



Odyssey CMS Cheatsheet

Topic: Adjusting Negative Balances that Converted from the Legacy System
Date: 2/12/2015

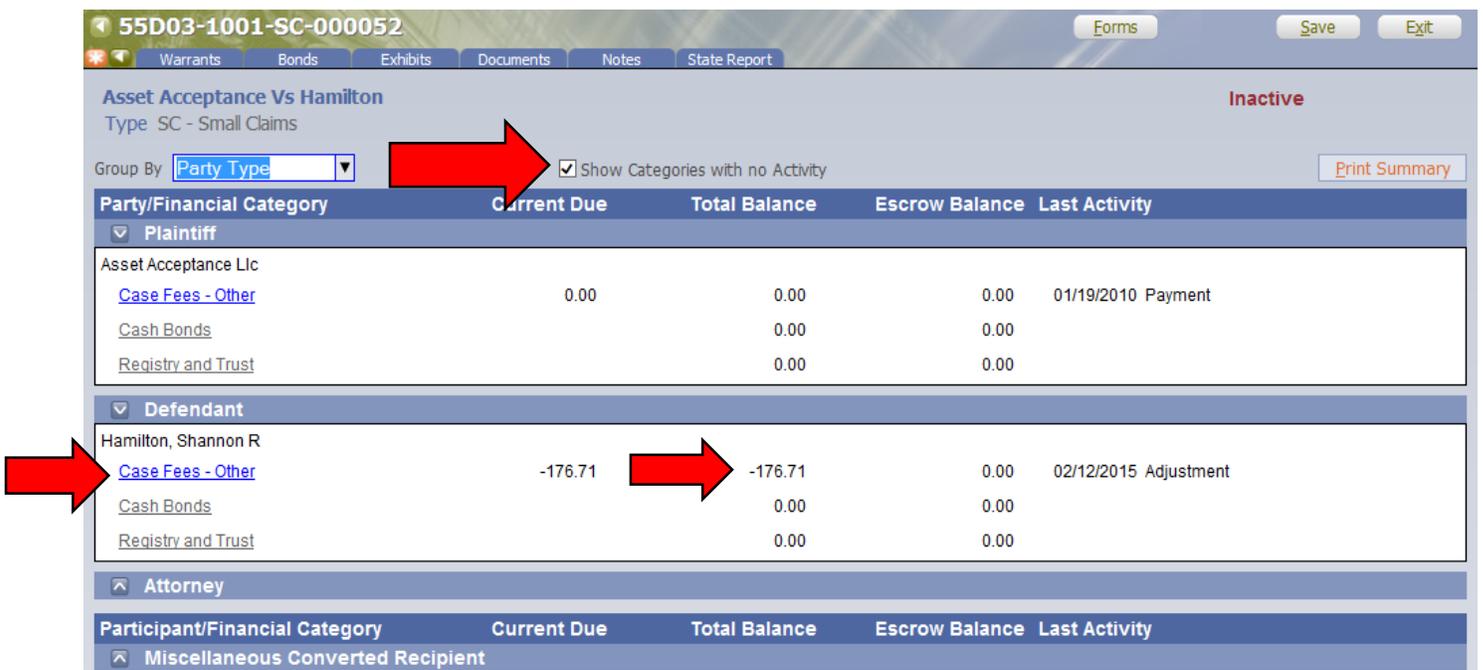
Summary: This cheat sheet explains how to correct negative balances that convert from the legacy system. If the balance should be Joint & Several and both balances are negative but do not match, please contact the help desk. There may be additional assistance needed to get all parties in balance before correcting the negative balance.

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. When in your case go to the **Financial** tab or click on the hyperlinked words **Financial Balance** on the summary screen.



2. On the view summary screen make sure the Show Categories with no Activity box is checked. Click **Case Fees – Other** under the party where the negative amount displays under the total balance column.





Odyssey CMS Cheatsheet

3. This will take you to the view balance screen. Click the Red dollar sign (\$) to assess fees then click the plus sign (+).

55D03-1001-SC-000052

Summary Detail Parties Events Service Hearings Conditions Causes Disposition Time Stds **Financial** Prot. Orders

Asset Acceptance Vs Hamilton
Type SC - Small Claims Inactive

Hamilton, Shannon R Show Indirect Fees No Collection Status

Balances Edit Detail

Fee Category	Charges	Payments	Credits	Balance	Diso	Escrow
Judgment/Restitution	1,478.08	1,654.79	0.00	(176.71)	1,654.79	0.00
Totals	1,478.08	1,654.79	0.00	(176.71)	1,654.79	0.00

Enter Defendant Charges on Case # 55D03-1001-SC-000052

Date 01/30/2015 Case Due Date For Party Hamilton, Shannoc

System Distribution Manual Distribution Case Grace Days

Charge Information [Auto Assess](#)

Fee Schedule Charge +

Totals 0.00

Comment

User Long, Maria

Save Exit Save/Payment

4. Select **Manual Judgment Interest** then click **Continue**.

Select Fee Schedules

Description Code

Show Selected Codes Only Sort Description

Description	Code
1. <input type="checkbox"/> Change of Venue Fee - Civil	CVCV
2. <input type="checkbox"/> Copy Fees	CF
3. <input type="checkbox"/> Judgment	JDG
4. <input type="checkbox"/> Judgment Interest	JINT
5. <input checked="" type="checkbox"/> Manual Judgment Interest	MJINT
6. <input type="checkbox"/> Non-Sufficient Funds Check	NSF
7. <input type="checkbox"/> Refund	REF
8. <input type="checkbox"/> Reimbursement for Appraiser Fees	APP
9. <input type="checkbox"/> Reimbursement for Certified Mail	RCMF
0. <input type="checkbox"/> Reimbursement of Court Interpreter Expense	RIE

Get All Codes Select All 23 Results - Page 1 of 3

<<Back Next>> Search Continue Exit



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- Next enter the amount that represents the overpayment. In the example below the amount is 176.71, then click **Finish**.

Calculate Manual Judgment Interest

Enter the amount for "Manual Judgment Interest - CV"

[Cancel](#) [Finish](#)

- The next screen will show the **Manual Judgment Interest** entered with the amount, verify the amount is correct, then click **Save**. If the amount is incorrect, click the question mark icon (?) to the left of the words: Manual Judgment Interest and enter the correct amount.

Enter Defendant Charges on Case # 55D03-1001-SC-000052

Date Case Due Date For Party **Hamilton, Shann**

System Distribution Manual Distribution Case Grace Days

[Charge Information](#) [Auto Assess](#) [Edit Detail](#)

Fee Schedule	Charge
<input checked="" type="checkbox"/> Manual Judgment Interest	176.71

Totals 176.71

Comment

User **Long, Maria**

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

- Now click the **Adjustment button** which looks like the plus (+) and minus (-) sign.

55D03-1001-SC-000052

Summary Events Service Hearings Conditions Causes Disposition Time Stds **Financial** Prot. Orders

Asset Acceptance Vs Hamilton
Type SC - Small Claims

Hamilton, Shannon R Show Indirect Fees No Collection Status

[View Summary](#) [Print Detail](#)

Fee Category	Charges	Payments	Credits	Balance	Disb	Escrow
Interest	176.71	0.00	0.00	176.71	0.00	0.00
Judgment/Restitution	1,478.08	1,654.79	0.00	(176.71)	1,654.79	0.00
Totals	1,654.79	1,654.79	0.00	0.00	1,654.79	0.00



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8. On the Enter an Adjustment screen click on the arrows to the left of the **Judgment** and **Manual Judgment** rows to expand or collapse these rows.

Enter an Adjustment

Date Show Amounts Show Adjustments Show Indirect Fees

Fee Schedule	Charges	Payments	Credits	Balance	Disb	Escrow
03/19/2010 Judgment	1,478.08	1,654.79	0.00	(176.71)	1,654.79	0.00
01/30/2015 Manual Judgment	176.71	0.00	0.00	176.71	0.00	0.00

Current Adjustments	None	None	None	None	None	None
Adjusted Totals	1,654.79	1,654.79	0.00	0.00	1,654.79	0.00
Indirect Totals	0.00					

Reason

Comment

User **Maria Long**

Till

Enter an Adjustment

Date Show Amounts Show Adjustments Show Indirect Fees

Fee Schedule	Charges	Payments	Credits	Balance	Disb	Escrow
03/19/2010 Judgment	1,478.08	1,654.79	0.00	(176.71)	1,654.79	0.00
Interest Bearing Principal -	1,478.08	1,654.79	0.00	(176.71)	1,654.79	0.00
01/30/2015 Manual Judgment	176.71	0.00	0.00	176.71	0.00	0.00
Manual Judgment Interest -	176.71	0.00	0.00	176.71	0.00	0.00

Current Adjustments	None	None	None	None	None	None
Adjusted Totals	1,654.79	1,654.79	0.00	0.00	1,654.79	0.00
Indirect Totals	0.00					

Reason

Comment

User **Maria Long**

Till



Odyssey CMS Cheatsheet

9. Left click in the white space of the **Credit** column in the **Interest Bearing Principal** row, the amount in that area will be highlighted in blue and an X will appear in that field. Enter the **negative** amount of the credit and press <enter> or <tab> out of that field. You will now see a **red** arrow pointing down in that **Credit** column and a **green** arrow pointing up in the **Balance** column of that row.

Enter an Adjustment

Date: 01/30/2015 Show Amounts Show Adjustments Show Indirect Fees

Fee Schedule	Charges	Payments	Credits	Balance	Disb	Escrow
03/19/2010 Judgment	1,478.08	1,654.79	0.00	(176.71)	1,654.79	0.00
Interest Bearing Principal -	1,478.08		0.00 X	(176.71)	1,654.79	0.00
01/30/2015 Manual Judgment	176.71	0.00	0.00	176.71	0.00	0.00
Manual Judgment Interest -	176.71	0.00	0.00	176.71	0.00	0.00

Current Adjustments: None None None None None None None

Adjusted Totals: 1,654.79 1,654.79 0.00 0.00 1,654.79 0.00

Indirect Totals: 0.00

Reason:

Comment:

User: Maria Long

Till:

Enter an Adjustment

Date: 01/30/2015 Show Amounts Show Adjustments Show Indirect Fees

Fee Schedule	Charges	Payments	Credits	Balance	Disb	Escrow
03/19/2010 Judgment	1,478.08	1,654.79	(176.71)	0.00	1,654.79	0.00
Interest Bearing Principal -	1,478.08	1,654.79 ↓	(176.71) ↑	(0.00)	1,654.79	0.00
01/30/2015 Manual Judgment	176.71	0.00	0.00	176.71	0.00	0.00
Manual Judgment Interest -	176.71	0.00	0.00	176.71	0.00	0.00

Current Adjustments: None None -176.71 +176.71 None None

Adjusted Totals: 1,654.79 1,654.79 (176.71) 176.71 1,654.79 0.00

Indirect Totals: 0.00

Reason:

Comment:

User: Maria Long

Till:



Odyssey CMS Cheatsheet

10. Next, left click the white space of the **Credit** column in the **Manual Judgment Interest** row. The amount area will also become highlighted in blue and an X will appear in that field. Enter the amount of the credit and press <enter> or <tab> out of that field. A **green** arrow pointing up should appear in that **Credits** column and a **red** arrow pointing down should appear in the **Balance** column of that row.

Enter an Adjustment

Date: 01/30/2015

Radio buttons: Show Amounts (selected), Show Adjustments, Show Indirect Fees (checked)

Fee Schedule	Charges	Payments	Credits	Balance	Disb	Escrow
03/19/2010 Judgment	1,478.08	1,654.79	(176.71)	0.00	1,654.79	0.00
Interest Bearing Principal -	1,478.08	1,654.79 ↓	(176.71) ↑	(0.00)	1,654.79	0.00
01/30/2015 Manual Judgment	176.71	0.00	176.71	0.00	0.00	0.00
Manual Judgment Interest	176.71	0.00 ↑	176.71 ↓	0.00	0.00	0.00

Current Adjustments: None, None, 0.00, 0.00, None, None

Adjusted Totals: 1,654.79, 1,654.79, 0.00, 0.00, 1,654.79, 0.00

Indirect Totals: 0.00

Reason: [Dropdown]

Comment: [Text Area]

User: Maria Long

Till: [Text Field]

Buttons: Save, Exit

11. It is strongly recommended to **add a comment** at the bottom left of the screen to keep a history of why the amount was adjusted.

12. Click **Save**.

Enter an Adjustment

Date: 01/30/2015

Radio buttons: Show Amounts (selected), Show Adjustments, Show Indirect Fees (checked)

Fee Schedule	Charges	Payments	Credits	Balance	Disb	Escrow
03/19/2010 Judgment	1,478.08	1,654.79	(176.71)	0.00	1,654.79	0.00
Interest Bearing Principal -	1,478.08	1,654.79 ↓	(176.71) ↑	(0.00)	1,654.79	0.00
01/30/2015 Manual Judgment	176.71	0.00	176.71	0.00	0.00	0.00
Manual Judgment Interest	176.71	0.00 ↑	176.71 ↓	0.00	0.00	0.00

Current Adjustments: None, None, 0.00, 0.00, None, None

Adjusted Totals: 1,654.79, 1,654.79, 0.00, 0.00, 1,654.79, 0.00

Indirect Totals: 0.00

Reason: [Dropdown]

Comment: Adjusting balance to remove overpayment of the original judgment.

User: Maria Long

Till: [Text Field]

Buttons: Save, Exit



Odyssey CMS Cheatsheet

Note: After saving the adjustment when you go back into your summary tab, you should see the **Financial Balance** represented as zero.

55D03-1001-SC-000052 Forms Save Exit

Summary | Detail | Parties | Events | Service | Hearings | Conditions | Causes | Disposition | Time Stds | Financial | Prot. Orders

Asset Acceptance Vs Hamilton

Status **Decided**
 Filed 01/19/2010
 Type SC - Small Claims
 Court Morgan County Superior Court 3
 Judicial Officer Craney, James Spencer
 Financial Balance 0.00

Most Recent Events & Hearings Case Summary

10/24/2011	Converted Event <i>"Order" issued, Plaintiff failed to request interest, Judgment is released as it has been paid in</i>
10/24/2011	Converted Event <i>Red. Disp REDBD</i>
09/20/2011	Converted Event <i>Counsel present. Counsel to file SOC. (s) (RJO? N) JTS Minute Entry Date: 2011-09-20</i>
09/02/2011	Converted Event <i>Letter to Plt. RE: SOC or interest. Review case on 10/7/11. ce (RJO? N) JTS Minute Entry .</i>

[statistical closure](#)
03/19/2010 Bench Disposition

[case cross reference](#)
Legacy System Number
D310SC0052

