

**WSC's Guide to Creating Manual Ticklers**

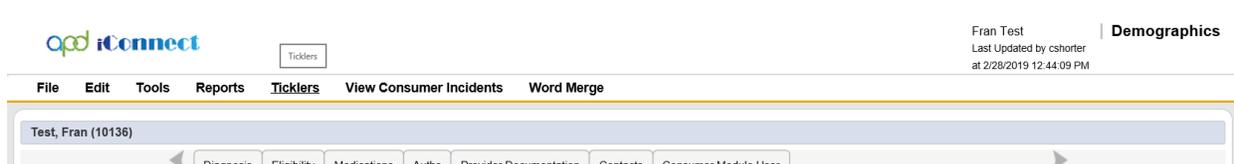
WSCs may choose to issue reminders that certain tasks need to be completed at certain times. WSCs may choose to generate a Tickler to remind them when home visits are due or when face-to-face meetings need to occur.

**Tip**

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

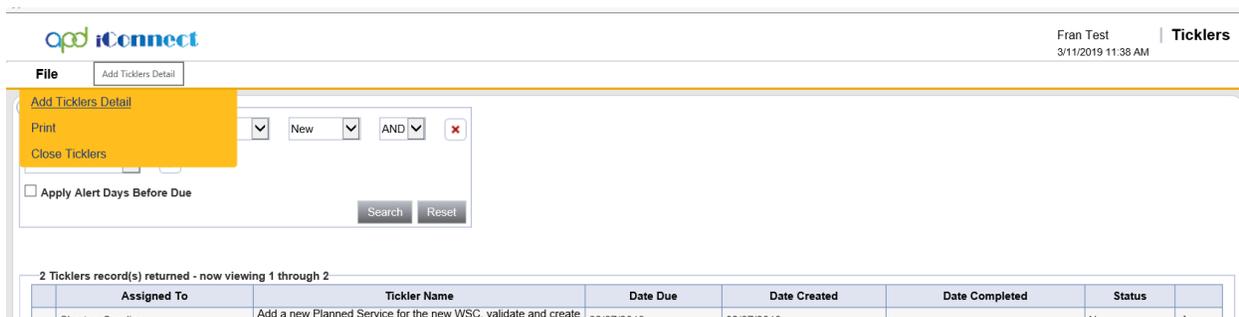
**Instructions**

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 they receive the tickler)
- File > **Save and Close Ticklers Detail**

File

Manual Tickler	
Tickler *	Self Generated Reminder
ReviewType *	As Needed
Comment	
Date Due *	03/31/2019
Assigned To	Worker, Applicable
Message *	During Face to Face visit, Educate Consumer on Rights.

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.

The screenshot shows a web application interface. In the background, there is a table with columns for 'Tickler Name' and 'Date Due'. A dialog box titled 'Message from webpage' is displayed in the foreground. The dialog box contains a yellow warning triangle icon and the text: 'During Face to Face visit, Educate Consumer on Rights.' There is an 'OK' button at the bottom right of the dialog box. In the top left corner of the application, there are 'Search' and 'Reset' buttons.