



## Using TimeSolv with evolveVoucher

To best use evolveVoucher, you will want to set time and expense categories you can attribute to your slips. These categories can then be mapped in evolveVoucher to speed your data entry.

Within TimeSolv, select TIME and then EXPENSES tabs  
Begin adding your categories, for each CJA time and expense category

The screenshot shows the 'New Task Code' form in the TimeSolv application. The 'Time' tab in the top navigation bar is highlighted with a green circle. The form contains the following fields and options:

Code *	OCRE
Description *	Out of Court - Review records & Discovery
Narrative	<div></div> <p>If provided, shall be used as Description of the time entry when this task code is selected. Otherwise, Description field value (above) shall be used.</p>
Rate *	152
Rate Type *	Hour
Billable Type	Billable
Summarized?	<input type="checkbox"/>
Taxable?	<input type="checkbox"/>
Active?	<input checked="" type="checkbox"/>
<div>Save Save &amp; New or Cancel</div>	

### Example of setting Activity Codes

You can call these categories whatever makes sense to you - they do not have to match the verbiage of the CJA website. For example, I still use the old abbreviations: OCMT

(out of court meeting) OCRE (out of court reviewing same thing with your expense slips.

documents) etc. Do the

**Settings**

General | **Expense Codes**

Enter Search Criteria | Status: Active | Summarized: All | Taxable Status: All | Search | Reset

**New Expense Code**

Code \* MILE

Description Mileage

Narrative

If Narrative provided it will be used as the Description of the expense entry when this expense code is selected. Otherwise, Description field value (above) will be used.

Billable Type Billable

Default Price Per Unit .58

Default Quantity \* 1

Markup Percent 0

Summarized? ☐

Taxable? ☐

Hard Cost? ☐

Active? ☒

Save Save & New or Cancel

**Example of setting Expense Codes**

Code	Description	Active?	Delete
E100	E100 - Expenses	✓	Delete
E101	E101 - Copying	✓	Delete
E102	E102 - Outside printing	✓	Delete
E103	E103 - Word processing	✓	Delete
E104	E104 - Facsimile	✓	Delete
E105	E105 - Telephone	✓	Delete
E106	E106 - Online research	✓	Delete
E107	E107 - Delivery service	✓	Delete
E108	E108 - Postage	✓	Delete
E109	E109 - Local travel	✓	Delete
E110	E110 - Out of town travel	✓	Delete
E111	E111 - Meals	✓	Delete
E112	E112 - Court fees	✓	Delete
E113	E113 - Subpoena fee	✓	Delete
E114	E114 - Witness fees	✓	Delete
E115	E115 - Deposition transcript	✓	Delete
E116	E116 - Trial transcript	✓	Delete
E117	E117 - Trial exhibits	✓	Delete
E118	E118 - Litigation support	✓	Delete

Once you have your activity and expense categories created, use them on each of your slips as you enter your time in Timesolv.

When you are ready to bill, you will export your time slips per client to a CSV file. Find the Report tab to go to the Report Dashboard:

**Report Dashboard**

Time and Expense

Report Name	Description
<a href="#">Time Entries</a>	List of time entries grouped by client and matter
<a href="#">Time Entry Summary</a>	Weekly and monthly totals of time entries grouped by combination of client, matter and professionals
<a href="#">Expense Entries</a>	List of expense entries grouped by client and matter
<a href="#">Missing Time</a>	Hours missed by a professional per day or per week
<a href="#">Time and Expense Entries</a>	List of time and expense entries grouped by client and matter
<a href="#">Task Summary</a>	Sum of time entries grouped by professional and task

## Select the Time and Expense Report

- 1&2. Select the Time & Expense Entries Report from the menu.
3. Select the client name,
4. the date range you are billing for, ensure output format is CSV.
5. Click Generate Report and allow the report to download.

TIME SOLV

Name saved successfully.

Dashboard - Clients - Documents - Calendar - To-Do - Time - Expense - Invoices - Payments - **Reports** - Account

### Time and Expense Entries

1. Reports

2. Professional

3. Client - Matter

4. Date Range

Generate Report

Generated Invoices & Reports

Reports and Invoices can be viewed also on the Downloads link.

Clear All

Name	Submitted	Ready?
Galt Time and Expense Entries.csv	2020-05-06 13:31:07	

1 record

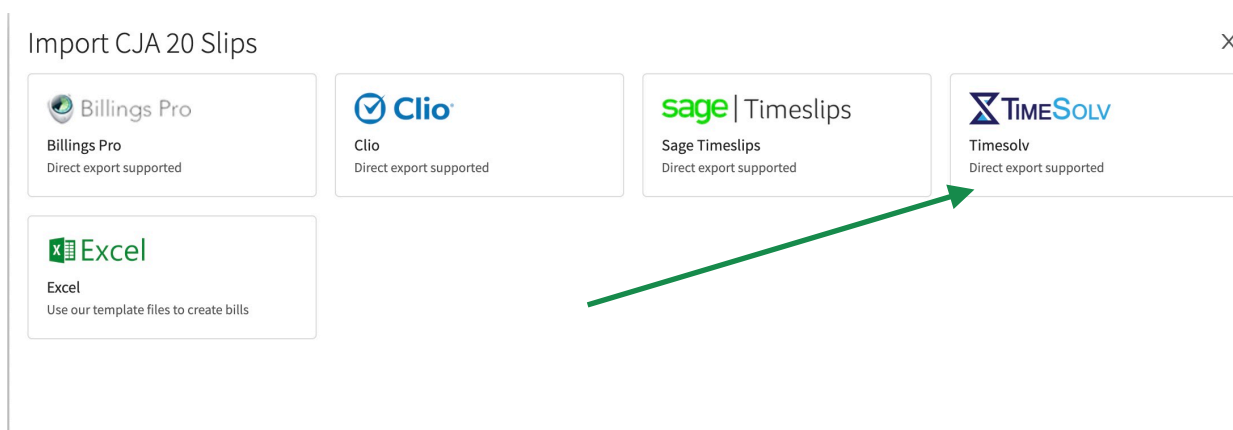
5

Help

If all has gone well, you should have an excel sheet that looks like this:

Entry	Client	Matter	Date	Status	Type	Code	Professional	Rate/Price	Start	Stop	Duration/Qty	Markup %	Amount	Description
Time	John Galt	John Galt	5/6/20	Approved	Billable	Out of Court	Shertz, Lauri	152			1		152	Intake meeting with client
Time	John Galt	John Galt	5/6/20	Approved	Billable	Out of Court	Shertz, Lauri	152			2		304	Begin reviewing discovery pages 1-200
Time	John Galt	John Galt	5/6/20	Approved	Billable	In Court Arra	Shertz, Lauri	152			0.5		76	attend client arraignment
Expense	John Galt	John Galt	5/6/20	Approved	Billable	Mileage	Shertz, Lauri	0.58			48	0	27.84	Travel to meeting with client

Log in to evolveVoucher and select TimeSolv as your data source. Follow the prompts in evolveVoucher to ensure your activity/time codes and expense codes are mapped to



evolveVoucher. You will see all of your activity codes will be red the first time you log in, but they will start turning green when they are matched to the CJA codes. You should only have to do this process once (though occasionally after a major update to either eVoucher or evolveVoucher, you may have to remap.

Date	Service Type (Source Category ⇄ CJA Service Type)	Hours	Rate	Amount	Description
10/02/2019	OCRE - Reviewing Records ⇄ ServicesRecordHours	0.1	\$148.00	\$14.80	Review CJA email, r...
10/03/2019	OCRE - Reviewing Records ⇄ ServicesRecordHours	0.1	\$148.00	\$14.80	Review email re: cli...
10/04/2019	OCRE - Reviewing Records ⇄ ServicesRecordHours	0.1	\$148.00	\$14.80	Review CJA email r...
10/04/2019	OCTR - Travel Time ⇄ ServicesTravelHours	0.1	\$148.00	\$14.80	travel to mag court
10/04/2019	OCMT - Meetings ⇄ ServicesInterviewHours	0.2	\$148.00	\$29.60	meeting client at U...
10/04/2019	ICAP - In Court Arraignment/Plea ⇄ ServicesArraignmentPleaHours	1.0	\$148.00	\$148.00	at Mag court (start...
10/04/2019	OCTR - Travel Time ⇄ ServicesTravelHours	0.1	\$148.00	\$14.80	return travel from ...
10/04/2019	OCOT - Investigation/Other ⇄	0.1	\$148.00	\$14.80	TCT client wife

Press continue, choose your district, and then launch the secure browser & enter your eVoucher credentials. Remember, we neither store your credentials nor do we access them: you are entering them directly into eVoucher yourself, so you can be assured your data and account stay safe and in your control.

evolveVoucher will begin uploading your slips into eVoucher so fast it will be done before you can walk back from the office kitchen with another cup of coffee. In fact, maybe you'll want to get your coffee first, before you fire it off, and watch the magic happen with your feet on your desk.

NOTE: Because eVoucher can be buggy and unpredictable, please make sure you double check all of your slips are in eVoucher properly before submitting your bill to CJA.