UNITED STATES COURTS
DISTRICT OF IDAHO

CJA eVoucher
Expert User Guide
2011

CJA eVoucher for Experts

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 includes several modules:

Voucher & Authorization Request Submission
- On-line authorization requests by attorneys for expert services.
- On-line voucher completion by expert with submission to attorney.
- On-line review by attorney and submission to court.

Accessing the CJA eVoucher Program

You may access the CJA eVoucher program several ways:

- Click on the CJA eVoucher link on the court internet site:
  -> Attorney Resources -> CJA eVoucher
- Bookmark the web address and use your internet browser to access the system.

Logging In

STEP	RESULT
The password will be set originally by the Court. After the first log in to the program, the expert should change the password to a unique and secure password. See "Maintaining Your Account."	CJA eVoucher USER LOGIN Existing user? Please log in. Username: Password: Log In Forgot your login? Notice: This is a Restricted Web Site for Official Court Business only. Unauthorized entry is prohibited and subject to discipline by the Court and/or prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.
If you forget your password, you may click on the "Forgot your login?" hyperlink. Enter your Username and e-mail 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

The Home Page

Your home page provides access to all of your vouchers. Security has been put into place that prohibits you from viewing information for any other case or expert. Likewise, no-one else will have access to your information.

Folders on the Home Page

Your home page has several folder to organize your appointments and vouchers.

FOLDER	
My Vouchers	Contains vouchers you are currently working on.
My Submitted Vouchers	Contains vouchers which have been submitted to the attorney for approval or court for payment.
Closed Vouchers	Contains vouchers that have been paid by the court. Closed vouchers will only be displayed for open cases. When the appointment is completed, the closed vouchers will no longer be displayed on your home page. They are still accessible through the appointment page.

Navigating in the CJA eVoucher Program

Menu Item	
Home	The eVoucher home page (see section on Home Page)
Operations	Allows you to search for specific appointments.
Reports	None currently available for experts.
Links	Hyperlinks to CJA resources: forms, guides, publications, etc. (see Links)
Help	Provides: • Another link to your Profile • "Contact Us" e-mail • Privacy Notice
Logout	Logs user off the eVoucher program.

Adjusting Views

You may alter the manner information is displayed in the folders.

Opening/Closing Folders: Click on the [−] to close the folder.

Click on the [+] to open the folder.

Moving Folders: You may rearrange the folders on your screen.
1. Left click on the folder you wish to relocate.
2. Drag the folder to your designed location and release the mouse.

Sorting: Click on the column heading to sort in either ascending or descending chronological order.

Resizing of Column:
1. Along the folder headings, move your cursor to the line between the columns until an arrow appears.
2. Left click your mouse and drag the line in the desired direction to enlarge or reduce the column size.
   Note: The folder does not increase, therefore some columns may move off the screen.

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.
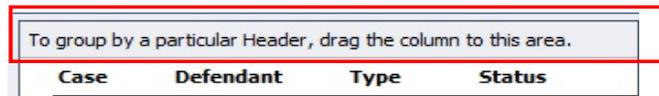
1. Left click on the header for the column you wish to group by.
2. Hold the cursor and drag the header to the "Group by Header" bar.
3. Release the cursor and all the information in that folder will be grouped and sorted by that selection.

Group by...	RESULT
Case	

Group by...	RESULT
Defendant	Group by: Defendant → Case · Defendant · Type · Status ⊞ Defendant: Curtis Caraway
Type	Group by: Type → Case · Defendant · Type · Status ⊟ Type: AUTH ← 2:12-CR... · Marisela Isela ... · AUTH · Voucher Start: 05/... · Claimed Amou... · Investigator · Closed End: 05/2... · Approved Amo... · 0976.0 ⊞ Type: CJA-20 ← ⊞ Type: CJA-26 ←
Status	Group by: Status → Case · Defendant · Type · Status ⊞ Status: ATTORNEY-APPROVAL ← ⊟ Status: VOUCHER-ENTRY ← 2:12-CR... · Marisela Isela ... · CJA-20 · Voucher Start: 01/... · Claimed Amoun... · Entry End: 01/0... · Edit

My Profile

In the My Profile section, the expert may:

- Login Info: Change password
- Expert Info: Edit contact information, phone, e-mail physical address
- Billing Info: Update SSN or EIN numbers and any firm affiliation
- Expert Specialties: Select specialties of expert.

LOGIN INFO	SCREEN
1. Click **Edit** to change your Password.	
2. Click the **Reset** hyperlink.	
3. Type new password and retype in the confirm field. Press the **Reset** button to save.	
4. Click the **Close** button to exit.	

EXPERT INFO	SCREEN
1. Click the **Edit** button to access your personal information	
2. Make any changes necessary and click **Save**. Note: The USA is required in the Country field.	

BILLING INFO	SCREEN
1. Select **Add** if no billing information is available. 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 EIN or SS# must be the number that wages are to be reported to the IRS for. 3. Make any changes necessary and click **Save**. Note: The USA is required in the Country field.	
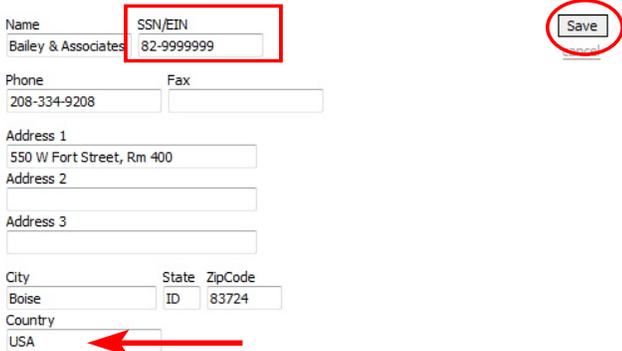
EXPERT SPECIALTIES	SCREEN
1. Click the **Edit** button to access the specialties information.	**Expert Specialties** List your assigned specialties Your current assigned specialties are: **[General]:** Interpreter Translator Edit
2. Check the box of any specialties that apply to you	Please, select what specialties apply to you: **General** ☐ Accountant ☐ Ballistics Expert ☐ CALR(Westlaw, Lexis, etc) ☐ Chemist, Toxicologist ☐ Computer (Hardware, Software, Systems) ☐ Documents Examiner ☐ Duplication Services ☐ Fingerprint Analyst ☐ Hair, Fiber Expert ☑ Interpreter Translator ☐ Investigator ☐ Jury Consultant ☐ Legal Analyst/Consultant ☐ Mitigation Specialis ☐ Other ☐ Other Medical Expert ☐ Paralegal Services ☐ Pathologist, Medical Examiner ☐ Polygraph Examiner ☐ Psychiatrist ☐ Psychologist ☐ Voice, Audio Analyst ☐ Weapons Firearms Explosive Expert **Transcript** ☐ Court Reporter
3. Click **Save**	Please, select what specialties apply to you: Save **General** Cancel ☐ Accountant ☐ Ballistics Expert
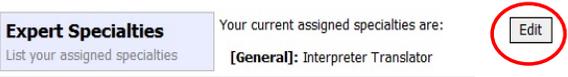
Appointment Record

Search for the Appointment in Search Existing Appointments.

Search by
- Case Number
- Defendant's Name
- Attorney
-

Click on the case number hyperlink to open the appointment record.

<u>Note</u>: You will only be allowed to access those cases for which you are assigned.

Expert CJA 21 Voucher Template

Group-by Header Bar

Interpreter Voucher in the data entry process.

Expert Service Request Process Overview

Before expert services may be claimed by an attorney, the judge's authorization must be obtained. The process moves the request from attorney to chambers for the approval step, and finally to the Clerk's office for final system update. The authorization will appear in the appointment record for that defendant, and is viewable by the court, the attorney and expert.

| Attorney submits Request | → | Request reviewed & approved or rejected by Chambers | → | Authorization amounts are set by Clerk's Office | → | Attorney notified and may submit vouchers against authorization |
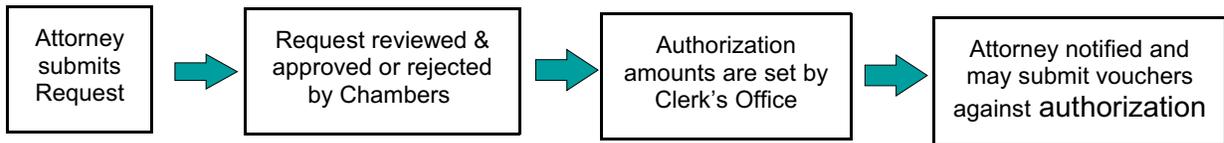
Requests for Authorization for Expert Services

An Authorization Request is submitted to the court through the CJA eVoucher program and approved by the Court. If the authorization is in excess of the statutory maximum, the 9th Circuit must also approve the service prior to employment.

The Clerk's Office will enter an authorization with a "not-to-exceed" amount. An e-mail is generated notifying counsel that an authorization is approved

A voucher which exceeds the authorized amount can not be submitted without additional approval. The eVoucher program will decline the submission of a voucher in excess of the "not-to-exceed" amount.

Translation of Documents: When employing an interpreter to translate and transcribe documents, an Authorization Request should be submitted for prior approval when it is anticipated the total cost will exceed the statutory maximum.

In all instances, separate CJA-21 vouchers should be submitted for document translation/transcription services and regular interpreting services.

If a non-English-speaking defendant needs to be advised of the content of an English language document, this should be done by means of sight translation.

CJA 21 Voucher

1. The expert or attorney will complete the voucher.
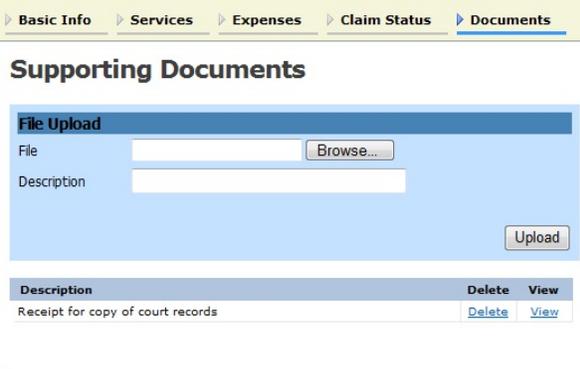2. The attorney must submit the voucher to the court.

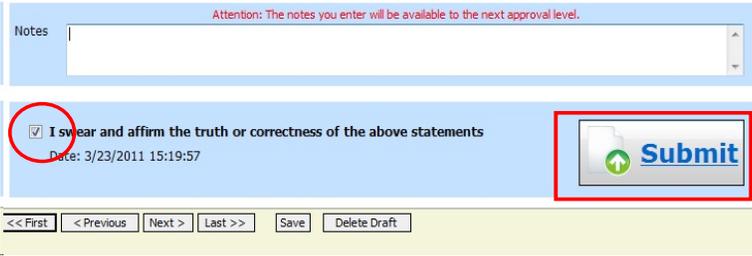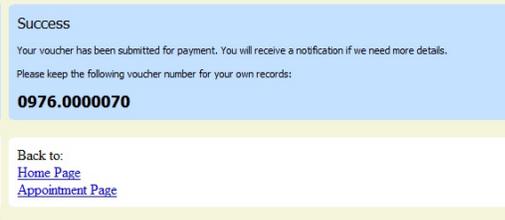| STEP	
Open the Appointment record. Note: You will only be able to access the appointment record if there is authorization for your services approved in the record. Click on **Create** from the CJA 21 Voucher template found on the Appointment screen.	
Click on **Use Previous Authorization**	
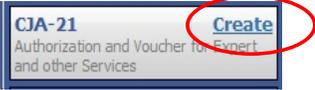
STEP	
All existing Authorizations will appear in the **Existing Requests** folder. Click on the Authorization for the services you wish to submit this voucher for.	**Authorization Selection** You can select a previous authorization request, request a new authorization or click the "No Authorization Required" button if under the statutory limit. **No Authorization Required** If your voucher compensation is under the statutory limit and does not require prior authorization. **Existing Requests for Authorization** ID Number: 69 Order Date: 05/12/2010 Authorized Amount: 6000 Service Type: Investigator Estimated Amount: 6000 Requested Provider: Dick Tracy **Use Previous Authorization** Select this option to display a list of previous authorizations and requests in this appointment. **New Voucher Information** **Service Type** **Description** **Voucher Assigment** This indicates who will be responsible for filling the voucher claim part ◉ Attorney ○ Expert **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** First Name Middle Last Name * SSN/EIN: * Email * Phone * Fax
When you select the authorization, the Service type will be filled in from the information located in the authorization. 1. Select the Expert from the drop-down list. The expert's payment information will be filled in. 2. Select **Expert** in the Voucher Assignment section. This will be grayed-out until the expert name is identified 3. Click **Create Voucher**.	**ID Number: 138** Order Date: 12/09/2010 Authorized Amount: 3000 Service Type: Investigator Estimated Amount: 3000 Requested Provider: Dick Tracy **New Voucher Information** **Service Type** Investigator **Description** **Voucher Assigment** This indicates who will be responsible for filling the voucher claim part ○ Attorney ② ◉ Expert **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** ① Tracy, Dick **Expert Info** **Dick Tracy** Details 1234 Front Street Boise ID 83724 USA Phone: 208-334-9208 ③ Create Voucher

STEP	
A **CJA 21 Voucher** will open. Follow the menu bar along the top to enter time and expense information for this voucher.	
You may also navigate through the voucher using the navigation bar located at the bottom of the screen.	
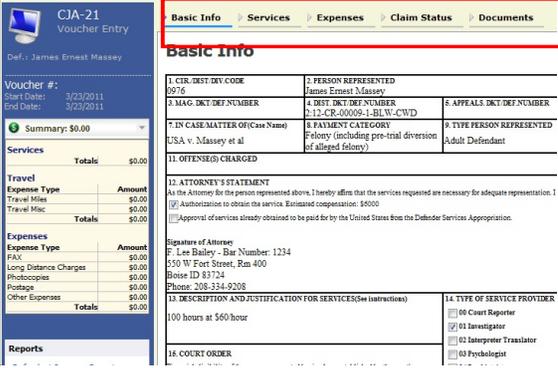
STEP	
CLAIM STATUS - Initial Setup The eVoucher program will date the voucher with today's date. To enter and save services or expenses prior to today's date, edit the start date of the voucher on the **Claim Status** screen.	
SERVICES 1. Type the date of services. 2. Type the number of hours (in tenths of an hour) 3. Type the authorized rate. 4. Type a concise description of the services provided. 5. Click **ADD**.	
The service will be added to the voucher. Click **SAVE** from the bottom navigation menu	
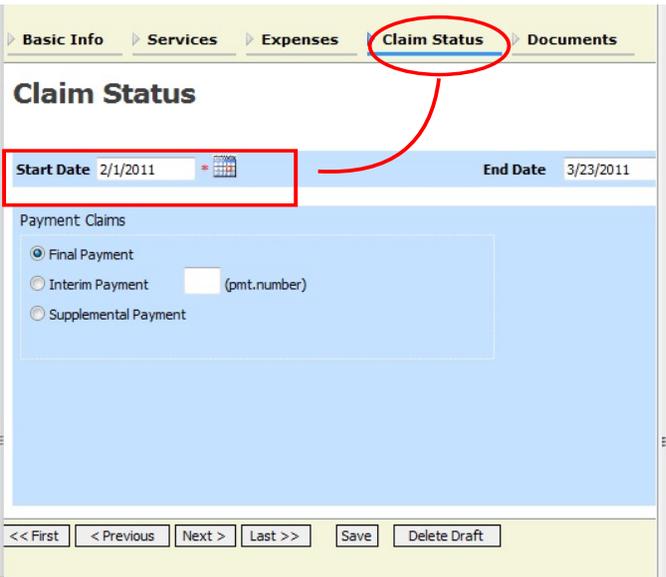
STEP	
To edit a previously added entry, click on the entry from the added section. The information will repopulate the top blue section of the services screen. Make your edits and reclick the **Add** button.	
EXPENSES 1. Enter the date the expense was incurred 2. Select the Expense type from the drop down menu.	
3. Type the number of miles if claiming mileage. 4. Type in the dollar amount of expense if claiming another expense type. 5. Type in a description of the expense. If adding mileage, indicate to/from locations. Click **ADD**. Click **SAVE**.	
Note: All entered expenses will be added to the itemized list. You may sort any of these items by clicking on the header name. Additionally, you may group any of the items by dragging the header to the "Group By" bar.	

STEP	
The eVoucher program also maintains a running balance in the left-hand panel.	
CLAIM STATUS When ready to submit the voucher for payment, edit the claim status screen to indicate final or interim payments. Note: Any voucher submitted during the progress of the case is considered an Interim Payment Click **SAVE**.	
DOCUMENTS Upload copies of any receipts. Upload a copy of the billing statement, or time slips. Note: Only documents in PDF format can be uploaded. Click **SAVE**.	

STEP	
Confirming Voucher To access the confirmation screen, click on the **Last** button located along the bottom menu bar.	
A **CJA 21 Voucher** screen will appear. Scroll to the bottom of the Voucher screen. 1. Check the box affirming to the truth and correctness of the voucher 2. Click **Submit**.	
A **Success** screen will appear.	
ATTORNEY'S CONFIRMATION The expert's voucher will appear in the attorney's eVoucher folder. The attorney must verify and affirm the voucher before submission to the court.	

CJA 21 Voucher without Prior Authorization

1. The attorney will initiate the CJA 21 voucher.
2. The expert or attorney will complete the voucher.
3. The attorney must submit the voucher to the court.

STEP	
Open the Appointment record. Click on **Create** from the CJA 21 Voucher template found on the Appointment screen.	
Click on **No Authorization Required**	
1. Select **Service Type** from drop-down menu. 2. Type in **Description** of Services.	
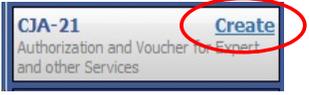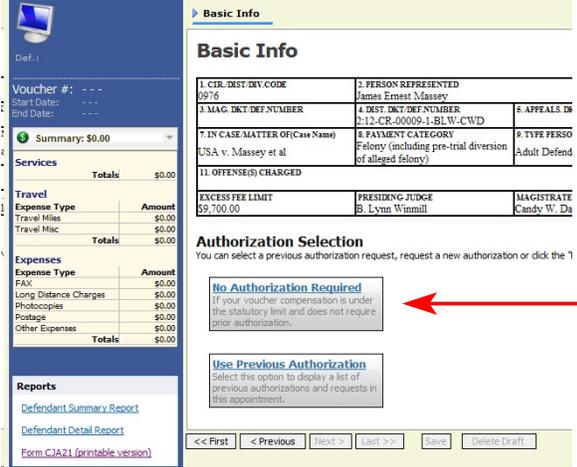
STEP	
<u>Note</u>: The eVoucher program searches the database for experts who perform the specific service type selected in Step #1. If the expert has never submitted a voucher in the eVoucher system, nor received prior authorization, their name may not appear in the Expert field. Therefore, the attorney will enter the expert's information on this screen. <u>Note</u>: No vouchers may be submitted until the expert's information has been approved by the court .	**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** ▾ First Name Middle Last Name * SSN/EIN: * Email * Phone * Fax Address 1 * City * Address 2 State * Zip * Address 3 Country
If the expert already exists in the database, the expert information will be available to select from the drop-down list. **Voucher Assignment**: Indicate who will be entered data into the voucher, Attorney or Expert. Click **Create Voucher** and continue as previously explained in creating a CJA 21 voucher with prior approval.	**New Voucher Information** **Service Type** Investigator **Description** **Voucher Assigment** This indicates who will be responsible for filling the voucher claim part ○ Attorney ◉ Expert **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** Tracy, Dick ▾ **Expert Info** **Dick Tracy** Details 1234 Front Street Boise ID 83724 USA Phone: 208-334-9208 Create Voucher
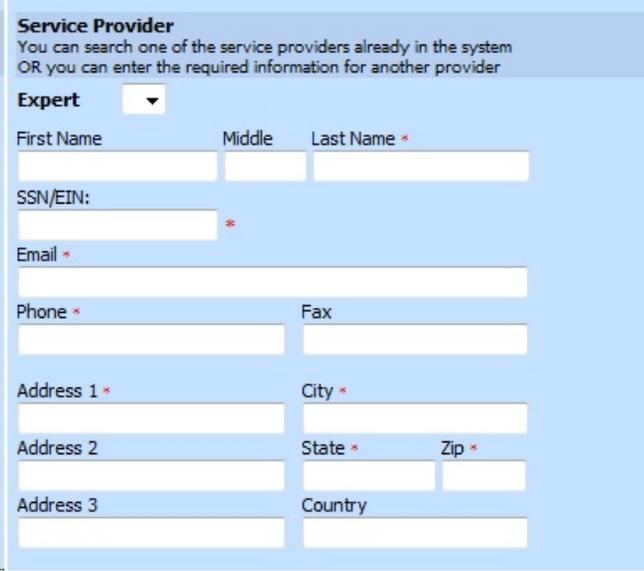
Links

Along the blue menu bar, the eVoucher program provides links to commonly used resources for CJA panel attorneys and experts.