



# Odyssey CMS Cheatsheet

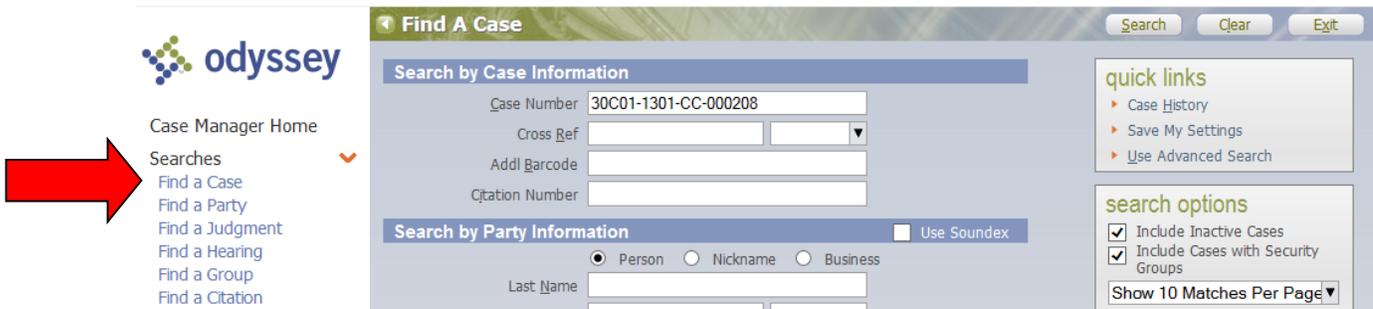
**Topic:** Disbursing an Individual Check from a Case

**Date:** 6/11/2013

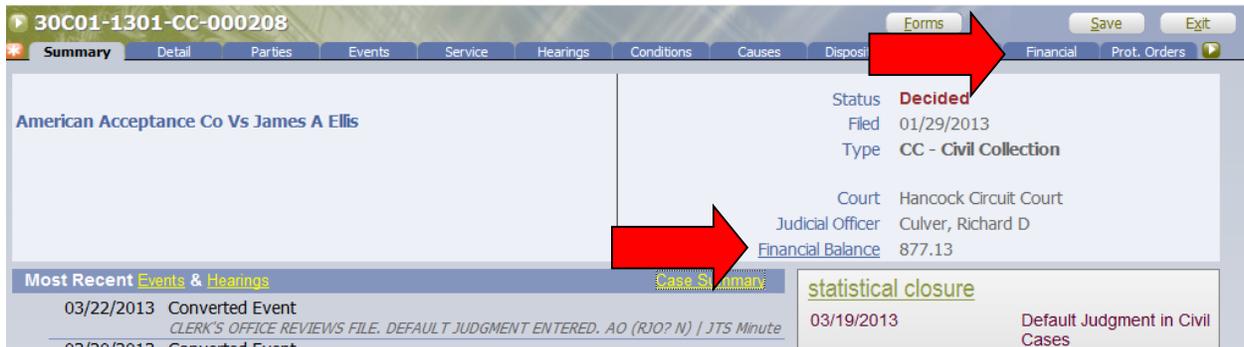
**Summary:** The purpose of this cheatsheet is to instruct the user how to disburse a check directly from a case.

**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.

- Using **Find a Case**, navigate to the Case in which the check is to be disbursed from.



- Click on the **Financial Balance** link or navigate to the Financial Balance tab.



- Click onto the **Case Fees** link found under the Party that made the payment. In this example, James Ellis is the party who made the payment.

Party/Financial C	Current Due	Total Balance	Escrow Balance	Last Activity
<b>Plaintiff</b>				
American Acceptance Co Lic				
<a href="#">Case Fees - Other</a>	0.00	0.00	0.00	01/29/2013 Charge
<a href="#">Cash Bonds</a>		0.00	0.00	
<a href="#">Registry and Trust</a>		0.00	0.00	
<b>Defendant</b>				
Ellis, James A				
<a href="#">Case Fees - Other</a>	877.13	877.13	500.00	06/11/2013 Payment
<a href="#">Cash Bonds</a>		0.00	0.00	
<a href="#">Registry and Trust</a>		0.00	0.00	



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4. Click on the **CHECK** icon to create the check.

American Acceptance Co Vs James A Ellis  
Type CC - Civil Collection

Ellis, James A  Show Indirect Fees No Collection Status

Balances Add Pmt Plan Edit Det **CHECK** + \$ \$ \$ \$

Fee Category	Charges	Payments	Credits	Balance	Disb	Escrow
Judgment/Restitution	1,377.13	500.00	0.00	877.13	0.00	500.00

5. When the **Select Escrow to Disburse** dialog box appears:

- a. Choose the type of party to receive this check: Recipient, Trust / Case Party, or Non-Case Party.
  - i. If Recipient is chosen, any party listed as a recipient in the Edit Detail box is available.
  - ii. If Trust / Case Party is chosen, click the picker (☰) to select the party to receive this check. The options in this instance will be any party added to the Party Tab of the case.
  - iii. If Non-Case Party is chosen, use the search (🔍) icon to find your party. This can be any party in the system and does not have to be a party on the case.

b. Select "As of Date" or leave default of current date.

c. **Uncheck any fee that is NOT to be disbursed** and any line that contains a zero (0.00). This will blank out the dollar amount or "0.00" in the right column – when this is completed, click **Continue**.

*It is important to note that you must never change a 0.00 balance from this screen. If the amount to be disbursed is in the wrong fee, you must exit this screen, open your adjustment till and follow adjustment procedures.*

*Also note that you may decrease an amount to be disbursed (if an amount exists), but you never increase the amount to disburse. Again, if the amount is incorrect you need to move the money in the adjustment screen before you can proceed with an individual disbursement.*

Select Escrow to Disburse

From Party **Ellis, James A**

Recipient  Trust/Case Party  Non-Case Party

Pay To: American Acceptance Co Llc

As Of Date: 06/12/2013  Ignore Holds

Total Amount to Disburse: **500.00**

<input checked="" type="checkbox"/> Hancock County Trust		<b>500.00</b>	<b>500.00</b>
100-030-010			
<input type="checkbox"/> Attorney's Fee - CV		0.00	
<input checked="" type="checkbox"/> Interest Bearing Principal - CV		500.00	500.00
<input type="checkbox"/> Judgment - Non-Interest Bearing Prin		0.00	
<input type="checkbox"/> Manual Judgment Interest - CV		0.00	
<input type="checkbox"/> Prejudgment Interest - CV		0.00	

Continue Exit



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6. On the **Enter a Check** screen:
  - a. Use the drop down box to select an appropriate check **Type**.
  - b. Enter any information or comment in the **Memo** field. Note that the case number will print on the check stub automatically however, you may want to include in the memo field.
  - c. Click **Save and Submit**.

Enter a Check on Case # 30C01-1301-CC-000208

Type: **Check to Party (Case Fees)**  Hand Check

Pay To: **American Acceptance Co Llc**

Address: **99 E 86Th St Ste E**

Cutoff Date: **06/11/2013**

Trans Date: **06/11/2013**

Amount: **500.00**

*Five Hundred and no/100 Dollars*

Memo: **30C01-1301-CC-000208**

User: **Campbell, Kelly**

Account: **100-030-010**  
Hancock County Trust

**Save/Submit** **Exit** **Save/Export**

7. To view the check in the processing queue, navigate to **Check Processing Queue** which can be found under **Fees & Finances** in the left side navigation bar.
  - a. Choose your appropriate location from the Location picker box.
  - b. Select the appropriate Checking Account from the Checking Account Drop Down box.

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**Check Processing Queue**

Location: **Hancock County**

Submitted By: **All Users**

Checking Account: **Hancock County Trust**

**Greenfield Banking Compa**

Show: **All**

Sort By: **Date/Time Submitted**

Show Included Checks

Show Excluded Checks

Checks to Process						Print	Previous	Next	Clear All
Submitted	Submitted By	Source	Pay To	Case Number	Amount	Select			
06/06/2013 2:27 PM	Nieman, Ginalee	Individual	Rita K Jacobs Peters	30D02-1305-SC-00	50.00	<input checked="" type="checkbox"/>			
06/06/2013 4:18 PM	Devitt, Janelle	Individual	chase	30C01-1306-CC-00	2,361.00	<input checked="" type="checkbox"/>			
06/11/2013 3:46 PM	Campbell, Kelly	Individual	American Acceptance Co LI	30C01-1301-CC-00	500.00	<input checked="" type="checkbox"/>			

Check Processing Queue