Administrative Office
of the United States Courts
Department of Technology Services

CJA eVoucher

Expert User Manual

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Contents

Introduction 3
Browser Compatibility 3
Accessing the CJA eVoucher Program 4
Single Login Profile vs. Court Profile 5
Creating a Single Login Profile 6
Forgotten Password – Legacy 10
Signing In to eVoucher 12
Single Login Profile (SLP) 13
Account Information 14
Security Questions 16
Link Your eVoucher Accounts to Your Single Login Profile (SLP) 17
Court Profile 19
Expert Info 20
Billing Info 21
    Self-Employed Service Provider 22
    Company Employed 23
Expert Specialties 24
Menu and Home Page 25
Expert vs. Expert Enter 27
CJA-21/31 Entry 28
    Entering Services 30
    Entering Expenses 31
    Claim Status 32
    Documents 33
    Signing and Submitting to Court 34
Returned Vouchers 35
Printing a CJA-21 Form 36
Reports 36

Introduction

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

- Online submission of vouchers and authorizations by attorneys and experts.
- Line-item auditing of vouchers by judges and court staff.
- The ability to attach PDF documentation to vouchers and authorizations.
- Automatic email notification to attorneys on approval or rejection of vouchers.
- Electronic transfer to the circuit for excess approval.
- Panel management tools and reports for attorney appointments.
- Built-in reporting for budgeting and analysis.

Browser Compatibility

CJA eVoucher is compatible with the following browsers:

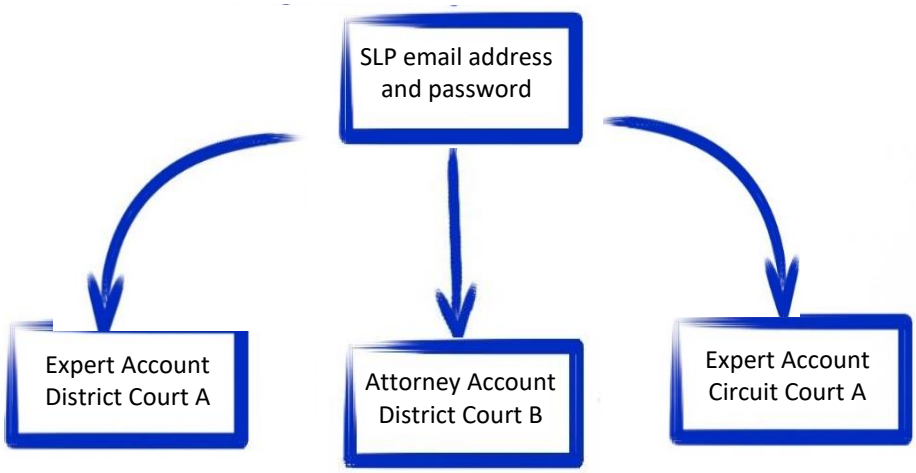
- Internet Explorer 10.1 (with Compatibility Mode)
- Internet Explorer 11
- Edge 16
- Firefox 57
- Chrome 62
- Safari 10.1

Accessing the CJA eVoucher Program

Prior to version 6.4, if you had eVoucher accounts in multiple courts, you were required to sign out of eVoucher and sign in to each individual court account in which you wanted to work. You had a separate username and password assigned by each individual court. Starting with version 6.4, you can now create a Single Login Profile (SLP) with a single email address and password that can be linked to each eVoucher account you have. You can now switch from one eVoucher account to another from within the eVoucher application without the need to log off.

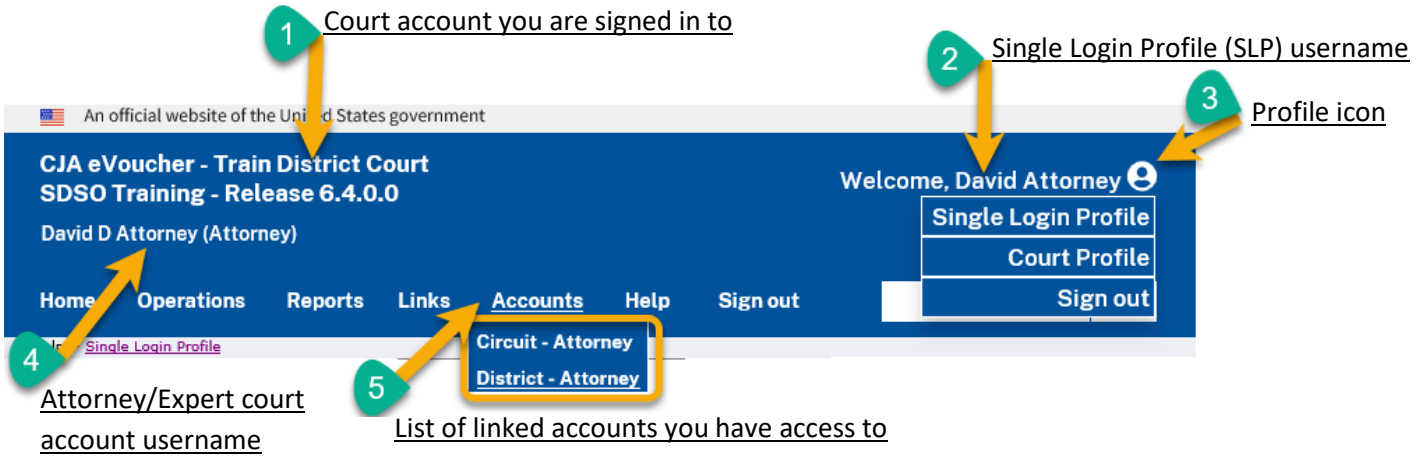
Note: If you have more than one eVoucher account, you must designate one account as the default account; the court used to create your Single Login Profile (SLP) automatically becomes your default court, unless you change it.

Single Login Profile for David D. Expert



Single Login Profile vs. Court Profile

Below are tips on how to view which court account you are in and who you are within that court.



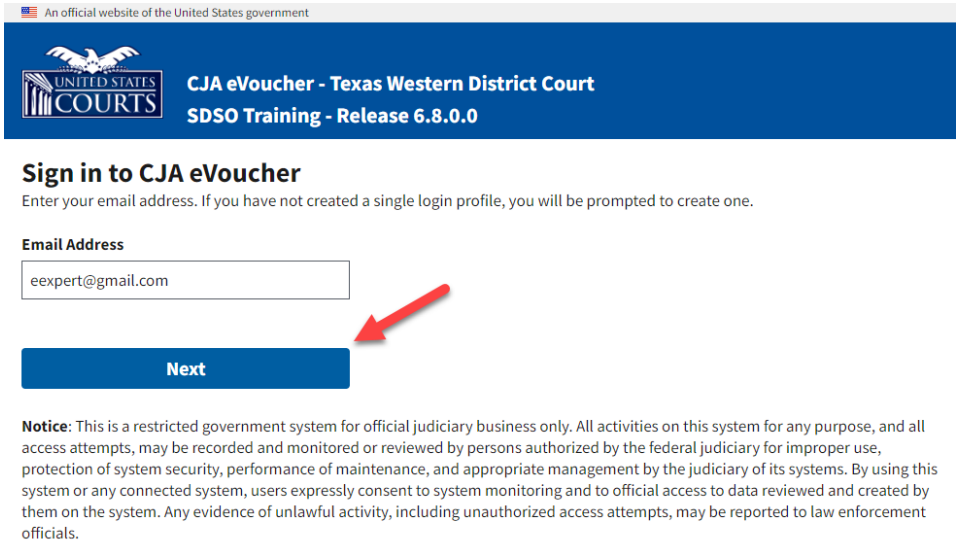
1. **Court account** – This is the court account you selected from the **Accounts** menu, showing the account to which you are signed in.
2. **Single Login Profile (SLP)** – This profile is attached to a person. Regardless of the court account you are accessing, you must always be signed in to your Single Login Profile (SLP).
3. **Profile icon** – You can access your Single Login Profile (SLP) or court profile, or sign out from here. You can also access these options from the **Help** menu.
4. **Court account username** – This displays the court user you are signed in as, and your full name and user role as they appear for that court profile.
5. **Accounts menu** – From this menu, you can access all of the court accounts to which you are linked.

Creating a Single Login Profile

You only need to create your Single Login Profile (SLP) once, or whenever you need to relink your account to your default court. To create your Single Login Profile (SLP), visit the eVoucher site for the district or circuit in which you already have an eVoucher account.

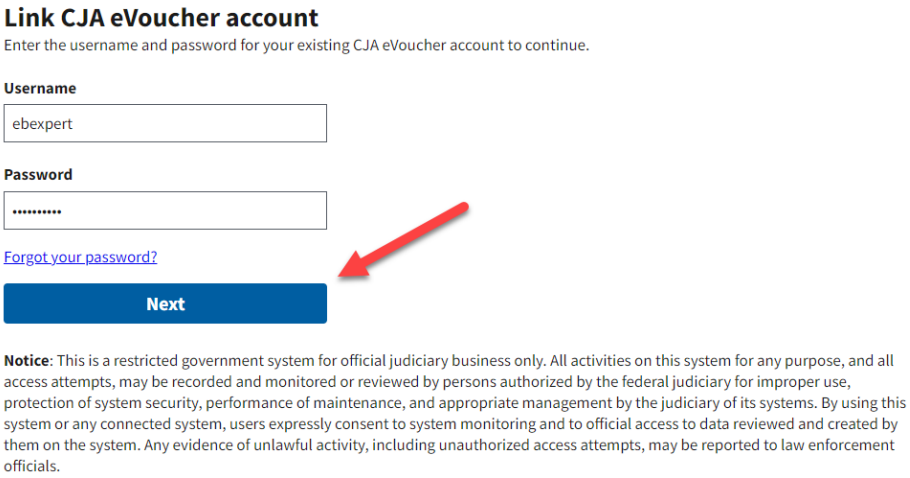
Step 1

In the **Email Address** field, enter your email address, and then click **Next**.



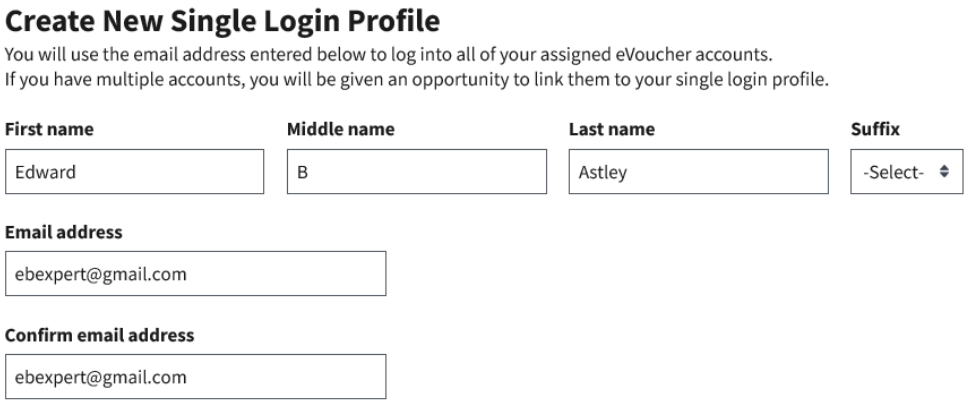
Step 2

If you use more than one court account, choose one, and then click **Next**.



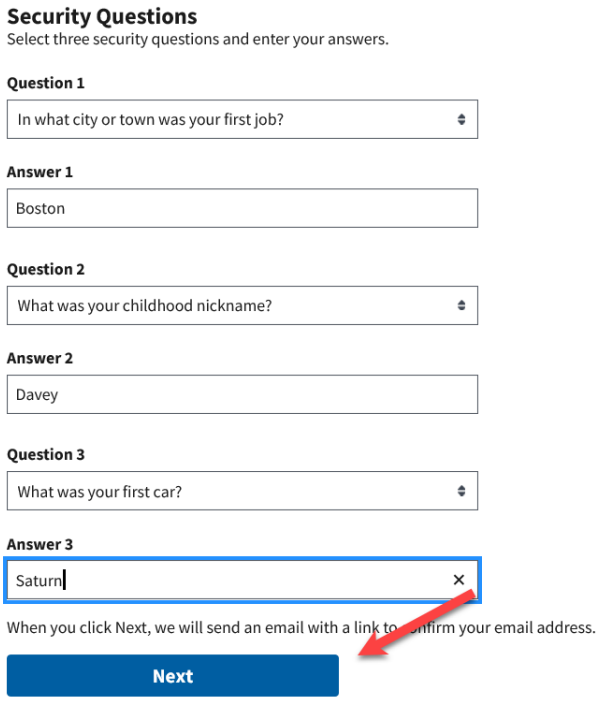
Step 3

On the Create New Single Login Profile screen, complete the **First name**, **Middle name**, **Last name**, and **Suffix** (if applicable) fields, and then enter and confirm your email address.



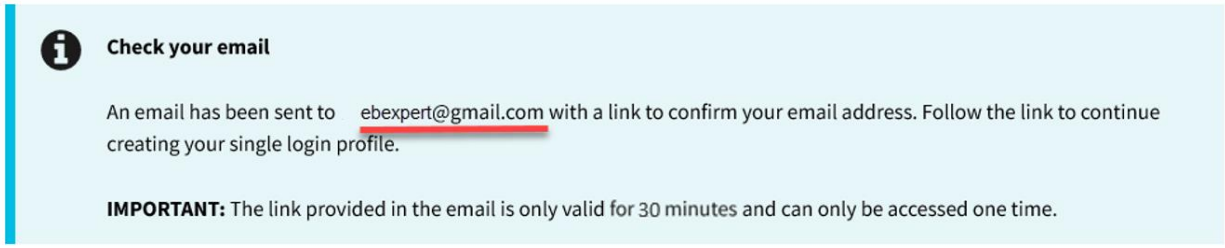
Step 4

Next, answer the security questions. In the Security Questions section, select a question from each question drop-down list, and then type your answer in the corresponding answer field. Click **Next**.



Step 5

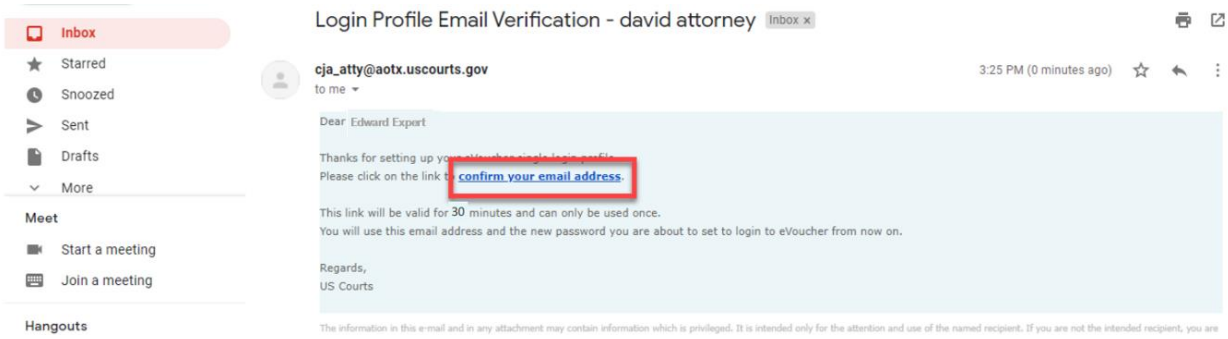
A message appears, stating that an email was sent to the email address you provided when creating your Single Login Profile (SLP).



Step 6

Go to your email account. Click the link in the email message to continue creating the profile.

Note: The email is valid for only 30 minutes and can be used only once. In the email message, click the **confirm your email address** link.

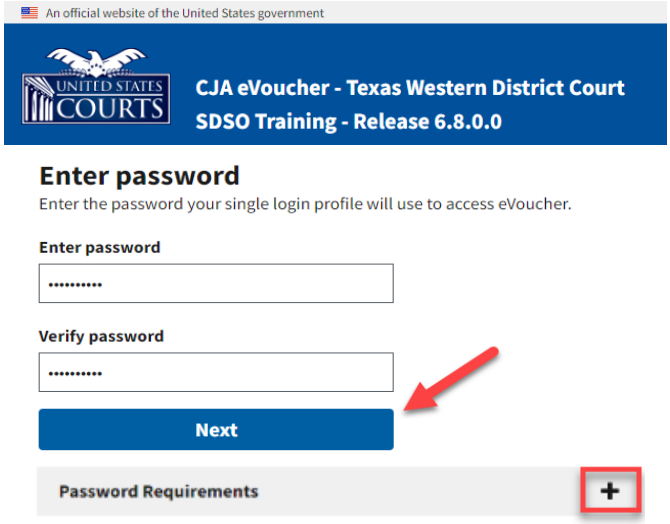


Step 7

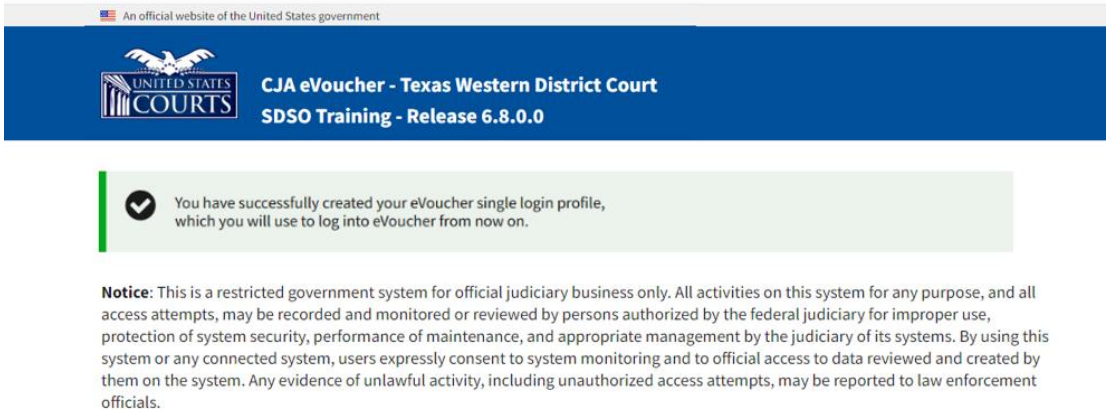
In the **Enter password** field, enter a new password to be used for your Single Login Profile (SLP). The new password must:

- Be at least eight characters.
- Be alphanumeric.
- Contain at least one lowercase and one uppercase character.
- Contain at least one special character.
- Not be a password used in the past 365 days.

To view current password requirements, click the plus sign (**+**) icon to expand the Password Requirements section. You must change your password every 180 days. In the **Verify password** field, verify the password, and then click **Next**.

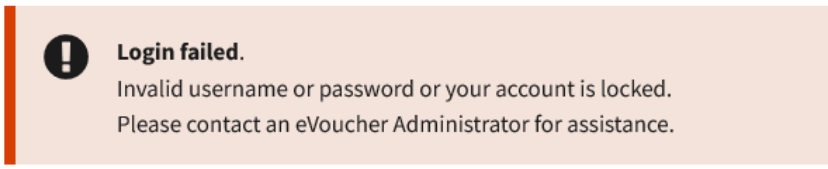


A success message appears, and you are directed to the eVoucher home page. <u>Your email address and new password are now your new login credentials</u>. You have now successfully created your Single Login Profile (SLP) and can use the email address you entered when setting up your Single Login Profile (SLP) to log in to all your CJA eVoucher accounts going forward.



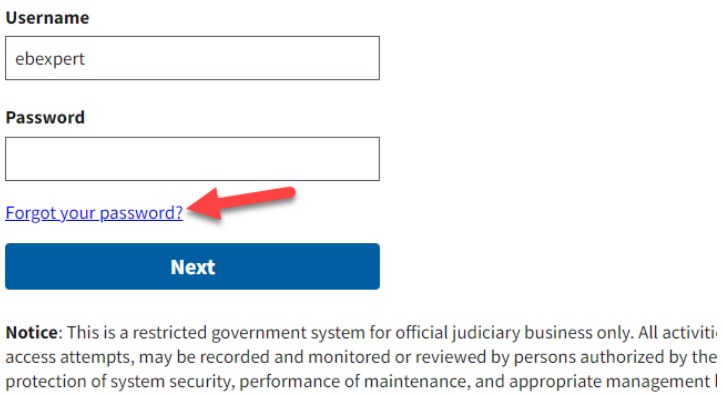
Forgotten Password – Legacy

If you have forgotten your current court password or entered it incorrectly, a login failed message appears. To recover your password, click the **Forgot your password?** link. Please note that you should follow this same process if you have not reset your password in the last 180 days. If you entered your password incorrectly more than six times and your account is locked, or if you are still unable to recover your password, contact your court administrator.



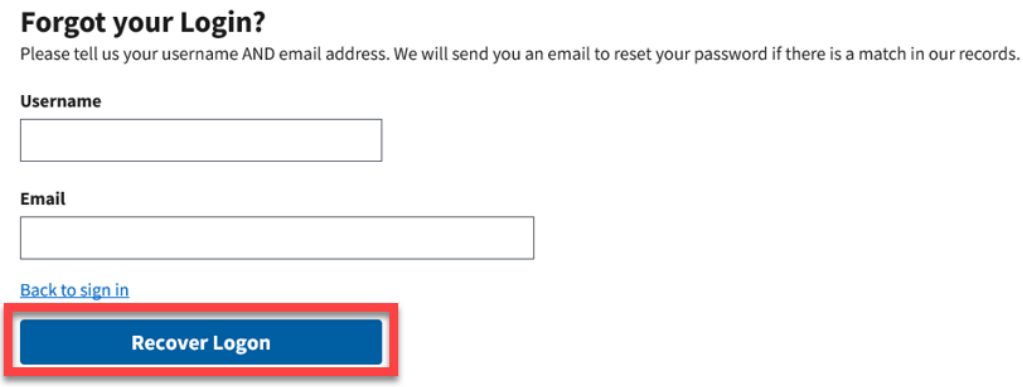
Step 1

Click the **Forgot your password?** link.



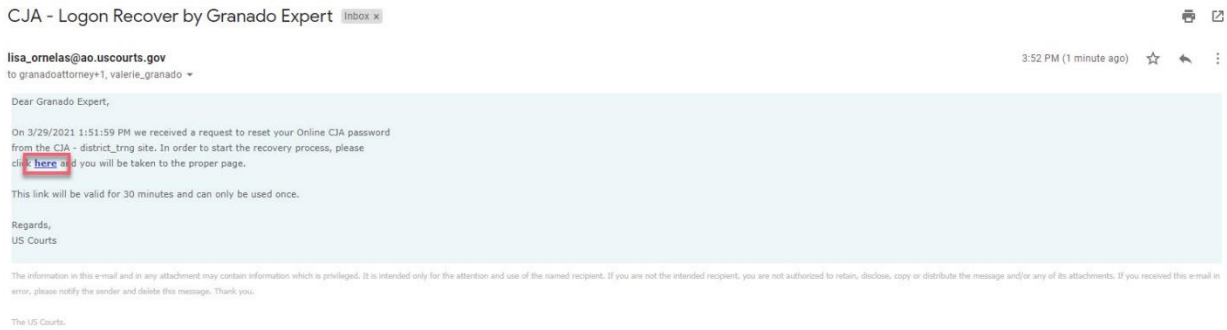
Step 2

In the **Username** and **Email** fields, enter your information, and then click **Recover Logon**.



Step 3

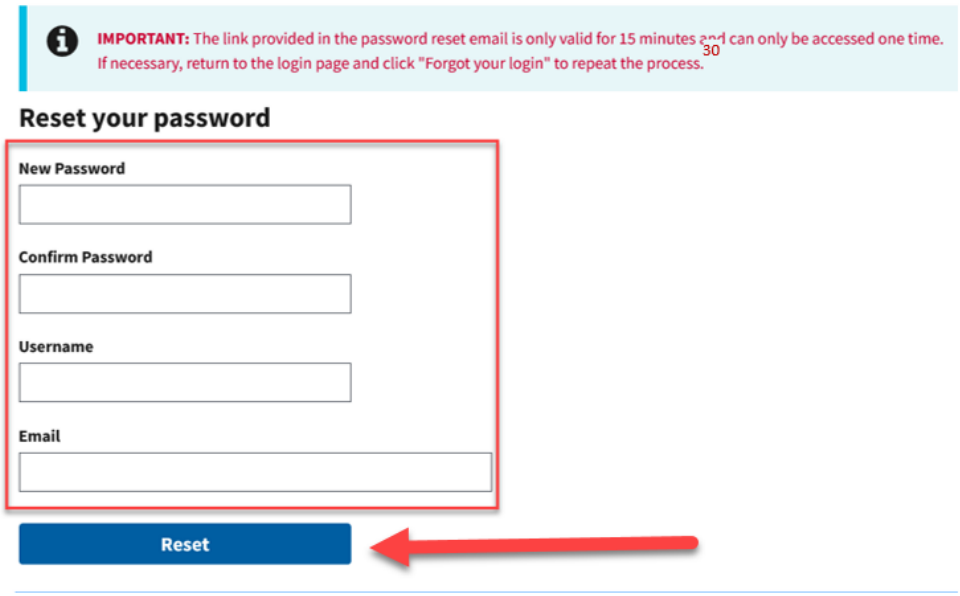
In the email message, click the **here** link to create a new password.



Note: The password link expires after 30 minutes and can be used only once. If you don't reset your password within that time, you must return to the login page and repeat the process.

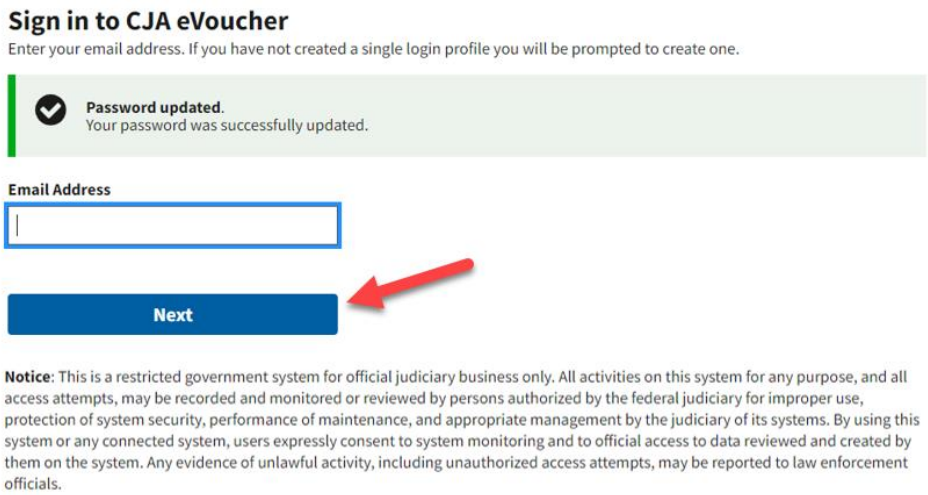
Step 4

You are taken to the Reset your password page, where you must create a new password to complete the Single Login Profile (SLP) process. Enter and confirm your new password, username, and email address, and then click **Reset**.



Step 5

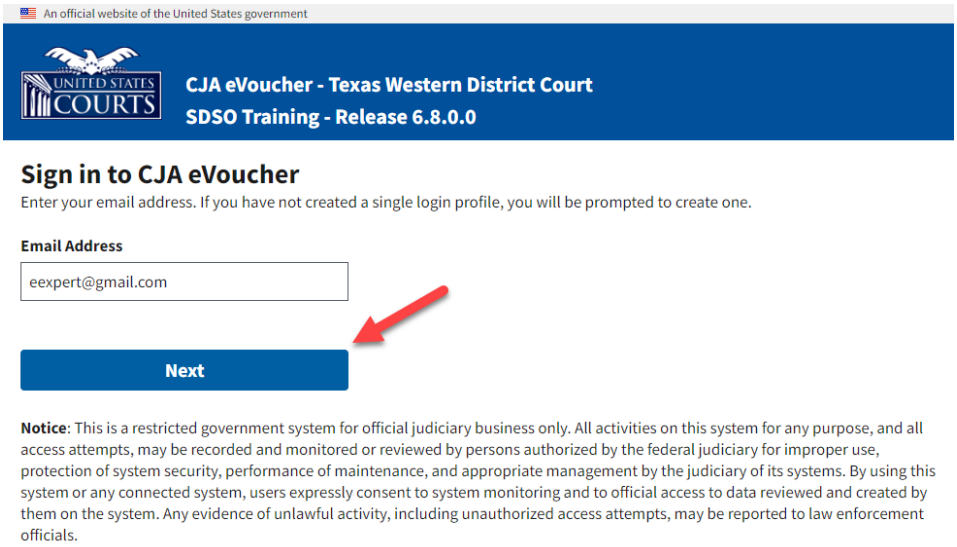
Your password is now reset. A success message appears, and you can either continue creating your Single Login Profile (SLP), or, if you have already created one, enter your email address and click **Next** to sign in to eVoucher.



Signing In to eVoucher

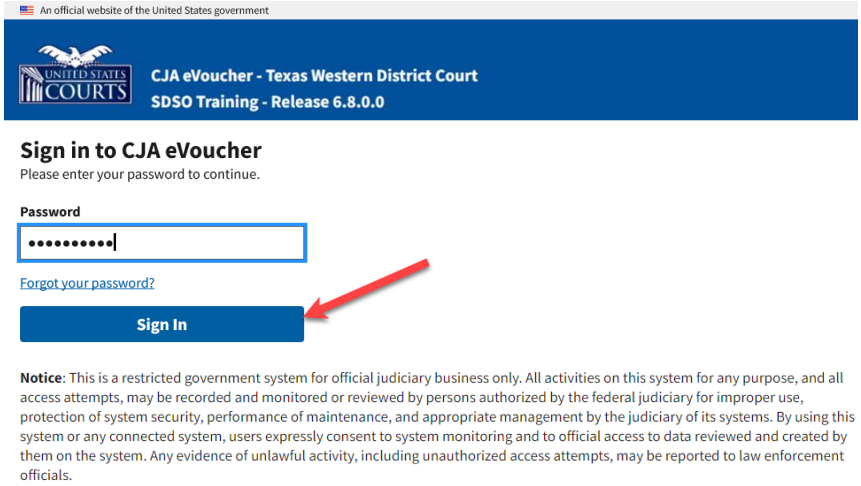
Step 1

On the eVoucher webpage, in the **Email Address** field, enter the email address you used to create your Single Login Profile (SLP), and then click **Next**. If you forget this email address, contact the security administrator for your court.



Step 2

In the **Password** field, enter your password, and then click **Sign In**. You have now successfully signed in to eVoucher.



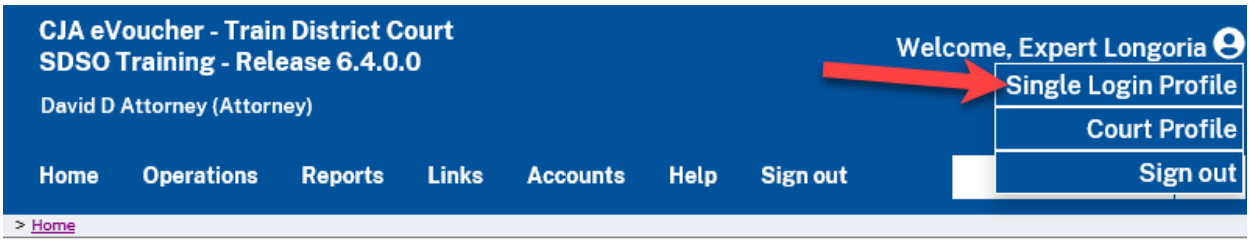
Single Login Profile (SLP)

In the Single Login Profile section, you can:

- Edit your first, middle, and last name.
- Edit your email address.
- Edit your Single Login Profile (SLP) password.
- Edit security questions.
- View your linked eVoucher accounts.
- Link your eVoucher accounts to your Single Login Profile (SLP).

Step 1

To access the Single Login Profile page, from the menu bar, click **Help**, and then click **Single Login Profile**, or click the **Single Login Profile** link to the right of the menu bar.

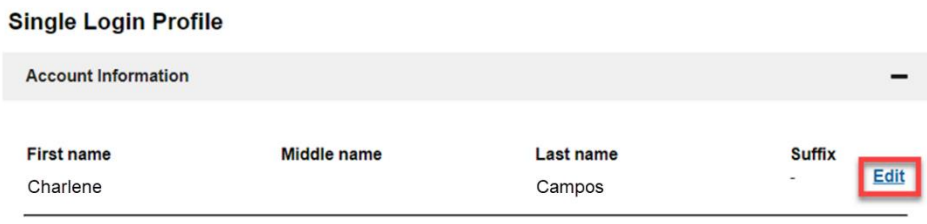


Account Information

In the Account Information section, you can change your name, email address, and password.

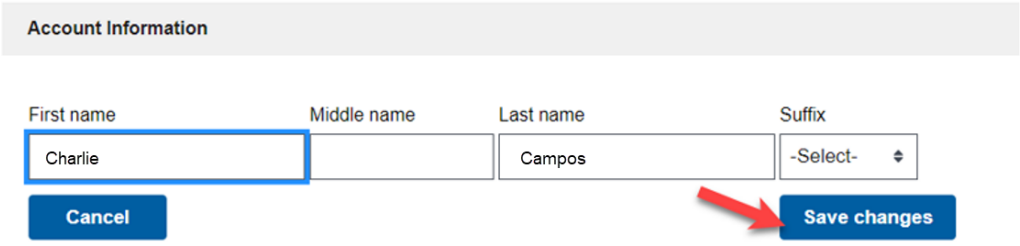
Step 1

To edit your name, click the **Edit** link to the right of your name.



Step 2

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



Step 3

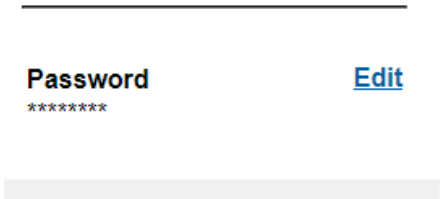
To edit your email address, click the **Edit** link to the right of your email address.

Step 4

Enter your new email address, confirm it, and then click **Save changes**.

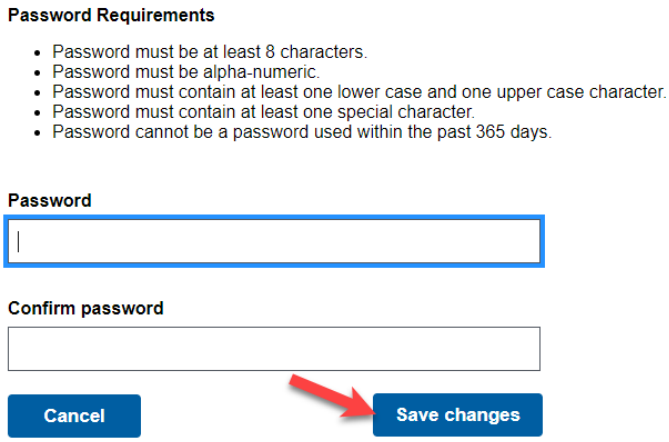
Step 5

To edit your password, click the **Edit** link to the right of your password.



Step 6

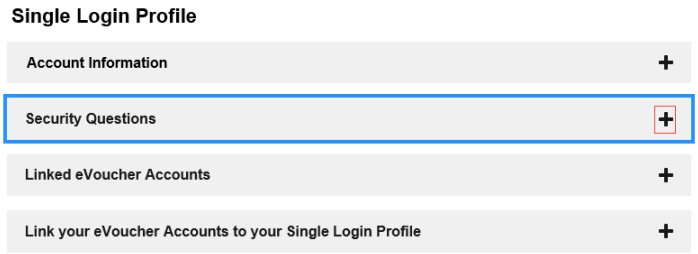
Make any necessary changes, and then click **Save changes**.



Security Questions

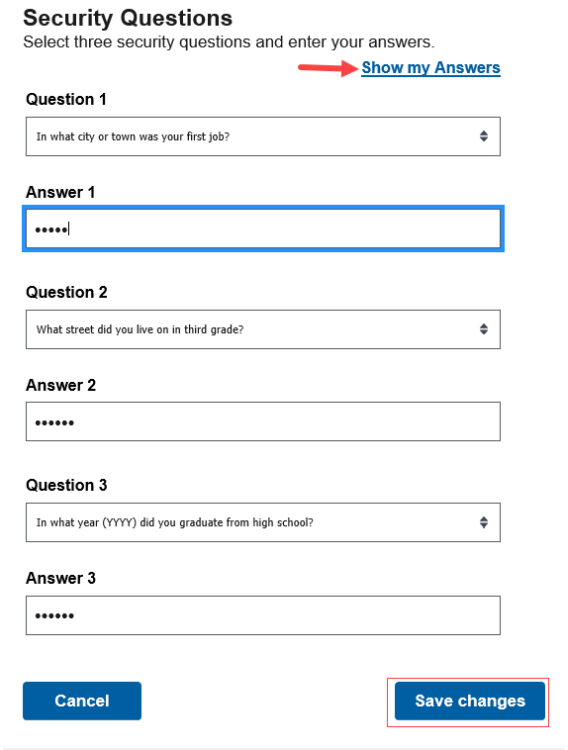
Step 1

To access your security questions, click the plus sign (**+**) icon to expand the **Security Questions** section.



Step 2

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



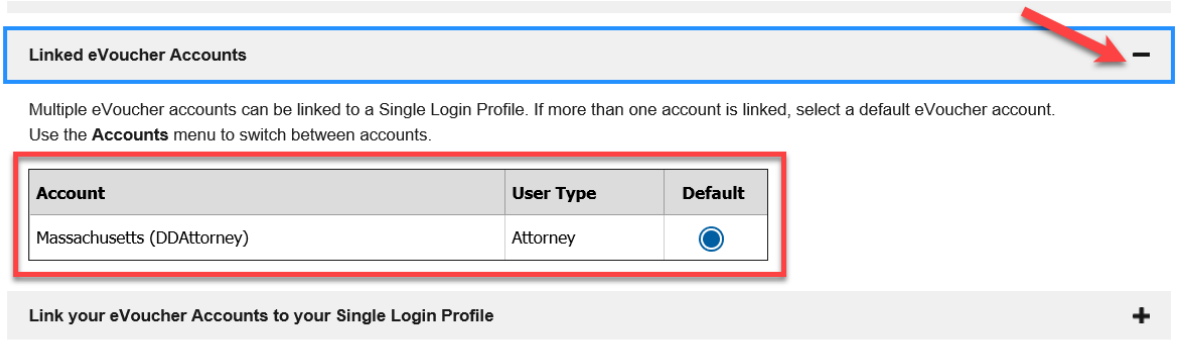
Note: The answers to the security questions are hidden. To view your answers, click the **Show my Answers** link.

Link Your eVoucher Accounts to Your Single Login Profile (SLP)

If you have more than one eVoucher account because you perform CJA-related services in more than one court, or if you have separate attorney and expert user logins in the same court, you must link those accounts to your Single Login Profile (SLP) to access them.

Step 1

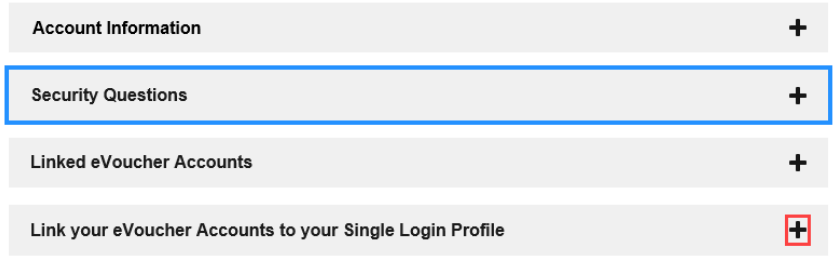
Click the plus or minus sign (**+**/**-**) icons to expand and collapse the Linked eVoucher Accounts section. When expanded, you can view any accounts that are currently linked. If this is your first time in the system, your only linked account is the one with the court you just logged in as. This is your default account.



Note: You can also change your default court in the Linked eVoucher Accounts section, but you will always initially be logged in through your default account.

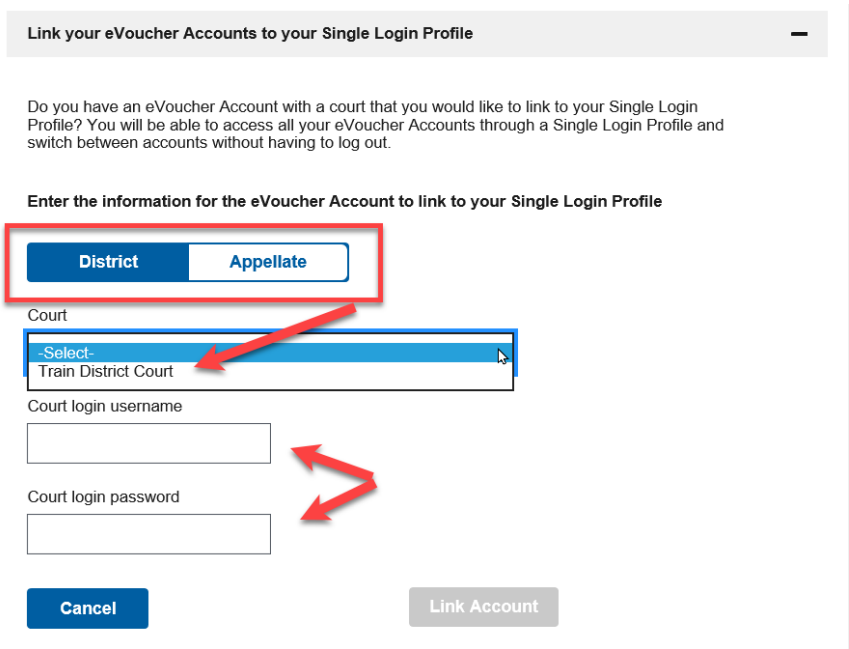
Step 2

If you need to sign in to other district or appellate courts, you must link to those accounts. Click the plus sign (**+**) icon to expand the **Link your eVoucher Accounts to your Single Login Profile** section.



Step 3

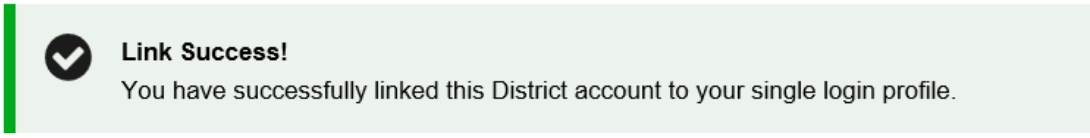
Click **District** or **Appellate** for the type of court you want to link to. From the **Court** drop-down list, select your court, and then in the **Court login username** and **Court login password** fields, enter your username and password for that court.



Step 4

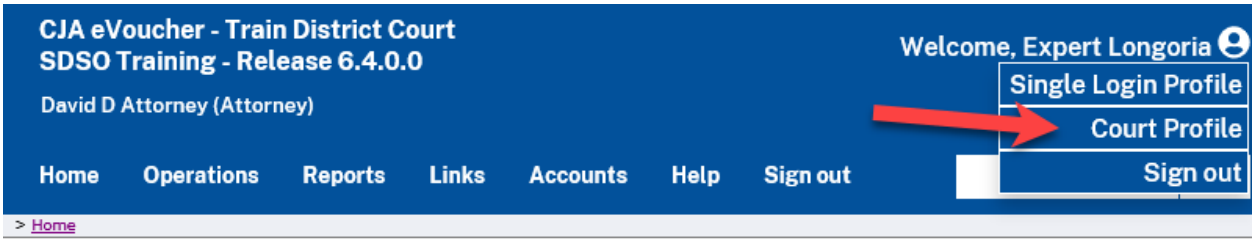
Click **Link Account**.

A success message appears, stating that your account(s) is now linked.



Court Profile

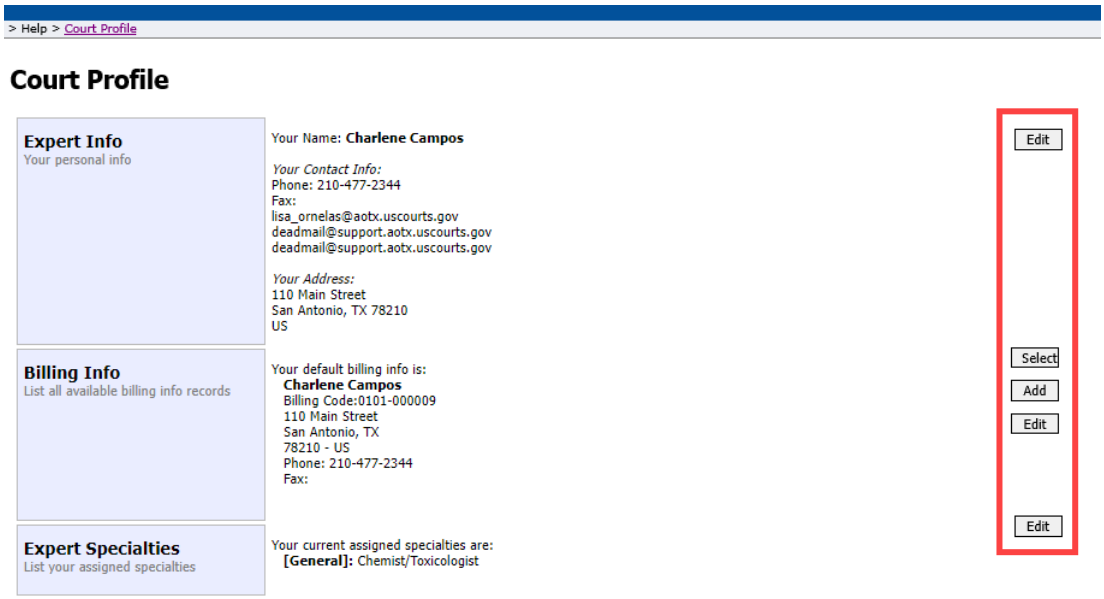
If given access by your court, you can make changes to your eVoucher account information. On the home page, point to your profile icon, and then click **Court Profile**.



On the Court Profile page, you can:

- Edit contact information, phone, email, and/or physical address.
- Update the Social Security number (SSN) or employee identification number (EIN). Copies of a W-9 must be provided to the court, and any changes to the SSN after the first logon must be made through the court.
- Enter expert specialties.
- Document any continuing legal education (CLE) attendance.

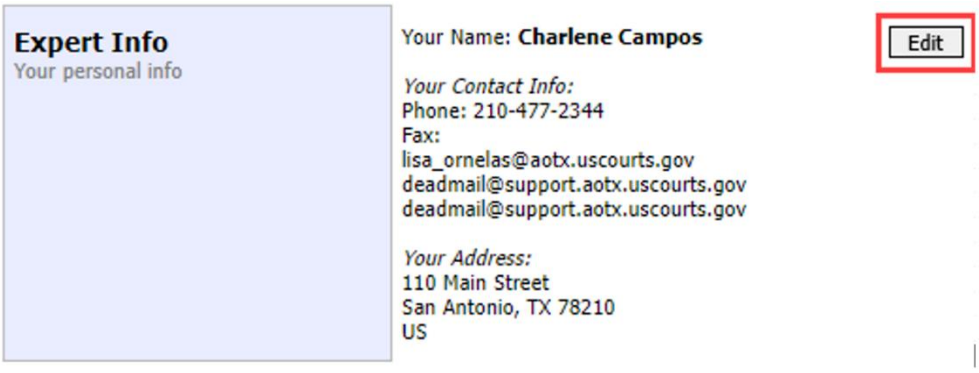
Click **Edit**, **Select**, **Add**, or **View** to the right of each section to expand the section and edit any information. Review your court profile and add any missing information as needed.



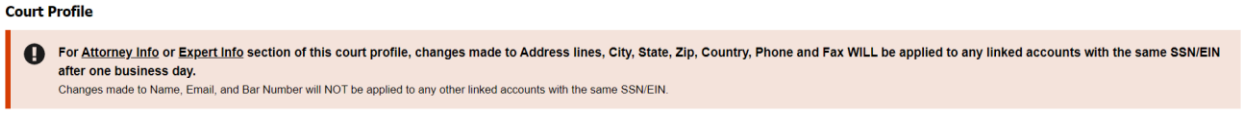
Expert Info

Step 1

In the Expert Info section, click **Edit** to access your personal information.

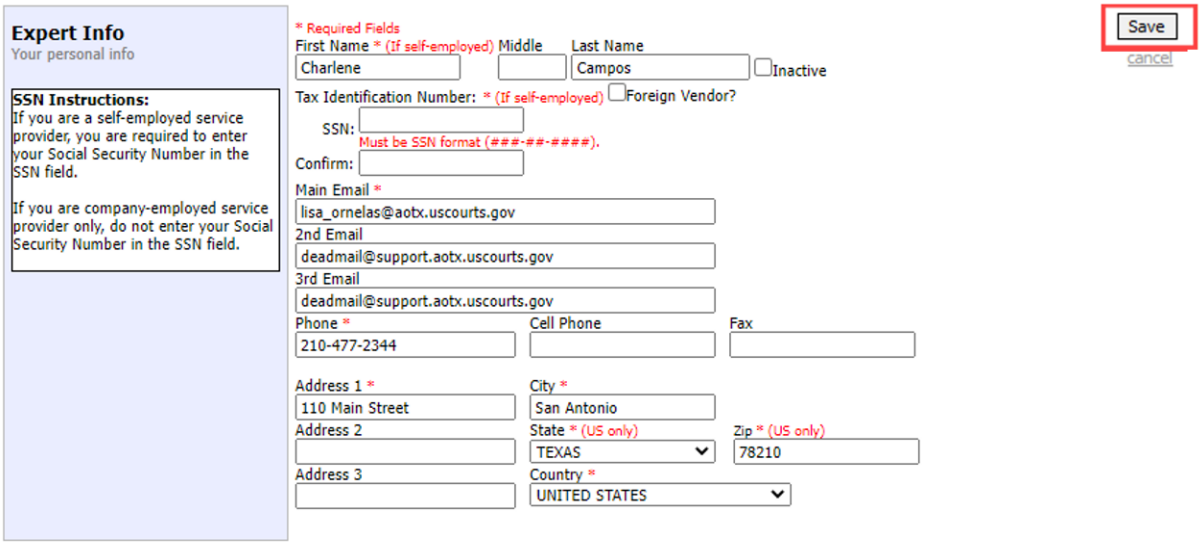


If you have a Single Login Profile (SLP) that is linked to more than one court, certain changes made to the Expert Info section of your court profile will be applied to any of your other linked accounts with the same SSN/EIN after one business day. This information displays at the top of your Court Profile page and details the sections that are affected across any of your other linked accounts:



Step 2

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



Note: If you are a self-employed service provider, you must enter an SSN in the user profile. If you are a company-employed service provider, you must enter an EIN. When the SSN is saved, it becomes read-only, and the record is transmitted to CJA6x. Once this occurs, only an eVoucher administrator can change an SSN, and you must contact your court to do so.

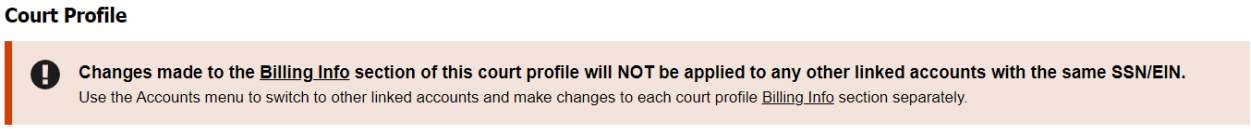
Billing Info

The Billing Info section of the profile contains the billing information for your services.

Step 1

Click **Add** if no billing information is available. Click **Edit** to change the information already entered.

If you have a Single Login Profile (SLP) that is linked to more than one court, changes made to the Billing Info section of your court profile will not be applied to any of your other linked accounts with the same SSN/EIN. This information displays at the top of your Court Profile page and describes the action necessary to apply changes to any of your other linked accounts:



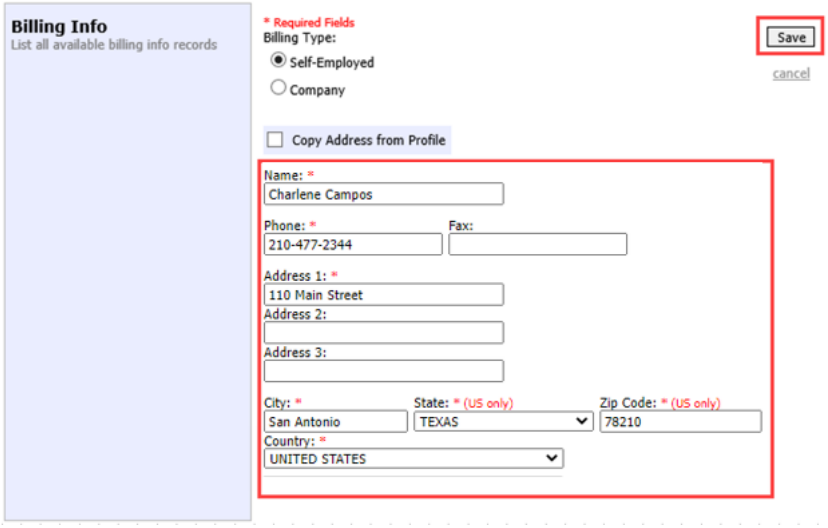
Step 2

The Billing Type group contains two radio buttons:

- Click the **Self-Employed** radio button if payments are made to your SSN.
- Click the **Company** radio button if payments are made to a firm's EIN.

Self-Employed Service Provider

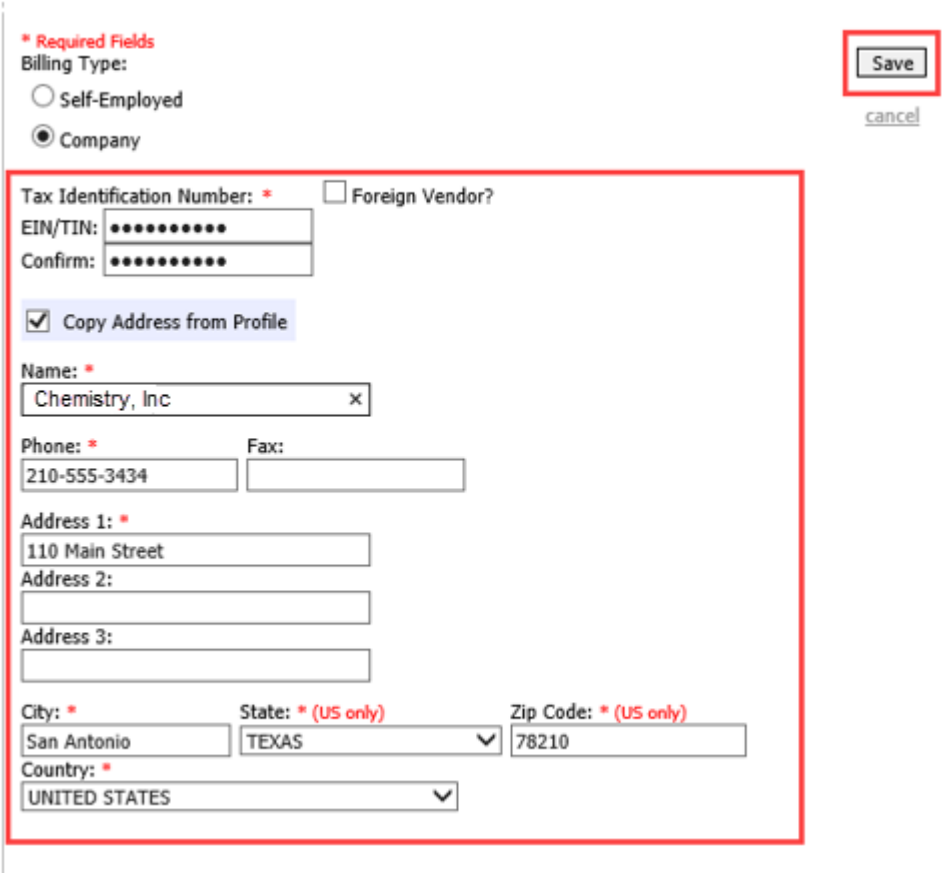
If you are a self-employed service provider, you must enter all required information, and then click **Save**.



Note: You can select the **Copy Address from Profile** check box to populate your information. If the payment address is different from the address in your profile, you should enter your information.

Company Employed

If you are a company-employed service provider, you are required to enter the company's EIN, name, and payment address information, and then click **Save**.



Notes:

- Payments cannot be made if the SSN or EIN is missing from your profile. This is a requirement of the payment system with which eVoucher interfaces.
- Validations have been added to billing information to ensure the data is in the proper format to be sent to the payment system.
- The system alerts you if there are errors with your billing information. Errors must be fixed before payments can be made.
- The SSN or EIN cannot be changed once it has been synced with the interface. Only the CJA6XAdmin user has rights to change SSNs.
- Add new or additional billing records if the billing information changes. Do not edit the existing record.
- Billing information must be complete to submit a voucher in CJA eVoucher.
- You or the attorney for whom you are providing services must choose the billing information you wish to use when creating vouchers or authorizations.

Expert Specialties

The Expert Specialties section lists any specialties for which you are approved for eVoucher billing.

Changes made in this section are not applied to any of your other linked accounts. This information is noted at the top of your Court Profile page.

Court Profile

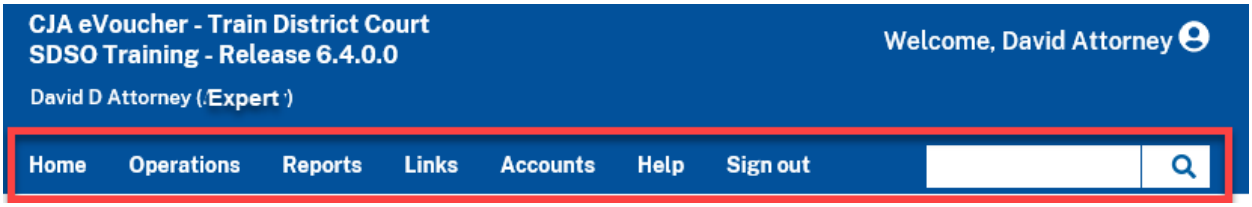
Changes made to this court profile will not be applied to any other linked accounts.
Use the Accounts menu to switch to other linked accounts and make changes to each court profile separately.

Step 1

Select the check box(es) for any specialties that apply to you.

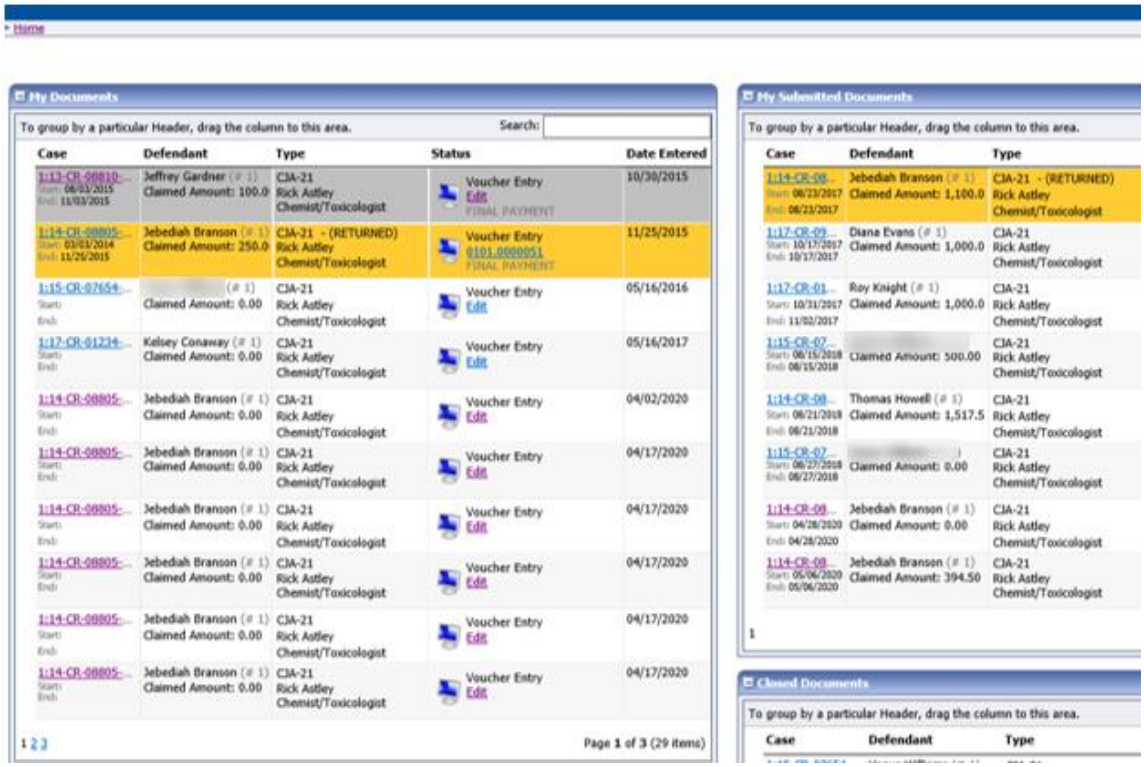
Menu and Home Page

Use the menu bar to navigate to the different areas of the application.



Menu Bar Item	Description
Home	Click to access the eVoucher home page.
Operations	Click to search for specific appointments.
Reports	Click to view selected reports you can run on your appointments.
Links	Click to access links to CJA resources such as forms, guides, publications, etc.
Accounts	Click to access your different court accounts.
Help	Click to access: • Another link to your Single Login Profile (SLP). • Another link to your court profile. • The Contact Us email address. • The privacy notice. • eVoucher help documentation for attorneys and experts.
Sign out	Click to sign out of the eVoucher program.

The home page provides access to information about your cases and billing information that you submit, or the billing information the attorney submits on their behalf.



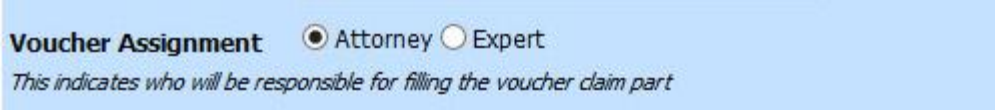
Section Name	Contents
My Documents	This section contains documents that you are currently working on or that have been created on your behalf by the attorneys. These documents are waiting for you to take action.
My Submitted Documents	This section contains vouchers for you that have been submitted to the court for payment.
Closed Documents	This section contains documents that have been paid or approved by the court. Closed documents only display for open cases. Closed documents display until they are archived and/or for 60 days after the appointment is terminated. They are still accessible through the Appointment page.

Expert vs. Expert Enter

CJA eVoucher allows two designations for experts to complete the voucher: Expert and Expert Enter. When you log on, a list of all your documents appears on the home page.

Step 1

Click the **Expert** radio button to log on to eVoucher.



Step 2

View any documents the attorney is creating on your behalf.

Step 3

Verify the information is correct and run reports or copies of the CJA-21 or CJA-31.

The Expert Enter right allows you to complete your voucher after the attorney has created it. If you have these privileges, the attorney can choose to let you complete the voucher. You can then enter the correct information and submit the voucher back to the attorney for approval.

CJA-21/31 Entry

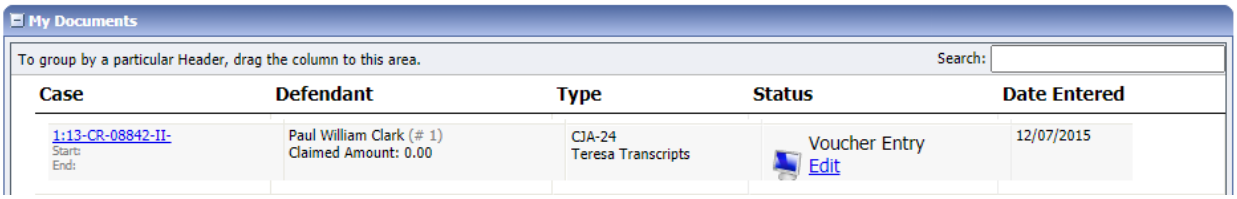
The attorney creates the CJA-21 or CJA-31 voucher. If you have Expert Enter rights, the attorney can choose to let you enter the services and expenses. You will receive an email informing you that a voucher has been created on your behalf and that you can enter your information on the voucher.

Step 1

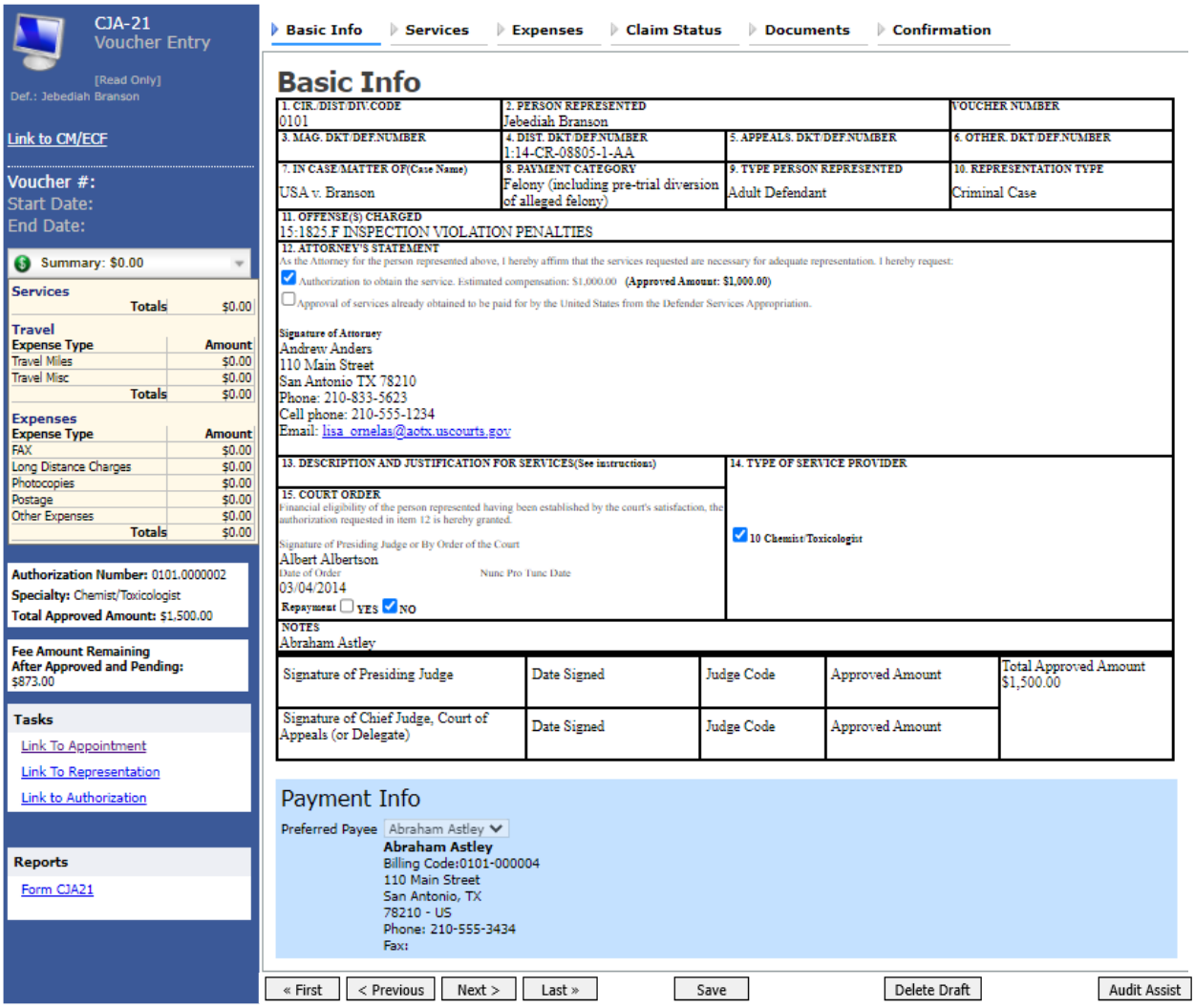
Log on to the eVoucher application. The voucher should appear in the My Documents section of your home page.

Step 2

To enter your fees and expenses, in the Status column, click the **Edit** link.



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



Notes:

- To avoid data loss, frequently save any entries made to a voucher.
- To delete a voucher, click **Delete Draft** at any time prior to submitting it.
- To check for warnings or errors in the document, click **Audit Assist** at any time.
- To navigate, click the tabs or the navigation buttons in the progress bar.

Entering Services

Line-item time entries should be entered on the Services page. Both in-court and out-of-court time should be recorded here.

Step 1

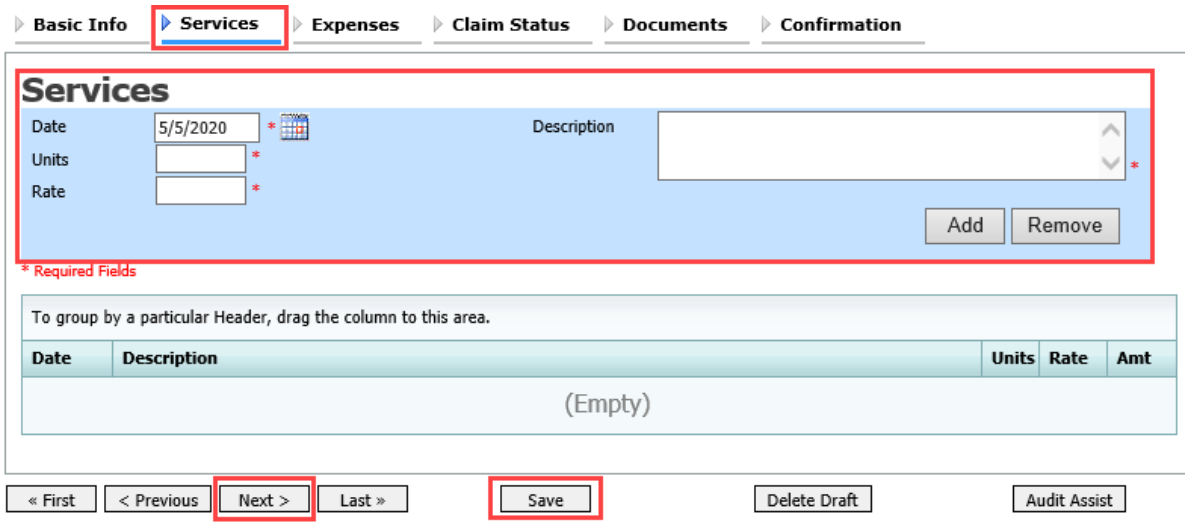
To enter your service fees and expenses, on the Basic Info page, click the **Services** tab, or click **Next** on the progress bar. Required fields are marked with a red asterisk.

Step 2

Enter the date of the service, the number of hours billed, and the rate. A description of the service provided is also required.

Step 3

Click **Add**. There is no auto-save feature in eVoucher, so click **Save** after every few additions. If you try to navigate to another section without saving, a dialog box appears, prompting you to save.



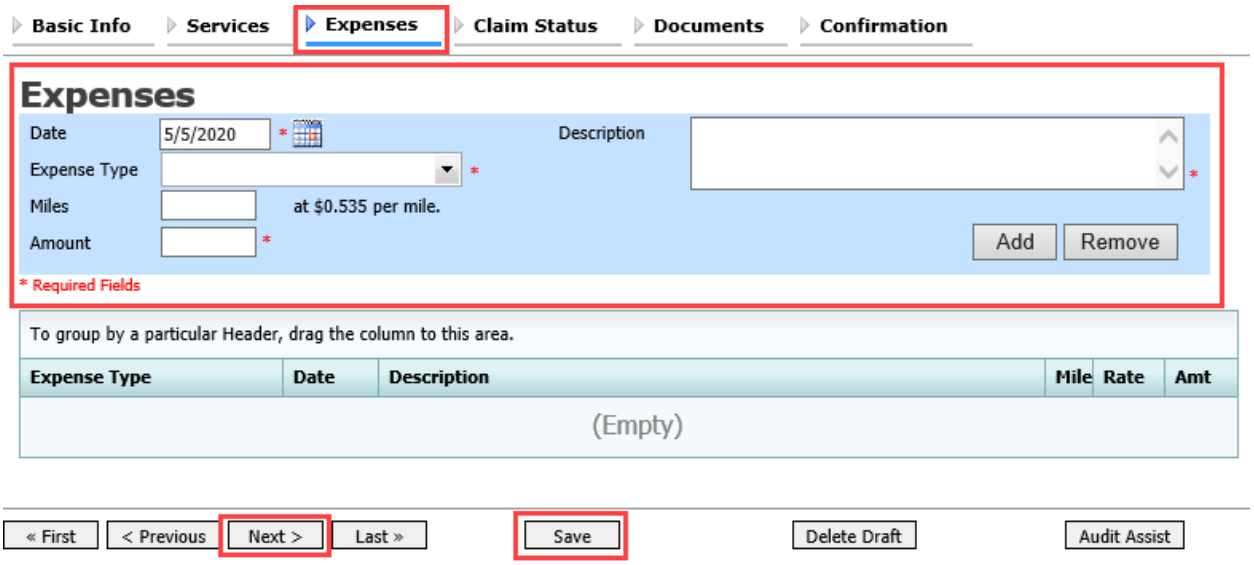
Entering Expenses

Step 1

Click the **Expenses** tab, or click **Next** on the progress bar.

Step 2

Enter the expenses, click **Add**, and then click **Save**.



Claim Status

Step 1

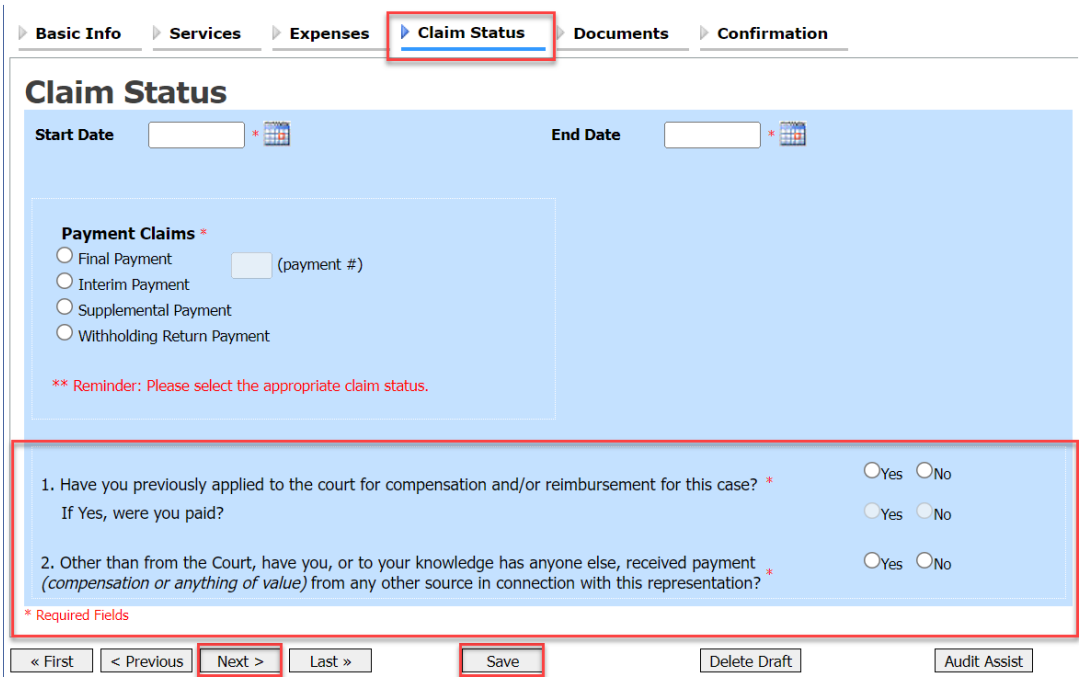
Click the **Claim Status** tab, or click **Next** on the progress bar.

Step 2

In the **Start Date** field, enter the start date from the services or the expenses entry, whichever is earliest. If necessary, go back to the Expenses and Services sections and click the **Date** header to sort by the earliest date of services.

Step 3

Answer all the questions regarding previous payments in this case, and then click **Save**.



Radio Button	Payment Claims Description
Final Payment	Request payment after all services have been completed.
Interim Payment	Request payment throughout the appointment, but each court's practice may differ. If using this type of payment, indicate the number of interim payments.
Supplemental Payment	Request payment due to a missed or forgotten receipt after the final payment has been submitted.
Withholding Return Payment	Request return payment of withheld funds. The attorney can submit a blank (no services or expenses) CJA-20/30/21/31 at the end of the case.

Documents

Step 1

Click the **Documents** tab, or click **Next** on the progress bar.

Step 2

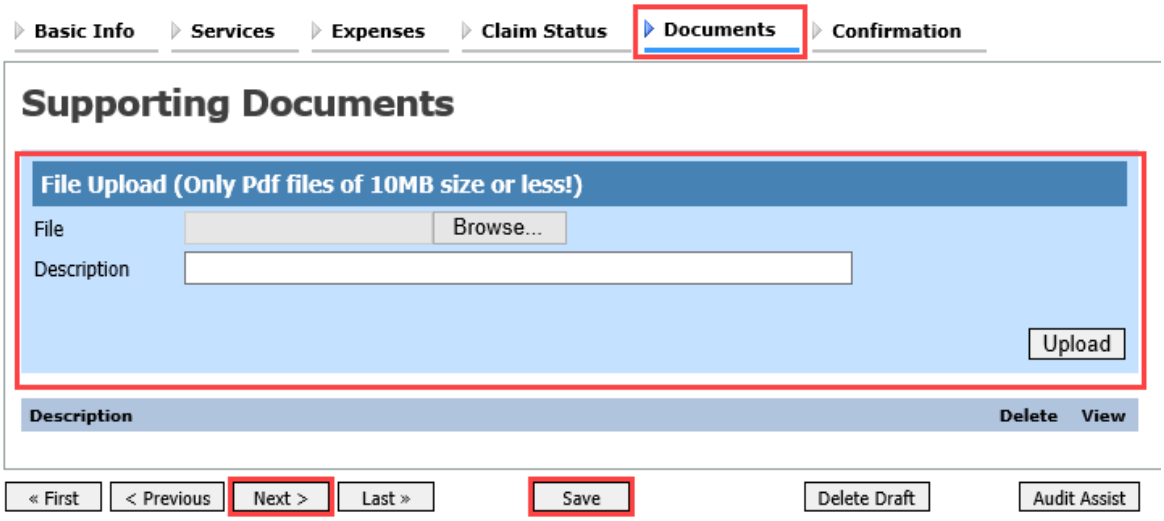
To add an attachment, to the right of the **File** field, click **Browse** to locate your file.

Step 3

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

Step 4

Click **Upload**. The attachment and description are added to the voucher and appear at the bottom of the Description column. Click **Save**.



Signing and Submitting to Court

When you have added all voucher entries, you are ready to sign and submit your voucher to the court.

Step 1

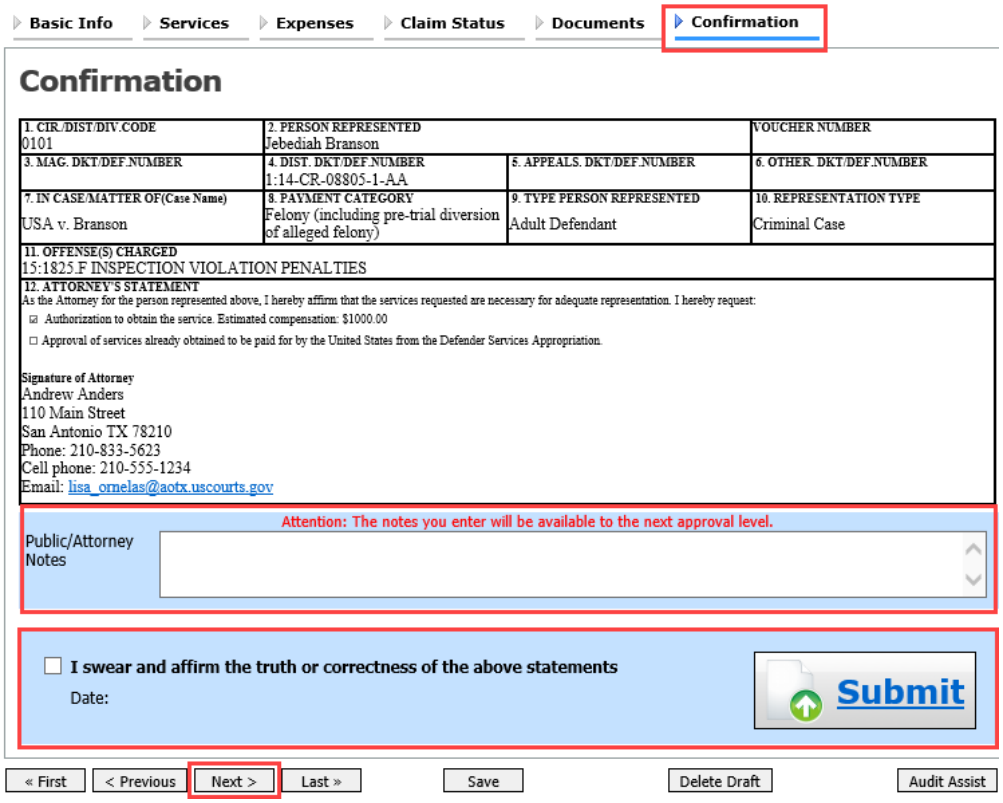
Click the **Confirmation** tab, or click **Next** on the progress bar. The Confirmation page appears, reflecting all entries from the previous screens.

Step 2

Verify the information is correct, and then scroll to the bottom of the screen.

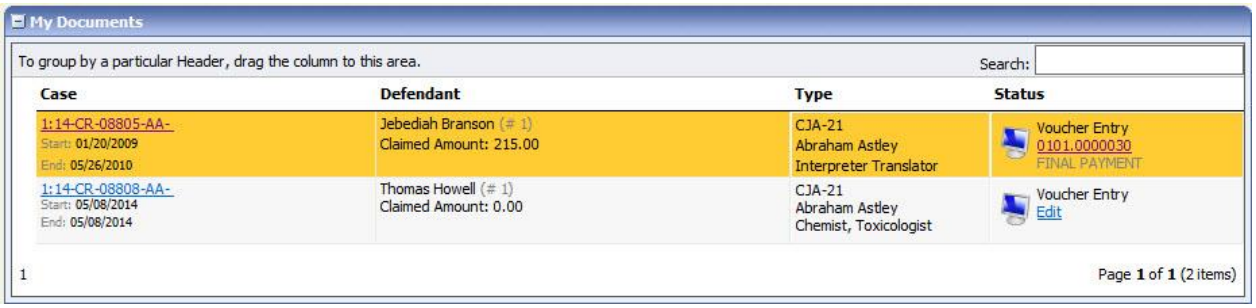
Step 3

In the **Public/Attorney Notes** field, you can include any notes to the court. Select the check box to swear to and affirm the accuracy of the authorization, which automatically time stamps it. Click **Submit**.



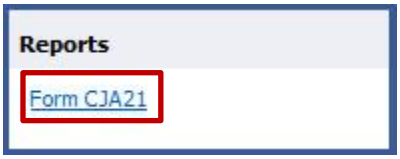
Returned Vouchers

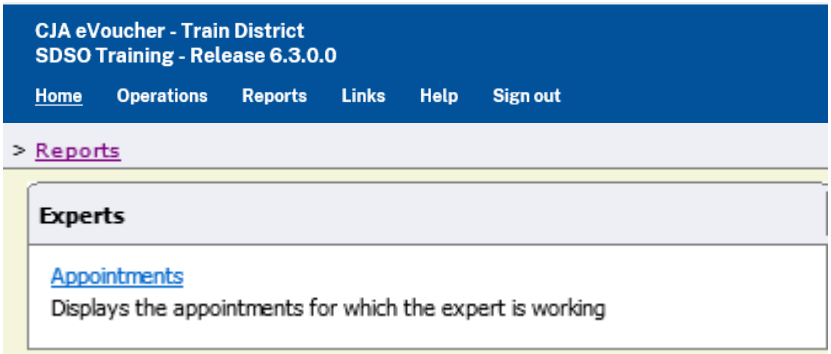
The attorney can return the voucher to the service provider for correction or additional documentation. Any returned vouchers appear highlighted in gold.



Printing a CJA-21 Form

From the left side panel, click the **Form CJA21** link to print a standard version of the voucher.



Reports

Any reports to which you may have access display on the Reports page. From the menu bar at the top of the screen, click **Reports** to see which reports are accessible.