

Submitting an Authorization Request for Expert Services

Step
1

Open the Appointment record.

Step
2

Click **Create** from the Authorization template.

Create New Voucher

AUTH

Authorization for Expert and other
Services

Create

The **Basic Info** screen will open.

Note:

There is **NOT AN AUTOSAVE** function on this program. You must click **SAVE** periodically in order to save your work.

Basic Info			
1. CIR./DIST./DIV.CODE 0101	2. PERSON REPRESENTED Jebediah Branson		VOUCHER NUMBER
3. MAG. DKT./DEF.NUMBER	4. DIST. DKT./DEF.NUMBER 1:14-CR-08805-1-AA	5. APPEALS. DKT./DEF.NUMBER	6. OTHER. DKT./DEF.NUMBER
7. IN CASE/MATTER OF(Case Name) USA v. Branson	8. PAYMENT CATEGORY Felony (including pre-trial diversion of alleged felony)	9. TYPE PERSON REPRESENTED Adult Defendant	10. REPRESENTATION TYPE Criminal Case
11. OFFENSE(S) CHARGED 15:1825.F INSPECTION VIOLATION PENALTIES			
12. ATTORNEY'S NAME AND MAILING ADDRESS Andrew Anders - Bar Number: 12345 110 Main Street San Antonio TX 78210 Phone: 210-833-5623		13. COURT ORDER <input type="checkbox"/> A Associate <input type="checkbox"/> C Co-Counsel <input type="checkbox"/> F Subs for Federal Defender <input checked="" type="checkbox"/> O Appointing Counsel <input type="checkbox"/> P Subs for Panel Attorney <input type="checkbox"/> R Subs for Retained Attorney <input type="checkbox"/> Y Standby Counsel Prior Attorney's Name Appointment Dates Signature of Presiding Judge or By Order of the Court Albert Albertson Date of Order Nunc Pro Tunc Date 3/3/2014 Repayment <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
14. LAW FIRM NAME AND MAILING ADDRESS			

Order Date	<input type="text"/>
Nunc Pro Tunc Date	<input type="text"/>
Repayment	<input type="checkbox"/>
Estimated Amount	\$ <input type="text"/> *
Authorized Amount	\$ <input type="text"/>
Basis of Estimate	<input type="text"/>
Description	<input type="text"/>
Service Type	<input type="text"/> *
Requested Provider	<input type="text"/>

Submitting an Authorization Request for Expert Services (cont'd)

Step
3

Complete the information in the blue section at the bottom of the screen. This to include:

- Estimated Amount
- Basis for Estimate
- Service Type from drop-down
- Name of Service Provider

The screenshot shows a web form with a light blue background. The form fields are as follows:

- Order Date**: Text input field.
- Nunc Pro Tunc Date**: Text input field.
- Repayment**: Check box.
- Estimated Amount**: Text input field with a dollar sign and a red asterisk, containing the value "8000.00".
- Authorized Amount**: Text input field with a dollar sign.
- Basis of Estimate**: Text input field containing "100 hours at \$80/hour".
- Description**: Text area with up and down arrow controls.
- Service Type**: Drop-down menu with "Investigator" selected and a red asterisk.
- Requested Provider**: Text input field containing "John Doe".

At the bottom of the form is a navigation bar with the following buttons: « First, < Previous, Next >, Last », Save, and Delete Draft. The "Next >" and "Save" buttons are highlighted with red boxes.

Step
4

Click **Save**.

Step
5

Click the **Supporting Documents** tab or click the **Next** option located on the Progress bar.

Submitting an Authorization Request for Expert Services (cont'd)

Step 1 To add the attachment, click the **Browse** button to locate your file.

Note:
Documents are limited to PDF files, and must be 10 MB or less.

Step 2 Add a description of the attachment.

Step 3 Click **Upload**.

The screenshot shows the 'Supporting Documents' form. At the top, there is a blue header with the text 'File Upload (Only Pdf files of 10MB size or less!)'. Below this, there is a 'File' input field with a 'Browse...' button to its right. Underneath the 'File' field is a 'Description' text input field. In the bottom right corner of the form, there is an 'Upload' button.

The attachment and description will be uploaded and appear in the bottom of the Description section.

The screenshot shows the 'Supporting Documents' form after the upload. The 'File Upload' section is still visible at the top. Below it, the 'Description' section now contains a table of uploaded documents. At the bottom of the form, there are navigation buttons: '<< First', '< Previous', 'Next >', 'Last >>', 'Save', and 'Delete Draft'. The 'Next >' and 'Save' buttons are highlighted with red boxes.

Description	Delete	View
Proposed order	Delete	View
Affidavit in Support of Expert Service Request	Delete	View
Expert's Curriculum Vitae	Delete	View

Step 4 Click **SAVE**.

Submitting an Authorization Request for Expert Services (cont'd)

Step 5 Click **Next**.

The Confirmation screen will open.

Step 6 Check the box to swear and affirm to the accuracy of the voucher. The voucher will automatically be time stamped.

Note:

You may include any notes to the Court in the Public/Attorney Notes section.

Step 7 Click **Submit** to send to the Court.

A confirmation screen will appear indicating the previous action was successful and the Authorization Request has been submitted.

Step 8 Click **Home Page** to return to the home page. Click **Appointment Page** if you wish to create additional document for this appointment.

The Authorization Request will now appear in the “My Submitted Documents” section on the Attorney home page.