



Odyssey CMS Cheatsheet

Topic: Setting Non-Defaulted Parties in a Case

Date: 1/27/2015

Summary: This cheatsheet explains how to add parties to a case that are not typically a default party type on a particular 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.

The default parties for each case type in Odyssey are set by statute according to the case type. For example, a B Felony (FB) case is set with the default parties of “**State Plaintiff**” and “**Defendant**” in Odyssey.

Because there is variation in the types of parties that can be added to cases, Odyssey provides the functionality to add additional parties (or participants) onto cases, for example, Probation, Community Corrections, Mediators, Intervenors, Witnesses, Victims, etc.

The State of Indiana is generically defaulted onto cases as well. However, the State of Indiana can serve as the State Plaintiff, State Bond Commissioner, State Petitioner, or Intervenor, depending on the case.

NOTE: ** This process is not used to add Case Attorneys, Public Defenders, Prosecutors, or Attorney Generals Anyone serving as an attorney are added via the Add Attorney function.

Attorneys who are involved in cases in capacities other than those listed above, such as Mediator, Personal Representative, CASA, GAL, Arbitrator’s, etc. should be added to the case through the **Add Party** function.

1. Access (or add) the case.
2. Click on the **Parties** tab and click **Add Party**.

Party & Attorney Information

Add Party

Add Attorney

Add Group/Associate

3. Select the *All Types* radio button. **Click** on the *Connection* drop down and **Select** the Connection.
4. **Select** the **Party** radio button if the party should be visible on the CCS or the **Participant** radio button if the party should not be visible on the CCS. In this example, the Victim will not appear on the CCS.
5. **Click** on the magnifying glass icon next to the Party field.

6. From the *Find a Party* screen, **Select** either the **Person**, **Nickname**, or **Business** radio button

There are two ways to search and find parties in Odyssey:

- Searching on Person ID’s
- Searching on Party / Business Names

7. From the *Find a Party* screen if you know the person ID you can enter that number in the person ID field and **Search**.



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Find A Party

Search by Party Information Use Soundex

Person Nickname Business

Last Name

First & Middle

Date of Birth Death

Driver's License

Person ID

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

8. If you do not know the Person ID, you can search on the person or department's name.
 - a. If you are searching by party, select the Person radio button.
 - b. If you are searching by a department or Business, select the Business radio button.

Type the name you are searching for (for example: "Community Corrections", "Probation", the name of the Victim or the name or agency of the "Interested Person" etc.) and click **Search**.

Find A Party

Search by Party Information Use Soundex

Person Nickname Business

Last Name

First & Middle

Date of Birth Death

Driver's License

Person ID

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

Note: Specific officer names for agencies such as Probation, Community Corrections, Victim's Assistance, etc. should not be added to Odyssey. The agency should be added to the case instead. It will look similar to this once the agency has been added to the case:

Probation Department [Probation Department](#)

9. Select the name or agency **or** click **Add Party** if the party does not appear in your search results.

Party Search Results | Records 1 - 1 of 1

Runner, Road

[<< Back](#) [Next >>](#) [Refine](#) [Search](#) [Add Party](#)



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- From the *Add Party Connection* screen, click **Add Next** if additional parties need to be added to the case or click **Continue** to attach the party or agency to the case.

Add Party Connection

Configured Types All Types

Connection:

Party Participant

Party:

Added:

Removed:

Reason:

Comment:

Relationship

- Verify all party information. Click **Save** before exiting the case.

02D05-1303-FB-000020

Summary Detail **Parties** Charges Events Service Hearings Conditions Notes Disposition Time Stds Financial Prot. Orders Warrants

State of Indiana vs. Minnie Mouse, Jr.
Type: FB - Class B Felony

Group By: Show:

Related Parties View

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

State Plaintiff	State of Indiana	★ Richards, Karen Elizabeth
Defendant	Mouse, Minnie, Jr.	
Probation Department	Probation Department	

Participant & Attorney Information

Victim	Runner, Road
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How to Locate a Person ID for common parties used:

Note: An 8 digit number has been assigned to each party on Odyssey called a Person ID. This number can be used in a search to Find a Case, Find a Party, Find a Hearing, Find a Group and Find a Citation. To locate a Person ID:

From Find a Case/Find a Party:

- Go to Find a Case or Find a Party.
- Enter the last name, or a portion of the name with the * in the last name field. (You must enter at least three characters in the last name field with an * to do a partial name search, unless you are in advanced search.)



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- 14. Enter the first name, or a portion of the first name with the *
- 15. The search results screen will display the Person ID in the middle section as you see below:

<u>Mellor, John P</u> 		DOB 03/15/1965	DL IN 1390756452
		Person ID 12207327	Party ID 15542135
Address	Phone	Description	
106 Country Club RD Terre Haute, IN 47803		WM	

From the Party on the Case:

- 16. Access a case and click into the **Parties** tab.

41D01-1501-CC-0024

Summary **Detail** Parties Events Service Hearings Conditions

- 17. Click on the Party whose Person ID you want to obtain.

Party & Attorney Information	
Plaintiff	Bank One
Defendant	ALLEN, DANIEL R 

- 18. Click on the Party's name from the Modify Case Party Details screen (displayed below); this takes you to the state party record. The Person ID is located at the bottom of the screen in the last screenshot.

Modify Case Party Details

<p>Name</p> <p><u>ALLEN, DANIEL R</u> </p> <p>Style <input type="text"/></p> <p><input type="checkbox"/> Do Not Send Notice</p> <p><input type="checkbox"/> Always Send Notice</p> <p>Connection</p> <table border="1"> <tr> <td>Type</td> <td>Defendant</td> </tr> <tr> <td>Added</td> <td>01/27/2015</td> </tr> </table>	Type	Defendant	Added	01/27/2015	<p>Address</p> <p>Party Correspondence Address 509 WILDFLOWER WAY WANATAH, IN 46390-9403</p> <p>★ Case Correspondence Address Same As Party Correspondence Address</p> <p>Attorney</p>
Type	Defendant				
Added	01/27/2015				

Continue Exit



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Modify Party

General | Additional | Employment | Relationships | Cases | Jailings | Warrants

Party in Jail

Name [Data Sheet](#)

ALLEN, DANIEL R

Date of Death 12

Gender Race

Ethnicity

Height Ft. In. Hair

Weight Eyes

Birth Date **Driver's License** **Social Security**

313-50-9335

Current Known Addresses **Current Known Phones**

509 WILDFLOWER WAY
WANATAH, IN 46390-9403

E-Mail @

Other Links **Party ID**

16363710

Person ID 12997663 Party ID 16363710