

# **Court Appointed Counsel System Login**

Please log into the CAC website by clicking the link below or pasting it into your web browser.

https://www.its.courts.state.co.us/cac/

Enter Username and Password and select "Submit" to open the welcome screen.

Court Appointed Counsel	10 per
	to at the state
Username: Password:	
Submit Reset	
Your security is important to us Password Rules: Password should be a minimum of 8 characters.	
Password <b>must</b> contain at least - 1 Upper Case or Capital letter [A-Z] - 1 Lower Case letter [a-2]	
- 1 Number [0-9] Passwords will <b>not</b> be reusable for two years.	
Passwords should be changed every 60 days.	
For Software Support Please Contact JBITS Customer Service 1-800-404-2857	Email: softwaresupport@judicial.state.co.us
The system will be unavailable from 1am to 6am for sch	eduled maintenance.
The system will be unavailable from 1am to 6am for sch	eduled maintenance.

# **Problems Logging In**

If you have problems logging in or setting your password please contact our **ITS Group** at **1-855-264-2237** or **720-625-5500** (select option 1) or email at: <u>e-FilingSupport@judicial.state.co.us</u>

### Password rules

In 60 days, the system will prompt you to change this password again. Below are the guidelines/rules that need to be used when creating a new password:

- 1. Password must be a minimum of 8 characters long.
- 2. Must contain at least 1 capital letter
- 3. Must contain at least 1 number.
- 4. May not include symbols or punctuation (\*&, !, ?, \_, etc.).
- 5. Passwords should be changed every 60 days; old passwords are not re-usable for 2 years.

# **Entering and Submitting Invoices**

Once logged in, you will begin at the Welcome screen (your "home" screen). On the welcome screen, you have the authorization to pay a law firm form, Chief Justice Directive's, SCAO contact names and other information, and the connection to your reports and billing.

To begin entering invoices, select "Counsel Options" from the upper right-hand part of the welcome screen. This will bring you to the page where you will be able to select flat fee or hourly invoices.

	Court Appointed Counse	
		6
s <mark>k Links</mark> Select - ✓	Show Counsel Information	Counsel Options
Documents	Welcome! Performin	g activities for DAVID TEST
sks ne bt <u>t</u>	Administrator's Office, Financial Services Division received and processed will result in your checks go	please complete a new W9 and submit it to State Court staff. Any invoices submitted prior to a new W9 being sing to the old address that is currently on record. Changing ange your billing information with the State of Colorado's
	If changing or leaving a law firm, please contact Sta staff to revise your billing information as appropria	ate Court Administrator's Office, Financial Services Division ate.
ms stitute W9 Form 12Pay Form pointment idelines	Respondent Parents' Counsel (ORPC) and requires that July 1, 2016. <u>All Respondent Parent Counsel (RPC) in</u> must be submitted through the Court Appointed Couns	t-92-103, as amended, C.R.S. establishes the Office of the t all existing appointments be transferred to the ORPC, effective voicing that includes service dates on or before June 30, 2016 sel System no later than July 10, 2016. The Department will not II RPC invoicing that includes services on or after July 1, 2016
	SCAO Contact Informat	tion Forms
	Financial Services Division Attn: Court Appointed Counsel Processing State Court Administrator's Office 1300 Broadway Denver, 80203-5600	Substitute W9 Form Authorization To Pay Law Firm Form
	Contact Direct	Email Banking
		ents@judicial.state.co.us
	Software Support (720) 625-5500 customers	support@judicial.state.co.us

# Flat Fee Invoices

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1) Under "Functions", select "Request Contract Payments by Appointment" and click on "Submit." This will bring up the "Request Contract Payments" screen (next page) which lists all billable flat fee appointments.

Your request may take a few minutes to display due to the amount retrieve from our database. Functions Request Contract Payments by Appointment Request Hourly Payments by Appointment List All Ap List Open A List Closed List Concur Request Contract Payments by Appointment Close An Appointment Request Concur Request Su Request Su Request Contract Payment Concur Request Concur Reques	
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Counsel Name: Tax Id: Type: Both Attorney & Non-Attorney Bar#: Statu Your request may take a few minutes to display due to the amoun retrieve from our database. Functions Request Contract Payments by Appointment Request Hourly Payments by Appointment Close An Appointment Close An Appointment Close An Appointment Statu Counsel Name: Tax Id: Type: Both Attorney & Non-Attorney Bar#: Statu	to the space
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W9 Form O Request Su O Request CO	ntract Obligation Ending Report
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• Request CC	bmitted Invoices Report
	FRS Payment Report
& Guidelines	ment History Report by Case Number
Submit Reset	

2) Find the appropriate case you would like to bill on, click on "Open Invoice" in the first column. This will bring you to the "Contract Payment Request" page (see examples of the mental health and truancy flat fee process below)

\*\*\*Make sure that you are adding a payment to the correct case number/district since case sequence numbers are duplicated across districts\*\*\*

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Select -	G	ounsel Name:		Та	x Id:	SSN:	
sks		pe: Both Attorney	& Non-Attor	2000 N.C.		V since 1981-12	2-08
<u></u>	Counsel Options	County & District	Start Date	Closed Date	Case Number	Party Name	Role
	Action	Appt Type	Payment Type	Payments Entered	Bills Paid	Max Amount	Amount
						Amounte	Approved
	Open Invoice	3-18 Arapahoe (District)	2019-05-15	Open	2019 MH	Announc	ста
	Open Invoice		2019-05-15 C (100%)	Open No	2019 MH No	\$923.00	
		Arapahoe (District) Mental Health 1-17					СТА
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If you have any questions regarding your appointments (i.e. appointment is not appearing on the Request Contract Payments List; appointment has incorrect appointment/start date; appointment is wrong case type; appointment is set up with the wrong respondent) please contact the court directly since they are responsible for entering appointments.

# **Mental Health Contract Flat Fee Billing**

- 1) Find the appropriate case you would like to bill on, click on "Open Invoice".
- 2) Enter the "Payment Service Date" (should be the appointment date for the initial or supplemental appointment).
- 3) Select the "Type of Payment Request" (Initial or Supplemental).
- 4) Make a selection in the "Client Meeting Section" generally it will be the first selection whereas you'll enter the date you first met with client (either in person, by phone, or written correspondence).
- 5) Click on "Add Invoice Item" at the bottom of the page.

T	ype: Both Attor	nev & Non-A	torney Bar#:	Status: ACT	V since 1981-12-08	
Appointment	Appointment	Start Date	Court Location	Case	Party Name	Payment Type
100265244	Mental Health	2019-05-15	Arapahoe (District)	2019 MH		Contract
<u>Counsel Options</u>	<u>View Prior Billi</u>		t Paymer		est	
			New Invoid	ce		
	Begin Date: 05/1					
	End Date: 05/1		-			
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		do not expec	t to, for the following	ng reason: (max 20	00 characters)	
						ahova is
	В	v entering thi	s payment request.	contractor attest	s that date indicated	
		-	s payment request, rue and contractor		s that date indicated ntain records of all w	
	a	ccurate and ti	rue and contractor	has and will mai		ork and

**\*\*\*Note:** If the CAC system does not accept a payment item as you expected, there is a problem with one of three things, all have to do with your dates:

- 1. Look at the numbering format you have used in <u>all</u> your dates (has to be MM/DD/YYYY)
- 2. Your invoice begin and end dates (cannot start before your appointment date)
- 3. Your Dates of Service (have to use dates that are within your invoice begin and end dates)\*\*\*

6) Confirm all data in the contract payment request. If you do wish to create the invoice, select "Submit".

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elect - 🔻	Com	nsel Name:		Tax Io		SSN:	
Branchar		Both Attorney	& Man Attam		and the second second	/ since 1981-12	00
Documents	Type			Court	Status: ACTV		
	Appointment	Appointment Type	Start Date	Location	Case	Party Name	Payment Type
s	100229018		2017-09-05 B	roomfield County	2017 MH		Contract
Eclipse -	L		1/L		<u>ر</u>		
f	Coursel Only	Cor	n <mark>firm C</mark>	ontract	Pavme	nt Reau	lest
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		Invoice: ment Number: Begin Date: End Date: Service Date: Service Type: Payment: Indigency:	2137541455- 1 2139709889 2017-09-05 2019-09-05 2019-05-15 Mental Healt Subsequent Mental Healt Yes, Indigent	State Payment Remaining	us: Pendi Maxin Counse Payment ar requests pend balance <u>befor</u> Current Inv	ng Submis num Allowed: el Owes State: nount to date: ding approval: re this request: woice Amount:	ssion \$ 865.00 \$ 0.00 \$ 273.00 \$ 0.00 \$ 592.00

# **Truancy Contract Flat Fee Billing**

- 1) Find the appropriate case you would like to bill on, click on "Open Invoice".
- 2) Enter the "Payment Service Date" (should be the appointment date).
- 3) Select Initial under "Type of Payment Request" (initial) \*\*\*Truancy Contract Flat Fee billing does not allow for a supplemental or subsequent fees as MH contract billing does\*\*\*.
- 4) Make a selection in the "Client Meeting Section" generally it will be the first selection whereas you'll enter the date you first met with client (either in person, by phone, or written correspondence).
- 5) Click on "Add Invoice Item" at the bottom of the page.

		Both Attor					8
	Appointment	Appointmen Type	Date	Location	Case	Name	Typ
	100121453	Truancy	2013-06-18	Denver (Juvenile)			Pontr
Counsel Options	View Prior	Billing					
			Contra	ct Paymen	t Deque	et	
			Contra	ct I aymen	r Reque	st	
				New Invoi	ice		
Invoice F	Begin Date: 00	5/18/2013					
	e End Date: 00						
Payment Se	ervice Date:	06/18/2013	E13 -(F	Required) MM/DD/YY	CY Y		
Con	atract Type:	Truancy					
Type of Paymer	nt Request:	<ul> <li>Initial</li> </ul>					
Client Meet	ing Section						
		I have met	with my app	pointed client on: 6	/20/2013		
	select one:			oointed client on: 6			
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6) Confirm all data in the contract payment request. If you wish to create invoice, select "Submit".

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	Appointment	Appointment Type		Court	Case	Party Name	Payment Type	
	100121453		2013-06-18	Denver (Juvenile)			t	
Counsel		Invoice: 21372		nfirm Cont St			quest Submissio	on
Counsel	Payment 1	Number: 21384	290455- 0 156785			ending s	Submissio	\$ 750.0
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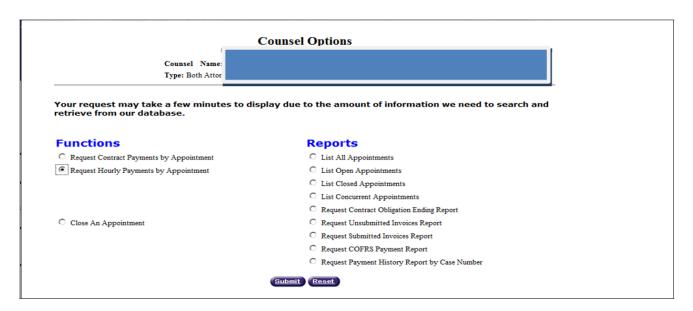
#### **Contract Period Expiration**

If your contract period has expired, the system will update your contract appointment to hourly automatically. Simply enter the case in your "Request Contract Payment by Appointment" screen. Enter the date of activity (which is now after the contract end date), select an option in the "Client Meeting Section" and select "Add Invoice Item". The system will generate a message that says, "You have entered a date after the contract period, do you want to convert this case to hourly?" select "Yes" and "Submit". You will now be able to bill the case as hourly.

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		unsel Name:			ax Id:	SSN:	
	Тур	e: Both Attorne	y & Non-At	tomey Bar#:	Status: ACT	V since 1981-12-	08
	Appointment	Appointment Type	Start Date	Court Location	Case	Party Name	Payment Type
	100164633	Mental Health	2015-01-27	Adams (Brighton	) 2015 MH		Contract
	C	hanga	ontro	et Annoi	ntmont	to Hour	<b>x</b> 7
ervice Date 05/ selecting "Yes" pending urly bill. After requesting	15/2019 is contract Paymen	beyond va t Request (not y	alid cont et submitted	) will be removed.			•

### **Hourly Invoices**

1) Under Functions on the Counsel Options page, select "Request Hourly Payments by Appointment" and click submit. This will bring up the "Request Hourly Payments" screen which lists all billable hourly appointments.



2) For the appropriate case, click on "Open Invoice" in the first column. This will bring you to the "Current Unsubmitted Invoice" page. \*\*\*Make sure that you are adding a payment to the correct case number/district since case sequence numbers are duplicated across districts \*\*\*

Quick Links - Select -	Counsel Options	Counsel 3 Type: Both	Name:	est Hourly	Payments		
<u>Create/Update</u> Appointment		County & District	Start Date	Closed Date	Case Number	Party Name	Role
Work With Counsel Payment Approval	Action	Appt Type	Payment Type	Payments Entered	Bills Paid	Max	Amount Approved
Reports FSD Reports	Open	69-2 Denver (Juvenile)	2013-12-03	Open	2013 JV 625		СТА
Court Locations	Invoice	Truancy	H (100%)	No	No		\$0.00
Maintenance Create/Update Counsel	Open	69-2 Denver (Juvenile)	2013-11-13	Open	2007 JV 367		СТА
Appointment Maintenance	Invoice	Paternity Support	H (100%)	No	No		\$0.00
Contract Maintenance Checks Received	Open	69-2 Denver (Juvenile)	2013-11-12	Open	2010 JV 2309		СТА
Forms	Invoice	Truancy	H (100%)	Yes	Yes		\$97.50
Substitute W9 Form		69-2					

If you have any questions regarding your appointments (i.e. appointment is not appearing on the Request Hourly Payments screen; appointment has incorrect appointment/start date; appointment is wrong case type; appointment is set up as contract status and should be hourly or appointment is set up as hourly status and should be contract, appointment is set up with the wrong respondent) please contact the court directly since it is only at the court level that appointments may be created and modified.

- 3) Confirm information in the header (entered by the Courts) to ensure correct court location and appointment type.
- 4) Enter the "Invoice Begin Date" and "Invoice End Date", using the format of MM/DD/YYYY (if you use any other format you'll receive a validation error message)

\*\*\*Note that the invoice begin date is the first date of your activity for this invoice and the invoice end date is the last date of activity for this invoice\*\*\*

Validation Error						
You must correct the following error(s) before	ore proceeding:					
<ul> <li>Service Date should be a valid date</li> </ul>						
Service Date should be a valid date	within the invoice dates					
Quick Links			(		1	
- Select -		Counsel Name				
Help Documents		Type: Both Atto	mey & Non-Attorney Bar#:	9781 Status: ACTV since 1981-12-08		
- Select -		Appointment Appointmen Type	t Start Court Date Location	Case Party P	ayment Type	
Tasks		33168572 Probate	1998-01-27 Denver (Probate		Hourly	
1 I am an	Counsel Options View Prior Billing					
Logoff			Current Unsubm	itted Invoice		
Create/Update Appointment						
Work With Counsel		faximum Allowed:	\$ 2,650.00	Deserves	mount to date:	\$ 601.65
Payment Approval Reports		unsel Owes State:	\$ 2,650.00	Payment requests pen		\$ 0.00
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Court Locations Maintenance						
Create/Update Counsel Appointment Maintenance	Invoice Begin Date: 11	/10/2013 •(Rec	uired) MM/DD/YYYY	Invoice End Date: 12/0	05/2013	*(Required) MM/DD/YYYY
Contract Maintenance						
Checks Received Forms	Add	new payment:				
Substitute W9 Form		Date of Service:	11/01/2013	8		
Auth2Pay Form ACH Form		Service Type:	In Court (qty in ho	urs )	-	
Policies & Guidelines		Service Sub-Type:	Hearing: Probation			
CJD		Quantity:	1			
c c	Counsel Options Add Invoice I	tem				
					_1	
		Select Service Date	Payment Type Quantity	Units Base Rate Total		
	Councel Options		There are no pending paymen	ts for this appointment		

5) Enter "Date of Service" **\*\*\*This must be within the invoice begin and end date \*\*\***.

Counsel Name Type: Both Atto Appointment Appointmen Type						
Appointment Appointmen						
33168572 Probate	Start Date 1 1998-01-27 Den	Court Location Case	Party Name	Payment Type Jourly		
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and a second	\$ 0.00		and the second se	and the strength of the second strength of th		
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	aired) MM/DD/YYY	r	Invoice End Dat	e: 12/05/2013	*(Required) MM/DD/Y	YYY
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6) Enter "Service Type" from drop-down list (See "Billing Options" document for a full list of Service Types and Service Sub-Types by appointment).

	35 1	and the second	and the s		A Startes	And a state		
				OSCAO Tax Id: 000 ey Bar#: 34505 St:				
	Appointment	Appointm Type	ent Start Date	Court Location	Case	Party Name	Payment Type	
	100139181	Domestic Re	lations 2015-12-1	4 Adams (Brighton) 2	012 DR 30066	MICKI TEST	Hourly	
	Maximu	n Allowed:	\$ 1,440.0	0	Payme	nt amount to d	ator	\$ 0.00
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Invoice Be	Current Invoic gin Date: 12/15/	d new payme	\$ 0.0 *(Required) MM/DD/YYYY nt:		ining balance <u>b</u>	efore this requ	est:	\$ 1,365.00 Required)
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\*\*\*<u>Please do not use Miscellaneous Expenses category for anything other than pre-approved overnight/out-of-state travel expenses such as air fare, lodging, per diem, etc. All other CAC appropriate expenses have their own categories: copies, travel mileage, postage, and long distance. Court costs such as Transcript Fees, Discovery, CBI, Subpoena Fees, Medical Records, etc. are billed directly to the court and not through the CAC system. If you are charged Efiling Fees, contact CCE to request a reimbursement for those expenses.\*\*\*</u>

7) Enter "Service Sub Type" from the drop-down list (click on arrow for list of dropdowns). The option you receive will be based on the Service Type selected. If none of the subtype categories matches the activity you performed, you can use "Other". When this category is selected, you must enter a free form description.

		unsel Name pe: Both Attor	ney Conference: Case Worker	*	
	Appointment	Appointment Type	Conference: Court Staff Conference: DA Conference: Family	nt	
Counsel Options View Prior Billing	33168572	Probate	199 Conference: GAL Conference: Guardian or Conservator Conference: Home Visit Conference: Intervenor Conference: Mental Health Staffing Conference: Other	у	
	Maximum Allov Counsel Owes St ent Invoice Amo	ate:	Conference: Pre-trial Conference: Probation Officer Conference: Resource Coordinator Conference: Social Worker Conference: Special Respondent	t to date: approval: request:	\$ 601.65 \$ 0.00 \$ 2,048.35
Invoice Begin Date:	1/10/2013	*(Requ	Conference: Staffing Conference: Team Decision Meeting Conference: Victim Conference: Victim Conference: Opposing Counsel Conference/Visit: Client	13	(Required) MM/DD/YYY
	Date of Se	rvice:	Prepare Acceptance of Office Prepare Certificates of Service		
	Service T	ype:	Prepare Letter/Email: ACA Prepare Letter/Email: Case Worker	-	
	Service Sul	-Type:	Other		
	Sub-Type "Oth (max 200 ch			*	
	Quanti	tv:			

- 8) Enter "Quantity" in hours or tenths of an hour (one-tenth of an hour = 6 minutes i.e. 12 minutes is charged as 0.2 hours).
- 9) Click "Add Invoice Item". The entry will appear towards the bottom of the invoice screen.

	and the second s		-					
		nsel Name: e: Both Attor						
	Appointment	Appointment Type	Date	Location	Case	Name	Payment Type	
	33168572	Probate	1998-01-27 D	enver (Probate)			D Hourly	
	Maximum Allowe	ed:	\$ 2,650.0	0		1	ayment amount to date	
	farimum Allows		\$ 2,650,0	5			arment amount to date	\$ 601.65
Ca	ounsel Owes Stat	te:	\$ 0.0			Payment re	uests pending approval	\$ 0.00
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**\*\*\*Note:** If the CAC system does not accept a payment item as you expected, there usually is a problem with one of three things, all having to do with your dates:

- 1. Look at the numbering format you have used in <u>all</u> your dates (has to be MM/DD/YYYY)
- 2. Your invoice begin date cannot start before your appointment date
- 3. Your dates of service are not within your invoice begin and end dates

10) Repeat Steps 5 through 9 until you have entered all billing activities for the invoice period.

11) Click on "Invoice Pre-Submission" (either location):

Appointm			-		~				
	ent Appoin	ntment :	Start Date	Court Location		ise	Party Name	Payment Type	
3316857			98-01-27	Denver (Pro	bate) 1998 P	R 1859		Hourly	
		Cu	irrent	t Unsub	mitted	Invoic	e	-	
Maximum A	llowed:		\$ 2,650	.00			Payme	nt amount to date:	\$ 601.65
Counsel Owe	s State:		\$ 0	.00		1	Payment requests	pending approval:	\$ 0.00
ent Invoice A	mount:		\$ 282	.50		Ren	aining balance <u>b</u>	efore this request:	\$ 2,048.35
	Rei e	p.	12/0	5/2013					
			-						
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e Item	Delete Pa	ayment		ice Pre-Sul	bmission	Update	e Invoice Dates	)	
Select Ser	vice Date	Pay	ment Ty	pe	Quantity	Units	Base Rate	Total	
@ 201			obation		1.00	hours	\$65.00	\$65.00	
C 201				ate -	0.75	hours	\$65.00	\$48.75	
C 201					25.00	miles	\$0.51	\$12.75	
C 201				ate -	0.50	hours	\$65.00	\$32.50	
C 201					0.20	hours	\$65.00	\$13.00	
O 201				ate -	0.50	hours	\$65.00	\$32.50	
C 201				ate -	1.20	hours	\$65.00	\$78.00	
	Counsel Ower ent Invoice A 11/10/2013 dd new payme Date Servi C Select Ser C 2011 C 2011 C 2011 C 2011 C 2011 C 2011 C 2011 C 2011 C 2011 C 2011	Item         Date of Service           Service Sub-Ty         Quantity:           2110         Doletto P2           Select         Service Date           ©         2013-11-10           C         2013-12-01           C         2013-12-02           C         2013-12-03           C         2013-12-05	Maximum Allowed: Counsel Owes State: ent Invoice Amount: 11/10/2013 Bd new payment: Date of Service: Service Type: Service Sub-Type: Quantity: Delete Payment Select Service Date Pay 2013-11-10 In Court - Hearing: Pre C 2013-11-10 Out of Court C 2013-11-10 Travel Mile Mileage: CC C 2013-11-10 Travel Mile Mileage: CC C 2013-11-10 Out of Court Travel Travel Travel Travel C 2013-12-01 Out of Court Telephone C C 2013-12-02 Out of Court Review Petr C 2013-12-05 Out of Court Prepare for	Maximum Allowed: \$2,650 Counsel Owes State: \$0 ent Invoice Amount: \$282 11/10/2013 III "(Required) MMDD 3d new payment: Date of Service: [12/0] Service Type: Copi Service Sub-Type: Copi Service Sub-Type: Other Quantity: [12] 11/10 Delete Payment Ty © 2013-11-10 In Court - Hearing Probation C 2013-11-10 Out of Court/Appelli C 2013-11-10 Travel Mileage - Mileage: Court C 2013-11-10 Travel Mileage - Mileage: Court C 2013-11-00 Out of Court/Appelli Travel Time: Chent C 2013-11-00 Out of Court/Appelli Telephone Call: Cher C 2013-12-01 Put of Court/Appelli C 2013-12-02 Review Petition C 2013-12-05 Out of Court/Appelli	Maximum Allowed: \$ 2,650.00 Counsel Owes State: \$ 0.00 ent Invoice Amount: \$ 282.50 11/10/2013 ES *(Required) MMDD/YYYY dd new payment: Date of Service: 12/05/2013 Service Type: Copies (qty in Service Sub-Type: Other Quantity: Copies (qty in Service Sub-Type: Other Quantity: Copies (qty in Service Sub-Type: Other Quantity: Copies (qty in Service Payment Type Quantity: Copies (qty in Select Service Date Payment Type 2013-11-10 In Court - Hearing: Probation C 2013-11-10 Out of Court/Appellate - Conference: Family C 2013-11-10 Travel Mileage - Mileage: Court C 2013-11-10 Out of Court/Appellate - Telephone Call: Chent Mother C 2013-12-01 Out of Court/Appellate - Review Petition C 2013-12-02 Out of Court/Appellate - Prepare for Hearing	Maximum Allowed:       \$ 2,650.00         Counsel Owes State:       \$ 0.00         ent Invoice Amount:       \$ 282.50         11/10/2013       Image: State:       \$ 0.00         Maximum Allowed:       \$ 282.50         11/10/2013       Image: State:       \$ 0.00         Maximum Allowed:       \$ 282.50         11/10/2013       Image: State:       \$ 0.00         Maximum Allowed:       \$ 282.50         11/10/2013       Image: State:       \$ 0.00         Service Amount:       \$ 282.50         Service Sub-Type:       Copies (qty in copies )         Service Sub-Type:       Other Image: State:         Quantity:       Image: Copies (qty in copies )         Service Date       Payment Type       Quantity         ©       2013-11-10       In Court - Hearing: Probation       1.00         C       2013-11-10       Travel Mileage - Mileage: Court       25.00         C       2013-11-10       Travel Mileage - Mileage: Court       0.50         C       2013-11-201       Out of Court/Appellate - 0.50       0.50         C       2013-12-01       Out of Court/Appellate - 0.50       0.50         C       2013-12-02       Review Petition       0.50 <td>Maximum Allowed: \$ 2,650.00 Counsel Owes State: \$ 0.00 ent Invoice Amount: \$ 282.50 Rem 11/10/2013 ES *(Required) MM DD YYYY In Bd new payment: Date of Service: 112/05/2013 ES Service Type: Copies (qty in copies ) Service Sub-Type: Other Quantity: Delete Payment Invoice Prossibumitssion Update Select Service Date Payment Type Quantity Units © 2013-11-10 In Court - Hearing: Probation 100 hours C 2013-11-10 Out of Court/Appellate - Courd Court/Appellate - C 2013-11-10 Out of Court/Appellate - C 2013-12-01 Out of Court/Appellate - C 2013-12-02 Review Petition C 2013-12-02 Review Petition C 2013-12-05 Out of Court/Appellate - Prepare for Hearing C 2013-12-05 Out of Court/Appellate - Prepare for Hearing</td> <td>Counsel Owes State:       \$ 0.00       Payment requests         ent Invoice Amount:       \$ 282.50       Remaining balance b         11/10/2013       Image: State in the state</td> <td>Maximum Allowed:       \$ 2,650.00       Payment amount to date:         Counsel Owes State:       \$ 0.00       Payment requests pending approval:         ent Invoice Amount:       \$ 282.50       Remaining balance before this request:         11/10/2013       Image: State:       \$ 282.50       Remaining balance before this request:         11/10/2013       Image: State:       \$ 282.50       Remaining balance before this request:         11/10/2013       Image: State:       \$ 12/05/2013       Image: State:       \$ 12/05/2013         Id new payment:       Date of Service:       \$ 12/05/2013       Image: Service Sub-Type:       Copies (qty in copies )       Image: Service Sub-Type:       Copies (qty in copies )       Image: Service Sub-Type:       Other Image: Service Date       Payment Type       Quantity:       Image: Service Date       Payment Type       Quantity:       Image: Service Date       Total       Service Service Date       Payment Type       Quantity:       Image: Service Date       Total       Service: Service Court - Appellate - 10.00       hours       \$ 565.00       \$ 548.75       Second S</td>	Maximum Allowed: \$ 2,650.00 Counsel Owes State: \$ 0.00 ent Invoice Amount: \$ 282.50 Rem 11/10/2013 ES *(Required) MM DD YYYY In Bd new payment: Date of Service: 112/05/2013 ES Service Type: Copies (qty in copies ) Service Sub-Type: Other Quantity: Delete Payment Invoice Prossibumitssion Update Select Service Date Payment Type Quantity Units © 2013-11-10 In Court - Hearing: Probation 100 hours C 2013-11-10 Out of Court/Appellate - Courd Court/Appellate - C 2013-11-10 Out of Court/Appellate - C 2013-12-01 Out of Court/Appellate - C 2013-12-02 Review Petition C 2013-12-02 Review Petition C 2013-12-05 Out of Court/Appellate - Prepare for Hearing C 2013-12-05 Out of Court/Appellate - Prepare for Hearing	Counsel Owes State:       \$ 0.00       Payment requests         ent Invoice Amount:       \$ 282.50       Remaining balance b         11/10/2013       Image: State in the state	Maximum Allowed:       \$ 2,650.00       Payment amount to date:         Counsel Owes State:       \$ 0.00       Payment requests pending approval:         ent Invoice Amount:       \$ 282.50       Remaining balance before this request:         11/10/2013       Image: State:       \$ 282.50       Remaining balance before this request:         11/10/2013       Image: State:       \$ 282.50       Remaining balance before this request:         11/10/2013       Image: State:       \$ 12/05/2013       Image: State:       \$ 12/05/2013         Id new payment:       Date of Service:       \$ 12/05/2013       Image: Service Sub-Type:       Copies (qty in copies )       Image: Service Sub-Type:       Copies (qty in copies )       Image: Service Sub-Type:       Other Image: Service Date       Payment Type       Quantity:       Image: Service Date       Payment Type       Quantity:       Image: Service Date       Total       Service Service Date       Payment Type       Quantity:       Image: Service Date       Total       Service: Service Court - Appellate - 10.00       hours       \$ 565.00       \$ 548.75       Second S

12) Confirm the bill is correct **\*\*\*** *This is your last chance to change the information on your hourly bill!* **\*\*\*** If everything looks good, click on "Submit Invoice". If there is a problem, click on Return to Itemization to make corrections to your invoice.

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	And Aller II MAR	* 1		18	the de
Ouick Links	Invoice Charges	by Service Code			
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	Ctatura (D	anding Cube	ningion)		
Help Documents	Status: (Po	ending Subr	mission)		
- Select -	Beginning date o	f activity: 2013-11-	10 Ending dat	te of activit	br: 2013-12-05
	beginning date o	activity. 2015 11	to Ending da	te of activit	y. 2015 12 05
Tasks		Service	Hours/Quantity	Billed	
Home		In Court	1	\$65.00	
ICON Eclipse		Travel Mileage	25	\$12.75	
Logoff		Out of Court/Appellate	3.15	\$204.75	
Create/Update			Total Billed:	\$282.50	
Appointment			_		
Work With Counsel	Counsel Options	Return to Itemiza	ation Submit	Invoice	
Payment Approval					
Reports					
FSD Reports					
Court Locations					
35.2.					

Screen after hitting submit.



# **Editing Hourly Invoices**

You can edit your own invoice before the point at which you click "Submit Invoice". After that, no edit functions are available to you. Please reach out to the local court CAC approver if you would like adjustments made after submitting the invoice \*\*\*Note: We are only able to revise quantities. We cannot add or delete entries or change Service Types or Service Sub Types or dates to an invoice that has been submitted. These kinds of changes would necessitate us denying the entire invoice, and requesting a new/corrected invoice be submitted\*\*\*

#### **Reports**

There are several report options available. Please experiment with these reports and email us with any questions at <u>CACpayments@judicial.state.co.us</u>



**List All Appointments** – Shows all <u>open and closed hourly/contract appointments</u> (once a case is closed and you have received your final payment, please email <u>CACpayments@judicial.state.co.us</u> the case number, district, and name of respondent to request appointment be closed).

List Open Appointments – Shows all <u>open hourly/contract appointments</u>.

List Closed Appointments – Shows all hourly/contract appointments that have been closed.

**List Concurrent Appointments** - Shows appointments that are set up as concurrent status – you will only see the primary/original appointments in your hourly/contract payments request so this report is helpful to decipher what secondary/concurrent cases are set up as you will be unable to access them for billing.

**Request Contract Obligation Ending Report** – Mental Health Contract Flat Fee appointments expire in 2 years from the date of appointment; Truancy Contract Flat Fee appointments expire in 1 year from the date of appointment. This report will show the appointments' contractual periods that are nearing expiration or have expired depending on the date parameters you enter into the date fields of the report.

**Request Unsubmitted Invoices Report** – Shows all invoices that have not been submitted to the court for payment.

**Request Submitted Invoices Report** – Shows all invoices that have been submitted and are awaiting court approval.

**Request COFRS Payment Report** –Shows what invoices have been submitted to COFRS/State Controller's Office for check or EFT processing based on dates entered into the submission parameters. COFRS receives the invoice after the final approval is submitted at which point a voucher number is assigned.

**Request Payment History Report by Case Number** – This report will allow you to view all billing and itemizations, adjustments, credits, payments on a specific case.

# **Frequently Asked Questions**

- 1. The appointment is not showing in my appointment screen?
  - Contact the local court.
- 2. The invoice will not let me bill from the start of the case?
  - Verify the appointment start date listed on your appointment. The system will not let you enter activity prior to that date. If the date is incorrect, contact the local court to have them update your appointment start date.
- 3. When I enter an invoice item, the amount is showing as \$0?
  - This is most common in CFI appointments and it happens when the percentage of state paid costs is removed from the appointment screen. Please contact the local court <u>prior to submitting any</u> <u>invoice activity on this case</u> to have them update the appointment to reflect a state paid percentage.
- 4. How do I bill CAC for a private/state paid split CFI case?
  - If the Judge orders the payment for a CFI to be a split between state paid and private paid, the court staff will enter that in the system when they create the appointment. So, the system is already programmed to bill the state for the portion of the case that is state paid. Since a CFI is appointed to a case and not a specific party in a case, the CFI must submit 100% of their time and activity on the case into the CAC system. The system will modify the hourly amount based on the portion of the case that is state paid. In a 50% state paid case, if an hour of time is billed, the invoice will reflect a payment for thirty minutes, since only 50% of the time is state paid. The CFI is responsible for billing the private paid party for the other 50% of the case.
  - If you have any issues with the system splitting the state paid portion correctly, contact the court to verify that the appointment was set up correctly.
- 5. Billing questions: How much have I billed on a case, why was my payment not the same amount as my invoice total, what invoices were included on the check I received, etc.?
  - For any billing, invoice, or case history records, please reference the "Reports" section in your appointment screen. There are several different reports that can be utilized to help you navigate through many of your billing questions.
  - If you are unable to resolve your questions by reviewing these reports, contact the local court for assistance.



- 6. How do I change an appointment from contract to hourly?
  - Reach out to <u>CACpayments@judicial.state.co.us</u>.
- 7. I changed my address and firm, who do I contact?
  - Email <u>CACpayments@judicial.state.co.us</u> an updated W-9.
- 8. If I have entered activity into the CAC system, but have not yet submitted it, what report would I look at to find my unsubmitted activity?
  - The Unsubmitted Invoices report.
- 9. How can I find where my invoice is in the approval process?
  - Look at one of the following reports "Unsubmitted Invoice Report", "Submitted Invoices Report", "COFRS Payment Report" or the "Payment History Report by Case Number".
- 10. If the CAC system does not accept a payment item as expected, what should I do?
  - Usually, this means that there is a problem with one of three things all relating to the dates:
  - a. Look at the numbering format used in <u>all</u> the dates, as the format has to be <u>MM/DD/YYYY</u>.
  - b. The invoice begin and/or end date starts before the appointment/start date.

- c. The "Dates of Service" are not within the invoice begin and invoice end dates.
- 11. Can I charge each case the full mileage and travel time when working multiple cases during the same trip?
  - No, travel mileage and travel time needs to be split out amongst multiple court/client/research trips in a single day (e.g., on 1/15/15, you traveled 30 miles to a client conference for case 15JV123 and then traveled 15 miles from the conference to the court for a hearing on case 14MH13 and from there 15 miles to the DA's office for case 13CR25 for a total of 60 miles and 1.2 travel time hours you would bill 20 travel miles per case number and .40 travel time hours per case number for 1/15/15).
- 12. How can I change my submitted bill?
  - Email the local court to have quantities adjusted, or to have the incorrect invoice denied so that you may submit a corrected one.
- 13. If I am billing for more than one appointee, will my login process be any different than those that are not billing for more than one appointee?
  - Yes, you will have an "intermediate" screen that asks you to select the appointee that you are billing for at that time. To change the appointee without logging off, select "Counsel Selections" from the left-header.
- 14. When entering a request for your initial contract payment, what date should you enter at the "Payment Service Date"?
  - Enter the date of your appointment. Furthermore, when entering for any subsequent contract payments, you will need to enter the date of the associated filing (Short term certification, long term certification, and/or extensions to either of those).
- 15. When I obtain a signed/approved order for excess fees, who do I direct it to so that my maximum amount is increased, and my invoice is approved/processed?
  - Submit a copy of the signed order of excess fees to the court staff that approves the CAC billing.
  - Please note, you may not bill for the time it takes to draft and submit the motion of excess fees.
  - CJD 04-04 and 04-05 states that the orders should be preapproved prior to submitting an invoice that will exceed the maximum amount and that the motion must include a dollar amount you are requesting in excess.

### **Reminders:**

- \*\* If you are appointed to the same client, in the same court location and hearings/activities are being held at the same time, you need to set up these appointments as concurrent status and bill under one case (primary or originating case): Email your case numbers/district/respondent name to the local CAC court approver to have the cases combined and billed concurrently.
- \*\* If you enter billing but do not submit, the unsubmitted invoice remains until you submit or delete it but no hourly or contract payments can be processed until you submit the invoice.

You may choose to enter billing daily/weekly/monthly (build invoices) and submit at chosen later intervals but please remember there is a <u>2-month limit for contract billing</u> (your invoice submittal date must be within 2 months of your appointment or event dates) and hourly billing requires you to submit all dates of service within 6 months of the activity date.