


WV Online Case Management (CM) Pilot Project

Job Aid: Manual Tickler

BoSS Revised 04/18/19

To add a manual tickler, users open the Participant record from the Agencies work list. The Ticklers menu displays on several pages, but not Demographics or the three for enrollments – Assignments, LOS and Dates, and Agencies. Users can go to any of the other pages (e.g., Clinical Documents).

File Ticklers Word Merge

WellSky Test **Ticklers**
3/14/2019 10:42 AM

File

Filters


Status Equal To New AND

Status

☒ Apply Alert Days Before Due

1 Ticklers record(s) returned - now viewing 1 through 1

Tickler Status	Tickler	Assigned To	Date Created	Date Due	Date Completed	
New	Tickler to enable display (do not cancel)	Greenberg, Debby	03/04/2019	03/01/2019		▶

WellSky Test **Detail**
3/14/2019 10:44 AM

File

Manual Tickler

Tickler *

Person Centered Assessment - Section 1 (CM) ▼

Message *

Assessment due

Assigned To

Greenberg, Debby ▼

Date Due *

03/31/2019

Type *

6 Month ▼

1. Click on Ticklers menu (next to File) to display Ticklers list view
2. Select 'Add Detail' option in File menu
3. Enter Tickler Details as shown
4. Select 'Save and Close' option in File menu

Users can select Ticklers either in that pane of My Work Lists or the Ticklers list view of the Participant record. To view ticklers due in the future, users uncheck the box 'Apply Alert Days Before Due' below the filters and click on the Search button.