



Odyssey CMS Cheat Sheet

TOPIC: e-Filed | Pre-Existing GU Cases in Odyssey
DATE: October 2016

***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.

Summary: This cheat sheet will instruct the user how to add pre-existing, and eFiled guardianship cases from Odyssey into the Guardianship Registry. The new event code used in Odyssey will automatically enter the case into INCite's Guardianship Registry.

1. **Details Tab:** On the Details tab, select from the Subtype dropdown Guardian: Adult, or Guardian: Minor.

31C01-1507-GU-000025 Forms Save Exit

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

In Re: the Guardianship of Gracielynn Elizabeth Bean
Type GU - Guardianship

Style In Re: the Guardianship of Gracielynn Elizabeth Bean
 Auto Style

Case Assignment Reassign

Case Number	31C01-1507-GU-000025
Court	Harrison Circuit Court
Date Assigned	07/29/2015
Judicial Officer	Evans, John T

Case Cross Reference Numbers

Guardianship Registry	1559
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Case Status

09/18/2015	Pending
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Related Cases

Type **GU - Guardianship**
Subtype Guardian: Minor
File Date 07/29/2015
Security

Print Label

Case Files Clerk's Office

Case Flags

Additional Barcodes



Odyssey CMS Cheat Sheet

2. **Parties Tab:** Prior to entering the new event code into Odyssey, you must first verify *and/or* enter the **Gender**, **Race**, **Home Address**, and **Mailing Address** on the party record for all parties. Next, verify *and/or* enter the **DOB** for the Protected Person.

***NOTE:** Verify *and/or* update the Party Type of the 'Protected' person to be listed as the **Incapacitated Adult/Child** only.
****** If the case is a pre-existing Guardianship with an Order Date, a Guardian must exist as a party on the Case.

Party & Attorney Information	
Guardian	Deaton, Michael W Deaton, Sherri Lynn
Incapacitated Adult/Child	Bean, Gracielynn Elizabeth
Interested Person	Bean, Danielle Bean, Scott
Petitioner	Deaton, Michael W Deaton, Sherri Lynn



Odyssey CMS Cheat Sheet

3. **Events Tab:** Next, click the [+] in the upper right hand corner to add the event. Add Event Code: **MEGUR** (*Added to Transmit to GU Registry*). **Click on the question mark.**

***NOTE:** Never enter any text into the Comment field. It will not go up to the registry.

The screenshot shows the 'Add Event' form with the following details:

- Type:** Added to Transmit to GU Registry
- Date:** 10/30/2015
- Due:** (empty)
- Completed:** (empty)
- Comment:** (empty)
- Checkboxes:** Docketable, Include on Appeal
- Dropdown:** Does not affect case aging clock
- Quick Links:** Add Next, Add Related, Add Hearing, Add Service, Relationships
- Buttons:** Save/Print, Save, Exit

Enter the applicable **Letter** and **Order** dates. *If the case is not active, you may enter 'NA' in both fields.* Select from the dropdown menu: **Temporary** or **Permanent**, **CHINS: Yes** or **No**, under the Prompts header. Click Finish.



Odyssey CMS Cheat Sheet

The screenshot shows a dialog box titled "Enter Prompt Text". It has two main sections: "Paragraph Text" and "Prompts".

Paragraph Text: A text area containing the following text: "Date of Letters: #1 [Date of Letters] Date of Order: #2 [Date of Order] #3 ['Temporary' OR 'Permanent'] #4 ['CHINS: Yes' OR 'CHINS: No']".

Prompts: A list of four prompts, each with a corresponding input field:

- #1: Date of Letters (text input)
- #2: Date of Order (text input)
- #3: Temporary (dropdown menu)
- #4: CHINS: Yes (dropdown menu)

At the bottom of the dialog box, there are two buttons: "Exit" on the left and "Finish" on the right.

You will return back to the prior Event box. The date of the Letter and Order, Temporary or Permanent type; as well as the CHINS status, will show in the Comment box. When you click 'Save', the case will be created in INCite's Guardianship Registry application.

***NOTE:** if you entered any incorrect information in the fields provided and need to make a correction, you will need to clear out the data in the comment box. Click on the question mark again and re-enter the correct data. Click Save to complete. **This only applies if you have not hit the 'Save' button first.** Otherwise, the events will have gone up automatically.



Odyssey CMS Cheat Sheet

Add Event

Type **Added to Transmit to GU Registry** ▼

Date **10/30/2015**  **12**

Due  **12** Completed  **12**

Comment  **ABC**
 

Docketable Include on Appeal

▼

quick links

- ▶ Add Next
- ▶ Add Related
- ▶ Add Hearing
- ▶ Add Service
- ▶ Relationships

Save/Print **Save** **Exit**

***NOTE:** On the Summary screen, you will receive an error message if you are missing any required data. See below. Enter the missing information to create the case.

12/01/2015	The Guardianship Registry record was not created in INCite <i>Missing Protected Person.</i>
12/01/2015	The Guardianship Registry record was not created in INCite <i>Missing Case SubType</i>