## WSC's Guide to Creating Manual Ticklers

WSCs may choose to issue reminders that certain tasks need to be completed at certain times. WSCs may choose to generate a Tickler to remind them when home visits are due or when face-to-face meetings need to occur.

Tip

Self-Generated Reminder Ticklers must be relevant to the consumer's record and are a part of the consumer's "Central Record."
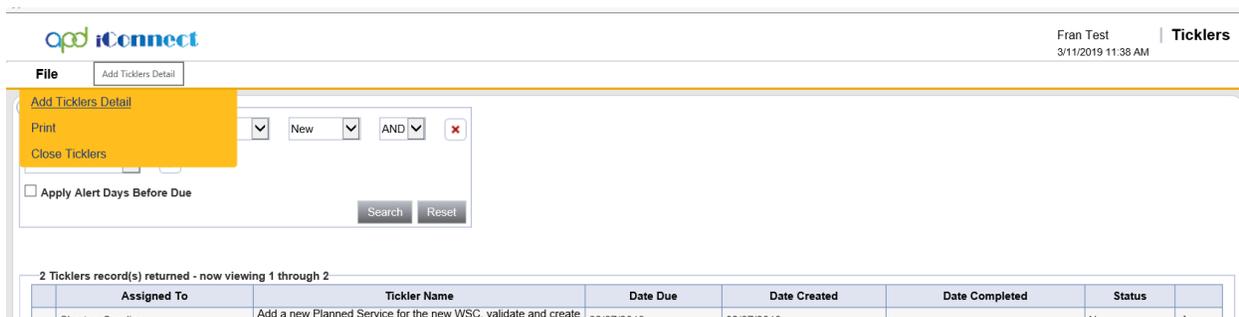
Instructions

1. Open the consumer's record and navigate to the **Ticklers** menu option.
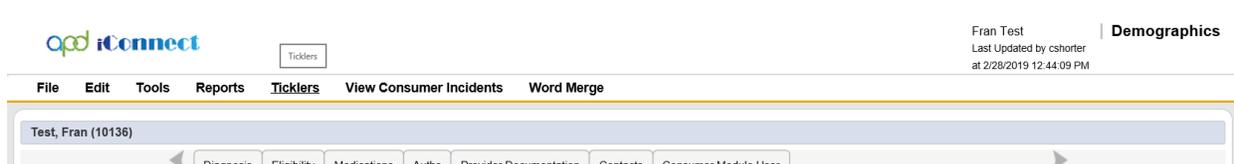
2. Open the Ticklers record and review the list grid view.
   - This will show you the existing ticklers assigned to you within this consumer's record. There may not be any.

3. File > **Add Ticklers Detail**

4. Add a Manual Tickler by completing the following:
   - "Tickler" = Self-Generated Reminder
   - "Review Type" = Select appropriate option

- "Comment" = Reference info for person creating tickler – can be left blank
- "Date Due" = Tickler Due Date
- "Assigned To" = Select the Recipient
  (WSC can add self if the Tickler is a personal reminder to keep up with tasks related to the consumer's case)
- "Message" = Enter the details that the recipient needs to know (what they will see when the receive the tickler)
- File > **Save and Close Ticklers Detail**

5. Below is an example of what the Worker will see when assigned the "Self-Generated Reminder."

Tip

Make sure to uncheck the "Apply Alerts Before Days Due" as this will show all Ticklers.