



Odyssey CMS Cheatsheet

Topic: Adding Multiple Recipients
Updated: 6/20/2013

Summary: The purpose of this cheatsheet is to instruct the user of how to add multiple parties to be included on a disbursement, e.g. John Doe AND Jane Doe; John Doe OR Jane Doe.

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. On the Financial Tab of the case, click into the party whose judgment will be disbursed to multiple recipients. From this screen, click *Edit Detail*.

04C01-1301-SC-000022

Summary Detail Parties Events Service Hearings Conditions Causes Disposition

Madison Cottage vs. James McLaughlin
Type SC - Small Claims

McLaughlin, James Show Indirect Fees No Collection Status

Balances

Fee Category	Charges	Payments	Credits	Balance	Disb	Escrow
Judgment/Restitution	2,587.00	0.00	0.00	2,587.00	0.00	0.00
Non-Interest Judgment/Restitu	102.00	0.00	0.00	102.00	0.00	0.00
Totals	2,689.00	0.00	0.00	2,689.00	0.00	0.00

Note: When the fees categories are expanded, you will see this symbol next to the fees with recipients when the restitution is set up as Joint and Several. If you see this symbol, there are no recipients assigned for those fee categories.

Balances

Fee Category

Judgment/Restitution

- Attorney's Fee - CV
- Interest Bearing Principal - CV
- Prejudgment Interest - CV

Non-Interest Judgment/Restitu

- Judgment - Non-Interest Bearing

Balances

Fee Category

Judgment/Restitution

- Attorney's Fee - CV
- Interest Bearing Principal - CV

Non-Interest Judgment/Restitu

- Non-Interest Bearing Principal

2. Click the Party Picker Icon to choose a recipient.

Edit Fee Detail on Case # 04C01-1301-SC-000022

Due Date Case Grace Days

Charged	Schedule	Priority	Hold*	Hold**	Recipient(s)
2/4/2013	Judgment				
Attorney's Fee - CV	70	<input type="checkbox"/>	<input type="checkbox"/>		
Interest Bearing Principal - C	70	<input type="checkbox"/>	<input type="checkbox"/>		
Prejudgment Interest - CV	70	<input type="checkbox"/>	<input type="checkbox"/>		
Judgment - Non-Interest Bea		<input type="checkbox"/>	<input type="checkbox"/>		

*Hold Indefinitely: Checkbox must be manually unchecked to release
**Hold Until Fully Paid: computer will automatically release

Save Exit



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3. Select the Party that you want the check MAILED to. Click Continue.

Select Case Party

Connection Type: All

Show Inactive Parties

Description	Connection	Lead Attorneys
<input checked="" type="radio"/> Madison Cottage	Plaintiff	<input type="radio"/> Roberts, Jeremy J. ★
<input type="radio"/> McLaughlin, Billi	Defendant	
<input type="radio"/> McLaughlin, James	Defendant	

4. If you have an additional party name that should also appear on the check, use the and/or feature. **Note: Choosing AND will require both parties sign the check in order to receive the money; OR requires one of the two parties to sign in order to cash the check.**

Edit Fee Detail on Case # 04C01-1301-SC-000022

Due Date: Case Grace Days: 0

Charged	Schedule	Priority	Hold*	Hold**	Recipient(s)
2/4/2013	Judgment				
Attorney's Fee - CV	70	<input type="checkbox"/>	<input type="checkbox"/>	Madison Cottage	and Madison, James
Interest Bearing Principal - C	70	<input type="checkbox"/>	<input type="checkbox"/>		
Prejudgment Interest - CV	70	<input type="checkbox"/>	<input type="checkbox"/>		
Judgment - Non-Interest Bea	90	<input type="checkbox"/>	<input type="checkbox"/>		

*Hold Indefinitely: Checkbox must be manually unchecked to release
**Hold Until Fully Paid: computer will automatically release

5. If you are not sure which fee (or fees) this disbursement applies to, fill in all of the recipient fields to ensure that the money will be disbursed.

Edit Fee Detail on Case # 04C01-1301-SC-000022

Due Date: Case Grace Days: 0

Charged	Schedule	Priority	Hold*	Hold**	Recipient(s)
2/4/2013	Judgment				
Attorney's Fee - CV	70	<input type="checkbox"/>	<input type="checkbox"/>	Madison Cottage	and Madison, James
Interest Bearing Principal - C	70	<input type="checkbox"/>	<input type="checkbox"/>	Madison Cottage	and Madison, James
Prejudgment Interest - CV	70	<input type="checkbox"/>	<input type="checkbox"/>	Madison Cottage	and Madison, James
Judgment - Non-Interest Bea	90	<input type="checkbox"/>	<input type="checkbox"/>	Madison Cottage	and Madison, James

Note: If the recipient is not on the parties tab, you can use the magnifying glass to search for the recipient so that they can receive the disbursement for that fee. **If you ever anticipate that additional fees may be assessed to the case for that recipient, add the recipient to the case as an Interested Person. Once added to the Parties tab, you can use the picker icon instead of the magnifying glass. This will also minimize the risk of sending out multiple disbursements when only one is necessary.**



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If the address for a recipient needs to be updated, complete the following steps:

1. Go to the Parties tab, click on the recipient name, and click on the name one more time. You should then be in the “Modify Party” screen.

Modify Party

General Additional Employment Relationships Cases Hearings Jailings

Non-Editable

Name: Madison Cottage

Fingerprint Data Sheet

Gender: [Dropdown] Date of Death: [Dropdown]

Race: [Dropdown]

Ethnicity: [Dropdown]

Height: [] Ft. [] In. Hair: [Dropdown]

Weight: [] Eyes: [Dropdown]

Birth Date: [] Driver's License: [] Social Security: []

Current Known Addresses: 1106 S Shawn, Fowler, IN 47944

Current Known Phones: Home: 765-884-8187

E-Mail: []

Other Links: [] Legacy IDs: 4_36433-1

Party ID: 7567588

Save Exit

2. Navigate to the “Cases” tab. Verify that the only case numbers associated with this party are your county’s cases.

Modify Party

General Additional Employment **Cases** Hearings Jailings

Madison Cottage

Locations: All Case Types: All Status: All Sort: Case Number

Cases

04C01-0408-SC-000135	Madison Cottage vs. Connie Freeman	SC	Filed On 08/26/2004	Judicial Officer: Kepner, Rex	Status: Decided	Court: Benton Circuit Court
04C01-0708-SC-000110	Madison Cottage vs. Nicole Gregory	SC	Filed On 08/29/2007	Judicial Officer: Kepner, Rex	Status: Decided	Court: Benton Circuit Court
04C01-1301-SC-000022	Madison Cottage vs. James McLaughlin	SC	Filed On 01/16/2013	Judicial Officer: Kepner, Rex	Status: Decided	Court: Benton Circuit Court

Party ID: 7567588

Save Exit



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3. If the case numbers are only associated with your county, go back to the “General” tab and click the plus sign next to “Current Known Addresses” to add a new address. **NEVER** click into the existing address to change. **ALWAYS** click the + to stack the address and maintain a history.

The screenshot shows the 'Modify Party' interface. The 'General' tab is active. A red arrow points to the plus sign next to the 'Current Known Addresses' section. Another red arrow points to the plus sign next to the 'Current Known Addresses' section header. The form contains fields for Name (Madison Cottage), Date of Death, Gender, Race, Ethnicity, Height, Weight, Hair, Eyes, Birth Date, Driver's License, Social Security, Current Known Phones (Home: 765-884-8187), E-Mail, Legacy IDs (4_36433-1), and Party ID (7567588). There are 'Save' and 'Exit' buttons at the bottom.

4. If the case numbers listed on the “Cases” tab have a different county listed, then you will need to remove this party from the case and add a new party with the correct address.

****Please note that this may vary if it is a converted case. In the instance of a converted case, the user can change the recipient by clicking on the party picker and selecting the party from the case. This process will ensure the recipient and party on the case are the same record.**