

Tickler Management for Supervisors

Background

The Tickler Management page allows supervisors to reassign or delete ticklers for cases/providers assigned to their workers. The Tickler Management page displays defaulting to the Tickler Reassignment view. To reassign a tickler, the Supervisor must select a worker from the Worker drop-down field and then select the case or provider, which has the tickler to be reassigned, from the Case/Provider drop-down field. All ticklers for the specific case/provider available for reassignment display.

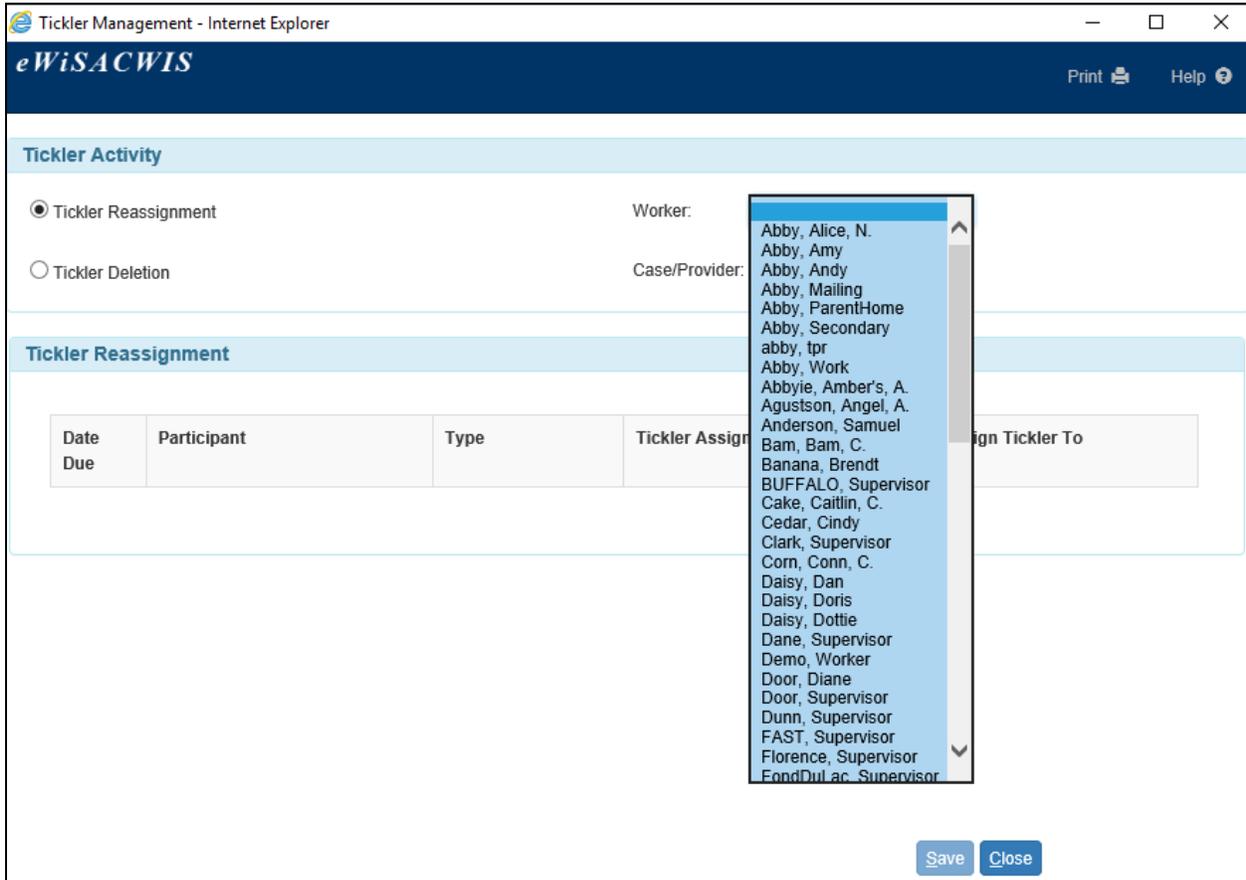
To delete a tickler, the Supervisor must select the Tickler Deletion radio button to access the Tickler Deletion view. When using the Tickler Deletion view, the Supervisor must select the worker from the Worker drop-down field. All ticklers for the specific case/provider available for deletion display.

To access the Tickler Management page, select Actions > Management > Tickler Management or click the [Tickler management](#) hyperlink on the Home tab of the desktop.

The screenshot shows a web application interface. At the top, there is a navigation bar with the following items: 'Actions' (with a dropdown arrow), 'Financial' (with a dropdown arrow), 'State' (with a dropdown arrow), 'Security' (with a dropdown arrow), 'Refresh', and 'Search'. Below this is a main menu with a list of items: 'AA/SG Eligibility Notices and Decisions', 'AFCARS', 'Appeal', 'Checklist Template', 'CIA Confirmation Report', 'Eligibility', 'ICWA Record', 'Imaging Search', 'Independent Living', 'Information and Referral', 'Juvenile Justice CCAP', 'Maintain Automated Message', 'Maintain Secure Detention Registry', 'Management', 'Merge/Delete', 'Placement Correction', 'Program Assignment', and 'Recruitment Event'. The 'Management' item is expanded, showing a sub-menu with the following items: 'Approval Management', 'Approval Messages', 'Assignment Management', 'Initial Assessment Assignments', 'Tickler Management' (which is highlighted with a dark blue background), and 'Worker'. Below the menu, there is a 'Page view:' section with radio buttons for 'Calendar' and 'Task list' (which is selected), and a dropdown menu set to 'Next 10 Days'. At the bottom right, there are three buttons: 'Create task' (with a plus icon), 'Tickler management' (with a plus icon and a red border), and 'Worker statistics' (with a bar chart icon).

Tickler Reassignment

1. The Tickler Management page defaults to the Tickler Reassignment view (if you wish to delete a tickler change your selection to “Tickler Deletion” and skip to the *Tickler Deletion* section of this guide). To continue with Tickler reassignment, select the worker from the Worker drop-down field.



- Select the Case/Provider in the Tickler Activity group box. Once the Case/Provider is selected, the ticklers will populate in the Tickler Reassignment group box for that worker. The Tickler Reassignment group box will display the date the tickler is due, the case name and case number, the type of tickler, who the tickler is currently assigned to. The 'Reassign Tickler To' will only display workers that are currently assigned to the case. Proceed through the list, selecting who should be reassigned to which ticklers. Click Save when finished.

The screenshot shows the 'Tickler Management' interface in Internet Explorer. The page title is 'eWiSACWIS'. There are two main sections: 'Tickler Activity' and 'Tickler Reassignment'.

In the 'Tickler Activity' section, there are two radio buttons: 'Tickler Reassignment' (selected) and 'Tickler Deletion'. To the right, there are two dropdown menus: 'Worker:' set to 'Daisy, Dan' and 'Case/Provider:' set to 'Aardvark, Amy, B. (9223581)'.

The 'Tickler Reassignment' section contains a table with the following data:

Date Due	Participant	Type	Tickler Assigned To	Reassign Tickler To
01/03/2020	Azul, Rita (9231499)	Health Screen Due	Cake, Caitlin, C. - Independent Investigation	Daisy, Dan
01/11/2020	Azul, Rita (9231499)	Confirming Safe Environments Due	Cake, Caitlin, C. - Independent Investigation	Daisy, Dan
01/31/2020	Azul, Rita (9231499)	Child/Youth Photo/Description - 30 day	Cake, Caitlin, C. - Independent Investigation	<div style="border: 1px solid black; padding: 2px;"> Cake, Caitlin, C. Corn, Conn, C. Daisy, Dan Fox, Frank </div>
01/31/2020	Azul, Rita (9231499)	30-day CANS	Cake, Caitlin, C. - Independent Investigation	

At the bottom right of the table area, there are two buttons: 'Save' and 'Close'.

- The following message will appear. Select yes if you wish to continue with the reassignment of the ticklers you have modified.

The dialog box is titled 'Confirmation'. It contains the following text: 'The selected ticklers will be reassigned and the associated escalated ticklers will be deleted. Are you sure you want to do this?' At the bottom right, there are three buttons: 'Yes', 'No', and 'Cancel'.

4. Notice the ticklers have now been reassigned..

Tickler Management - Internet Explorer

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Tickler Activity

Tickler Reassignment Worker: **Daisy, Dan**

Tickler Deletion Case/Provider: **Aardvark, Amy, B. (9223581)**

Tickler Reassignment

Date Due	Participant	Type	Tickler Assigned To	Reassign Tickler To
01/03/2020	Azul, Rita (9231499)	Health Screen Due	Daisy, Dan - Independent Investigation	<input type="text"/>
01/11/2020	Azul, Rita (9231499)	Confirming Safe Environments Due	Daisy, Dan - Independent Investigation	<input type="text"/>
01/31/2020	Azul, Rita (9231499)	Child/Youth Photo/Description - 30 day	Cake, Caitlin, C. - Independent Investigation	<input type="text"/>
01/31/2020	Azul, Rita (9231499)	30-day CANS	Cake, Caitlin, C. - Independent Investigation	<input type="text"/>

Save Close

Tickler Deletion

Once the Tickler Deletion radio button has been selected from the Tickler Activity group box, the page will change to Tickler Deletion mode.

1. Select the worker from the Worker drop-down field in the Tickler Activity group box. This will automatically populate the Tickler Deletion group box with all ticklers associated with the selected worker.

Note: AFCARS Ticklers cannot be deleted from Tickler Management.

2. In the Tickler Deletion group box, select the tickler to be deleted by checking the box for the tickler. Next to the corresponding check box is the Case/Provider Name, Participant, Due Date of the tickler and tickler Type. Click Save if you are ready to finalize this process.

Tickler Management - Internet Explorer

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Tickler Activity

Tickler Reassignment Worker: **Cake, Caitlin, C.**

Tickler Deletion

Tickler Deletion

Delete	Case/Provider Name	Participant	Due Date	Type
<input type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	01/31/2020	Child/Youth Photo/Description - 30 day
<input type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	01/31/2020	30-day CANS
<input type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	03/01/2020	Permanency Plan Due
<input checked="" type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	06/29/2020	Child/Youth Photo/Description - 6 month
<input checked="" type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	07/01/2020	Permanency Plan Review (6 months)
<input type="checkbox"/>	Aardvark, Amy (9223581)	Sample, Sally (9231421)	01/03/2020	Health Screen Due
<input type="checkbox"/>	Aardvark, Amy (9223581)	Sample, Sally (9231421)	01/11/2020	Confirming Safe Environments Due
<input type="checkbox"/>	Aardvark, Amy (9223581)	Sample, Sally (9231421)	01/31/2020	Child/Youth Photo/Description - 30 day

Save Close

3. The following message will appear after Save is selected. Click the Yes button if you are ready to delete the ticklers you had previously selected.

Confirmation

The selected ticklers and the associated escalated ticklers will be deleted. Are you sure you want to do this?

Yes No Cancel

4. The selected tickler(s) have been deleted. Select Close to return to the desktop.

Tickler Management - Internet Explorer

eWiSACWIS Print Help

Tickler Activity

Tickler Reassignment Worker: **Cake, Caitlin, C.**

Tickler Deletion

Tickler Deletion

Delete	Case/Provider Name	Participant	Due Date	Type
<input type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	01/31/2020	Child/Youth Photo/Description - 30 day
<input type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	01/31/2020	30-day CANS
<input type="checkbox"/>	Aardvark, Amy (9223581)	Azul, Rita (9231499)	03/01/2020	Permanency Plan Due
<input type="checkbox"/>	Aardvark, Amy (9223581)	Sample, Sally (9231421)	01/03/2020	Health Screen Due
<input type="checkbox"/>	Aardvark, Amy (9223581)	Sample, Sally (9231421)	01/11/2020	Confirming Safe Environments Due
<input type="checkbox"/>	Aardvark, Amy (9223581)	Sample, Sally (9231421)	01/31/2020	Child/Youth Photo/Description - 30 day

Save Close