



# Odyssey CMS Cheatsheet

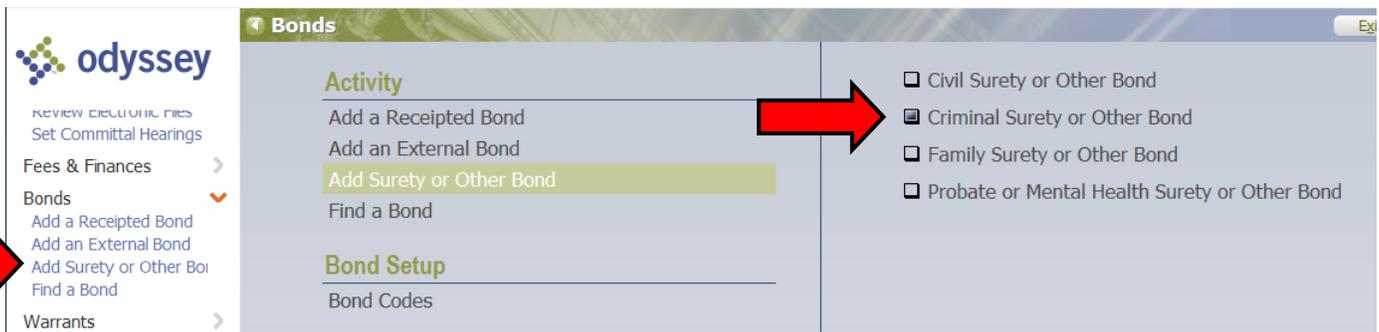
**Topic:** Adding a Free Standing Surety Bond for only the \$5 Special Death Benefit Fee

**Date:** 5/11/2013

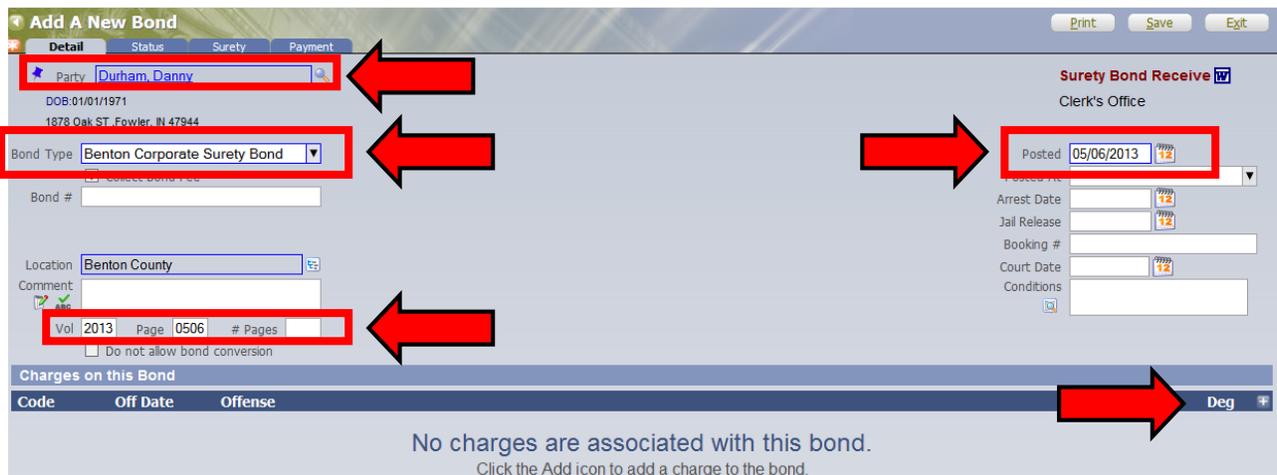
**Summary:** When the \$5 Special Death Benefit fee is brought to the Clerk’s office without formal charges, a case filed or the Surety Bond paper work, the Clerk will need to receipt the money in as a free standing Surety bond. The following process involves receipting the \$5 Special Death Benefit fee in so that when the case is added and Surety Bond information is supplied later, the party/payment can be linked to the case when it is filed.

**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.

1. On the left navigation bar, choose *Add Surety or Other Bond*. Then choose *Criminal Surety Bond*.



2. When prompted, select your County node, such as “Benton County”.
3. Click into the magnifying glass next to PARTY field to search and add party.
4. Choose Bond Type from the drop down and fill in the Posted date.
5. In the **Vol** and **Page** field you need to add the year in the Vol field (example: 2013) and the month and day of the day you are entering the surety bond in the Page field (example: 0506 for May 6<sup>th</sup> or 1220 Dec 20<sup>th</sup>). This is for the electronic Surety Bond Book.
6. Click “+” sign to add a charge. *This is required to add a bond.*



7. Since you haven’t received the charge information yet, enter NCA in the CODE field under charge detail.



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8. Fill in Offense date, using today's date. Click CONTINUE.

**Add Charge Detail**

Community of Offense: [Dropdown]

# [1]

Code: [NCA] Degree: [No State Code] GOC: [Dropdown]

Statute: [NCA] Description: [No Charge Applicable]

Off. Date: [05/06/2013] Time: [ ] Fine: [ ]

To: [ ] To: [ ] Bond: [ ]

On or About  At or About Bond Type: [Dropdown]

**Additional Statutes**

Type	Statute	Description

[Continue] [Exit]

9. Go to the **STATUS** tab.

10. At the bottom left hand corner of your screen, the date field is **always** today's date. If the bond was received the day before, then you can place that date in the comment field to the right and indicate the original date of when the bond was received at the Sheriff's Office.

11. Change the Status to "Received By Sheriff"

12. In the Location field, select the Sheriff's Dept.

**Add A New Bond** [Print] [Save] [Exit]

Tab: **Status** Surety Payment

**Durham, Danny** Received by Sheriff [W]

DOB: 01/01/1971 Sheriff's Office

1878 Oak ST, Fowler, IN 47944

Date	Status	Location	Comment
05/06/2013	Received by Sheriff	Sheriff's Office	Bond Original received by Sheriff 5/5/13.

**Status Detail**

Date: [05/06/2013] Comment: [Bond Original received by Sheriff 5/5/13.]

Status: [Received by Sheriff] Active

Location: [Sheriff's Office]

13. Go to the **SURETY** tab. Click the "+"

14. In the Surety Detail area located in lower section of your screen, click on "Party".

15. Search and locate your party.

16. Enter the Amount.

17. Add a comment if needed.

**Add A New Bond** [Print] [Save] [Exit]

Tab: Detail **Surety** Payment

**Durham, Danny** Received by Sheriff [W]

DOB: 01/01/1971 Sheriff's Office

1878 Oak ST, Fowler, IN 47944

Posted By	Amount	Comment
Durham, Danny	1,500.00	

**Surety Detail**

Party: [Durham, Danny]

Amount: [1,500.00]

Comment: [ ]



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18. If the \$5 is not received by the clerk and the Sheriff collects the fee but it is paid directly to the auditor, then go back to the detail tab to remove the check mark in the box "Collect Bond Fee". This removes the Payment tab which requires a payment to be taken on the bond.

**Add A New Bond**

**Detail** | Status | Surety | Payment

Party:

DOB: 01/01/1971

1878 Oak ST, Fowler, IN 47944

Bond Type:

Collect Bond Fee

Bond #

**\*\*If you need to process the \$5 Special Death Benefit fee, follow the steps below\*\***

19. Click on PAYMENT tab and choose BAIL REGISTRY DEPOSIT at *Type* dropdown
20. Fill in the *Payor*, and the *Till*.
21. Choose *Method* and *Amount* under *Tender Detail*.

**Add A New Bond** | Print | Save | Exit

**Detail** | **Payment** | Status | Surety

Durham, Danny | Received by Sheriff [W] | Sheriff's Office

DOB: 01/01/1971

1878 Oak ST, Fowler, IN 47944

**Transaction Detail**

Receipt # **System Assigned**  Manual

Date: 05/06/2013 Type:   Manual

Payment Amount to be Applied: **5.00**

Trust/Case Party  Non Case Party

Payor:  Address

Till:

Comment:

**Tender Detail**

Method:

Amount:

Add Additional Tender

Balance	Tender
Balance	0.00
Amt Applied	5.00+
New Balance	5.00

Tender	Applied
Tendered	5.00
Change	0.00

Transaction Balances | Use Manual Distribution

On Behalf Of / Fee	Amt to Apply
Durham, Danny	5.00
Bond Account	5.00

22. Click the "+" (located in the screen shot above) and select "Special Death Benefit Fee". Ignore the Cash Bond. You only use that on Free Standing or Case Cash Bonds.

**Select Fee**

Benton Cash Bond  
Special Death Benefit Fee

Exit

23. Click PRINT button in right corner to print your receipt and save your Surety Bond entry.



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When the case is officially filed, the free-standing bond may be linked to the case. This will allow the Special Death Benefit Fee money to be brought into the case.

1. Go to Add A Case.
2. Choose your case type.
3. At the Party tab, search for your party.
4. You will see that your party has a big blue **B** attached to their name which indicates that there is a free standing bond attached to that name.

Party Search Results | Records 1 - 3 of 3

<b>Durham, Danny</b>	DOB 01/01/1971	Party ID 20930354
<b>B</b>		
<b>Address</b>	<b>Phone</b>	<b>Description</b>
1878 Oak ST Fowler, IN 47944		
<b>DURHAM, DANNY E</b>	DOB 12/13/1968	DL IN 1190201087 Party ID 15513862
<b>Address</b>	<b>Phone</b>	<b>Description</b>
RR 1 BOX 19/B OWENSVILLE, IN 47665		WM 6'3" 235 BRO BRO
<b>Durham, Danny G</b>	DOB 10/15/1946	Party ID 15150585
<b>Address</b>	<b>Phone</b>	<b>Description</b>
Rr 4 Box 281 North Vernon, IN 47265		

<< Back    Next >>    Refine    Search    Exit    Add Party

5. Click on that name, adding that name to your case.
6. Click Continue.
7. Add the charges to the case.
8. When you click the "+" to add your charge the following screen will display. Click the yellow "**Add New Charge**" hyperlink. **Do Not** Check mark the NCA charge that is displayed below.

Add Charge Record

**Durham, Danny**

**Unlinked Charges** [Add New Charge](#)

Lists the party's charges that are not linked to a case. Select charges to either add to this case as one new charge or link to a charge already on the case, then click Next.  
To add a new charge, click Add New Charge above.

**1. No Charge Applicable**  
05/06/2013 (No State Code) NCA (NCA)  
[Bond](#) 05/06/2013

Exit    Next

9. Add your charge and click the big green SAVE button at the top right hand corner of your screen.
10. Select EDIT CASE on the Case Number pop-up (TA DA screen).

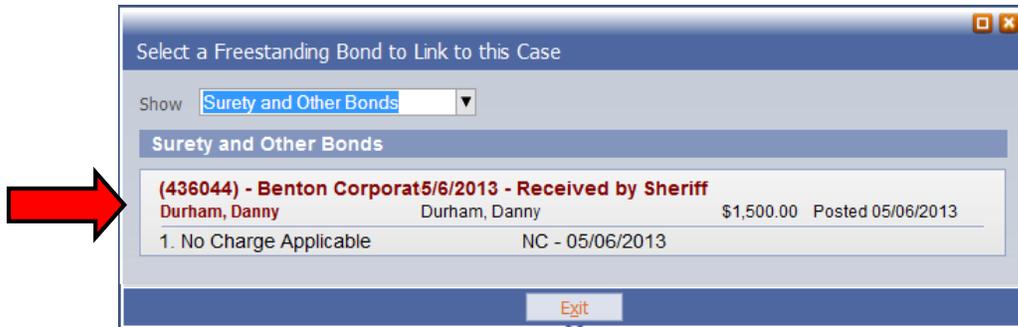


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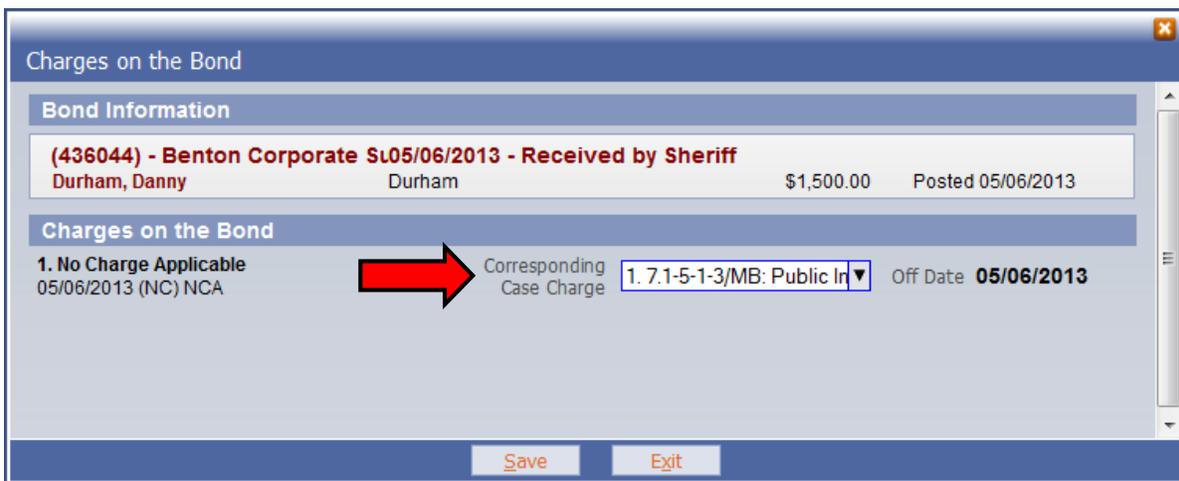
- Click on the **BONDS** Tab.
- Click into the yellow **LINK** hyperlink on right, next to the "+" in the lower half of the screen under Surety and Other Bonds.



- Click on the bond.



- At Corresponding Case Charge dropdown, select the charge and click SAVE.



- Click on the **STATUS** tab.
- Click the "+" to add a new status. Do not change the existing status; **always** select the plus sign to add a new status. You want a trail of what happened so the first status of Sheriff's Dept indicates that the Surety Bond was received by the Sheriff but the Clerk received the \$5 Special Death Benefit Fee. This new status indicates that the Clerk's office has now received the Surety Bond information.
- Select "Received Surety Bond by Clerk" in the Status field.
- Select "Clerk's Office" for the location.



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19. Click Save.

**Modify Bond**

Detail **Status** Surety Financial Documents

**Durham, Danny** **Surety Bond Receive**  
 Clerk's Office  
 DOB: 01/01/1971  
 1878 Oak ST ,Fowler, IN 47944

Date	Status	Location	Comment
05/07/2013	Surety Bond Received By Clerl	Clerk's Office	
05/06/2013	Received by Sheriff	Sheriff's Office	

**Status Detail**

Date: 05/07/2013  
 Status: Surety Bond Received E **Active**  
 Location: Clerk's Office  
 Comment: [Text Field]

Reprint Receipt Save Exit

20. Click on the **Parties** Tab.

21. Click on the yellow hyperlink "Add Party".

04C01-1305-CM-000091

Summary Detail **Parties** Charges Events Service Hearings Conditions Notes Disposition Time Stds Financial Prot. Orders Warrants

State of Indiana vs. Danny Durham  
 Type: CM - Criminal Misdemeanor  
 Group By: Connection Type  
 Show: Active Parties/Participants

**Party & Attorney Information** Add Party Add Attorney Add Group/Associate

State Plaintiff	State of Indiana
Defendant	Durham, Danny

22. Click on the All Types radio button, and click the Connection drop down. Select Bond Company.

**Add Party Connection**

Configured Types  **All Types**

Connection: Bond Company

Party  Participant

Party: [Search Field] **New**

Added: 05/07/2013  
 Removed: [Date Field]  
 Reason: [Dropdown]  
 Comment: [Text Field]

23. Click the magnifying glass, and click on the Business radio button. Search for the bond company.



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24. If the business comes up you can click on the business name, AS LONG AS the business name and address match. If not, Click Add Party and add the Bond company.



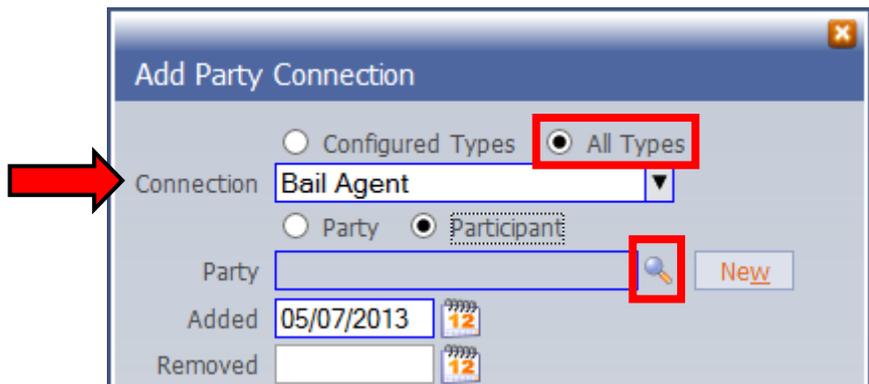
25. Click Continue.



26. Click on the Add Party hyperlink again.

27. Click on the All Types radio button, and click the Connection drop down. Select Bail Agent.

28. Click on the magnifying glass.



29. Search for the Bail Agent. (In the Example, James Woods was searched for).



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30. If you find the Bail Agent with their company address listed, you can select the party.

Party Search Results | Records 11 - 20 of 200

Address	Phone	Description
2602 Amhurst Drive Indianapolis, IN 46268		
<b>Woods, James</b>		
		Party ID: 5470060
Address	Phone	Description
Universal Fire & Casualty Ins 38 N Delaware St Indianapolis, IN 46204		

<< Back   Next >>   Refine   Search   Exit   Add Party

31. Click Continue.

Add Party Connection

Configured Types    All Types

Connection: **Bail Agent**

Party    Participant

Party: **Woods, James**   [New](#)

Added: 05/07/2013

Removed: [ ]

Reason: [ ]

Comment: [ ]

Relationship: [ + ]

[Continue](#)   [Exit](#)

32. Both the Bond Company and Bail Agent are listed on the **Parties** tab to send notice to.

04C01-1305-CM-000091

Summary   Detail   **Parties**   Charges   Events   Service

**State of Indiana vs. Danny Durham**  
Type: CM - Criminal Misdemeanor

Group By: **Connection Type**

Related Parties View

**Party & Attorney Information**

State Plaintiff	State of Indiana
Defendant	Durham, Danny

**Participant & Attorney Information**

Bail Agent	Woods, James
Bond Company	Woods Bail Bonds