



QUICK START GUIDE FOR NEW GSS CASE MANAGEMENT SOFTWARE

Global Strategic Services (“GSS”) is deploying a new immigration case management software, Trilby Suite (“Trilby” or “TS”), to prepare and track all immigration filings for university employees. TS is a comprehensive compliance management program which also provides hiring unit contacts access to all cases for their units and the ability to track the progress of cases they have submitted to GSS.

Trilby is a back-end program that GSS will use for case management. External users, such as employees/scholars and hiring unit contacts, will access the software through the GSS Intake Portal, which will be linked on the GSS website. VT users will use their PID and password to access the system.

This document is intended as a Quick Start Guide to the new software for hiring contacts so you will be able to initiate cases with GSS. More in-depth information will be provided in online training sessions that GSS will be scheduling.

1. To access Trilby go to the [VT Global Strategic Services Intake Portal](https://intake.gss.vt.edu/portal/) [https://intake.gss.vt.edu/portal/]
2. You will be taken to a Log In screen where you will enter your VT username and password.

LOG IN

A screenshot of the login interface for the Global Strategic Services Virginia Tech system. The page has a white background with a light gray border. At the top left, it says 'All Users'. Below this is a horizontal line. On the left side, there is a logo consisting of a stylized 'VT' in maroon, with 'GLOBAL STRATEGIC SERVICES' and 'VIRGINIA TECH' written in smaller text below it. On the right side, the text reads 'Log in with your Virginia Tech username & password.' Below this text is a rounded rectangular button with the text 'Log In'. At the bottom of the page, there is a blue hyperlink that says 'Don't have an institutional login? Use a one-time passcode.'

3. Each VT department has been assigned one or more Hiring Contacts. When you login, you will be taken to your [Hiring Contact Profile](#). This is your “home page” for all

immigration requests that will be submitted to GSS. Once you start using the system, the cases that you submit will appear here while active.

VT Global Strategic Services

Jeffrey A. Van Doren
Hiring Contact Profile

Requests

Lists

Settings

Log Out

Active Requests on File

Filter by name... ☐ Show Only My Requests [Find/Add Profile](#)

Actions	Pinned	Name	Request Type	Step	Status	Days in Status	Started On	Last Updated	Assigned Hiring Contact
					No Request on File				

1-1 of 1

When you click on the “Lists” button below your profile, you will be able to see the status of all incoming, active, and inactive scholars & employees for the Hiring Unit along with a request history.

Hiring Unit Lists

[Incoming Scholars & Employees](#)
 See the list of incoming scholars and employees for the hiring unit.

[Active Scholars & Employees](#)
 See the list of active scholars and employees for the hiring unit.

[Inactive Scholars & Employees](#)
 See the list of inactive scholars and employees for the hiring unit.

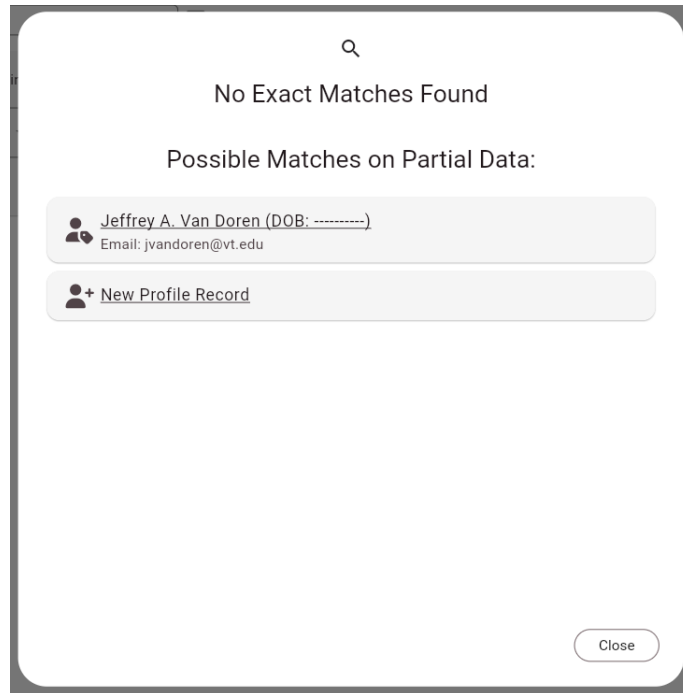
[Active Requests on File](#)
 Manage the active requests on file for the hiring unit.

[Request History](#)
 See the history of requests for the hiring unit.

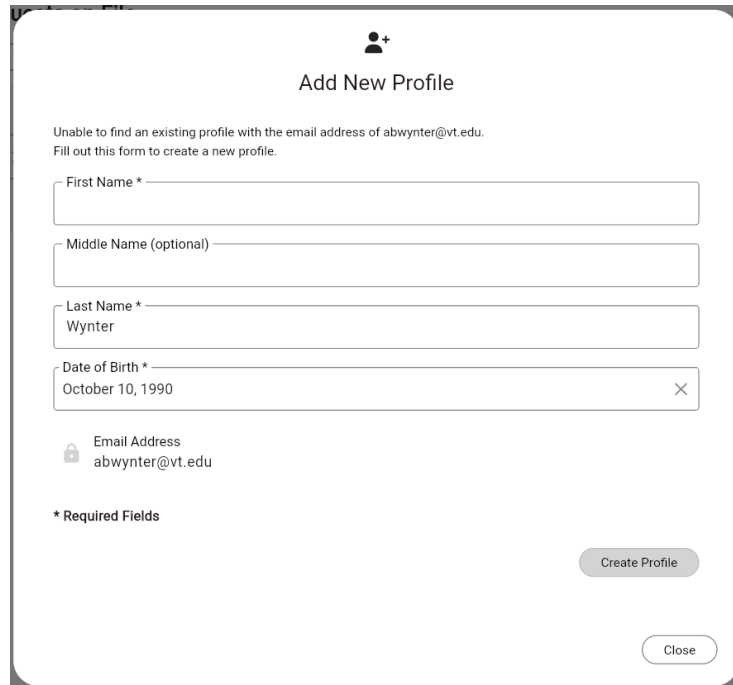
- To initiate a new request, click on the “Find/Add Profile” button at the upper right of the Hiring Contact Profile page. **You will need the employee’s/scholar’s full name, date of birth, and email address to create a profile.** If the employee/scholar already has a VT PID and login, please use that address. If not, provide the email address that you have and the employee/scholar will be able to access the system using a one-time passcode.
- The first step is to see if the scholar or employee for whom you are submitting a request already has a profile in the system. Complete the form and click “Find.” [Note:

even if you believe the employee/scholar never worked at VT previously, you must complete the form to ensure there are no duplicates.]

6. After you click Find, you will be taken to a results screen showing possible matches. If there is a possible match, please click to confirm that the information you have about the scholar/employee matches. If not, click on “New Profile Record.”



7. Note that the name, DOB, and email address you entered in the search box in Step 5, have been prepopulated in the Add New Profile box. Insert the person’s first , middle, and last name to create the profile and then click “Create Profile.”




Add New Profile

Unable to find an existing profile with the email address of abwynter@vt.edu.
Fill out this form to create a new profile.

First Name *

Middle Name (optional)

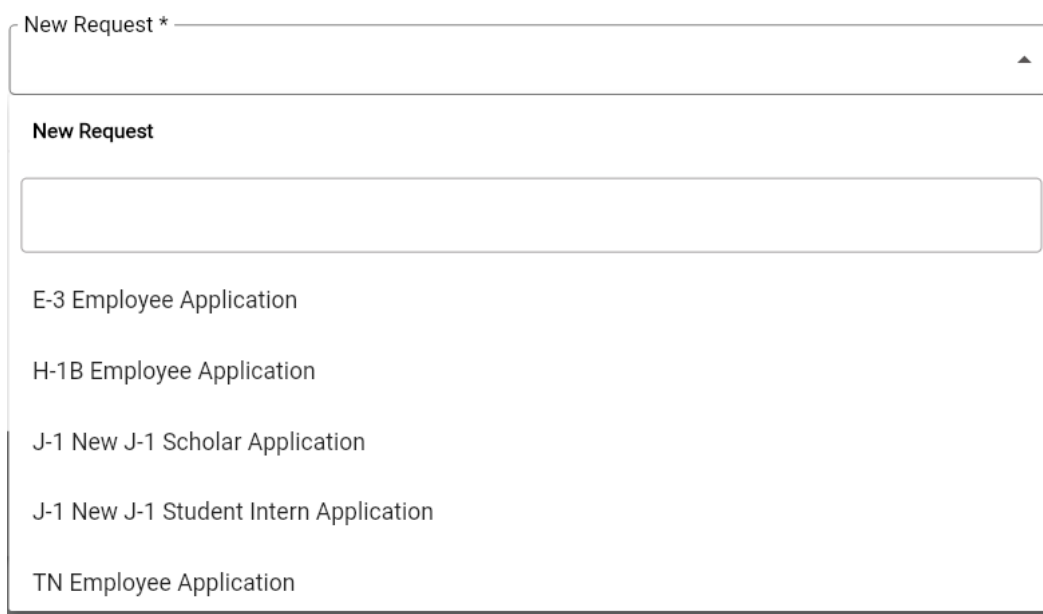
Last Name *

Date of Birth * ×

 Email Address
abwynter@vt.edu

* Required Fields

8. In the Create New Request box, there are two dropdown menus. The first is for Hiring Unit. If your Profile is only associated with one hiring unit, only that unit will be listed. If you are responsible for multiple hiring units, select the one to which the employee/scholar will be assigned from the dropdown menu.
9. The second dropdown menu is for “New Request.” From this list, select the type of case you wish to initiate with GSS.



New Request *

New Request

E-3 Employee Application

H-1B Employee Application

J-1 New J-1 Scholar Application

J-1 New J-1 Student Intern Application

TN Employee Application

If you are unsure what type of case you wish to initiate, there is an option for “Determine which application to start.” This will take you to the following screen.

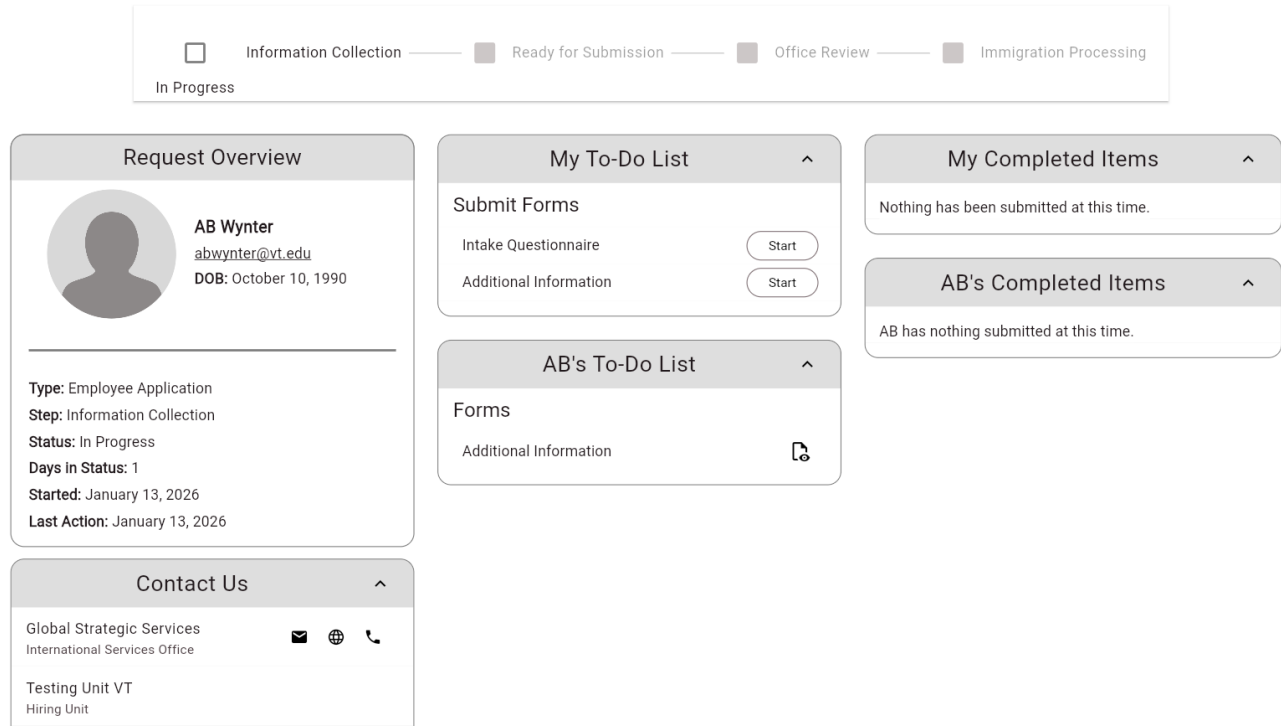
The screenshot shows a web form titled "Determine Which Application to Start". At the top, it displays "CLIENT: AB Wynter" and an email address "(abwynter@vt.edu)". Below this, a message states: "It seems you're not certain which type of application to start, we get it, it can be complicated! Please start by reviewing our online resources to help determine which visa application to choose." A link with a double arrow icon points to "Visa Overview for Foreign National Employment". Another message follows: "If you're still not sure which visa application to choose, please fill out the rest of this form and someone from Global Strategic Services (GSS) will get in touch to help. Thank you!". The form contains two radio button questions: "Do you know the exact dates of their visit? *" with "Yes" and "No" options, and "Will this person be paid by Virginia Tech? *" with "Yes" and "No" options. There is a large text input field for "Please briefly describe the intent of their visit. *" with a "0/5000" character count. A "Submit" button is located at the bottom right. A legend at the bottom left indicates "* Required Fields".

This page will provide additional information, including a link to a GSS website with a description of the various visa types. *If you are still unsure what type of case to pursue, please complete the rest of the form and someone from GSS will contact you for further assistance.* You can also contact GSS prior to initiating the case to discuss potential visa options.

10. Assuming you know what case type you wish to initiate, select from the dropdown menu and then click “Create.” There are two basic types of processes in TS. An “Employee Application” for H-1B, TN or E-3 visas and a “Scholar Application” for J-1 visas.
11. The screenshots and steps shown in 12-18 below illustrate the process for an **Employee Application**. Please skip to #19 for an illustration for a **Scholar Application**.

12. Employee Application Request. When you select E-3, H-1B, or TN Employee Application, you will go to the Employee Application Request Timeline screen, which contains various tiles with information about the case you just initiated.

Employee Application Request Timeline



The screenshot displays the 'Employee Application Request Timeline' interface. At the top, a progress bar shows four stages: 'Information Collection' (active, marked 'In Progress'), 'Ready for Submission', 'Office Review', and 'Immigration Processing'. Below this, the screen is divided into several tiles. The 'Request Overview' tile on the left contains a profile for 'AB Wynter' (email: abwynter@vt.edu, DOB: October 10, 1990) and details: Type: Employee Application, Step: Information Collection, Status: In Progress, Days in Status: 1, Started: January 13, 2026, and Last Action: January 13, 2026. The 'My To-Do List' tile in the middle has a 'Submit Forms' section with 'Intake Questionnaire' and 'Additional Information' (each with a 'Start' button), and an 'AB's To-Do List' section with 'Forms' and 'Additional Information' (the latter with a link icon). To the right, 'My Completed Items' and 'AB's Completed Items' tiles both show 'Nothing has been submitted at this time.' At the bottom left is a 'Contact Us' tile for 'Global Strategic Services International Services Office' and 'Testing Unit VT Hiring Unit', with icons for email, globe, and phone.

Across the top of this screen there is a progress chart that will update as the case moves through the various steps of the process. After you and the employee complete tasks on your To-Do Lists, the case will move to “Ready for Submission.” GSS will then work on the immigration filing and the progress bar will show as “Office Review.” Once GSS has submitted the case, the timeline will show as “Immigration Processing.”

13. The next step for the Hiring Contact is to complete the Intake Questionnaire. This can be accessed by clicking the “Start” box in the middle tile under My To-Do List. Answer the questions on the Intake Questionnaire and click “Submit.”

14. Based on the answers in the Intake Questionnaire, additional tasks will populate to your To-Do List. The system will also add tasks to the employee’s To-Do List, that will appear in the bottom middle tile on the Employee Application Request Timeline screen.

My To-Do List

Submit Forms

Job Description and Duties

Start

Job Requirements

Start

Worksite

Start

Processing Fee Information

Start

Additional Information

Start

Upload Documents

Letter: Job Offer - TOFO

Upload

Letter: Employee's CV

Upload

Letter: Position Description

Upload

Communication: Departmental Appro...

Upload

Miscellaneous: OESRC Form

Upload

Note: Criminal Conviction Check

Upload

AB's To-Do List

Forms

Additional Information



Applicant Intake Questionnaire



15. Work through the various items shown on My To-Do List. This includes uploading documents such as the ToFO, criminal conviction check, OESRC clearance, etc. You can save your work and return, but you will not be able to move forward until you have completed all of the forms and uploaded all required documents.

16. As you complete each task and click “Submit,” the items will move from your To-Do List to the My Completed Items list.

My Completed Items

Forms

Intake Questionnaire

Job Description and Duties

Job Requirements

Actual Wage & Employment Certification

Worksite

Processing Fee Information

Additional Information

Documents

Letter: Job Offer - TOFO

Letter: Employee's CV

Letter: Position Description

Communication: Departmental Approval ...

Miscellaneous: OESRC Form

Note: Criminal Conviction Check

17. After you have completed all of the items on your To-Do List, the employee will receive an email asking him/her to complete the Applicant Intake Questionnaire and upload documents required by GSS. You will be able to follow the employee’s progress on the Employee Application Request Timeline screen as items move from the employee’s To-Do list to their Completed Items list.

18. You should receive an email once the employee has completed all of his/her tasks. At that time, you will need to complete a “Hiring Unit Attestation.” This item will appear on your My To-Do List on the Employee Application Request Timeline screen. Complete the attestation and click “Submit.” The case will be submitted to GSS for review and preparation.

For further information on J-1 Initial Requests, please see the GSS website at:
<https://gss.vt.edu/vt-host/vt-host-j-1/J-1-Request-Procedure1.html>

An overview of all J-1 requests can be found here:
<https://gss.vt.edu/vt-host/vt-host-j-1/j-1-case-management-processes.html>

Trilby is a new product, both to the market and to Virginia Tech. If you experience any difficulties using the system or have suggestions for improvements to the work flow, we encourage you to reach out to us. For questions on the J-1 process, contact Mingzhi Li (mingzhil@vt.edu). For questions on the employee processes (H-1B, TN, E-3, etc.), contact Manu Casanova (manucasanova@vt.edu).