



Odyssey CMS Cheatsheet

Topic: Setting up the Odyssey CMS Financial Shell for Quest Cases
Date: 1/10/2014

Adding Quest cases to Odyssey for financial tracking:

1. Confirm the case hasn't been added to Odyssey. If not, select **ADD A CASE** from the case manager home screen.
2. Select the appropriate **Case Category** and **Case Type**.
3. On the **Detail Tab** select the **manual checkbox** for the case number and enter the entire case number, **including the dashes, and leading zeroes in the 6 digit sequence number**.

Note: Please use zeroes "0" and not the letter "O". If the letter "O" is entered where you should enter a zero "0" that case may not be found when searching by case number and a duplicate case could be added as a result.

4. Enter the original **File Date** of the case. Updating the File Date will automatically update the **Date Assigned** date. (Note: Changing the **Date Assigned** date will not update the **File Date**.) If the case is "sealed" please select the appropriate case security. Juvenile case types default to the appropriate security level of "juvenile proceedings – confidential".

Note: Once the case is saved with a security designation the case may not be visible to you depending on the access level of your userid. Contact your supervisor or the JTAC staff or helpdesk if you are not sure whether you have access to certain cases.

5. A Case Cross Reference number can be added if desired and cases can be related from the Detail Tab.
6. From the **Parties** tab, add the parties and participants:
 - a) Navigate to the **Parties** Tab to add the parties. Right click on the party connection and left click on the selection. Other parties and participants can be added when necessary.
 - b) Right click on the configured party type or left click on the yellow "Add Party" link to select the **connection** from the drop down list.

Note: Choose the All Types radio button to add other Participants for the case. (For example, Victims, interested parties, etc.) *Participants* do not appear on the CCS. *Parties* appear on the CCS.

- c) Click on the **magnifying glass** icon to the right of the Party Field. The **Find a Party** dialog box will populate. From the top of the dialog box use the Person radio button (or Business radio button), using proper case, enter the name you are searching for and click Search.

Note: Searching functionality isn't case sensitive but using proper case saves time when entering Party information.



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- d) If a match to your party is available, click on the name link of the matching party to add per the **Statewide Party Matching Policy**:

Party matching is available for criminal case category defendants and business or government entities only. For criminal defendants (which includes juvenile respondents in the criminal case category) EACH and ALL of the following 5 (five) criteria should be an EXACT match: Name, Address, SS or DL, gender, and race. Matching businesses or government entities requires an EXACT match on the name and address.

- e) If the above Statewide Party Matching Policy criterion is not met, click the Add Party button to enter the new party information.

7. Go to the **Charges** tab to add the applicable charges to the case.

- a) Once you have entered your parties, click on the Charges tab. Click on the plus sign (+) to add a charge. At the Add Charge Detail screen, search for the charge(s) associated with the case. The actual "Offense Date" should be entered. If this date is unknown, the case filing date can be used.

- b) Click **Continue**, then click **Save** to add the case in Odyssey.

8. Please confirm that the correct case number has been entered and is the case number that appears in the case filing dialog box. From this box, select **Edit Case**.

9. Go to the **Events** tab and click on the "+" to add the event code: **__ADMJV**. (In the __, enter your two digit county number. For example, Allen County will be 02ADMJV.) The event description is: "For case events please see Quest. Refer to Quest for CCS Events." This event can be added in bulk via List Manager also.

10. When applicable, reverse or add any case filing fees, costs, or fines.

11. When applicable, add or convert bond or registry & trust account transactions.