



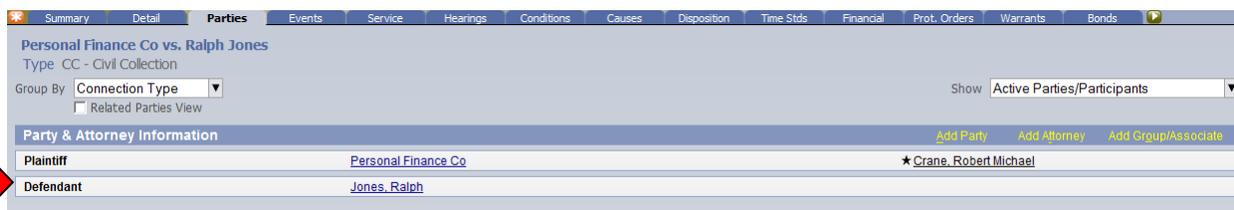
Odyssey CMS Cheatsheet

Topic: Adding a Party, Participant or Attorney to a Case
Date: 1/27/2015

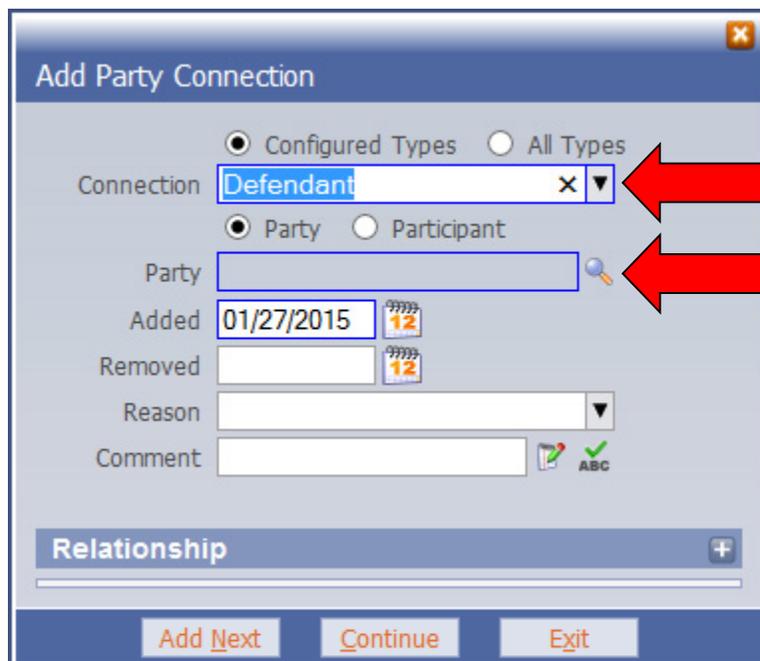
Summary: This cheatsheet describes how to add a party, participant, or attorney to cases in Odyssey.

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. From the **Parties tab**, you can right click on the party type for the type of party you want to add. i.e., if you want to add a defendant, right click on defendant.



2. In the **Add Party Connection** box, select the appropriate connection type. If you need a party type that is not listed, select the All Types option above the Connection dropdown.
3. Click on the magnifying glass next to the Party field in order to search for your party.



4. From the *Find a Party* screen, **Select** either the **Person**, **Nickname**, or **Business** radio button

There are two ways to search and find parties in Odyssey:

- Searching on Person ID's
- Searching on Party / Business Names



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- From the Find a Party screen if you know the person ID you can enter that number in the person ID field and **Search**.

The screenshot shows the 'Find A Party' window. Under 'Search by Party Information', the 'Person' radio button is selected. The 'Person ID' field is highlighted with a red arrow. The 'Search' button is also highlighted with a red arrow.

- If you do not know the Person ID, you can search on the person or department's name.
 - If you are searching by party, select the Person radio button,
 - If you are searching by a department or Business, select the Business radio button.

Type the name you are searching for and click **Search**. Remember that you must enter at least 3 letters of the last name with an * and at least 1 letter of the first name with an * in order to search... OR click the Use Advanced Search button to search on last name only

The screenshot shows the 'Find A Party' window. Under 'Search by Party Information', the 'Person' radio button is selected. The 'Last Name' field contains 'mel*' and the 'First & Middle' field contains 'Joh*'. The 'Search' button is highlighted with a red arrow.

- Select the name of your Party from the results screen and **Continue**.

NOTICE that the Person ID displays on the Party Search Results screen (as displayed in the screenshot below). This allows you the opportunity to write down the number to use it in the future if you have a litigant that files frequently, especially in instances such as an Apartment Complex, School Corporation, etc.



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Party Search Results | Records 1 - 4 of 4

Address	Phone	Description
917 Kings Mill Road #215 Greenwood, IN 46142	Person ID 26976186	Party ID 31457809
<u>Mellon, John</u>	DOB 05/20/1985	
3184 E CAROL AVE TERRE HAUTE, IN 47805	Person ID 23010394	Party ID 26917789 WM
<u>MELLON, JOHN M</u>	DOB 05/20/1985	DL IN 1390821510 Party ID 16547651
3184 E CAROL AVE TERRE HAUTE, IN 47805	Person ID 13179305	Description M 6'0"
<u>Mellor, John P</u> ←	DOB 03/15/1965	DL IN 1390756452 Party ID 15542135
106 Country Club RD Terre Haute, IN 47803	Person ID 12207327	Description WM

<< Back Next >> Refine Search Exit Add Party

8. If the party is not in Odyssey, you can add a new party from the search results screen by clicking **Add Party**.

Note: Do not add Attorney's from this screen. Please see Cheatsheet to edit Attorney information.

Party Search Results | No Data Returned

No Match Found

<< Back Next >> Refine Search Exit Add Party ←



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9. Add the required fields outlined in blue and **Save**. Make sure to type the appropriate case type (Upper Case vs. Lower Case) letters for the beginning of names and initials

Add A New Defendant

Name Person Nickname Business
Title
First
Middle
Last
Suffix

Description
Date of Birth
Gender
Race
Ethnicity
Height Ft. In.
Weight
Hair
Eyes

Identifiers
Driver's License State
Social Security FBI Number
Other Agency No.

Address Standard U.S. Standard U.S. with Attn. Non-Standard U.S. Foreign
No. St.
Unit No.
City State ZIP Code

Phones and E-Mail
Home Ext.
Work Ext.
Fax Ext.
Cell Ext.
E-Mail @

Save **Exit** **Advanced**

10. Click **Continue** and Save the case before exiting.

Add Party Connection

Configured Types All Types
Connection
 Party Participant
Party
Added
Removed
Reason
Comment

Relationship

Continue **Exit**