DEFENDERDATA (DD7)
ATTORNEY INSTRUCTIONS

HOME SCREEN

- **Accept or Reject case - Home Screen.** This should be done ASAP on dd7 (whether you are accepting or rejecting the case). If you are not able to do this right away, then email Jill Crist – assignments@assigned.org.
- **Lists Open Cases –**Case will remain "open" until you have been paid on the case. After the case has closed, you can still go to any case by clicking **Search.**
- **Alerts/Tasks**
- **Schedule-** events will appear if you list events in the **Calendar**

CASE TAB

- **File Information –** assignment dates, client information, Case Team, Closing Information, Charges, Court, Judge
- **Report of Financial Status –** Create RFS (go to documents, ACP forms, select Family or Criminal RFS. The form will populate with all the client information. Print and have the client sign. Take the form with you for the 1st meeting with the client. Upload the form to the Case Screen (+ sign of "Report of Financial Status". If you need to change the RFS, alert Yvonne Banks and she will delete the uploaded form so you can resubmit a new RFS.
- **Closing Information –** must be completed before you can submit a voucher. (Disposing Judge, Disposing Court, Closed Date and Opposing Attorney- if applicable).

CHARGES(CRIMINAL) OR PETITIONS (FAMILY) TAB

- **Petitions listed, Role, Status (disposition) and Status Date**
- **Status and Status Date-** must be completed before submitting a voucher

CALENDAR

- **Use for Future Events**

TIME

- **Enter your time for payment.** In Court time (click box). Date of event, event (be sure the correct $ amount is shown). $75 Family Court, $75 Felonies, $60 misdemeanors and violations.
- **Hours –** watch decimal points.
- **Notes -**You can add notes to each time entry also. Be aware that those notes on the time entry screen will transfer to the voucher for all reviewing to see.
- **Description –** ie-add one if you want to explain why an event took longer than normal

EXPENSES

- **Pre-Auth –** must ask for prior approval for Experts, Investigators, Interpreters, Transcripts, Social Workers, Etc. YOU MUST USE THE "PRE-AUTH" button. This will open up a box that you will then populate. See the instruction on this screen typed in blue.
- **Paying for an expense yourself.** Enter your expense below the blue type. Event – select "5000 Attorney Exp"; Payee – Select yourself; Date – Date of expense and add a comment to explain expense. Valid expenses could be: Process Server, Medical Records copies, Transcripts (you are not reimbursed for things like mileage, parking or postage).

NOTES

- **Attorney notes they create are confidential and can only be seen by you.**
- **Alert or Task.** If you want to send a note to an employee at Assigned Counsel, you must create a new note, write the note, click save and then click the Task box and select the employee you want to task or Select the employee you want to Alert by clicking the + sign after you have first saved the note.

DOCUMENTS

- **Confidential** – documents that you upload here can ONLY be seen by you. If you load the RFS here, we are not able to view it.
- **Documents Assigned Counsel creates –** ie – if you receive an approval for an expert, the necessary documentation with our approval will be found here for you to print.

CLOSING A CASE: BEFORE YOU CREATE the voucher you will need to do the following:

1. **Case Tab – Enter the Closing Information – Disposing Judge, Disposing Court, Closed Date and Opposing Attorney (if the opposing attorney's name is available).**
2. **RFS uploaded.** If you were not able to have the RFS completed and signed, you MUST state a reason in the NOTES section and alert Yvonne Banks or Eileen Gallagher as to why there is no RFS attached. If you don't your voucher will be rejected and you will need to submit a response before the voucher can go through the review process.
3. **Charge Tab – complete Status, Status Date, (for criminal cases - Sentencing Info and TRIAL CONDUCTED (Non-Jury/Jury)**
4. **Time Entry** – all dates have to be between referral date and close date. Also check that all entries are at the correct rate for the file type. ($75 or $60/hr).
    - Time not billed (DON'T CREATE A VOUCHER). **Send an alert to Eileen Gallagher that you are closing case and not billing.** The case will be removed from your home page as an open case.
5. **Expenses –** if you paid out of pocket (process server, etc) enter on Expense tab
6. **REFRESH**

VOUCHER

- **Create voucher – + New and select your name and save.**
  BEFORE YOUR CLICK SUBMIT – Upload any pertinent documents (excess fee affidavit, receipt if asking for expense reimbursement, if appeal – brief and cover sheet). Upper right corner, + Voucher Attachments. MUST be done BEFORE you click submit.
- **Check voucher –** If the time is wrong, you forgot time, forgot expense. Delete the voucher you just created by clicking the red X. The red X will not be there after you click SUBMIT voucher. Correct your time, etc. REFRESH. Then recreate a NEW voucher.
- **Only 1 attorney voucher per case allowed**
- **When you are confident that voucher is OK, click SUBMIT VOUCHER**
- **Be sure the status reads "VALIDATED PENDING REVIEW"**
- **If not, answer the INFORMATION NEEDED that is listed.**

TO SPEED UP THE REVIEW OF YOUR VOUCHER:

- **Complete the voucher correctly**
- **Check status (VALIDATE PENDING)**
- **RFS attached**
- **Answer any alert/task from our staff ASAP**