



# APPOINTMENT MANAGEMENT PORTAL USER GUIDE



12/29/2015

CIVIL & CRIMINAL COURTS

Quick Start Guide for the Appointment Management Portal

Mark Erwin, Technology Manager

Courts Technology Team

Version 5.0

# AMP User Guide

## Introduction

The purpose of the User Guide is to give the reader an easy to follow guide to many of the common features you will regularly use in the Appointment Management Portal (AMP).

If you have any questions or need further assistance you can contact the Courts Technology Team by emailing Courts-Help@traviscountytx.gov or calling the 854-TECH (8324) number. The Courts Technology Team internally developed this application and is not associated with the Travis County ITS Department.

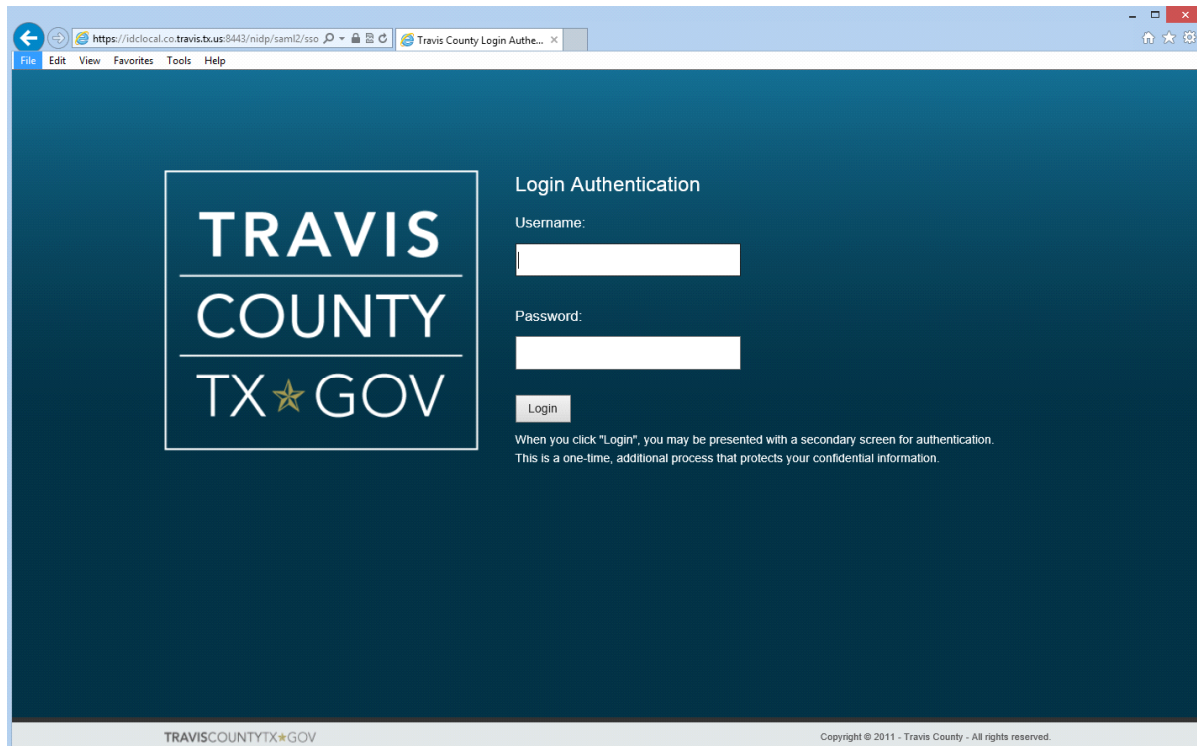
In addition, if you have any feedback you would like to provide regarding this guide or the application itself, please send an email to Courts-Help@traviscountytx.gov .

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## LOGGING IN TO AMP

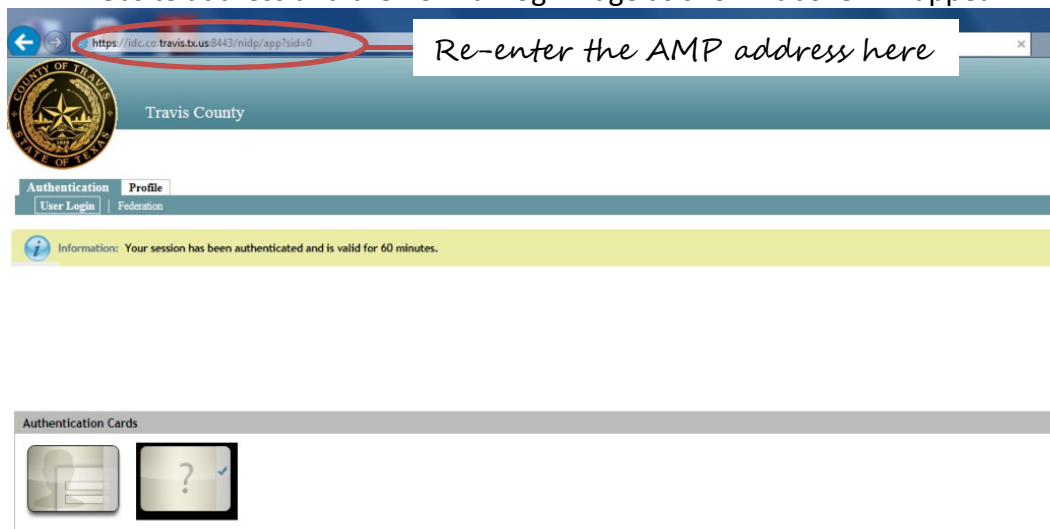
1. Open your internet browser (e.g., Internet Explorer)
2. Enter the AMP website address: <https://courts.co.travis.tx.us/AMP> and press the <Enter> key.
3. The AMP login page will appear.



Enter your AMP user id and password then press the <Enter> key on the keyboard or click Login.

Please note that if you have an ARRO user id, it may not work for AMP. Both ARRO and AMP use the same login page.

NOTE: There may be times in which the following screen appears. If this occurs, please re-enter the AMP website address and the normal Login Page as shown above will appear.



## ALERTS

Each time you log in to AMP, you will be presented with an Alerts page which will display alerts for the following areas:

- A warrant was issued or executed for one of your criminal court clients.
- A criminal court client has been incarcerated or released from jail.
- A criminal court client has been reindicted, a charge has been enhanced or a charge has been reduced.
- A criminal court client has had their bond forfeited.
- A voucher has been rejected.
- A required activity linked to a Criminal Appointment is past due.

AMP - Appointment Management Welcome, Rick

My Cases

Alerts (13)

My Settings

My Vouchers

Jail List

Warrants (4)

Alerts I want to... ▾

Warrant for EDWARD WILLIAMS executed / recalled on 2/21/2017. ⓘ ✕

Warrant for EDWARD WILLIAMS executed / recalled on 2/1/2017. ⓘ ✕

Voucher for BRANDO GIOVANNI PAZ submitted on 6/24/2016 has been rejected. ⓘ ✕

Your opt-out period for the Misdemeanor panel expired on 6/10/2016. You are now active on that panel. ⓘ ✕

Initial Contact has not been reported for DANIEL GOMEZ. Initial Contact must be completed by 3/18/2016 and reported by 3/23/2016. ⓘ ✕

Initial Contact has not been reported for ASHLEY AMBER HILL. Initial Contact must be completed by 3/9/2016 and reported by 3/14/2016. ⓘ ✕

Initial Contact has not been reported for NICHOLAS ROBERT IACONIS. Initial Contact must be completed by 2/2/2016 and reported by 2/5/2016. ⓘ ✕

Initial Contact has not been reported for MICHAEL ROLAND WHITE. Initial Contact must be completed by 1/26/2016 and reported by 1/29/2016. ⓘ ✕

1 - 13 of 13 items

Depending on the type of alert, a Details icon ⓘ will be enabled allowing you to view more detail or take action for that alert.

- For a Warrant Issued or Executed alert, a Warrant page will display details for the warrant.
- For a Reindicted, Charge Enhanced, Charge Reduced or Bond Forfeited alert, the Register of Actions page associated with the correct appointment will be displayed.
- For a Voucher Rejected alert, you will be shown the specific voucher allowing you to revise and resend or void the voucher and create a new one.
- For a Required Activity Past Due alert, you will be shown the Required Activities page allowing you to complete the activity.

Also, depending on the type of alert, a Dismiss Alert icon ✕ will be enabled for the alert. Please note:

- A Required Activity Past Due alert cannot be dismissed.

- A warrant Issued alert will automatically be dismissed when the warrant has been executed.
- You can view all dismissed alerts by selecting the View History option from the “I want to...” dropdown shown at the top of the Alerts page.

In support of the Warrant Alerts, you will also see a Warrants link in the left-side navigation panel. The link will indicate the number of active warrants for any of your open appointments. So even if you dismiss the Warrant Issued alert, you can still view details about the warrant by clicking on this link.

Any client having an active warrant will be listed. Click on the arrow to the left of the name to expand the list to view the warrant(s) for that client.

AMP - Appointment Management Welcome, Rick

My Cases  
Alerts (13)  
My Settings  
My Vouchers  
Jail List  
Warrants

### Active Warrants for Your Defendants in Open Appointments



Name	Type	Issued	Cause	Charge	Judge	
KISER, MAURICE EMANUEL	Class C - Other	02/06/15	14-011297	TRAFFIC	SLAGLE	
	Class C - Other	02/06/15	14-011299	TRAFFIC	SLAGLE	
	Class C - Other	02/06/15	14-015486	MISDEMEANOR	SLAGLE	
	Class C - Other	02/06/15	14-011298	TRAFFIC	SLAGLE	

1 - 4 of 4 items

1 - 1 of 1 items

*Click to show list of warrants*

Clicking the Details icon will display detail for that specific warrant.

**AMP - Appointment Management**Welcome, Rick 

- My Cases
- Alerts (13)
- My Settings
- My Vouchers
- Jail List
- Warrants (4)

### Warrant Detail for KISER, MAURICE EMANUEL on Cause 14-011297

<b>Type:</b> Class C - Other	<b>Issued:</b> 2/6/2015
<b>Bail:</b> Unknown	<b>Court ORI &amp; Judge:</b> JUSTICE PEACE PCT. 2 / SLAGLE
<b>Charge:</b> TRAFFIC / TRAFFIC	
<b>Cleared:</b> Not yet cleared	

### Defendant Information

<b>Address:</b> 2425 CROMWELL CIR AUSTIN, TEXAS 78741	<b>OLN &amp; State:</b> 16430348 / TX
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## MY CASES

The My Cases page contains a Case Search feature that allows you to locate your hired cases or appointments by client name, Court Type (Civil, Criminal or All), Case Type (Only applicable for Criminal Court Type. E.g.: Felony or Misdemeanor), Court, Cause Number, Jail Status (client is in or out of jail), Appointed/Hired (list my appointments, my hired cases or both), Appointment Status (Open is set as the default value, Closed, All), Jail Status and Date Range. The Date Range will default to a one year period from today's date and you will be shown any appointments that fall within that date range for the search criteria you specified.

The screenshot shows the AMP - Appointment Management interface. At the top, there is a navigation bar with the AMP logo, the text "AMP - Appointment Management", and a user profile "Welcome, Rick" with a dropdown arrow. On the left is a dark sidebar with menu items: "My Cases", "Alerts (13)", "My Settings", "My Vouchers", "Jail List", and "Warrants (4)". The main content area is titled "Case Search" and contains several filter fields: "First Name", "Last Name", "Start" (3/10/2015), "End" (3/9/2017), "Court Type" (Criminal), "Case Type" (All), "Court" (All), "Cause Number", "Jail Status" (All), "Appointed / Hired" (Both), and "Status" (Open). There are "Search" and "Reset" buttons. Below the filters is a table of cases with columns: Date, Type, Client Name / Role, and Causes. The table contains several rows of case data with associated icons for information, calendar, and folders.






Date	Type	Client Name / Role	Causes
01/15/2016	CR WARRANT ARREST	AGUILERA, NOE	C1CR16500040
01/11/2016	Misdemeanor	WILLIAMS, EDWARD	C1CR15217999 C1CR15402994 C1CR15402993
01/04/2016	Misdemeanor	ARMSTEAD, ARMANN J	C1CR15218319 C1CR15218320
12/21/2015	CR WARRANTLESS ARREST	CHAPMAN, MICHAEL	C1CR15218581
12/11/2015	Misdemeanor	CHEN, ANTHONY	C1CR15217583
11/10/2015	CR WARRANT ARREST	ELDER, MICHAEL	C1CR15501512

Once you have a list of your cases, you can sort the list by Date, Type, Client Name or Cause by clicking on the corresponding column heading. Clicking on the column heading again will sort it in reverse order.

You can export your list of cases to Excel by clicking on the Export to Excel icon  located in the upper right corner of the page.

Your case list will show the following information: The case entry date for a hired case or the appointment date for a case you were appointed to; the Case Type; Client Name and Role and the cause number(s).

Additional information is provided by clicking on or hovering over various icons shown to the right of each case:

1. Clicking on the View Appointment Detail icon  will take you to the Case Details page.
2. Clicking on the Activities icon  will take you to the Required Activities page (Criminal Only) where you can enter the information about each activity. The counter shown in the icon indicates the number of required activities that have not been completed.
3. For a case you were hired on, the Hired icon  will be shown in place of the Activities icon.
4. Clicking on the Voucher icon  will take you to the Voucher page where you can view a list of vouchers saved or submitted on this appointment or create a new voucher for this appointment. A counter will be shown in the icon to indicate the number of vouchers you have submitted on this appointment. This icon will not be shown for your hired cases.
5. Clicking on the Documents icon  will take you to the Case Document page where you can view all of the documents on this case. NOTE: At this time, documents are only available for District Court cases.

## Case Details

The Case Details page displays important information about a specific case/appointment:

- The date, type and status of the appointment
- Information about the party(ies) (including the jail location for a defendant on a criminal case)
- Information about each cause linked to the appointment, including the next setting date, time and type
- A list of Activities that you are required to complete (Criminal Only)
- Contact Opportunities is a list of phone calls, video conferences and jail visits you made with the defendant (Criminal Only)
- Attorney Notes entered by Criminal Court Administration

You can elect to view additional information and perform a number of tasks from this page:

- Notes about the case that you entered
- Documents you uploaded to the appointment




- My Cases
- Alerts (13)
- My Settings
- My Vouchers
- Jail List
- Warrants (4)



Appointment for WILLARD HOUSTON    I want to... ▾

<b>Date:</b> 8/13/2015	<b>Case Type:</b> Felony	<b>Status:</b> Open
<b>Gender:</b> Unknown	<b>DOB:</b> Unknown	<b>Mental Health:</b> No
<b>Booking Number:</b> 1519849	<b>Booking Date:</b> 5/25/2015	<b>Jail Location:</b> HSF


Cause(s)

<b>Cause Number:</b> D-1-DC-15-203056 	<b>Setting Date Time:</b> 04/12/2016 09:00 AM	<b>Setting Type:</b> PRETRIAL
<b>Court:</b> 167	<b>Indictment:</b> Yes	<b>Bond Amount:</b> \$20,000.00
<b>Charge Description:</b> INJ CHILD/ELDER/DISA	<b>Charge Date:</b> 5/25/2015	<b>Level:</b> Felony, 3rd Degree
<b>Recorded Attorney in CMS:</b> ROBB SHEPHERD		

Required Activities

Description	Deadline	Completed	Contacted By	Comment
Initial Contact	08/14/15	08/14/15	Letter	IC ltr to dv. 
Face to Face Meeting	08/23/15	08/20/15	Meeting	hsf 6pm 

Create Voucher

Contact Opportunities 



Booking	Contact Method	Date	Notes
1519849	Phone	09/11/2015	Phone: 5128543030, duration (in seconds): 44
1519849	Meeting	08/20/2015	Disp: COMP - 18221900
1519849	Meeting	08/20/2015	Disp: COMP - OV..HYATT..SOCIAL WORKER
1519849	Phone	12/04/2015	Phone: 5122645100, duration (in seconds): 344
1519849	Phone	12/04/2015	Phone: 5122645100, duration (in seconds): 177

  1  

1 - 5 of 7 items

The screenshot displays two sections of the AMP interface. The top section, titled "Notes", features two tabs: "Case Mgmt" and "To/From Administration". Below the tabs is a table with two columns: "Date" and "Text". A "Create new" button is located on the right side of the table. Below the table is a pagination control with buttons for "Previous", "0", "Next", and "Last", and the text "No items to display". The bottom section, titled "Uploaded Documents", has columns for "Name", "Description", and "Date". An "Upload" button is on the right. Below the table is a pagination control with buttons for "Previous", "0", "Next", and "Last", and the text "No items to display".

Appointment Details – Criminal Appointment

 AMP - Appointment Management Welcome, Richard 

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My Cases

Alerts (21)

My Settings

My Vouchers

Warrants (1)

Appointment (972919) I want to... ▾

**Date:** 4/28/2015  
**Case Type:** CPS  
**Status:** Open

Clients

Name	Role
WILLIAM FRANKLIN BUSE	Father

Cause D1FM13001415

**Case Style:** IN RE SANDERS  
**Recorded Attorney in CMS:** CONNIE JOBE

No Future Settings found.

Notes

Case Mgmt To/From Administration

Date	Text
------	------

[Create new](#)

◀ ◁ 0 ▷ ▶

No items to display

Uploaded Documents

Name	Description	Date
------	-------------	------

[Upload](#)




◀ ◁ 0 ▷ ▶





No items to display

Appointment Details – Civil Appointment

## Defendant Information

For Criminal Defendants, additional information is provided by clicking on or hovering over various icons shown next to their name:





Appointment for EDWARD WILLIAMS   

1. Clicking on the Defendant History icon  will display the report.
2. If the defendant is scheduled for transport to court, a Jail Transportation icon  will be shown. Hover your cursor over the icon to display the date(s), time(s) and court(s) the defendant is being transported for.
3. Clicking on the Pretrial Bond Report icon  will display the report.
4. Hover your cursor over the Defendant Contact icon  to display the defendant’s address and contact information.

## Case File Documents

There are a number of ways you can view the case file documents from the District Clerks Document Management System (DMS). NOTE: At this time no documents are available from the County Clerk.

1. On the My Appointments page, you can click on the Documents List icon:

My Appointments				Status Filter	All <span>▼</span>
Date	Type	Client Name / Role	Cause(s)		
01/28/2015	Felony	RODRICK D MILLER / Defendant	C1CR14500465 D1DC10300092	   	<i>Document List</i>

2. Within the Application Detail page, you can click on the View Cause Documents icon next to the Cause Number (which will only display the documents for that specific cause):

**Cause(s)**

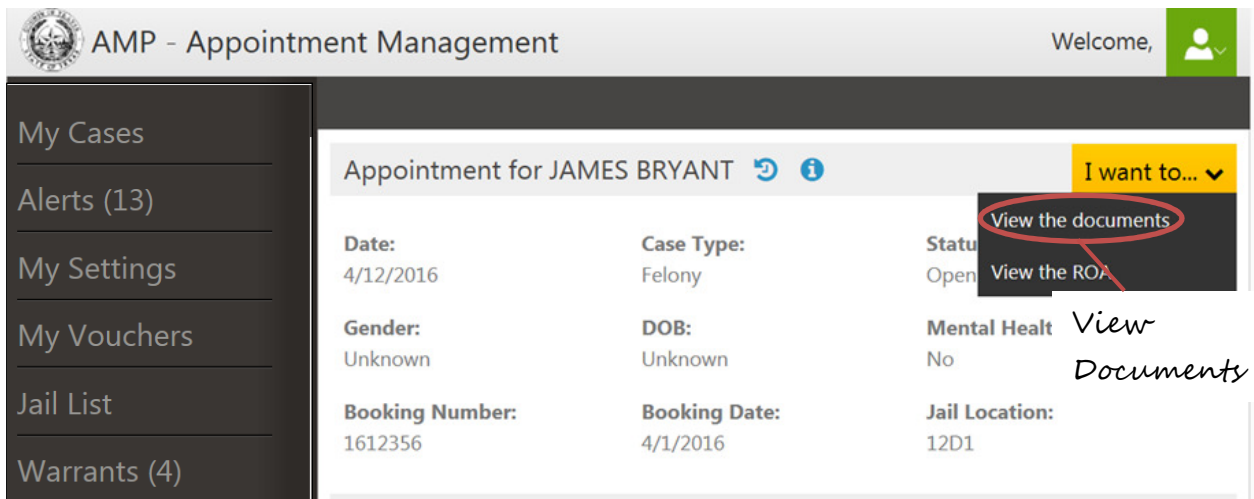
**Cause Number:**  
D-1-DC-14-202487 

*View Cause Documents*

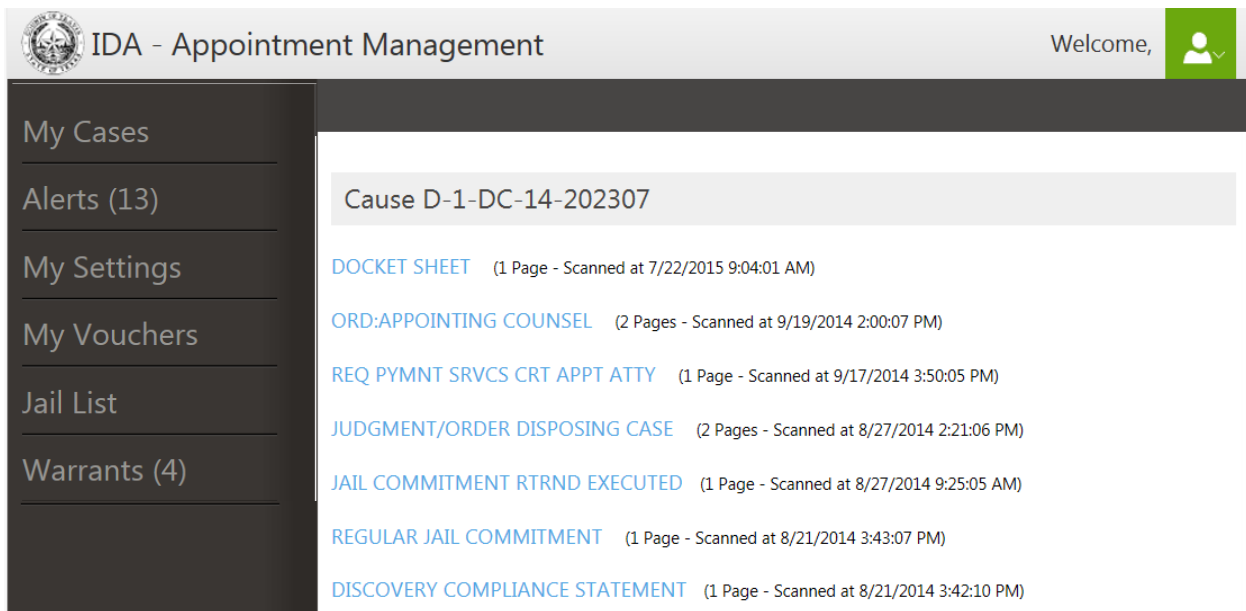
**Setting Date Time:**  
11/3/2014 9:00:00 AM

**Setting Type:**  
PTROI

- 3. Also within the Application Detail page, you can open the "I want to..." dropdown menu and click on the View the Documents option:



The Appointment Documents page will be shown:



You can view the contents of a document by clicking on the document title. AMP provides a document viewer in which you can page through the document or go to a specific page within the document. You can return to the list of documents by clicking the browser back button.

### Case Register of Actions

Within the Application Details page, you can view the Register of Actions (ROA) for each cause on your appointment by opening the “I want to...” dropdown menu and clicking on the View the ROA option:

The screenshot shows the AMP - Appointment Management interface. On the left is a navigation menu with options: My Cases, Alerts (13), My Settings, My Vouchers, Jail List, and Warrants (4). The main content area displays details for an appointment for JAMES BRYANT. The details are organized into three columns: Date (4/12/2016), Case Type (Felony), and Status (Open); Gender (Unknown), DOB (Unknown), and Mental Health (No); and Booking Number (1612356), Booking Date (4/1/2016), and Jail Location (12D1). A yellow dropdown menu labeled 'I want to...' is open, showing two options: 'View the documents' and 'View the ROA'. The 'View the ROA' option is circled in red, and a red arrow points from the handwritten text 'View ROA' to it.

Appointment for JAMES BRYANT			I want to... ▾
<b>Date:</b> 4/12/2016	<b>Case Type:</b> Felony	<b>Status:</b> Open	View the documents View the ROA
<b>Gender:</b> Unknown	<b>DOB:</b> Unknown	<b>Mental Health:</b> No	
<b>Booking Number:</b> 1612356	<b>Booking Date:</b> 4/1/2016	<b>Jail Location:</b> 12D1	

The Register of Actions page will be displayed:



The screenshot shows the AMP - Appointment Management web application. The header includes the logo, the title "AMP - Appointment Management", and a user greeting "Welcome," next to a profile icon. A dark sidebar on the left contains navigation links: "My Cases", "Alerts (13)", "My Settings", "My Vouchers", "Jail List", and "Warrants (4)". The main content area displays the "Register of Actions - ST v ARMSTEAD,ARMANN J" for cause number C1CR15218319. A table lists events with columns for "Event Date", "Event Description", and "Event Category Description". The events are sorted by date in descending order. A pagination control at the bottom of the table shows "1" selected out of 2 items, with "1 - 10 of 20 items" displayed. Below the table, a link for cause C1CR15218320 is visible.

Event Date	Event Description	Event Category Description
03/27/2017	CAL:PLEA	CALENDAR EVENT
02/10/2017	CAL:PRE-TRIAL CONFERENCE 4	CALENDAR EVENT
02/10/2017	NOT:JURY WAIVER/PLEA AGREEMENT	NOTING
01/06/2017	CAL:PRE-TRIAL CONFERENCE 3	CALENDAR EVENT
11/16/2016	CAL:PRE-TRIAL CONFERENCE 4	CALENDAR EVENT
10/11/2016	CAL:PRE-TRIAL CONFERENCE 4	CALENDAR EVENT
08/26/2016	CAL:PRE-TRIAL CONFERENCE 3	CALENDAR EVENT
07/20/2016	CAL:PRE-TRIAL CONFERENCE 2	CALENDAR EVENT
06/03/2016	CAL:PRE-TRIAL CONFERENCE	CALENDAR EVENT
05/09/2016	ORD:TO TRANSFER	ORDER

The list is sorted by event date. You can click on a column heading to change the sort order so that, for example, you can see all events for the Calendar event category. When there are multiple causes on the appointment, the ROA for the first cause will be shown. Use the arrow sign next to the Cause Number to expand or collapse the list of ROA Events. You can return to the Appointment Details page by clicking on the browser back button.

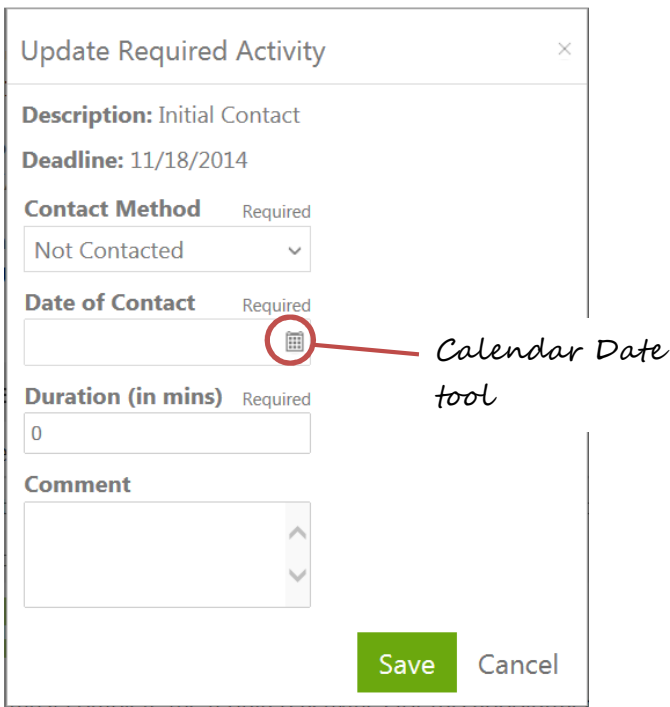
## Required Activities

For criminal appointments AMP will automatically create the Initial Contact and Face-to-Face Meeting activities which you are required to complete.

Activities			
Description	Date Completed	Contact Method	Comment
Face to face meeting.		Not Contacted	
Initial contact with client		Not Contacted	

*Edit Activity*

Clicking the Edit Activity icon will display the Activity Details window:



*Calendar Date tool*

To complete the activity, enter the date completed (either by entering the date into the field or using the calendar date tool to choose a date), choose the appropriate contact method from the dropdown, the duration/time of your contact and any comments that are needed.

Click Save to save your data or Cancel. You will return to the Appointment Detail page.



## Criminal Court Vouchers

Vouchers for Criminal Court cases can be classified in one of two ways:

1. Standard Fee or Flat Rate – Vouchers which contain one or more pre-defined activities such as: Attorney Release; Plea and Sentence; etc. for which a flat rate has been set by Criminal Court Administration, or
2. Hourly Rate – Vouchers containing amounts for in-court time, out-of-court time and expenses.

### Creating a Criminal Court Voucher

There are multiple ways to initiate the creation of a new Voucher:

1. On the Appointments page, click on the Vouchers icon (Note the number in the right corner of the icon. This indicates the number of vouchers entered against this appointment) :

Date	Type	Client Name / Role	Causes	Icons
11/04/2015	Felony	SHAQUEA FRIAR	D1DC15205248	→ Vouchers
10/07/2015	Felony	MICHAEL BRENNER DIAZ	D1DC15205690 C1CR15214600	

The Vouchers page will be shown which lists any vouchers previously entered for an appointment.

IDA - Appointment Management
Welcome, Rick

Appointments

Alerts (1)

My Settings

My Vouchers

Warrants (3)

Appointment: 1030809

Vouchers

Start	End	Req. Total	Cause(s)	Status	Format
11/06/2015	12/18/2015	\$550.00	D1DC15302398	Submitted to Auditor for Payment	Online

[Create New](#)

⏪ < 1 > ⏩

1 - 1 of 1 items

Clicking on the Create New button will open the Create Voucher page.

2. In the Required Activities section of the Application Detail page, you can click on the Create Voucher button:

Required Activities				
Description	Deadline	Completed	Contacted By	Comment
Initial Contact	11/27/2014		Not Contacted	
Face to Face Meeting	11/29/2014		Meeting	

Create Voucher

You must complete the required activities for this appointment before creating a voucher.

**NOTE:** The Create Voucher button will be enabled (shown in bright green) only after all Required Activities have been completed.

3. On the Appointments page, click on the Activities icon

Date	Type	Client Name / Role	Causes	
11/04/2015	Felony	SHAQUEA FRIAR	D1DC15205248	<span style="font-style: italic;">Activities</span>
10/07/2015	Felony	MICHAEL BRENNER DIAZ	D1DC15205690 C1CR15214600	

The Activities page will be shown. You can complete your activities and then click on the Create Voucher button:

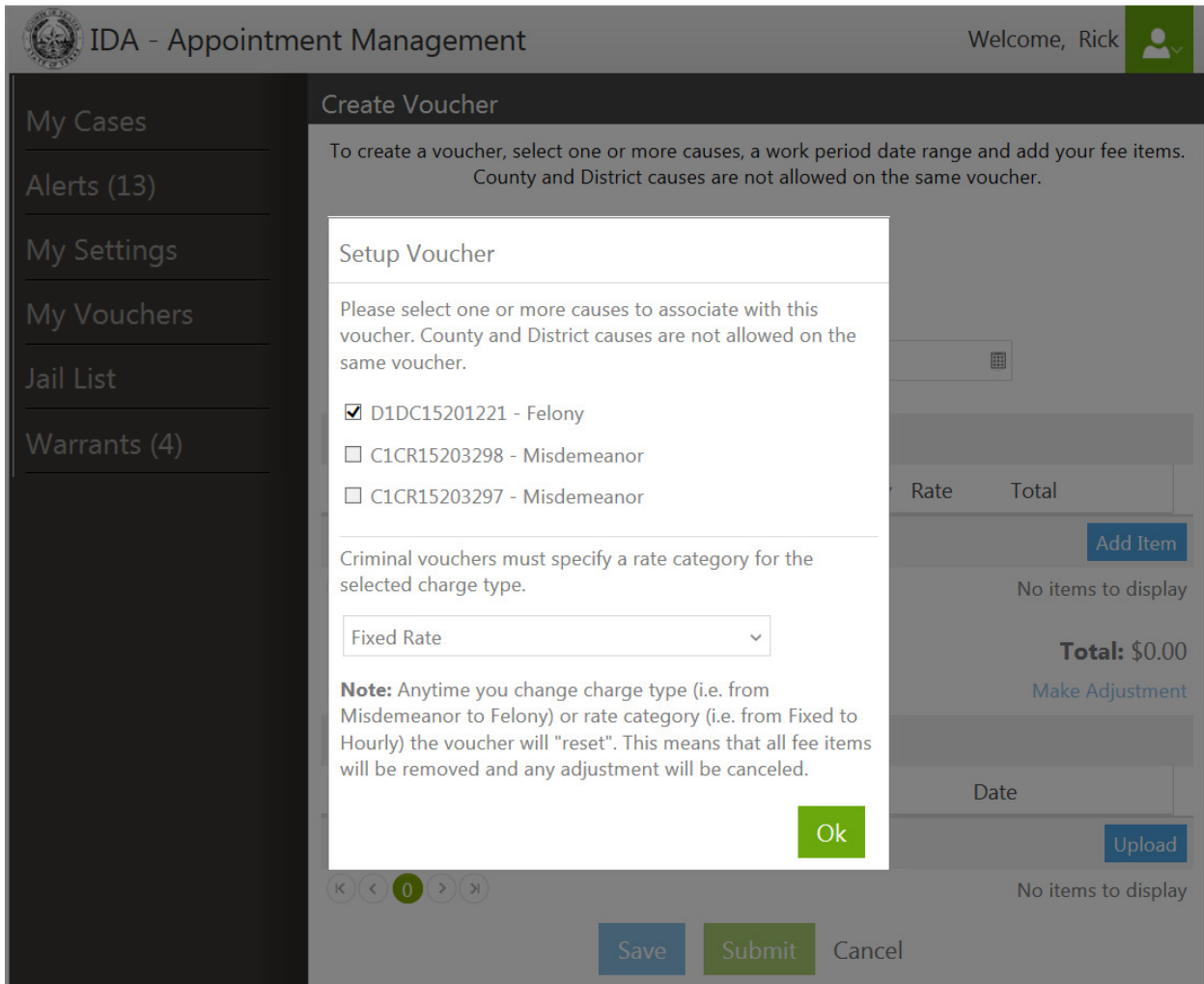
The screenshot shows the AMP - Appointment Management interface. The header includes the system logo, the title 'AMP - Appointment Management', and a user greeting 'Welcome, Rick' with a profile icon. A dark sidebar on the left contains navigation options: 'My Cases', 'Alerts (13)', 'My Settings', 'My Vouchers', 'Jail List', and 'Warrants (4)'. The main content area features a 'Required Activities' table with columns for Description, Deadline, Completed, Contacted By, and Comment. The table lists two activities: 'Face to Face Meeting' with a deadline of 'None' and 'Initial Contact' with a deadline of '12/14/15'. Below the table is a bright green 'Create Voucher' button. A message at the bottom states: 'You must complete the required activities for this appointment before creating a voucher.'

Description	Deadline	Completed	Contacted By	Comment
Face to Face Meeting	None			
Initial Contact	12/14/15			

NOTE: The Create Voucher button will be enabled (shown in bright green) only after all Required Activities have been completed.

### The Create Voucher Page


The first step in creating a voucher is to indicate which cause(s) are to be included in the voucher. If the appointment contains a single cause, it will be checked off automatically. When creating a voucher for an appointment that has multiple causes, AMP will prevent you from mixing both County and District causes on the same voucher.



Please note that you cannot combine County and District causes on the same voucher.

When you create a new voucher you will be prompted to select the Rate Category (Fixed Rate, Bond Work or Hourly Rate if approved). You cannot create a voucher that contains multiple rate categories.



Click OK to continue.

IDA - Appointment Management Welcome, Rick 

### Create Voucher

To create a voucher, select one or more causes, a work period date range and add your fee items.  
County and District causes are not allowed on the same voucher.

**Causes:** D1DC15201221  
**Rate Category:** Fixed Rate

**Start:**   **End:**   *Calendar Date tool*

#### Fee Items

Type	Date	Quantity	Rate	Total
<a href="#">Add Item</a>				
No items to display				
<b>Total:</b> \$0.00				
<a href="#">Make Adjustment</a>				

#### Uploaded Documents

Name	Description	Date
<a href="#">Upload</a>		
No items to display		

[Save](#) [Submit](#) [Cancel](#)

AMP will automatically set the Work Period Start Date to the date of the appointment. The Work Period End Date will be automatically set to today's date. You can change either date by entering a date into the appropriate field or by clicking on the calendar date tool and choosing a date.

If the appointment contains multiple cause numbers and you need to change the cause number(s) or rate category that you selected for this voucher, you can click on the Causes or Rate Category label to redisplay the Setup Voucher pop-up window.

The screenshot shows a 'Create Voucher' window with a dark header. Below the header, there is a text instruction: 'To create a voucher, select one or more causes, a work period date range and add your fee items. County and District causes are not allowed on the same voucher.' Below this, there are two fields: 'Causes: D1DC15201221' and 'Rate Category: Fixed Rate'. Both labels are circled in red. To the left of the 'Causes' field, there is a handwritten note: 'Click on Causes to change the Cause Number(s)'. To the left of the 'Rate Category' field, there is another handwritten note: 'Click on Rate Category to change between Fixed and Hourly Rate'. Below these fields, there are two date pickers: one for the start date (partially visible as '12/29/2015') and one for the 'End' date (12/29/2015).


### Adding Fee Items


Click the Add Item button in the Fee Items section of the Create Vouchers page to display the Create Fee Item window:

The screenshot shows a 'Create Fee Item' window with a close button (X) in the top right corner. Below the title bar, there is a 'Type:' label followed by a dropdown menu that currently displays '--- Please Select ---'.

After selecting the Type of activity from the dropdown list, the window will refresh to display additional fields needed for the selected type. Any fields that are required will be identified.

**Create Fee Item** ×

**Type:** Additional Case  *Click the Edit icon to change the Type*

**Date** Required  *Calendar Date tool*

**Quantity** (cases) Required *Indicates a required field*

**Comment** *Quantity Unit of Measure*

**Total:** \$0.00  
Total is calculated when you enter a date.

**Save** Cancel

To complete the activity, enter the date the activity was performed (either by entering the date into the field or using the calendar date tool to choose a date), the quantity if appropriate and any comments that are needed.

- Click Save to save your data and return to the Create Vouchers page.
- Click Save and add Another to save your data and keep you in the Create Fee Item window so that you can enter a new fee item.
- Cancel will not add this fee item and return you to the Create Vouchers page.

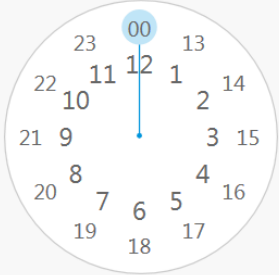
#### NOTES:

- The Total amount for a Fee Item will be calculated after you enter the date.
- For the In-Court Hourly Rate Itemized and Out-of-Court Hourly Rate Itemized fee items, you will be prompted to enter the rate you are authorized to charge.
- Certain Fixed Rate and the In-Court Hourly Rate Itemized, Out-of-Court Hourly Rate Itemized and Expense fee items will require you to enter a quantity. The appropriate unit of measure will be shown below the Quantity label. After entry of the Quantity, AMP will calculate the Total Amount for the activity using the standard fee amounts as defined in the current Criminal Court Fee Schedule or the rate you specified for the In-Court Hourly Rate Itemized and Out-of-Court Hourly Rate Itemized fee items.
- For Bond (i.e., Jail Release) Work, you will be required to enter the start and end times for each activity you performed. You can either type in the start or end times or use the clock tool to select the hour and minute values.

Start Required

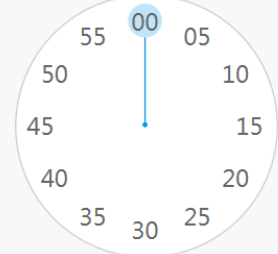
⊙

00 : 00



[Ok](#)

14 : 00



[Ok](#)

After selecting the hour a minutes scale will be shown.

### Requesting an Increase to the Standard Fee Amounts

To request an increase to the total voucher amount (which is a summation of the standard fee amounts for all of your activities), click on the Make Adjustment link shown below the total amount.

**Total:** \$0.00  
[Make Adjustment](#)

The page will expand, displaying additional fields for you to enter your request.

**Total:** \$0.00

**Adjusted Total:**

**Justification:** Required

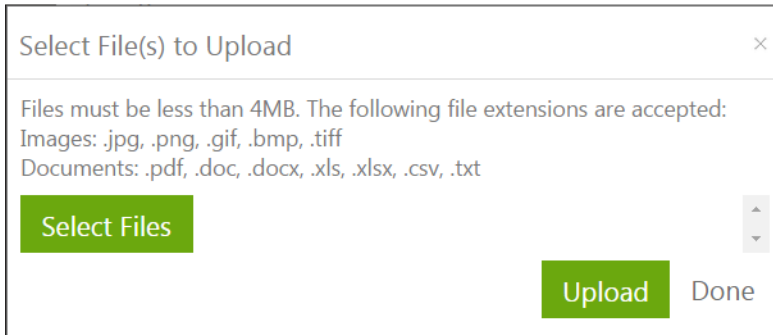
[Remove](#)

Enter the total amount you are requesting in the Adjustment Total field followed by the reason you are requesting the adjustment (please note that this is a required field). If you clicked the Make Adjustment link in error, just click the Remove link to remove the two fields.



### Uploading Documents to the Voucher

AMP allows you to upload one or more images or documents to the voucher to provide support for your claim. A Select Files to Upload window will be shown after clicking the Upload button.

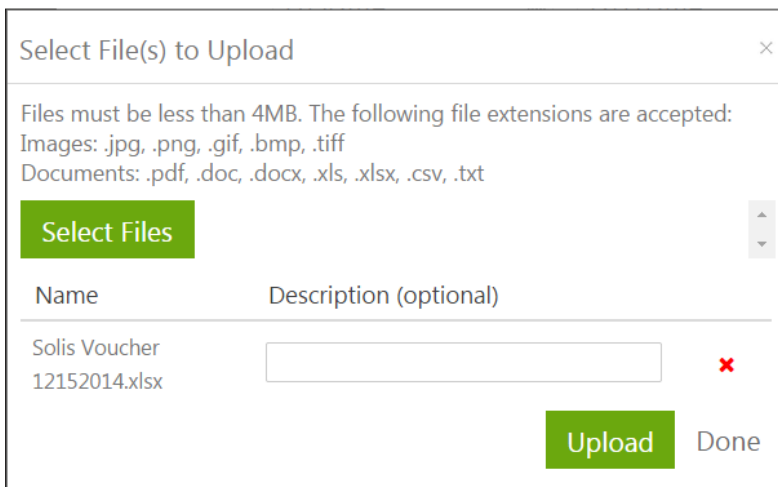


NOTE: Each file cannot exceed 4MB in size. The following File Extensions are accepted:

- Images: .jpg, .png, .gif, .bmp, .tiff
- Documents: .pdf, .doc, .docx, .xls, .xlsx, .csv, .txt

Clicking the Select Files button will display a standard Open Files dialog window allowing you to select one or more files at the same time.

Each file you select will be shown in the Select File to Upload window. You have the option of entering a description for each image or document you selected. If you've made a mistake, click on the Delete icon to remove that document.



When you have completed your selection, clicking the Upload button will start the upload process. If the upload was successful, the Delete icon (red x) will change to a Success indicator (green checkmark). Click Done to close the window and return to the Voucher page.

### *Saving / Submitting a Voucher*

Saving a voucher allows you to return to it in order to add or modify activities before you submit it for approval. Think of it as saving a draft voucher. After clicking the Save button, you will be presented with an acknowledgement window. Clicking OK will save the voucher and return you to the page listing all vouchers for the appointment you selected. Clicking Cancel will return you to the Create Voucher page.

Clicking the Submit button will both save the voucher and submit it for approval. After clicking the Submit button, you will be prompted to enter data about the disposition of the appointment. Please note that this data is for research purposes only. After entering the data, you can continue to the acknowledgement window. From the acknowledgment window, you can go back to revise your disposition summary or click the OK button to save and submit the voucher. You will then return to the page listing all vouchers for the appointment you selected. Clicking Cancel will return you to the Create Voucher page.

### **Recalling a Voucher**

Recognizing that there may be times in which you may have submitted a voucher containing an error, or forgot to include a fee item, AMP allows you to recall a Voucher so that you can modify and resubmit it.

From the Voucher page:


Start	End	Req. Total	Cause(s)	Status	Format
03/16/2015	05/11/2015	\$50.00	C1CR14214995	In Financial Review	Online

Create New

1 - 1 of 1 items

Clicking the Edit Voucher icon will display the Voucher Details window:

**Voucher - Appointment: 1248986**


**Details** 


**Causes:** C1CR14214995  
**Start & End Dates:** 3/16/2015 - 5/11/2015  
**Status:** In Financial Review (5/11/2015)  
**Format:** Online  
**Requested Total:** \$50.00

**Fee Items**

Fixed Rate - \$50.00


Summary	Comment	Date	Qty	Total
Obtaining Jail Release		05/11/2015	1	\$50.00

 1 - 1 of 1 items

 1 - 1 of 1 items

**Uploaded Documents**

Name	Description	Date
------	-------------	------

 0 - 0 of 0 items

[Upload](#)

[Recall](#)

Click the Recall button to pull back the Voucher from the review approval process.

## MY SETTINGS

The My Settings page allows you to view all of your cases (both appointed and retained) which have a future setting within in one of the Quick Date options (Today, This Week, 30 Days and 60 Days) or within a customizable date range. You can also view past, future or all settings for a specific case or client using the corresponding search options.

Note that when choosing one of the Quick Date options, the Start and End Dates will reflect the dates corresponding to the option you selected. You can increase or decrease this range by using the arrow buttons or by using the Calendar tool to select a specific date.

AMP - Appointment Management

Welcome, Rick

My Settings

View future settings

Decrease by 1 day    Increase by 1 day

Quick Date: This Week    Start: 3/10/2017    End: 3/17/2017

Or view settings (past, future, present)


Calendar tool


First Name:    Last Name:    Cause Number:    Period: Future

Search    Reset

Date	Court	Cause	Client / Style	Type
03/10/2017 9:00 AM	CC9	C1CR16150046	HILL, ASHLEY A	PTRC4
03/10/2017 9:00 AM	CC7	C1CR16500419	SIQUEIRA, JEREMIAS N	PLE
03/10/2017 9:00 AM	CC7	C1CR16500418	SIQUEIRA, JEREMIAS N	PLE
03/10/2017 9:30 AM	CC4	C1CR16501193	TABB, SCOTT R	PTR
03/13/2017 9:30 AM	CC8	C1CR16208588	CALDERON, ELIAS A	
03/15/2017 9:00 AM	299	D1DC16200370	DURCAN, VINCENT P	

View Setting Detail

You can print your list of future settings by clicking on the Print icon  located in the upper right corner of the page.

You can also export your list of settings to Excel by clicking on the Export to Excel icon  located in the upper right corner of the page.

You can view detailed information about a specific setting and the associated cause by clicking the Information icon shown in the right most column of the list.

The screenshot shows the AMP - Appointment Management interface. On the left is a dark sidebar with navigation options: My Cases, Alerts (13), My Settings, My Vouchers, Jail List, and Warrants (4). The main content area has a header with the user's name 'Welcome, Rick' and a profile icon. Below the header is a dark bar with a back arrow and 'Back to My Settings'. The main content displays a setting for 'C1CR16150046 for HILL, ASHLEY A' with a yellow 'I want to...' dropdown menu. Below this is a table of key information:

<b>Date:</b>	<b>Time:</b>	<b>Court:</b>	<b>Code:</b>	<b>Description:</b>
3/10/2017	9:00 AM	CC9	PTRC4	PRETRIAL CONFERENCE DOCKET 4

Below the table is a 'Details' section with the following information:

<b>Charge Date:</b>	<b>Charge Description:</b>	<b>Charge Level:</b>
1/6/2016	DRIVING W/LIC INV W/	Class B Misdemeanor
<b>Booking Number:</b>	<b>Indictment Status:</b>	<b>Jail Location:</b>
1600738	Out of Custody	N/A
<b>Bond Amount:</b>		
\$2,000.00		

From this page, you can view the documents or ROA for the Cause associated with this setting by selecting the appropriate option from the "I want to..." dropdown menu.

## MY VOUCHERS

The My Vouchers page contains an search feature that allows you to view all of your vouchers by client name, Cause Number, Voucher Status (Submitted is set as the default value, Not Submitted, Rejected and Paid and Date Range. The Date Range will default to a one year period from today's date and you will be shown any vouchers that were created within that date range for the Voucher Status selected.

**NOTE:** The Submitted status will display vouchers that are in Financial Review, CAPDS Review or have been Submitted to the Auditor for Payment.

IDA - Appointment Management

Welcome, Rick

- My Cases
- Alerts (13)
- My Settings
- My Vouchers
- Jail List
- Warrants (4)

### My Vouchers

**First Name**
**Last Name**

**Start**
**End**

**Cause Number**
**Status**

Submitted
v

Search
Reset

Start	End	Req. Total ^	Cause(s)	Status	Format	
05/26/2015	08/24/2015	\$650.00	D1DC15202966 D1DC15202967	Submitted to Auditor for Payment	Online	✎
07/20/2015	09/24/2015	\$780.48	J34792	Submitted to Auditor for Payment	Paper	✎
05/14/2015	06/25/2015	\$1,005.00	J31770	Submitted to Auditor for Payment	Paper	✎
02/02/2015	09/01/2015	\$1,686.00	D1DC15200613 D1DC14201906	Submitted to Auditor for Payment	Online	✎
06/08/2015	12/17/2015	\$1,905.00	D1DC15203277	CAPDS Review		
03/03/2015	12/23/2015	\$2,490.00	D1DC15201221	CAPDS Review		
09/02/2014	12/17/2015	\$3,003.00	C1CR13220048 C1CR15406305	Submitted to Auditor for Payment	Paper	✎


⏪ ⏩ 1 2 3 4 ⏪ ⏩

31 - 37 of 37 items


View Voucher Detail

Once you have a list of appointments, you can sort the list by Work Period Start or End Date, Requested Total Amount, Status or Format by clicking on the corresponding column heading. Clicking on the column heading again will sort it in reverse order.

You can view the detail for a specific voucher by clicking on the View icon located in the right most column of the list.

IDA - Appointment Management Welcome, Rick 

Voucher - Appointment: 1018249


**Details** 

**Causes:** D1DC15202966, D1DC15202967  
**Start & End Dates:** 5/26/2015 - 8/24/2015  
**Status:** Submitted to Auditor for Payment (8/24/2015)  
**Format:** Online  
**Requested Total:** \$650.00

**Fee Items**


Summary

▸ Fixed Rate - \$650.00

 1 - 1 of 1 items

**Uploaded Documents**

Name	Description	Date
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 0 No items to display Upload

*Print Request for Payment form*

For Vouchers that have been paid, you can print the Request for Payment for Service form that was sent to the County or District Clerk’s office for addition to the Case file, by clicking on the Print icon in the upper right corner of the page.

## JAIL LIST

The Jail List page allows you to view jail information for any of your clients that are incarcerated. For each incarcerated client you will be shown: the number of days they have been in jail; the date & time they are to be transported; types of holds that have been placed and the housing unit where they are located. You can search for clients using any of the following criteria: name; cause number; days in custody; case type; Court; those with or without holds and those that are either in jail or scheduled to be transported.

AMP - Appointment Management

Welcome, Rick

My Cases
Alerts (13)
My Settings
My Vouchers
Jail List
Warrants (4)

?

### Jail Status Search

This data is accurate as of 7:00 AM. If you need current jail status, click [here](#) to access the Travis County Sheriff's Inmate Search page.

<b>First Name</b>	<b>Last Name</b>	<b>Cause Number</b>	<b>Days in Custody</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Any"/>
<b>Case Type</b>	<b>Court</b>	<b>Holds</b>	<b>Transportation Status</b>
<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="Any"/>	<input type="text" value="Any"/>

Search
Reset

Client	Days in Jail	Transport Time(s)	Hold Type	Housing Unit
VASQUEZ-SOTO,DANIEL C	164	None	---	Bldg. 12 - D3



## PROFILE MANAGEMENT

AMP allows you to view and maintain your profile information that is used by Travis County Court Administration. Click on the dropdown menu shown next to your name at the top of each page and select Profile Management.

The screenshot displays the AMP - Appointment Management interface. On the left is a navigation menu with options: My Cases, Alerts (8), My Settings, My Vouchers, Jail List, and Warrants (0). The main content area is titled 'Personal Information' and shows the user's name as 'Booth, Rick'. To the right, under 'Mailing Address', is the address: 11 W 11th St, Suite 11, Austin, TX 78701. A light blue callout box contains the text: 'Should you need to change your address or other payment-related information, please contact the Auditor's Office at **AP@traviscountytexas.gov**.' Below this is the 'Contact Information' section, which is divided into 'Phone Numbers' and 'Email Addresses'. The 'Phone Numbers' section lists two numbers: 512-555-1212 (primary) labeled 'Office' and 512-555-3434 labeled 'Cell'. There is an 'Add Phone' button. The 'Email Addresses' section lists 'test@email.com' labeled 'Primary Email' and an 'Add Email' button. Handwritten annotations 'Edit Phone' and 'Edit Email' with red arrows point to the edit icons (pencil in a circle) next to the 'Office' phone number and the 'Primary Email' respectively. At the bottom, the 'Assigned Wheels' section lists 'Felony C' and 'Misdemeanor', each with an 'Opt Out' link.

Through AMP, you can maintain your contact information (phone and email address) which we will use in contacting you for appointment and/or other notifications. Remember to click the Save button to save any changes you made.

You may also temporarily Opt Out of any of your assigned wheels by clicking the Opt Out link. NOTE: You will need to opt back in prior to 90 days or else you will have to reapply for that wheel.

**Revision History**

<b>Number</b>	<b>Date</b>	<b>Summary of Changes</b>	<b>Author</b>
1.0	May 16, 2014	Initial Release	Rick Booth
2.0	Dec 17, 2014	Added sections for Required activities; Appointment Search; Voucher process and Document Upload	Rick Booth
3.0	May 21, 2015	Added sections for Closing, Reopening an Appointment and Recalling a Voucher	Rick Booth
4.0	July 14, 2015	Added section for Alerts and Warrants	Rick Booth
5.0	Dec 29, 2015	Added sections for My Vouchers, My Settings and Metrics	Rick Booth
6.0	Mar 10, 2017	Added sections for Jail List. Documented new icons and other new features.	Rick