

Micro Learning Video: Case Timeline Notes and File Types

In this video, you will learn where to enter case timeline notes and file types.

1. Click the **Timeline** tab on a case record.

The **Timeline** tab displays the information associated with the case as timeline items.

The data captures all the major events on a case, including case coordinator notes, attachments, results mailers, and PDC summary.

The options available under this tab are:

- Add Timeline Item (+) - Add tasks or case notes
- Search Timeline - Search all timeline items for the case
- Enter a note - Enter a case coordinator note
- The paperclip icon - Attach a file to a case record

Most common files types are allowed.