



## Odyssey CMS Cheatsheet

**Topic:** Adding a Surety Bond to the Bond Tab

**Date:** 3/31/2015

**Summary:** When a Surety Bond is brought to the Clerk's office, follow this cheatsheet to add the Surety Bond onto the Bonds Tab.

**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. Navigate to the case.
2. Go to the Bonds Tab.
3. Verify the correct party is listed in the Party box.
4. Click the plus sign in the Surety and Other Bonds header.

The screenshot shows the Odyssey CMS interface for case 08D01-1503-F6-000011. The 'Bonds' tab is selected, and the party is 'Luthor, Lex'. The interface displays three sections: 'Cash Bonds', 'Surety and Other Bonds', and 'Property Bonds'. Each section has a plus sign icon in the top right corner. Red arrows point to the 'Bonds' tab and the plus sign in the 'Surety and Other Bonds' header.

5. If a warrant has been added to the case setting the bond, you may receive a "Select Setting" window. If so, click the yellow "Post Bond" link.

The screenshot shows the 'Select Setting' dialog box. The dialog box contains a 'Settings' section with a plus sign icon and a yellow 'Post Bond' link. A red arrow points to the 'Post Bond' link.



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- In the Bond Type drop down choose the Corporate Surety Bond. Leave the "Collect Bond Fee" box checked if you are collecting the \$5 Special Death Benefit Fee. **\*\*Make sure you uncheck the "Collect Bond Fee" box if you are NOT collecting it.\*\*** Fill in date posted (always today's date). If it was filed stamped a different day mention that in the comment field. In the Vol and Page fields you will put the year in the "Vol" field (ex. 2013) and the month and day in the "Page" field (ex. 0531). In addition, if your county tracks the Power Number from the bond, this can be entered in the Bond Number field.

**Add A New Bond**

**Detail** | Status | Surety | Payment

**Luthor, Lex**  
Male DOB:08/20/1939 DL:IN-789456123 SSN:555-12-3456  
234 S Kryptonite LN , Smallville, IN 46204

**Surety Bond Receive**  
Clerk's Office

Bond Type: **Carroll Corporate Surety Bond** (dropdown)  
 Collect Bond Fee  
Bond #: Power Number  
Location: Carroll Superior Court  
Comment: File Stamped 3/28/15  
Vol: 2015 Page: 0331 # Pages:   
 Do not allow bond conversion

Posted: 03/31/2015  
Posted At:   
Arrest Date:   
Jail Release:   
Booking #:   
Court Date:   
Case #: 08D01-1503-F6-000011

**Charges on this Bond**

Code	Off Date	Offense	Deg
08D01-1503-F6-000011			
354342a1A1	03/01/2015	1. 35-43-4-2(a)(1)(A)/F6: Theft	F6

**Conditions**

Conditions:



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7. Navigate to the Surety Tab. Click the plus (+) sign.

**Add A New Bond**

Detail **Surety** Payment

**Luthor, Lex** **Surety Bond Receive**  
Male DOB:08/20/1939 DL:IN-789456123 SSN:555-12-3456 Clerk's Office  
234 S Kryptonite LN ,Smallville, IN 46204

Posted By	Amount	Comment
No surety information exists for this bond. Click the Add icon to add surety or other bond.		

**Surety Detail**

Bond Company  Party

Bond Company

Amount

Comment

Save Save/Print Exit

8. Select the Party radio button. Click the picker icon next to Party field.

**Surety Detail**

Bond Company  Party

Party

Amount

Comment

Save Save/Print Exit



## Odyssey CMS Cheatsheet

- Search for the Bondsman or Bond Company. Once found, click on the party. This takes you back to the Surety tab on the "Add a New Bond" screen.

**Find A Party**

Search by Party Information  Use Soundex

Person  Nickname  Business

Business

Person ID

[Search](#) [Clear](#) [Exit](#) [Use Advanced Search](#) [Add Party](#)

- Enter the amount of the surety bond in the Amount field.

**Add A New Bond**

Detail Status **Surety** Payment

**Luthor, Lex** **Surety Bond Receive**  
Male DOB:08/20/1939 DL:IN-789456123 SSN:555-12-3456 Clerk's Office  
234 S Kryptonite LN ,Smallville, IN 46204

Posted By	Amount	Comment
▶ Roche Surety & Casualty Co	2,500.00	

**Surety Detail**

Bond Company  Party

Party

Amount

Comment

[Save](#) [Save/Print](#) [Exit](#)

**\*\*If the \$5 Special Death Benefit Fee is not received by the Clerk (e.g. the Sheriff collects the fee but it is paid directly to the auditor), click SAVE and skip to step 14. If you need to process the \$5 Fee, follow steps 10-13.\*\***



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11. On the Payment tab, fill in the *Type* (Bail Registry), *Payor*, and *Till* under Transaction Detail. Select the *Method* and fill in the *Amount* under Tender Detail.

**Add A New Bond**

Detail Status Surety **Payment**

**Luthor, Lex** **Surety Bond Receive**  
Male DOB:08/20/1939 DL:IN-789456123 SSN:555-12-3456  
234 S Kryptonite LN, Smallville, IN 46204  
Clerk's Office

**Transaction Detail**

Receipt # **System Assigned**  Manual  
Date 03/31/2015 Type **Bail Registry**  
Payment Amount to be Applied **0.00**  
 Trust/Case Party  Non Case Party  
Payor **Luthor, Lex** Address  
Till **Carroll County Daily Till**  
Comment

**Tender Detail**

Method **Cash**  
Amount **5.00**

**Add Additional Tender**

Balance	Tender
Balance	0.00
Tendered	5.00
Amt Applied	0.00+
Applied	0.00-
New Balance	0.00
Change	5.00

**Transaction Balances**  Use Manual Distribution

On Behalf Of / Fee	Amt to Apply
Luthor, Lex	0.00
08D01-1503-F6-000011	0.00
Bond Account	0.00

**Totals for this Transaction** **0.00**

Save Save/Print Exit

12. On the Payment Tab, click the + sign as shown below to add assess the \$5.

**Add A New Bond**

Detail Status Surety **Payment**

**Luthor, Lex** **Surety Bond Receive**  
Male DOB:08/20/1939 DL:IN-789456123 SSN:555-12-3456  
234 S Kryptonite LN, Smallville, IN 46204  
Clerk's Office

**Transaction Detail**

Receipt # **System Assigned**  Manual  
Date 03/31/2015 Type **Bail Registry**  
Payment Amount to be Applied **0.00**  
 Trust/Case Party  Non Case Party  
Payor **Luthor, Lex** Address  
Till **Carroll County Daily Till**  
Comment

**Tender Detail**

Method **Cash**  
Amount **5.00**

**Add Additional Tender**

Balance	Tender
Balance	0.00
Tendered	5.00
Amt Applied	0.00+
Applied	0.00-
New Balance	0.00
Change	5.00

**Transaction Balances**  Use Manual Distribution

On Behalf Of / Fee	Amt to Apply
Luthor, Lex	0.00
08D01-1503-F6-000011	0.00
Bond Account	0.00

**Totals for this Transaction** **0.00**

Save Save/Print Exit



## Odyssey CMS Cheatsheet

13. Select “Special Death Benefit Fee” and click Continue.

Select Fee

Carroll Cash Bond

Special Death Benefit Fee

[Continue](#) [Exit](#)

14. Click **Save/Print** when finished.

15. Navigate to the Parties tab on the case. Click on the “Add Party” link. This will add the Bond Company and/or Agent to the parties tab to send notice to.

08D01-1503-F6-000011

Forms Save Exit

Summary Detail **Parties** Charges Events Service Hearings Conditions

State of Indiana vs. Lex Luthor  
Type F6 - Felony 6

Group By Connection Type Show Active Parties/Participants

Related Parties View

Party & Attorney Information [Add Party](#) [Add Attorney](#) [Add Group/Associate](#)

State Plaintiff	State of Indiana
Defendant	Luthor, Lex

16. Click on the “All Types” radio button, and from the drop down find “Bond Company”. Click the magnifying glass.

Add Party Connection

Config  All Types

Connection Bond Company

Party  Participant

Party

Added 05/31/2013

17. Click on the “business” radio button, and search for the bond company. Click **Search**.

Find A Party

Search by Party Information  Use Soundex

Person  Nickname  Business

Business Roche Surety\*

Person ID

[Search](#) [Clear](#) [Exit](#) [Use Advanced Search](#) [Add Party](#)



## Odyssey CMS Cheatsheet

18. If you find the company, click on it if the business name and address match.

Party Search Results | Records 1 - 10 of 54

Address	Phone	Description
<b>Roche Surety &amp; Casualty Co</b>		
	Person ID 3542139	Party ID 6382971
Address	Phone	Description
<b>Roche Surety &amp; Casualty Co</b>		
	Person ID 17397078	Party ID 21065488
1910 Orient RD Tampa, FL 33619		
Address	Phone	Description
<b>Roche Surety &amp; Casualty Co</b>		
	Person ID 20863255	Party ID 24592587
191 0 Orient Road Tampa, FL 33619		
Address	Phone	Description
<b>Roche Surety &amp; Casualty Co</b>		
	Person ID 22059806	Party ID 25916258

<< Back   Next >>   Refine   Search   Exit   Add Party

19. Click Continue.

Add Party Connection

Configured Types    All Types

Connection **Bond Company**

Party    Participant

Party **Roche Surety & Casualty Co**

Added **05/31/2013**

Removed

Reason

Comment

Relationship

 

20. Follow steps 14-18 to add the Bail Agent, if need be.