-----|-----|------|-----|
| y)  |     |      |     |

Go to page:  View items per page: [10](#) [25](#) [50](#) [100](#)

Entries added for the associate are added at the rate entered by court staff when the associate was added to the appointment. The rate may be at or below the statutory hourly rate. Service and expense entries for the appointed attorney appear at the statutory rate (non-capital or capital). The Attorney column in the table indicates for whom each line item applies.

**CJA-20 Attorney Enters**

Def.: Practice Voucher

[Link to CM/ECF](#)

Voucher #:   
 Start Date:   
 End Date:

Services: \$1312.00

**In Court Services**

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

**Out of Court Services**

| Service | Hours | Amt. |
|---------|-------|------|
|         |       |      |

**Services**

Attorney:   
 Date: 3/26/2020   
 Service Type:   
 Doc.# (ECF):   
 Pages:   
 Hours: \* at \$148.00 per hour.   
 Add Remove

**Services**

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

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

### Step 5

Click the **Claim Status** tab to enter the start and end dates of the voucher, along with other information. This tab is always read-only for the associate. Click the **Documents** tab to submit supporting documentation in PDF format.

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

**Claim Status**

Start Date: 03/24/2020 \*   
 End Date: 03/25/2020 \*

**Payment Claims \***

☒ Final Payment   
 ☐ Interim Payment (payment #)   
 ☐ Supplemental Payment   
 ☐ Withholding Return Payment

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

## Step 6


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

|  |      |                 |                                  |
|--|------|-----------------|----------------------------------|
| 34. SIGNATURE OF THE CHIEF JUDGE, COURT OF APPEALS (OR DELEGATE) <i>Payment approved in excess of the statutory threshold amount</i> | DATE | 34a. JUDGE CODE | TOTAL AMT. CERTIFIED FOR PAYMENT |
|--|------|-----------------|----------------------------------|

Attention: The notes you enter will be available to the next approval level.

Public/Attorney Notes

☒ I swear and affirm the truth or correctness of the above statements  
Date: 10/3/2018 13:49:42



## Adding Services/Expenses as an Associate Attorney

Associate appointments appear on the My Appointments page with the order type of Associate For [the appointed attorney's name]. Only the appointed attorney can create a voucher.

- If the associate is given **On Voucher, Can Edit** permission, they can add their services and expenses to the voucher.
- If the associate is given **On Voucher, No Edit** permission, only the appointed attorney can edit the voucher.

Associates can only see their own claims and claimed amounts on the voucher. The appointed attorney is the only one who can view the entire voucher with the combined entries.

| Home | Operations | Reports | Links | Help | Sign out |
|------|------------|---------|-------|------|----------|
|------|------------|---------|-------|------|----------|

> Home

My Active Documents

Appointments' List

Search:

| Appointments   | Defendant  |
|--|--|
| <a href="#">Case: 1:12-CR-03242-AA</a><br>Defendant #: 3242<br>Case Title: USA v Hall<br>Attorney: Eddie Associate<br><a href="#">Representation ID: 319019</a><br>Appointment ID: 325395  | <b>Defendant: Jessica Hall</b><br>Representation Type: Criminal Case<br>Order Type: Associate For David D Attorney<br>Order Date: 06/05/24<br>Pres. Judge: Albert Albertson<br>Adm./Mag Judge: |
| <a href="#">Case: 5:08-CR-00806-AA</a><br>Defendant #: 14<br>Case Title: USA v. Watson<br>Attorney: Eddie Associate<br><a href="#">Representation ID: 319021</a><br>Appointment ID: 325397 | <b>Defendant: Thomas Watson</b><br>Representation Type: Criminal Case<br>Order Type: Associate For David D Attorney<br>Order Date:<br>Pres. Judge: Albert Albertson<br>Adm./Mag Judge:         |

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## Step 1

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


Home Operations Reports Links Help Sign out

> Home

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**My Active Documents**

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

| Case  | Defendant                                   | Type                    | Status  | Date Entered |
|---|---|-------------------------|---|--------------|
| <a href="#">1:14-CR-08806-...</a><br>Start: 07/24/2016<br>End: 08/07/2019 | Thomas Watson (# 1)<br>Claimed Amount: 0.00 | CJA-20<br>Andrew Anders |  Voucher Entry<br><a href="#">Edit</a> | 03/31/2016   |

The **Basic Info** tab contains read-only information about the case. The appointed attorney is the only person who can upload documents and submit the voucher; therefore, the voucher does not include the **Documents** or **Confirmation** tabs when viewed by the associate.

Basic Info Services Expenses Claim Status

**Basic Info**

|  |   |   |  |
|--|---|---|--|
| 1. CIR. DIST. DIV. CODE<br>0542  | 2. PERSON REPRESENTED<br>Thomas Watson  | VOUCHER NUMBER  |  |
| 3. MAG. DKT/DEF. NUMBER  | 4. DIST. DKT/DEF. NUMBER<br>5:08-CR-00806-14-AA                                 | 5. APPEALS. DKT/DEF. NUMBER   | 6. OTHER. DKT/DEF. NUMBER                |
| 7. IN CASE MATTER OF (Case Name)<br>USA v. Watson  | 8. PAYMENT CATEGORY<br>Felony (including pre-trial diversion of alleged felony) | 9. TYPE PERSON REPRESENTED<br>Adult Defendant   | 10. REPRESENTATION TYPE<br>Criminal Case |
| 11. OFFENSE(S) CHARGED<br>12:1738.P MORTGAGE DISCRIMINATION  |   |   |  |
| 12. ATTORNEY'S NAME AND MAILING ADDRESS<br>Eddie Associate - Bar Number: 4589885<br>Associate for David Dd Attorney<br>2500 Main St<br>San Antonio TX 78209<br>Phone: 2105552500 |   | 13. COURT ORDER<br><input checked="" type="checkbox"/> A Associate <input type="checkbox"/> C Co-Counsel <input type="checkbox"/> D Federal Defender <input type="checkbox"/> F Subs for Federal Defender<br><input type="checkbox"/> L Learned Counsel (Capital Only) <input type="checkbox"/> O Appointing Counsel <input type="checkbox"/> P Subs for Panel Attorney <input type="checkbox"/> R Subs for Retained Attorney<br><input type="checkbox"/> S Pro Se <input type="checkbox"/> T Retained Attorney <input type="checkbox"/> U Subs for Pro Se <input type="checkbox"/> X Administrative<br><input type="checkbox"/> Y Standby Counsel<br>Prior Attorney's Name<br>Appointment Dates<br>Signature of Presiding Judge or By Order of the Court<br>Albert Albertson<br>Date of Order    Nunc Pro Tunc Date<br>Repayment <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO |  |
| 14. LAW FIRM NAME AND MAILING ADDRESS  |   |   |  |

**Payment Details**

**David D Attorney**  
TIN (SSN): .....00

Electronic payments will be sent to:  
Routing Number: 121000248, FAKE BANK  
Account Number: .....89

« First < Previous Next > Last » Save

## Step 2

Click the **Services** tab to add services. Complete the required fields and click **Add**. If there are expenses to be claimed, click the **Expenses** tab. Complete the required fields and click **Add**.

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

### Services

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

\* Required Fields

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

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

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

### Services

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

\* Required Fields

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

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

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

**Note:** See the Appointments with Associates report for more information applicable to associates.