



# Odyssey CMS Cheatsheet

**Topic:** Using Person IDs for Consolidated Checks & 1099s  
**Date:** 12/7/2015

**Summary:** This Cheatsheet will explain the process of using a party's Person ID to process consolidated checks and ease the 1099 process.

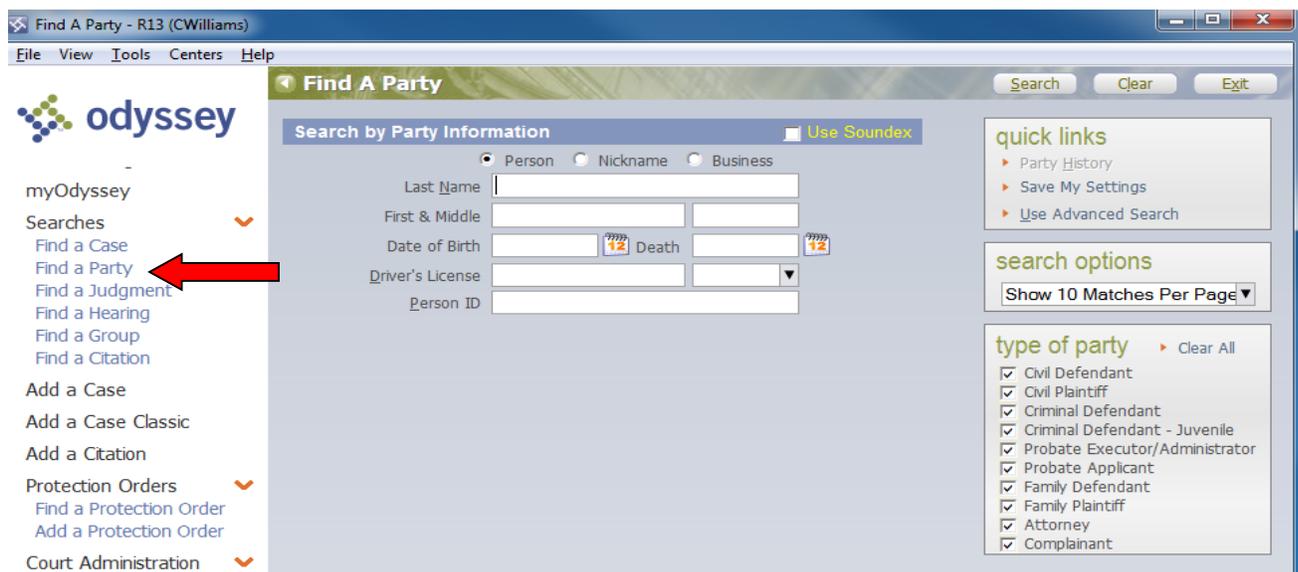
**Important:** Odyssey is software owned by Tyler Technologies, Inc. Any screenshots of Odyssey may contain proprietary information that should not be disclosed to non-Odyssey users.

Due in large part to the conversion process for counties, you may find multiple instances of a party record when you search. These are sometimes exact duplicates of a business name and address or multiple entries with different addresses. In order to ensure that the same party record is used on cases for large filers or law firms, users can search for a party by a unique Person ID. When the same party is used across cases, any money payable to that selected party will be consolidated onto a single check in the disbursement process. In addition, using the Person IDs on cases will facilitate the 1099 process for law firms.

1. The county should begin a master Person ID spreadsheet. Below is a sample of the fields that may be helpful in creating the spreadsheet.

	A	B	C	D	E	F	G
1	<b>Name (Last or Business</b>	<b>Name (First</b>	<b>Street Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Person ID</b>
2	Bowman Heintz Boscia & Vician		8605 Broadway	Merrillville	IN	46410	26206
3	Bowman	Gerald	8605 Broadway	Merrillville	IN	46410	3660
4							

2. To begin adding parties to your county-specific spreadsheet, click on Find a Party.





## Odyssey CMS Cheatsheet

3. Select all boxes in the "Type of Party" field. Click on the Business Radio Button if you are searching for a Business, type in the party name, (i.e. Bowman, Heinz\*), Click Search or press Enter.

Find A Party - R13 (CWilliams)

File View Tools Centers Help

odyssey

Case Manager Home  
myOdyssey

Searches

- Find a Case
- Find a Party
- Find a Judgment
- Find a Hearing
- Find a Group
- Find a Citation

Add a Case

Add a Case Classic

Add a Citation

Protection Orders

- Find a Protection Order
- Add a Protection Order

Find A Party

Search by Party Information  Use Soundex

Person  Nickname  Business

Business:

Person ID:

Search Clear Exit

quick links

- Party History
- Save My Settings
- Use Advanced Search

search options

Show 10 Matches Per Page

type of party Clear All

- Civil Defendant
- Civil Plaintiff
- Criminal Defendant
- Criminal Defendant - Juvenile
- Probate Executor/Administrator
- Probate Applicant
- Family Defendant
- Family Plaintiff
- Attorney
- Complainant

4. Click on the hyperlink to select the business name that matches the name and address your office would like to use. Note that the Person ID is listed here as well.

Search Results - Indiana Production

File View Tools Centers Developer Help

odyssey

Case Manager Home  
myOdyssey

Temp Launch

Searches

- Find a Case
- Find a Party
- Find a Judgment
- Find a Hearing
- Find a Group
- Find a Citation

Add a Case

Add a Case Classic

Add a Citation

Protection Orders

- Find a Protection Order
- Add a Protection Order

Search Results

Add Back Next Refine Exit

[Bowman Heintz Boscia & Vician](#)  
d.b.a. BOWMAN HEINTZ BOSCIA & VICIAN

Person ID 26206 Party ID 99095

Address Phone Description

8605 Broadway Merrillville, IN 46410 Work 219-769-6671 Fax 219-738-3044

[bowman heintz boscia & vician](#)

Person ID 14525073 Party ID 17981303

Address Phone Description

[Bowman Heintz Boscia & Vician](#)

Person ID 14763346 Party ID 18223840

Address Phone Description

[BOWMAN HEINTZ BOSCIA & VICIAN](#)

Records 1 - 10 of 1000 12/7/2015 9:56am Messages



## Odyssey CMS Cheatsheet

5. Review the party's information to ensure that this is the correct record. The Additional tab is where you will find the Person ID listed.

The Odyssey Assistant - R13 (CWilliams)

File View Tools Centers Help

odyssey

myOdyssey

Searches

- Find a Case
- Find a Party
- Find a Judgment
- Find a Hearing
- Find a Group
- Find a Citation

Add a Case

Add a Case Classic

Add a Citation

Protection Orders

- Find a Protection Order
- Add a Protection Order

Court Administration

- View Calendar
- View Resource Schedule
- Find Available Sessions
- Print / Send Notices
- Print Resource Letters
- Move Multiple Case Files
- Review Electronic Files
- Set Committal Hearings

General

Party in Jail

**This Party is marked as Non-Editable. Information on the General, Additional, and Employment tabs cannot be added, deleted, or modified.**

Name [Go To](#) [Previous](#) [Next](#) [Data Sheet](#)

**Bowman Heintz Boscia & Vician**

>Bowman Heintz Boscia & Vician  
48bhbv  
BHBV  
Boscia & Vician, Bowman & Heintz  
Boscia & Vician, Bowman, Heintz

Gender  Race

Date of Death

Height  Ft.  In. Hair

Weight  Eyes

Birth Date  Driver's License  Social Security

Current Known Addresses

- 8605 Broadway  
Merrillville, IN 46410
- 8605 BROADWAY  
Merrillville, IN 46410

Other Links

[Merge History](#)

Current Known Phones

- Work: 219-769-6671
- Fax: 219-738-3044

E-Mail

Legacy IDs

- 10\_338834-1
- 1000-01
- 1057\_AFirm
- 32\_237857-1
- 32\_459079-1
- 32\_481111-1
- 46\_210488-1
- 46\_227620-1
- 46\_697463-1

3/4/2014 2:51pm Messages

The Odyssey Assistant - Indiana Production

File View Tools Centers Developer Help

odyssey

Case Manager Home

myOdyssey

Temp Launch

Searches

- Find a Case
- Find a Party
- Find a Judgment
- Find a Hearing
- Find a Group
- Find a Citation

Add a Case

Additional

**Bowman Heintz Boscia & Vician**

**This Party is marked as Non-Editable. Information on the General, Additional, and Employment tabs cannot be added, deleted, or modified.**

State ID  FBI Number

Sex Offender Registration

Registered Sex Offender

Date Last Registered

Place of Birth

Hospital

Birth Record File #

Time

City

SO Number

Person ID  Person ID

Other Agency Number

Scars, Marks and Tattoos

12/7/2015 10:01am Messages

**NOTE:** The merging of party records is an on-going task that is performed by Court Technology. If you discover multiple records for a party record and need them merged, please contact the Court Technology Help Desk. This may happen frequently as Court Technology is required to merge after conversions and new Courts begin using the system.

6. Add the name, address, city, state, zip, Person ID, and any other information you may need for the spreadsheet.



## Odyssey CMS Cheatsheet

**HINT:** If your county will be using the 1099 report out of Odyssey, you can navigate to the Additional tab of the party record to record the Tax ID information while you are on the party record. For steps, see the “1099 Process” cheatsheet.

Once the spreadsheet has been started, you can circulate this spreadsheet to staff who add parties to cases and/or financial judgments to cases. If the party on your spreadsheet is a party to a case, the specific party can be added during case initiation. If the party on your spreadsheet is a recipient of judgment funds (i.e. a law firm), the party can be added on the party tab as a participant with the connection type of “Interested Person”. To add the party, go to the party tab as you normally would and follow the steps below.

7. Click the magnifying glass to search for the party.

**Add Party Connection**

Configured Types  All Types

Connection: **Interested Person**

Party  Participant

Party: [ ]  **New**

Added: 03/17/2014

Removed: [ ]

Reason: [ ]

Comment: [ ]

**Relationship**

**Add Next** **Continue** **Exit**

8. Enter the Person ID and click the Search button.

**Find A Party**

**Search by Party Information**  Use Soundex

Person  Nickname  Business

Last Name: [ ]

First & Middle: [ ] [ ]

Date of Birth: [ ]  Death: [ ] 

Driver's License: [ ]

Person ID: 26206

**Search** **Exit** **Use Advanced Search** **Add Party**



## Odyssey CMS Cheatsheet

9. Select the party name as you normally would.

Party Search Results | Records 1 - 1 of 1

[Bowman Heintz Boscia & Vic](#) ←

Person ID 26206 Party ID 99095

Address	Phone	Description
8605 Broadway Merrillville, IN 46410	Work 219-769-6671 Fax 219-738-3044	

<< Back Next >> Refine Search Exit Add Party

At this point, this party will be available on the Financials Edit Detail tab to select as a recipient for financials. All payments made where this specific party is the recipient will be automatically combined into a single check for the disbursement date range. In addition, all 1099-able payments made to this party will be combined on the 1099 report within Odyssey.