# 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

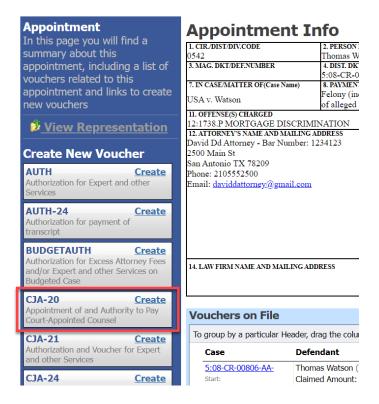
On the Home page, in the Appointments' List section, click a case number link.

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



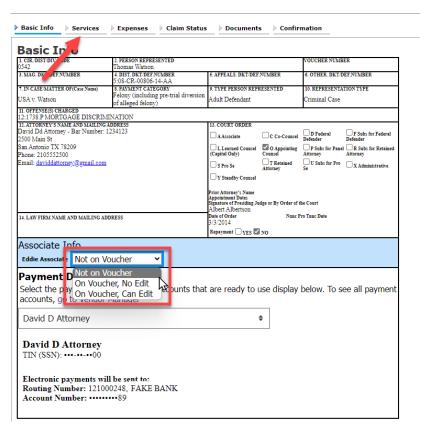
#### Step 3

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 readonly 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.

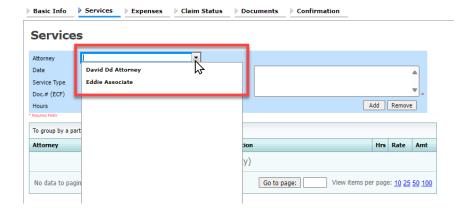


After selecting **On Voucher, No Edit** or **On Voucher, Can Edit**, click the **Services** and/or **Expenses** tab.



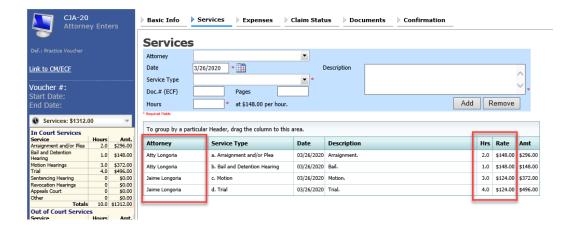
#### Step 4

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.





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.



#### Step 5

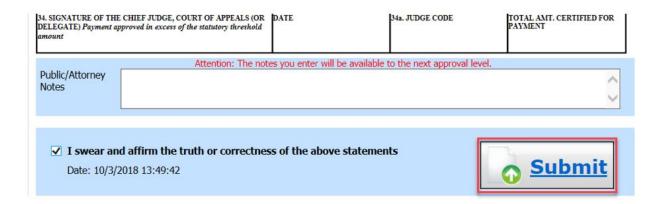
Click the **Claim Status** tab to enter the start and end dates of the voucher, along with other information. This tab is always read-only for the associate. Click the **Documents** tab to submit supporting documentation in PDF format.





#### Step 6

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



### 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.

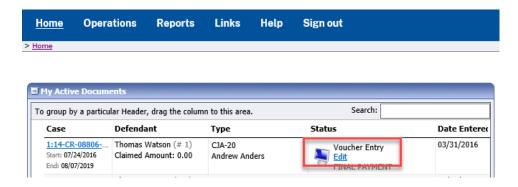
Associates can only see their own claims and claimed amounts on the voucher. The appointed attorney is the only one who can view the entire voucher with the combined entries.



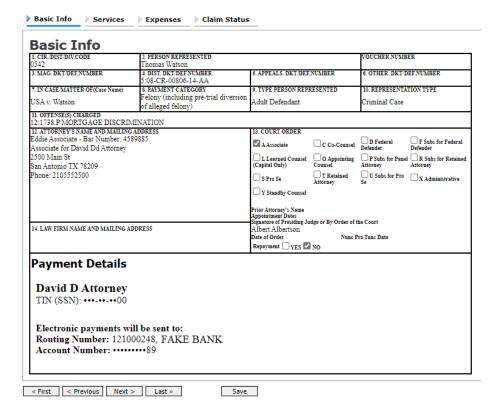


Step 1

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.



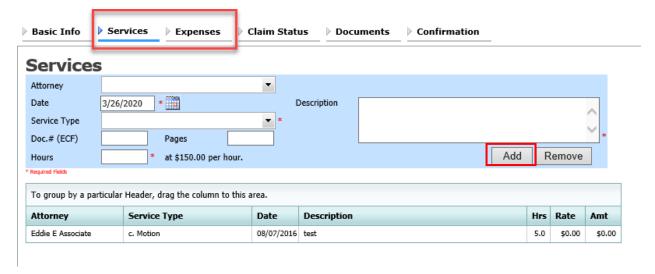
The **Basic Info** tab contains read-only information about the case. The appointed attorney is the only person who can upload documents and submit the voucher; therefore, the voucher does not include the **Documents** or **Confirmation** tabs when viewed by the associate.



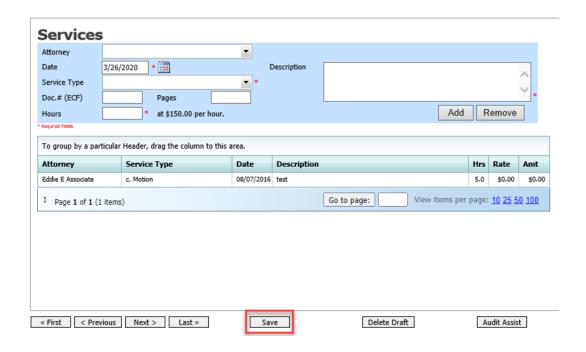


#### Step 2

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**.



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.



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

