Trellis

Student Administration Instruction Document

Module:	Academic Advisement
Business Process Name:	**Advisor Notes (**Case Notes - Creating a new case with case details)
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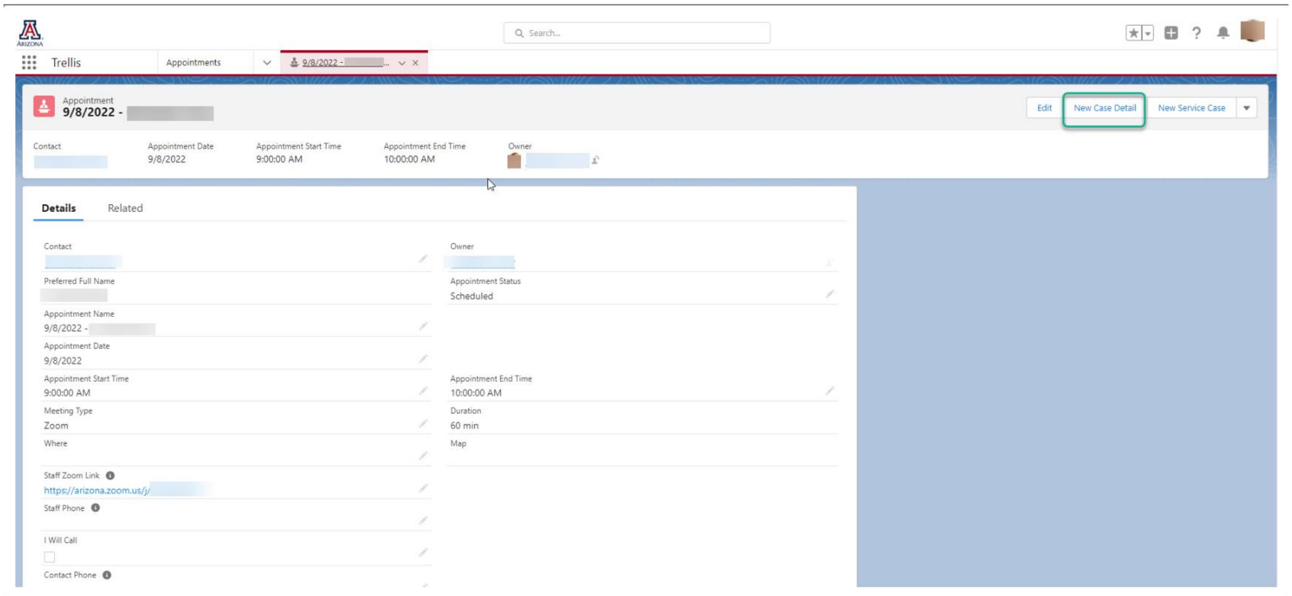
In Trellis, notes on an interaction are called Cases.
There are two parts to Cases in Trellis: Cases and Case Details. A Case is a high-level overview of an interaction. A Case Detail provides more detail on the interaction.

Note: individuals might have access to view Cases, but not Case Details.

How to create a case from an appointment record

1. Make an appointment on your calendar.
2. Access the appointment record.
    a. If you are making a Case for an appointment the same day you had it, the right sidebar on the calendar view will show today's appointments and you can access the record from there.
    b. You can also access the appointment record via the Appointments list view.
3. Select the "New Case Detail" button on the top right.
    a. Select "Undergraduate" or "Graduate" where appropriate.
4. Fill out the fields. Things to consider when filling out the fields:
    a. The "subject" field is attached to the Case record, and the "comment" field is attached to the Case Detail record.
    b. The "appointment status" field is "attended" by default. This is because the system assumes that since you're making a Case, the student attended the appointment.
    c. You can select multiple note types by clicking on a note type while holding Ctrl (Windows) or Cmd (Mac). You can also Shift+click to select many types at once.
    d. You can paste text in the comments field.
    e. If you need to, you can stretch the comment field by clicking and dragging the bottom right of the box.
5. When you finish filling out all the fields, select the "Next" button.
6. You can then upload file(s) to the Case Detail.
    a. There is a 2 gb file size limit per file.
7. Select the "Next" and "Finish" buttons.

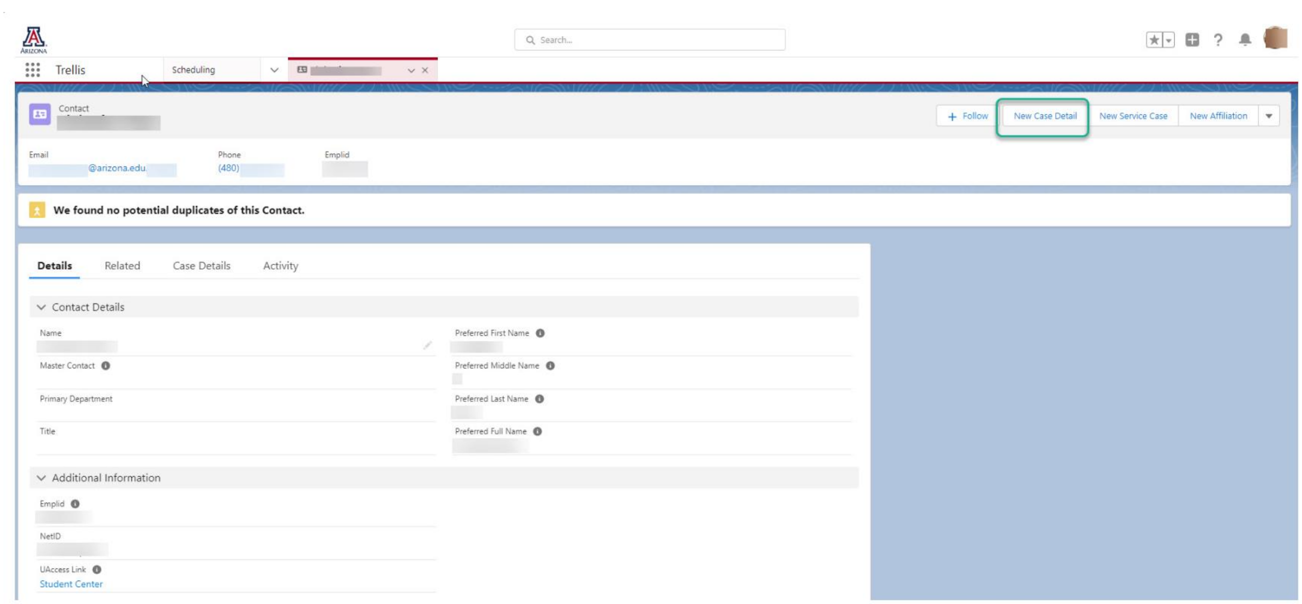


Creating a new case detail from an appointment record

How to create a case from a student's Contact record
This is most useful when creating notes for a drop-in appointment, or for any other situation where you interacted with a student that didn't schedule an appointment with you.

1. Go to a student's contact record.
2. Select the "New Case Detail" button in the top right.
3. Check the box to create a drop-in appointment if you want.
   a. If you check it, you'll create a drop-in appointment on the next screen.
4. Fill out the subject, note type, and comment fields.
5. Attach file(s).
6. Select Next and Finish.

The major difference between each of the above workflows is drop-in appointment checkbox and creation.



Creating a new case detail from a contact record