



Odyssey CMS Cheatsheet

Topic: Transferring from a SC Case to a CC Case or a PL Case

Date: 5/6/2013

Summary: This cheat sheet will instruct the user on how to transfer a Small Claims case to a Civil Collections case or a Civil Plenary case. When a Small Claims case is moved to a CC or PL, it needs to be counted as a Transfer in order for it to be properly counted for QCSR (Quarterly Case Statistics Report).

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. **Click** on **Events** tab of the SC case and add the **QCSERR** (QCSR Error) event and in the comment, type: **“Case Transferred OUT to CC case +1.”**

Add Event

Type: QCSR Error

Date: 05/06/2013

Due: [] Completed: []

Comment: This case Transferred OUT to CC Case +1

Volume: [] Page: [] # Pages: []

Docketable Include on Appeal

Does not affect case aging clock

Save/Print Save Exit

quick links

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

2. **Click** on **Disposition** Tab and close the SC case with a stat closure of Other and Case Status of Decided.

USA Bank vs. Sherry King Inactive Case Close

Type CC - Civil Collection

Statistical Closure	Case Status
05/06/2013 Other	05/06/2013 Decided

3. **Add** a new civil case type of CC. You will direct file the CC case in the same court as the SC.
4. **Navigate** to the Detail Tab and Click the plus sign next to Related Case.

Related Cases +

5. Enter in the case number of the case you are relating. Select the reason of Other and type in the comment box **“Transferred from SC to CC”**. **Click** Continue.

Add Related Case

Case Number: 29D04-0808-SC-001863

Reason: Other

Comment: Transferred from SC to CC

Continue Exit



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6. **Click** on the Events tab on the CC case and add the QCSTRAN event.

Add Event

Type: **Case Transferred In**

Date: **05/06/2013**

Due: [] Completed: []

Comment: **Case <49D13-1305-SC-000279> transferred in.**

Volume: [] Page: [] # Pages: []

Docketable Include on Appeal

Does not affect case aging clock

quick links

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

Save/Print Save Exit

7. **Click** Add Next and add the QCSERR event and add the comment “**This case should be counted as Transferred IN +1**”.

Add Event

Type: **QCSR Error**

Date: **05/06/2013**

Due: [] Completed: []

Comment: **This case should be counted as Transferred IN +1.**

Volume: [] Page: [] # Pages: []

Docketable Include on Appeal

Does not affect case aging clock

quick links

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

Save/Print Save Exit

8. **Navigate** to the Financials Tab and Reverse the filing fees that were auto assessed on the CC case type. Assess the Small Claims Transfer Fee Schedule.

Select Fee Schedules

Description: [] Code: []

Show Selected Codes Only Sort: **Description**

Description	Code
6. <input type="checkbox"/> Refund	REF
7. <input type="checkbox"/> Reimbursement for Appraiser Fees	APP
8. <input type="checkbox"/> Reimbursement for GAL/CASA	RGAL
9. <input type="checkbox"/> Sheriff's Service Fee	SSF
0. <input checked="" type="checkbox"/> Small Claims Transfer	SCT

Get All Codes Select All

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<<Back Next>> Search Continue Exit